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# Multidisciplinary Journal of School Education

## In Search of Spirituality and Support in Educational Settings

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# Editorial

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Educational reality is constantly changing, with new challenges arising alongside fresh concerns. However, the key actors in the educational setting – students, teachers, and parents – remain unchanged, as does the fundamental goal of upbringing and education: to shape an independent, autonomous, and mature human being. In other words, education aims to form and guide human character rather than merely inform and impart specific skills. While the success of the educational process is largely dependent on the competence and engagement of teachers, a great deal of support is also needed to make the process efficient and effective. This support is required not only by teachers and students but also by students' families, as all parties involved in education need assistance.

The main topic of this issue of the *Multidisciplinary Journal of School Education* is support in educational settings, including spiritual support. The articles presented here take a broad view of education, inviting us to ponder the spiritual, religious, and axiological aspects of educational reality. By bringing together educational theory, philosophy, and practice, they offer diverse perspectives on the issue of support as well as multiple methodological approaches. Consequently, the image of the individual – whether student, teacher, or parent – that emerges from these studies results from complex interaction processes, which involve individuals' relationships with others and the outside world, as well as their inner selves. Viewed from various anthropological angles, individuals are seen in the context of everyday situations and social connections. Above all, they are recognized as spiritual beings in search of transcendent values, meaning, and moral focus, particularly in the educational context. The articles in this issue encourage consideration of various theoretical approaches to teaching and invite critical reflection on concepts such as support, spirituality, and meaningful engagement in education.

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# Thematic Articles

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# Spiritual Education: Ignatian Inspirations (pp. 11–28)

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**Abstract**

**Research objectives and problems:** The holistic, integral approach to education requires the inclusion of the spiritual dimension in the educational process. While theoretical discussions in pedagogy often reference spirituality, it is typically absent or only marginally present in educational practice. The aim of this article is to highlight the necessity of incorporating spiritual education into the entire educational process for all participants. The analysis conducted here leads to the following questions: What potential does Ignatian pedagogy have in supporting the spiritual development of young people? What role does the teacher play in this process when utilizing such pedagogy?

**Research methods:** The methods used include document analysis (source texts and studies) across various scientific disciplines (e.g., psychology, theology, pedagogy), focusing on spirituality, spiritual education as a practice of supporting spiritual development, and Ignatian pedagogy.

**Structure of the article:** The article begins with an introduction to the concepts of spirituality and spiritual development based on existing literature. It then outlines the general principles of spiritual education through the lens of Ignatian pedagogy.

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**Research findings and their influence on the development of pedagogical science:** Ignatian pedagogy, which grew out of the spirituality of the Spiritual Exercises of St. Ignatius of Loyola, can effectively stimulate the spiritual development of all participants of education. This pedagogy, based on the philosophy of *cura personalis* (care for the person in all dimensions), the practice of Ignatian spirituality-oriented education promotes the fulfilment of humanity in both individual and social aspects. It promotes the education of individuals who are free, creative, self-reflective, and committed to serving others.

**Conclusions and/or recommendations:** Spiritual education is crucial in nurturing a mature, independent, and thoughtful individual with a meaningful life anchored in axiological, social, and cultural commitments. This process requires cultivating attentiveness and reflectiveness from an early age, which can be instilled in students by well-prepared teachers. Therefore, teacher training programs should ensure that future educators develop these competencies.

***Keywords*:** spirituality, spiritual development, spiritual education, teacher, Ignatian pedagogy

## Introduction

The increasing existential problems of young people, resulting in rising rates of suicide attempts, depression, and a pervasive sense of loneliness in a hyper-connected world, prompt us to ponder the condition of contemporary education. On the one hand, there is a call for a multidimensional educational approach to personal development, while on the other, the effectiveness of educational initiatives appears to be lacking. This raises questions about the feasibility and role of spiritual education as an integrating factor in the educational process. However, there are challenges in implementing spiritual education. While the value of spiritual education in fostering spiritual development is widely acknowledged in principle, with the literature on the subject providing insights on the education of the “whole person” including cognitive, emotional and

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moral or spiritual dimensions, the reality differs in practice (Znaniecka, 2016b, p. 12). Hanan A. Alexander and David Carr argue that today's schools overly prioritize rational and vocational aspects of the modern market economy, thus neglecting or even dismissing the spiritual and ethical growth of young people (Alexander, Carr 2006). René Barbier sounded the alarm at the beginning of the 21st century, highlighting the great absence of inner or spiritual life in contemporary education (Barbier, 2001, p. 10).

Marta Znaniecka presents an insightful diagnosis of this situation based on American research, which may be of a universal relevance. One reason for the marginalization of spirituality in educational practice is its perception as a private, individual aspect of life. Additionally, positivist and scientific worldviews have notably shaped socially valued ideals emphasizing individual achievement, competition, materialism, and objective knowledge, thus displacing self-reflection, and open dialogue as something that is less tangible and less quantifiable. This trend was further reinforced by the neo-liberal model of education, which emerged in the second half of the 20th century, focusing on productivity and profitability. This led to a devaluation of the humanities and a retreat from a holistic, integral approach to education and upbringing (Znaniecka, 2016a, p. 207). The result of such approach has been a lack of engagement by teachers in fostering the spiritual development of pupils/students. This state of affairs is compounded by the difficulty of clearly defining the concept of spirituality (Znaniecka, 2016a, p. 208).

## The concept of spirituality

Although the concept of spirituality is not easy to define, the literature on the subject offers numerous definitions and explanations of the term. According to Maj (2019), "Spirituality is a category describing the nature and existence of a person; encapsulating their profound understanding of life and guiding principles, implying a totality of attitudes and actions. It is a subject of interest to many disciplines, including theology, philosophy,

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psychology, sociology, and pedagogy, especially in its anthropological aspect. Once associated or even solely identified only with religious practices (and this trend still persists), it owes its widespread interest today to its its interpretation through a naturalistic lens and its intrinsic connection with the human condition in general, including both psychological and physical well-being" (Maj, 2019, p. 49). Spirituality serves as an anthropological category, indicating a specific aspect of human nature – the experience of transcendence. It involves transcending one's own person and momentary experience, and moving beyond the material, corporeal, and transient. Thus, spirituality represents a multidimensional human experience acquired across different stages of education (Iwanicki, 2014, p. 106). In this context, the spiritual dimension denotes "the pinnacle of human development, of the natural human drive to actualize innate potentialities, to be a creator of culture, a being who is more than a body, more than the sum of their experiences, or the 'resultant' of external influences" (Uchnast, 2001, p. 87). An individual's spirituality is "a set or shape of attitudes towards what is objectively or subjectively regarded as a value" (Chmielewski, 2002, p. 229).

Spirituality can be linked to a wide spectrum of human experience, and especially to facets such as imagination, creativity, and ingenuity, as well as interpersonal connections – whether with oneself, others, or a transcendent reality, which may be nameless or identified as the Divine, God, or the Spirit. Spirituality is also associated with a sense of awe and festivity, with adoration, and devotion, while also providing solace during times of adversity and suffering (King, 2008, p. 3).

Paweł Socha, a pioneer in the field of spiritual psychology in Poland, points to many areas of human functioning that demonstrate spirituality. These include a) consciousness and self-consciousness; b) reason and wisdom; c) feelings; d) sensitivity (rational, emotional, perceptual); e) creativity: the capacity for transgression and imagination; f) aesthetic sensibility; g) morality; h), religiousness; i), worldview; j), and faith (Socha, 2000, pp. 16–33). Socha contends that the spiritual dimension, also known as the noetic dimension, is not reducible to the psychological, let alone the biological aspects of human existence. It represents the highest form of psychic activity for each individual, significantly influencing their quality of life. Since spirituality encompasses a wide range of practices and belief systems it eludes a single, comprehensive definition, making the term itself one of the most ambiguous in scientific discourse.

In his examination of various psychological perspectives on spirituality, Socha identifies five interpretations of the term. These include: (a) an innate "essential" attribute bestowed upon humanity by God, nature, or another supernatural power; (b) a natural, biological property of the Homo sapiens species; (c) the domain of spirits, i. e. the extrasensory dimension of reality; (d) the realm of practices aimed at attaining spiritual enlightenment or coming into direct contact with the supernatural realm; and, finally, (e) a process or integrated series of mental processes triggered by an adaptive response of each individual to the awareness of their own existence and condition (Socha, 2014, pp. 24–28).

Closely associated with the latter aspect of spirituality is another significant element: the sense of the meaning of life. This notion is illuminated by Viktor Frankl in his concept of logotherapy. The perception of life's meaning is intricately tied to the axiological, social, and cultural involvement of individuals, as well as to a unique way of life and personal existence (Popielski, 2004). In other words, spirituality entails a person's endeavour to discover their own identity and to follow a distinct, individual path of growth" (Sękalski, 2008, p. 4).

Paweł Socha notes that spirituality can be seen as the differentia specifica of humanity, which is essential for its fulfilment. He posits that spiritual life is the driving force behind culture, implying that culture cannot exist without spirituality. Through spiritual development, individuals not only enrich their humanity and personal growth but also contribute to the formation of culture (Socha, 2000, p. 18). Spirituality is the key to understanding culture; it is deeply intertwined with social and cultural contexts (Wargacki, 2016, p. 41). Hence, spirituality emerges as a permanent feature of humanity's culture-shaping, reflecting its universal and supra-religious character. It embodies a person's quest for personal and social development (through a shift in circumstances or awareness), guided by higher values, whether religious, ethical, or aesthetic, that transcend religious

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boundaries (Skowronek and Pasek, 2013, pp. 18–19). This journey of growth involves the entirety of human existence, both physical and psychological dimension. The path of transcending one's condition is the path of self-development (Pasek, 2008, p. 128). Spirituality that develops by transcending oneself in all spheres of psychological life, through the pursuit of higher values, serves as the stimulus for constructing and defending one's own subjectivity. However, if spirituality veers away from these values, as noted by Katarzyna Olbrycht, it becomes a transgression only towards and in the name of the freedom of actualizing one's self, a freedom detached from other guiding principles, thus losing its clear purpose in shaping personal identity (Olbrycht, 2018, p. 85).

## Spiritual education

Regardless of whether we view spirituality from a confessional or supra-religious perspective, it can still evolve. This fact alone broadens the scope for pedagogy as a scholarly examination of upbringing and education, as well as for educational practice itself. Spiritual development can result from spiritual education, which involves regular interaction with individuals through appropriate methods and techniques. Spirituality is a capacity and potentiality that can be further deepened through the educational process (Iwanicki, 2014, p. 97). However, it is important to acknowledge that, similar to the development of other spheres of human personality, spiritual growth also involves the development of individuals aimed at their subjective functioning and constructive participation in social life (Olbrycht, 2018, p. 84).

In this approach, fostering spiritual development requires educational support which, according to Katarzyna Olbrycht, comprises two dimensions. The first dimension involves preparing individuals to develop their own spirituality while also acknowledging the spirituality of others. Within this dimension, we should focus on such aspects as

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> helping students to acquire knowledge about spirituality, its components and the essence of spiritual life; teaching cognitive and emotional skills that foster the development of spirituality: such as reflectiveness, concentration, creative thinking, empathy, and care. Furthermore, it entails guiding individuals to become orientated towards one's own spirituality and towards the spirituality they discover in others (searching for one's own identity, meanings and goals, noticing one's own spiritual needs, and searching for ways to fulfil them). Discovering these spheres of spirituality in various domains of culture, e.g. in religion, art, philosophy, traditions, ethics, and language is also pivotal. Moreover, this approach entails instilling sensitivity to spiritual life as a realm of upholding absolute and normative values (commonly recognised as valid in one's own and other cultures), which includes the defence of human dignity (physical freedom, freedom of speech, freedom of conscience, justice, and peace) and values ensuring subjective, constructive participation in social life (community, solidarity, service, and dialogue). (Olbrycht, 2018, p. 87)

To sum up, in this first dimension, the emphasis is on the individual, his or her individuality and subjectivity.

The second dimension of educational support for spiritual development emphasizes the social nature of human functioning, underscoring relationships with others and with the Other. Here, the focus is on acquiring skills necessary for building social relations and bonds. In this social context, educational support for spiritual growth involves several components. These include "helping individuals learn about the spiritual practices across various cultures, as well as seek and discover general human values in different cultural settings, and raise awareness where it is scarce. Additionally, it involves cultivating sensitivity to the role and significance of higher values, their presence, and to how they are understood and experienced in one's own culture and others" (Olbrycht, 2018, p. 87).

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## Christian spirituality

It seems that one of the avenues or contexts conducive to nurturing spiritual development, which unfolds in both individual and social dimensions, is Christianity and the Christian spirituality built on its foundation. The wellspring of Christian spirituality lies in the revelation of God found in the Holy Scriptures, which is actualized and made real especially in in liturgical practices and within the community of the Church. Christian spiritual life encompasses both a natural dimension because it involves the faculties of reason, will, and emotions, and a supernatural dimension, as it is intimately connected to the Triune God and His grace, imparted through the sacraments. The spiritual life of Christians is marked by a universal vocation to holiness, i.e. a call to participate in the life of God Himself by striving towards moral perfection expressed in genuine love, i.e. being a selfless gift of one's self. Since there are different paths toward holiness, a plurality of spiritual practices and traditions is possible.

The Christian tradition of spiritual guidance, or more aptly termed spiritual accompaniment, offers a model of education in which the interpersonal relationship is a fundamental value. The centrality of interpersonal connection as the cornerstone for spiritual advancement can be traced back to the teachings of the Desert Fathers, as well as other spiritual luminaries, such as St. Ignatius of Loyola (Filliot, 2020).

## Ignatian spirituality

One of the forms of Christian spirituality is Ignatian spirituality built precisely on the foundation of the personal religious experience of St. Ignatius of Loyola, the founder of the Jesuit Order. He chronicled this experience in a small book entitled *The Spiritual Exercises*. The idea of writing the Exercises was born during Ignatius' stay in Manresa (1522–1523). The text, translated into Latin and endorsed by Pope Paul III, was published in 1548 (*Encyclopedia* 2004). Over centuries, the *Spiritual Exercises* have been esteemed as an effective method for the holistic development of

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a person; a form of guidance towards self-improvement or self-education (Augustyn, 2010, p. 17). *Spiritual Exercises* underpin Ignatian pedagogy.

The goal of spiritual formation in Ignatian pedagogy is closely linked to the overarching goal of the entire *Spiritual Exercises*, which is to "overcome oneself and to order one's life" (CD 21). This overarching aim is subordinate to intermediate aims that correspond to different stages in the spiritual journey revealed in specific weeks of the *Exercises*. These stages can be compared to the three classical spiritual paths: the path of purification, enlightenment, and union (Królikowski, 1998, p. 14). Following these paths leads to a perfect balance between what we say and what we do; between who we are and who we want to appear to be. Saint Ignatius of Loyola, in the 16th century, proposed the *Spiritual Exercises* as a method to achieve this profound balance.

In the *Spiritual Exercises*, an important role is assigned to the spiritual director, whose primary task is to accompany the exercitant. The exercitant, in turn, should apply the exercises to their own life and strive to translate words into actions. The Exercises entail a holistic engagement of all senses (sight, hearing, feeling…) (Filliot, 2020). It is no accident that St. Ignatius called his booklet the *Exercises*. In Ratio Studiorum,[1] the term "to exercise" appears twice as often as "to learn." Therefore, the repetition, expression, and communication of what has been learnt, foster a metareflection that leads to personal unity and integration. In this educational dynamic between the exercitant and the spiritual director, "the spiritual experience takes precedence" (Giuliani, 1990, p. 32). Ignatian spirituality emerges as a suggestion for a way of life characterized by a reflective attitude to everyday life, a respectful attitude to the world, and the hope of finding God fully (immortality) (Fleming, 2013, p. 6).

Growing out of Ignatian spirituality, Ignatian pedagogy endeavours to assist individuals in achieving harmony between different aspects of

[1] The Jesuit school law issued by the Order's Superior General, Claudius Aquaviva, in 1599, applicable to all Jesuit schools until the 19th century. A new version was promulgated in 1832 by the Superior General John Roothaan. In 1980, new *Normae Generales de Studiis* were introduced, taking greater account of the needs of the various regions of the world in which the Order operates.

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human life: the physical, psychological, and spiritual dimensions. While the spiritual realm encompasses the "lower" levels of human experience, namely the psychological and somatic aspects, these cannot be disregarded. Any attempts to diminish their role or pit different dimensions of human life against each other result in internal turmoil and disintegration.

In the realm of spiritual reflection, it is worth noting the key aspects of Ignatian pedagogy, as they offer valuable insights for all participants in the educational process. Ignatian pedagogy champions freedom and personal creativity, with the relationship between the exercise director and the retreat participant serving as a model for teacher-student relationship. Just like the spiritual director, the teacher should avoid exerting pressure on the student. In Ignatian pedagogy, the role of the teacher is not to impart knowledge but to encourage the self-education of young people, fostering their growth in freedom, awareness, and responsibility for their own lives. Central to Ignatian education is the appreciation of the individual psychological and spiritual support provided to each student. Furthermore, teachers who themselves benefit from spiritual guidance develop a sensitivity to support others in their educational journey.

An Ignatian teacher should have the ability of psychological, existential, moral, and spiritual discernment. Each of these types of discernment is important because, as Józef Augustyn argues, at the root of frustration, discouragement, and even depression experienced by many young people lie not only psychological issues but also religious, moral, and spiritual problems. In order to help young people, the teacher should be able to identify the sources and nature of these problems.

Ignatian pedagogy emphasizes the importance of using appropriate language in the educational process, considering both the students' needs and the values that should be promoted in the educational process. Teachers adhering to Ignatian principles should engage in spiritual exercises themselves to undergo personal spiritual growth. Through these exercises, teachers can develop a more communicative language that resonates with young people (Augustyn, 2010, pp. 20–22).

The comprehensive nature of educational influence within Ignatian pedagogy is underscored by documents originating from the Jesuit

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tradition, which seek to redefine and reinterpret the principles of Ignatian pedagogy outlined in *Ratio Studiorum*. According to these documents, "Ignatian pedagogy prioritizes the formation of the whole person – heart, mind, and will – not just intellect. It encourages students to discern the meaning of what they are learning through reflection rather than by burdening the memory" (*Podstawy edukacji ignacjańskiej* [Fundamentals of Ignatian Education], 2006).

In Ignatian pedagogy, the educational process begins with experience, which is then subjected to reflection, ultimately leading to action. These three pillars of Jesuit education – experience, reflection, and action – are now commonly referred to as learning by refraction[2] (Atienza, & Go, 2023). Experience initiates the learning process, while, without reflection on experience, the student will not make progress. Moreover, experience alone does not necessarily translate into action and the Ignatian model of learning should culminate in action – in commitment to others and to the world.

In Jesuit educational institutions, the cultivation of the whole person is fostered within a nurturing school environment marked by care, respect, and trust. This supportive atmosphere enables individuals to confront (sometimes) painful challenges facilitating their growth into individuals who are deeply engaged living among others and for others (*Podstawy edukacji ignacjańskiej* [Fundamentals of Ignatian Education], 2006). The fruit of this formative process is reflectiveness, a cornerstone of spiritual development.

## The spirituality of the teacher

The characteristics of Ignatian pedagogy outlined above assign specific tasks to the teacher. If a teacher inspired by this pedagogy wants to promote the holistic development of students, including their spiritual growth, they must take responsibility for own spiritual development.

[2] A word made up of two English words: reflection and action.

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This was well understood by the great Jesuit educators before the Order's suppression, such as Francesco Sacchini, Juan Bonifacio, and Stefan Sczaniecki. They emphasized that a good teacher is characterised by three attitudes: he is gentle in interactions with students, upholds high moral standards, and is thoroughly educated. They also underscored the importance of maintaining harmony between professional expertise and moral integrity. Teachers were expected to be both righteous and learned. This is the bedrock of Christian education (Vergara Ciordia, 2012, p. 88). The Jesuit educational model thrived on this balance of knowledge and virtue within the teacher, who served as a personal role model (Królikowska, 2019, p. 206).

Contemporary Ignatian pedagogy fits into this historical tradition. According to the document "Characteristics of Jesuit Education," teachers and administrative staff, whether Jesuit or lay, are viewed as more than mere instructors in matters of learning. They are personally involved in the intellectual, emotional, moral, and spiritual growth of each student, nurturing a sense of dignity and worth in each individual and fostering responsible citizenship within the community (*Podstawy edukacji ignacjańskiej* [Fundamentals of Ignatian Education], 2006, p. 26). In this context, the teacher's role extends to being a member of a learning community where everyone is encouraged to develop. Since intellectual, emotional, and spiritual growth is a lifelong pursuit, adult members of the learning community are also encouraged to continue their growth in these areas (*Podstawy edukacji ignacjańskiej* [Fundamentals of Ignatian Education], 2006: 27).

Maturing and gaining independence, inherent in growing in freedom, rely more on active participation than on passive reception. This process involves personal study, seeking opportunities for self-discovery, and the development of one's creativity and a reflective attitude. The teacher's task is to help each student become an autonomous learner and take responsibility for their own education and development (*Podstawy edukacji ignacjańskiej* [Fundamentals of Ignatian Education], 2006, p. 27).

In the Jesuit order, teaching has always been considered a service. *Servicio*, the service that defines the work of teachers and educators in the Ignatian tradition, must retain its mystical dimension; without it, teaching

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becomes merely the function of a well-organized and efficient institution (Decloux, 1991, pp. 27, 33). This approach fails to address the deepest needs of individuals and undermines the practice of Ignatian pedagogy, which views education as a communication between people – sharing not just knowledge, but also experience (Decloux, 1990, p. 128).

Therefore, the teacher should first and foremost, adopt an attitude of service towards students (*Ratio Studiorum*, p. 90). Similarly, in the *Spiritual Exercises*, the spiritual director's role is to merely accompany the retreat participant on their personal path of spiritual growth: not to direct or impose, but to provide support. This is a principle that modern Ignatian pedagogy calls *cura personalis*, or concern for the person.

## Conclusions

Spirituality is connected to values, purpose, and the meaning of life. Therefore, spiritual education requires the involvement of all aspects of the personal "I": the cognitive, emotional, and active dimensions.

Recognizing spirituality as a developmental category implies a process of supporting its growth and becomes one of the most important, even fundamental, goals of education. It must be emphasized that spiritual development and its support is not a means to increase the effectiveness of education, especially education with neoliberal or authoritarian policies (Olbrycht, 2018, p. 87). It is an autonomous value because it affects the development of humanity, which should never be used as a means to other ends (Kant, 1984, p. 62).

It should be noted that this concerns the development of humanity in all participants of education: both the student and the teacher, and perhaps, above all, the teacher. a teacher who does not nurture their own spiritual development will not effectively assist their students in this endeavour. Georges Gusdorf's assertion that "we educate by who we are" has not lost its relevance. This principle encourages teachers to focus on developing their own personality and humanity, which – apart from disciplinary knowledge and teaching methods – is considered crucial in spiritual education.

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The inner transformation of the teacher is, therefore, the first condition for effective teaching and education. Then, education becomes an opportunity for "spiritual exercise" and a place for "working on oneself" (Gusdorf, 1963, p. 65).

Christian spirituality, and, therefore, Ignatian spirituality, seeks to cultivate a new sensitivity to oneself and to the world, moving towards constant attention to God's presence. Attention, or attentiveness (*nepsis* in Greek), is described as "key to the Christian concept of education" (Weil, 1966, p. 85). However, this crucial skill is waning in today's hyper-connected societies, making it more necessary than ever. Therefore, according to Filliot, it is essential to reinvent the ecology of attention. This approach is what we need in order to practice a true pedagogy of the inner self, often neglected in modern schooling, which allows us to feel and relish things inwardly and dwell in them (Filliot, 2020). Ultimately, it is not the abundance of knowledge but the inward feeling and tasting of things that satisfies and satiates the soul (*Spiritual Exercises,* 2002, point 2).

The ecology of attention, or mindfulness, has become a primary educational challenge today. According to Katarzyna Olbrycht, personal development should focus on consciously cultivating one's own spirituality. This leads to increased reflectiveness, a stronger sense of subjectivity and agency, as well as finding one's way to one's identity and deeper bonds with others (Olbrycht, 2018, p. 80). This is compliant with the fundamental aim of Ignatian education: to discover and explore the meaning of human life and to foster the full, holistic development of each student (*Podstawy edukacji ignacjańskiej* [Fundamentals of Ignatian Education], 2006, p. 20).

Ignatian pedagogy, which grew out of Ignatian spirituality, aims to strengthen young people's inner resources, self-awareness, and self-understanding, helping them navigate the prevailing insecurity of the modern world (Znaniecka, 2016a, p. 208).

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# The Teacher Spiritual Development in the Reference to the Metaphorical Understanding of "Education as a Spiritual Journey" by Parker J. Palmer

(pp. 29–44)

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## Abstract

**Objective of the article:** The aim of the article is to elicit and show the correlation between a spiritual teacher's development and education seen as a spiritual journey in a pedagogical, personalistic perspective. The research question is as follows: How does the relationship between the teacher's spiritual development and Palmer's perception of education in spiritual perception look?

**Research method**: To answer the research question, the method of hermeneutic content analysis seems to be appropriate, as it provides a deeper meaning of education rooted in spirituality for the teacher seen as a unity achieved in the integrative process of formation.

**A short description of the context of the presented issue:** The contents of the article are rooted in the personalistic perspective and cover the reference to spirituality, to some extent corresponding with human spiritual development and teacher spiritual development, tightly connected with Parker J. Palmer's concept of education perceived in the spiritual dimension.

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**Research findings:** The article elicits the meaning of spirituality in the quality of teacher development and the need to provide a space for spirituality in education, in the care of future generations. The research emphasizes that students achieving a spiritual identity on a transpersonal level can become fruitful for contemporary civilization, and further research in this light demands engagement of the broader scientific community, working in the personalistic paradigm.

**Conclusions and recommendations:** Education lacking the space for spirituality determined by higher values does not foster the building of the wholeness of a person and can cause many problems with forming one's identity, the core of which is a spiritual identity on the autonomous, transpersonal level. The conclusion is that the more "technical/pragmatic" approaches to education are propagated, the more problems in the functioning of future generations can appear. That is why the core curriculum in education needs changing, which should be followed by changes in teacher higher education and training.

***Keywords*:** spirituality, spiritual development, spiritual identity, teacher spiritual development, education

## Introduction

Dealing with the issue of a teacher's spiritual development in light of Parker J. Palmer's concept of education seen as a spiritual journey (1993) imposes the need to focus briefly on fundamental aspects that seem to be combined with a teacher's spiritual development, such as human spiritual development, which corresponds to the integrative model of spiritual development by Ken Wilber (1980). This model matches Eric Erikson's phases of identity development (1980), which fosters a better understanding of spiritual identity, also in the personalistic perspective of human integral development (Kunowski, 2000). All these aspects elicit the meaning of values in the process of teacher education, which should guarantee a space for spirituality to permeate the processes of learning and teaching. Ignoring

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this aspect can reduce education to the technical organization of schools, where "technical" paradigms appear insufficient, particularly when considering the psychological state of those being educated, who look for something deeper than the technological style of cultural functioning.

The discussion in the article of all these aspects from various perspectives, such as theology, philosophy, the social sciences, etc. has to be limited because of the formal requirements for text submissions. The issue of spirituality is broad. The reviews of the literature on spirituality made by, for example, Michael Miovic (2004), Dorte T. Viftrup, Niels C. Hvidt, and Niels Buus (2013), or Edward H. Taylor (2023) indicate that spirituality can be defined differently:

> Spirituality appears to be a transcendental internal experience and belief system that varies from person to person […]. Many definitions are all-inclusive, while others, especially those from religious organizations, have more restrictive parameters. However, whether inclusive or exclusive, these definitions are equally abstract. The lack of specificity invites individuals to self-define spirituality. (Taylor, 2023, p. 1008)

In the article, teachers' spiritual development in reference to education seen as a metaphorical journey is presented in the Christian perspective, which aligns spirituality with a religious lifestyle, as stressed by Stephan Kunowski (2000) and Parker J. Palmer (1993), and which requires courage from teachers working nowadays (Palmer, 2007). Here, it is worth mentioning that Palmer is a well-known educator all over the world. In 2011 he was one of 25 people changing the world. He has written many articles and books whose content elucidates the vocation and avocation of teacher. It is worth recalling some of them here: *Let Your Life Speak: Listening for the Voice of Vocation* (1999), *The Courage to Teach: Exploring an Inner Landscape of a Teacher's Life* (2007), *To Know as We Are Known: Education as a Spiritual Journey* (1993), *On the Brink of Everything: Grace, Gravity, and Getting Old* (2018), and *a Hidden Wholeness: The Journey Toward Undivided Life* (2009).[1]

[1] A biography of Parker J. Palmer is accessible at https://www.biola.edu/talbot/ce20/database/parker-palmer.

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The article uses hermeneutic content analysis (Vieira & de Queiroz, 2017). It can be mentioned here that

> the Hermeneutic Content Analysis (HCA) goes beyond the description of Qualitative Content Analysis. The HCA also involves description, but considers understanding and reflection of material. The main responsibility of HCA consists of understanding of sense of analysed material. The Hermeneutic makes possible to understand the sense and the deepest sense of a text. (Vieira, de Queiroz, 2017, p. 14)

Choosing this method seems to be justified, since presenting the strong relationship between a teacher's spiritual development and education perceived in a spiritual dimension requires deeper knowledge and metaknowledge connected with spiritual identity and an integrative model of spirituality, as depicted below.

## The spiritual development of a teacher in the personalistic pedagogical perspective

Spiritual development can be seen from two perspectives. One is connected with religion and faith (e.g. Szymańska, 2017; Fowler, 1981; Kunowski, 2000; Palmer, 1993, 2007; Marek, 2017), while the other can be combined with the idea of human development free from religion (Russo-Netzer, 2017). This variation comes from the view on religion and spirituality. Thus, the first seems to be deeply rooted in theocentric personalism while the second is rooted in anthropocentrism, which can be acknowledged in the research conducted all around the world and recalled by Pninnit Russo-Netzer (2017). According to the research in such countries as the United Staes of America, Pakistan, or Indonesia, most of those who believe in God combine spirituality with religion; in such counties as Sweden or France, most of those who engage with spirituality locate themselves outside of the framework of religion, which is probably determined by the wider historical, cultural, and social context (Russo-Netzer, 2017).

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Here, it is a must to claim that the appearance of postmodernism broadened the possibility of perceiving spirituality as an important factor that influences the style of human living, particularly in the physical and psychological fields (Russo-Netzer, 2017). In this context, it is worth recalling the research conducted by Chris Kiesling and Gwendolyn Sorell (2009) on the relationship between the spirituality and identity formation, where the sense of spiritual identity coexists with human development (Kiesling et al., 2006); this corresponds with Erikson's theory on identity development within a life span (Erikson, 1980) and spirituality. Analyzing Erikson's holistic idea of the development of a spiritual adult, Kiesling and Sorell underscore the following:

> (1) actuality and mutuality: the release of defensiveness naturally acquired in attaining autonomy that frees one to participate and share effectively; (2) leeway: the freedom to be oneself and to grant such freedom to others; (3) adaptation: the move from passive acceptance of unacceptable life conditions to ego strength whereby one gains the power to fit the environment to one's needs and the needs of others (Gandhi overcoming prejudice is his exemplar); (4) insight: truth gained via contemplation of seeing into oneself and into a situation that it obliges toward ethical action (Erikson regarded confessional prayer as the precursor to psychoanalysis); and (5) virtue and centrality: the spiritual and ethical center that with optimum resolution of life stages allows the self to be bound together around transcendent values of hope, purpose, fidelity, love, wisdom, and so on. (Kiesling & Sorell, 2009, pp. 253–254)

Taking into consideration the concepts outlined above can help in reflecting upon spiritual identity and human spiritual development, which are tightly connected with a teacher's spiritual development and the target of this article. Kiesling et al. (2006) define "*spiritual identity* as a persistent sense of self that addresses ultimate questions about the nature, purpose, and meaning of life, resulting in behaviors that are consonant with the individual's core values" (p. 1269). They add that

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> a sense of spiritual identity focuses on individual construction of a relationship to the sacred and ultimate meaning […]. Our definition posits that a sense of spiritual identity emerges as the symbolic religious and spiritual content of a culture is appropriated by individuals in the context of their own life. In other words, the content of one's sense of spiritual self is individual, whereas the structure is inherently social and thus inevitably local and historically specific […]. a sense of spiritual identity is a role-related aspect of an individual's overall sense of ego identity. (p. 1270)

Achieving the mature sense of spiritual identity demands hard work on one's own multi-dimensional process of development influenced by individual, cultural, environmental, and contextual factors (Russo-Netzer, 2017) within one's whole lifespan, which could be considered deeply by teachers, who sometimes ignore this aspect while performing their roles and constraining their commitment in the educative process. They tend to reduce the meaning of spirituality and spiritual development in their practice, which results from complicated circumstances including the education system and its assumptions. In reply to this problem, Wilber's integrative model of spiritual human development (1980) appears justified. This model covers three stages: the pre-personal one, which reflects subconscious functioning and can be instinctual or conditioned by fundamental biological needs; the personal stage, where the mental processes is conscious, oriented mainly toward ego, and a coherent self-identity development appears to be achieved; and the transpersonal stage, at which the awareness goes beyond consciousness of ego, resulting in a new approach of self-consciousness to self-transcendence and the spiritual sphere (Russo-Netzer, 2017). The integrative model of spiritual human development by Wilber corresponds with the pedagogical concept of integrative layer human development by Kunowski (2000). Kunowski's concept shows the tight relationship between the development of layers – biological, psychological, social, cultural, and spiritual (religious) – and their reciprocal influence on each other in the way one achieves maturity, which is conditioned by individual developmental potential and approach to challenges, widely understood environmental circumstances, and upbringing powers: *bios*, *logos*, *agos*, and fate, which are formatted by functions such as *sanare*, *edocere*, *educere*, *educare*, and *initiare* (Kunowski, 2000). In this context, special attention should be paid to spiritual development, which seems to be influenced by many factors, including biological, psychological, social, cultural, and religious, as reflected in Kunowski's concept.

Based on this concept, spiritual development requires caring for the quality of the following elements of spirituality:

- reason, which enables the person to know the truth and incorporate it into their life and which is connected with developing the "ability to value and assess all the experiences in relation to the Self and others treated as good, true, and noble ones, where love helps man come closer to ideal: Good, Beauty, Truth, and Sanctity" (Szymańska, 2017)
- freedom, which is accompanied by a sense of responsibility for oneself and for other people (to some extent)
- transformative creativity, which helps the person find new solutions, gain new perspectives, construct new valuable things and ideas and share them with individuals and the community, experience a new quality of relation to self, others, God, and the world
- reflective openness to metaphysical depth, which fosters an understanding of life situations, particularly complicated ones, and helps overcome the barriers of sensual experience on the way to Transcendence, find the meaning of life in the light of Absolute and God, and pursue achieving unity with Him.

Considering all the above, it can be claimed that spirituality somehow characterizes the spiritual identity and corresponds with the third phase of Wilber's integrative model of spiritual development: the transpersonal one. This phase has a lot in common with the moral development on the postconventional level and matches the similar stage of identity development (Witkowski, 1988), as it requires not only that

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higher values be respected and incorporated into life, but it becomes effective when the mechanism of the introception of values works well (Kunowski, 2003).

The analysis of chosen aspects connected with spirituality, identity, and spiritual development of a human being implies the need to refer to a teacher's spiritual development, which can be associated with the teacher's spiritual identity fostering the realization of their prestigious vocation. The teacher, truly seeking ways that enable them to achieve their personal and professional goals, specially rooted in personalism, is bound to reflect on the stages of spiritual development in relation to other spheres infused with spirituality that provide a deeper sense of vocation that has an impact on others. The questions concerning the reflective skills (Szymańska, 2020) need to be posed within the pre-personal, personal, and transpersonal dimensions of spirituality, which can help in forming one's spiritual identity revealed in moral/social and cultural areas of life. According to the attributes of spirituality, the teacher constructs new lenses for perceiving the formative functions of reason, freedom, reflectivity, transformability, and creativity, which are determined by values such as dignity, truth, educative love (Szymańska, 2016), responsibility, faith, hope, and beauty. a new perception of self, others, the world, and God pushes the teacher to explore the meaning of Transcendence, in both the theoretical and practical dimensions of education. It shapes the openness, commitment, and participation that lead to maturity revealed in the personalistic paradigm infusing the teacher's activities.

## ***Education as a Spiritual Journey* by Parker J. Palmer in reference to teachers' spiritual development**

To consider the reference of a teacher's spiritual development to Palmer's metaphor of education as a spiritual journey, this metaphor must briefly be presented. Thus, Palmer (1993), in book entitled *To know as we are known: Education as a spiritual journey*, writes:

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> My vocation (to use the poet's term) is the spiritual life, the quest for God, which relies on the eye of the heart. My avocation is education, the quest for knowledge, which relies on the eye of the mind. (Palmer, 1993, p. xxiii)
> These both wings: heart and mind need to coincided in the search of "wholesight" perception of reality, what takes place in constructing a holistic way of getting knowledge that "must be translated into practical ways to teach and learn." (Palmer, 1993, p. xxv)

Therefore, the "spirit-seeking heart" and the "knowledge-seeking mind" (Palmer, 1993, p. xxiv) can embrace the whole reality in shaping the integral, holistic approach to self and life, as well as to education, which should induce the teacher's constant reflection on the quality of their work influencing the student's holistic, integral development. Education goes beyond the real, material aspects, as revealed in the author's confession:

> I mean a slow, subtle, nearly unconscious process of formation, something like the way a moving stream shapes the rocks over the long passage of time. The disciplines of textual study, observation and analysis, and community life are the channels through which that stream flows. (Palmer, 1993, p. 20)

This stream can be understood as transcendence, which cannot be separated from self and the world by education, as "such an education either turns out people who force their own distortions on the world, or it produces people who have succumbed to the world's distortion of themselves" (Palmer, 1993, p. 12). A threat for future generations can arise when "the technical/pragmatic" tendencies overwhelm the personalistic, integral, holistic approach to upbringing and education, when an axiological perception of the world can be reduced to the relativistic point of view of self, others, the world, and God. It occurs when building the spiritual identity on a personal or transpersonal becomes vague. Such an approach encourages us to lock ourselves in our own closed logic, reducing the meaning of love to soft, sentimental feelings or virtue and distorting

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the view of freedom and truth conditioned by our own image and desires, which leads to nowhere, to the destruction of self and the world. In this light, immaturely released curiosity and control in the educational process of gaining knowledge and skills gradually excludes transcendence on behalf of "tough scientific" knowledge taught and learned in a paradigm of objectivism, having not much in common with the transformative one (Palmer, 1993, pp. 13–40). The author understands that "to learn is to face transformation. To learn the truth is to enter into relationships requiring us to respond as well as initiate, to give as well as take" (p. 40). Palmer adds,

> we find it after to seek facts that keep us in power rather than truths that require us to submit. Objectivist education is a strategy for avoiding our conversion. If we keep "reality," we can avoid, for a while, the truth that lays the claim of community on our individual and collective lives. (Palmer, 1993, p. 40)

Being aware of difficulties and challenges that education faces now and may struggle with in the future, Palmer sees the solution in teachers' spiritual formation (1993, pp. 107–125), where the integrative model of spiritual development can be applied, particularly at the postconventional stage or in a transpersonal phase. This phase elicits the autonomy of the teacher in the personalistic perspective, especially the Christian one. Spiritual development here requires from teachers an attitude of openness to grace, accompanying them in the process of transmitting the information coming from outside to the innermost world, then transforming the knowledge that opens new gates into the teacher's larger capacity to better know themselves, others, the world, and God. This results in a higher capacity to help others be better known. To make it true and real, the education goals should also comprise the spiritual ones. Such an approach requires the teacher's spiritual formation and is determined by values or virtues, among which the pursuit to know and live in truth dominates. In this context, it is not surprising that Palmer (1983) claims:

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> The true professor is not one who controls the facts and theories and techniques. The true professor is one who affirms a transcendent center of truth, a center that lies beyond our contriving, that enters history through the lives of those who profess it and bring us into community. (p. 113)

The author draws attention to some aspects that indicate the connectedness of education seen as a spiritual journey with the teacher formation that takes place basically in the spiritual domain, which demands effort from the person and the community to overcome many steps of the spiritual ladder:

- affirmation of virtues such as dignity, love, true, faith, hope, care, commitment, curiosity, openness, and hospitability in personal and communal life. Teachers are supposed to create and arrange the space for these virtues, even if learning or teaching them can be painful, especially while bringing something new (e.g. ideas) and valuable into this space. Their struggles can appear to be difficult, but worth making an effort. In this light, the teachers are bound to be obedient to truth, although such an attitude can bring some discomfort to themselves and others, which requires the courage to face difficulties. The courage in defending the truth gains a new shape thanks to love emanating from God, who assists the teachers and enables them to cooperate fruitfully with His grace, which translates into achieving higher quality knowledge.
- affirmation of transcendence in personal and communal life, which requires being immersed in prayerful communication with God, mastering the skills of meditation and contemplation, and practicing the discipline of silence and properly understood solitude that deepens the knowledge of self and one's identity and in fact helps "to understand the liabilities and limits for our knowledge of the world" (Palmer, 1993, p. 123). Furthermore, Palmer writes, "as we face ourselves in solitude, we are slowly freed from

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the stranglehold of our dependencies and darkness and from the destructiveness of our objectifying world"(Palmer, 1993, p. 123).
- making space for feelings.
- building a deeper relationship with oneself and others (particularly the community), the world, and God, which can take place through learning, including personal and communal experiences. The lenses that enable perception of new, richer perspectives must be changed to better understand wholeness seen as unity of heart and mind. Such a relationship demands from its educational subjects to be curious, reflective, and open to new challenges facing the affirmation and implementation of high virtues mentioned above.

To summarize, the teacher's spiritual development taking place in the wholeness of the person, whose heart and reason are integrated while going through its phases until reaching the transpersonal one, seems to be related with the educational journey that can either make the school community stay on the pre-personal level or can provide many opportunities for them to achieve the transpersonal level within formation. Such a journey is assumed to reflect on Paul Avallone's statement (1989) that

> education must deal with the entire man. The harmonious development of all of man's faculties is the purpose of the educative process. Education, therefore, must deal not only with the physical, emotional, intellectual and moral aspects of man's life. The spiritual must also be taken into account, for man is a being endowed with spiritual qualities. (p. 53)

This thesis demands that the theory be transmitted into practice, creating a model that can be deployed in the education system, which is to be reformed in respect of personal and communal educational goals eliciting the need to build a spiritual, autonomous identity on a post-conventional level.

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## Conclusion, results, and recommendations

Having considered both the integrative model of spiritual development, the concept of spirituality in the integral development, and Palmer's vision of education hidden in the metaphor of a spiritual journey, it appears necessary to refer to a teacher's spiritual development, which should be regarded as a challenge for building a civilization of love and truth, starting with educating the younger generations. Such education has to face many obstacles that have fused contemporary lifestyles, shaped by eclectically mixed cultural trends and determined by the uncritical use of new technologies. It seems helpful to avoid many traps for upbringing, teaching, and learning, creating a space for formative education – in which spiritual development takes the central place. A spiritual journey in education has a lot in common with a teacher's spiritual development, as they both appear to be long-lasting, dynamic, integrative, transformative, reflective, creative, reasonable, transcendent, and individual/communal and to embrace two wings – heart and reason – in building the perspective of wholeness seen in the personal and communal dimension.

The aspects discussed above can bear some results. First of all, education has to provide a spiritual space for both teachers and students, which often requires that the hierarchy of goals be rearranged toward building a truly personalized model of education. This model has to go beyond the technical strategies used mainly for learning, seen in the "tough," materialistic horizons of effects on the ladder of success. Building an enriched spiritual identity requires conscience commitment in implementing the hierarchy of values in the school community, which can be reflected in the change of attitudes, beliefs, feelings, and motivations. This change reveals the need for formation and fostering the creation of a new, enriched identity (Cencini, 2005; Palmer, 1993) in the process of education going beyond the limits of tangible results, which demands openness and readiness for transformation. To realize formative, spiritual goals, it is necessary to change not only the curriculum, but also the system, to enable educators to engage in experimental projects and conduct

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research lasting some years with those who feel responsible for achieving goals within wholeness, in Palmer's understanding. In this context, it is necessary to claim that the teachers are supposed to be ready and eager for formation enlightened by the grace given them by God, who helps them master their faith permeated with love. Such a project could be made with the use of action research, in some circles documented thoroughly at the local, national, and international levels, and its results could be disseminated widely for the benefit of further generations, who are endangered by various wars, also metaphorically.

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# Service-Learning in the Context of Karol Wojtyła's Theory of Participation

(pp. 45–67)

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## Abstract

**Objectives of the research:** The aim of this article is to explore how Karol Wojtyła's theory of participation can enhance our understanding of 'Service Learning' (SL) and its potential benefits for education and personal development resulting from the implementation of SL in higher education.

**Research methods:** The research was based on an analysis of publications on Service-Learning, a hermeneutic examination of Karol Wojtyła's writings on participation, and a case study using SL.

**A short description of the context of the issue:** Service-Learning is defined as reflection and action to transform reality, as serving in solidarity with the application of learning content and as learning by serving the community. This article presents the principles of Service-Learning through community participation, exposing the benefits of this approach in education.

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**Research findings:** Karol Wojtyła's theory of participation serves as a creative inspiration for the theoretical basis of Service-Learning. Its principles can introduce SL project participants to personalistic values. The concepts of service, community, common good, solidarity, dialogue and opposition play a key role in this confrontation. By combining service with the learning process, SL can contribute to the development of project participants in terms of both knowledge and social skills.

**Conclusions and recommendations:** In drawing conclusions regarding the potential benefits of implementing the Service-Learning method in education, the authors emphasise that values, in accordance with Wojtyła's philosophy, are a key element of personal and social development. In the context of SL, people can find fulfilment through relationships with others, which is the answer to contemporary educational challenges. The authors recommend further research into different forms of SL implementation in order to better understand and maximise its potential in fostering participation and social service.

***Keywords*:** service-learning, service, theory of participation

## Introduction

In the third decade of the 21st century, higher education in Poland has seen a growing interest in Service-Learning – an innovative didactic proposal in academic education (Gierszewski, 2023; Kamiński et al., 2023). Service-Learning is defined as reflection and action for the transformation of reality; serving in solidarity with the application of learning content; and learning by serving the community (Tapia, 2019, p. 489). This concept traces its roots back to educational transformations initiated in the second half of the 20th century, drawing inspiration from John Dewey's (1859–1952) concept of experiential learning and Paul Freire's (1921–1997) emancipatory pedagogy (Biela et al., 2021; Culcasi & Cinque, 2021; Deans, 1999, pp. 15–29; Tapia, 2019, p. 489). The term "Service-Learning" (SL) itself was first coined in 1967 by Robert Sigmon and William

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Ramsey, teachers in the Manpower Development Internship Program in Atlanta (Stanton, Giles, & Cruz, 1999).[1] In order to capture the essence of the program, they introduced the concept of *service-learning,* which they described as embodying the relationship between authentic community service, conscious learning, and reflection. Service-Learning, as perceived by Sigmon and Ramsey, has an element of added value by occurring within an experiential context that facilitates constructive, positive contributions to the community (cf. Stanton, Giles, & Cruz, 1999). Andrew Furco, a proponent of SL in the USA, emphasises that SL is distinct from volunteering as it directly connects to learning at school or university, and therefore within the educational curriculum. SL is also not merely an educational activity confined to formal settings, such as the classroom or auditorium; rather, it requires the application of knowledge and skills to address real-world challenges (Furco, 1996, pp. 71–76; Furco & Biling, 2002). At its core, SL integrates service (solidarity actions, community volunteering, active citizenship, commitment to the common good) with learning (development of skills related to curriculum-based learning), so that pupils/students can enhance their knowledge and skills through solidarity service to the community (Fiorin, n.d., p.2; cf. also: Biling & Furco, 2002; Cohen, 1976; Fiorin, 2016; Eyler & Giles, 1999; McNatt, 2019; Sigmon & Keyne, 2010; Tapia, 2006). This framing is key to explaining Service-Learning as a distinct learning model.

The objective of this article is to explore the understanding of the 'Service Learning' educational paradigm through the lens of Karol Wojtyła's theory of participation, within the context of the potential benefits of SL in higher education for both academic learning and personal development. The authors contend that it is worthwhile to reflect on the potential outcomes for all stakeholders involved in the implementation of SL projects. When using the term "happen" concerning the student,

[1] William Heard Kilpatrick, who coined the term "project method," argued that learning should take place outside of school and involve efforts to meet real community needs (W. H. Kilpatrick,1929). Foundations of Method: Informal Talks on Teaching, MacMillan & Company). See: D. D. Chipman and C. B. McDonald (1980). The Historical Contributions of William Heard Kilpatrick, *Journal of Thought*, *1*, 71–83.

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one can mean what happens in the student, between the student and the beneficiary, and because of the student. Maria Nieves Tapia, the architect of the Latin American SL concept, illustrates this notion by stating that "studying architecture and designing plans is learning. Studying architecture, designing plans, and contributing to the construction of houses together with those in need is 'learning by serving'" (Tapia, 2019, p. 509). In essence, the goal of SL is not solely students' ability to apply knowledge in practice but also about their actions benefiting others, holding social significance, becoming valuable to someone, and instigating change in others. Tapia suggests that Service-Learning appears as a response to the four pillars of education envisioned for the 21st century by UNESCO, which situate the learning process in the perspectives of learning to know, learning to do, learning to live together and learning to be (Delors, 1996, pp. 85–97; Tapia, 2006, pp. 141–156; 2019, p. 511). Thus, it pertains to a specific subject, a specific person, because changes in their knowledge, emotions, and actions, are ultimately changes in their being.

The ultimate educational objective, as eloquently articulated by John Paul II in in his address to UNESCO is "being more" (1980, nos. 7 and 11), that is the person (subject) and their existential essence. In a personalistic framework, this notion of "being more" opens up the person to the realm of values. Values not only impose obligations but also stimulate various biopsychological energies, mobilise and unleash motivational forces. Within this context, values serve as mechanisms of action, as they foster personal development and the process of maturation. Through engagement with values, individuals develop in their being, find direction for growth, and achieve higher levels of maturity (Popielski, 1994, pp. 163–165). John Paul II encapsulated this idea by stating, "Values are the underpinnings of the choices that determine not only your own lives but also the policies and strategies that build life in society. (1985, no. 6). In other words, values open up a human being to the community, facilitating every human being's self-fulfilment in relation to others. This line of reasoning naturally leads us to advocate for a pedagogy centred on learning through service (Service-Learning), where individuals find fulfilment through personal interactions with others.

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## Service-Learning as learning through service

In the context of higher education, Service-Learning (SL) emerges as an answer to the question of the significance of knowledge acquisition. Over and over again, lecturers encounter inquiries from students such as, "Why are we learning this?" or "What are we learning this for?" SL projects aim to steer students towards society, by providing them with opportunities to apply the knowledge they acquire in practical settings.

"Service-Learning is an innovative pedagogical approach that integrates meaningful community service or engagement into the curriculum and offers students' academic credit for the learning that derives from active participation within the community and work on a real-world problem. Reflection and experiential learning strategies underpin the learning process, and the service is linked to the academic discipline' (Albanesi et al., 2021, p.12; Culcasi et. al., 2022).

From the point of view of academic didactics, this is an important element; however, limiting SL only to the realm of practical application (such as practical benefits for curriculum delivery and meeting social needs) reduces its significance. SL should be considered in a broader context, namely from the perspective of human education and personal development. When implemented correctly, SL has the potential to impact every aspect of education, benefiting both the learner and the beneficiary.

In our analysis of this phenomenon, we will somewhat detach ourselves from the conventional notion of learning, treating it as a byproduct of the previously defined academic learning objectives (although we will use the full wording of the term to describe the method under analysis). Our main focus lies on the latter part of the phenomenon: service, which shapes the implementation and direction of the learning process, i.e., the method itself. We are keen on dissecting this method both because of its essence and because of the conditions necessary for achieving optimal results across all possible perspectives – whether pertaining to individuals, relationships, or situations. While discussions regarding the benefits of university and lower-level education typically revolve around the perspective of pupils/students, the nature of the SL method compels us to broaden

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our analysis to encompass other beneficiaries. These include individuals targeted by students and learners within the framework of the method.

In the Polish context, the term "service learning" is most commonly translated as "uczenie się przez zaangażowanie" [literally: learning through engagement] (Gierszewski, 2023; Stowarzyszenie Centrum Wolontariatu, n.d.; PODN, 2023). On the other hand, the literal translation of the term into Polish as "uczenie się przez służenie" means "learning through serving," and this version of the term has independently been adopted by two research teams in Poland engaged in international projects: the John Paul II Catholic University of Lublin, which participated in the UNISERVITATE project in collaboration with CLAYSS, the Latin American Center for Service-Learning (Kaminski et al. 2023), and the University of Silesia in Katowice, Poland, which is implementing the eSL4EU project: e-Service Learning for more digital and inclusive EU Higher Education systems, in cooperation with four European universities.[2] It is likely that in Poland, the literal translation of the term "service" as "służba/służenie" has not been used previously due to the ambivalent connotations of these words. This interpretation, in relation to other countries where the word "service" as "służba/służenie" has not been used, is also adopted by Tapia, who argues that in very liberal societies, the concept of service in the context of specific assistance rendered to another person or community typically carries religious overtones (Tapia, 2006, p. 87).

The PWN *Dictionary of the Polish Language* (PWN, 1997) provides five different contexts for the term "service/służba," including "an institution of public utility or the military; also: the employees of such an institution; the activities of such institutions; duties performed during certain working hours in some institutions; performing the work of a servant in someone's home, household, etc., against remuneration; also: persons performing such work" (PWN, 1997). These four designations of the term "service" are either not particularly conducive to capturing the notion of

[2] Cf. European Observatory of Service learning in Higher Educational, Program Erasmus+ Key Action 2: Partnerships for Cooperation. 2021-1-PL01-KA220-HED-00003; https://e-sl4eu.us.edu.pl/en/the-project/

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Service-Learning, or are only minimally useful (e.g., as a place of performing service, as doing specific servile work, as carrying out socially beneficial activities). The interpretation that aligns most closely with the sense and meaning of this service is the first, which reads: "service is work for the benefit of a community, performed with dedication" (PWN, 1997). This definition evokes the most widely accepted understanding of SL. However, one may question whether "uczenie się przez zaangażowanie" fully encapsulates the complexity of the process that service-learning embodies in English. "Zaangażowanie" (engagement) is defined (WSJP, 2018) as an attitude in which one pursues a goal in a determined manner, with a significant personal contribution of time and effort. Therefore, "uczenie się przez zaangażowanie" is not a precise descriptor of the process involved in SL. The omission in translation of the potential offered by the word "service" (*służba* in Polish) contributes to this impoverishment, which in turn undermines the concept itself. Emanuel Levinas explored the notion of service, viewing it as a fundamental aspect of ethical living that arises from our relationships with other people (Levinas, 2002; cf. Kaczmarczyk, 2016, pp. 7–34). Thus, as "uczenie się przez służenie," Service-Learning entails working for the benefit of a specific community (here, the community is understood as comprising two beneficiaries: the social institution and those for whom the institution works, united by a common good), concurrently engaging in the learning process

In the context outlined here, service appears to be perceived as an attitude, one that can be characterised as such. Therefore, we define an attitude by its three constitutive factors: knowledge, emotions, and concrete actions. It can therefore be assumed that when embarking on Service-Learning, each learner (be it a pupil or student) has some background knowledge, emotions and experiences accompanying the intended action, all of which contribute to the action itself. In the specific scenario of a modality such as learning by doing, pupils/students engage in a collaborative relationship within a community comprised of the beneficiaries indicated above.

Let us consider, for instance, students of pedagogy who, in the process of learning by doing, will collaborate with two beneficiaries:

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the caregivers at a Mother and Baby Home (the people in charge of the Home) and the mothers (adolescents, immature, "with a baggage") taking care of their children. The students' task could entail imparting certain parenting techniques to these mothers. While students possess theoretical knowledge of these techniques (e.g., manipulative play, reading, singing, and playing with building blocks), it is through their interactions with the mothers and children that this knowledge system evolves, and acquires new meanings.

In the situation indicated here, it can be assumed that emotions will also change. They will be influenced by the dynamics of the student-mother and student-child relationships, which in turn will modify their knowledge. All of these processes, it is hypothesised, will unfold during concrete action, which, from the student's perspective, can be described as learning by serving. Service is recognised as a pivotal value for human and social development (Heska-Kwaśniewicz, 1998; Olbrycht, 2017; Tapia, 2019). By integrating the attitude of service into Wojtyła's theory of participation, we can observe the extent to which the inherent good, which becomes the goal of the attitude, can yield benefits for all the parties involved, provided that in the course of service it is internalised through genuine dialogue fostered by mutual solidarity and, when necessary, by rightful objection.

## Service-Learning in the personalistic perspective of Karol Wojtyła's theory of participation

Certainly, the experience of service learning (SL) is more intricate than portrayed in the aforementioned example. In essence, SL involves multiple stakeholders and beneficiaries (students do something for someone, with the help of someone and for the benefit of that someone) – each contributing to a social process of action, which is accompanied by certain emotions and entails a formation of relationships. Moreover, it facilitates a significant didactic and educational process that supports personal development, a concept well elucidated by Karol Wojtyła's personalistic

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philosophy. Wojtyła's theory of participation accurately describes and explains the requisite conditions for realizing SL objectives from various perspectives, and the potential educational and developmental impacts on each participant involved. The linkage between service in SL projects and the phenomenon of participation is not novel (cf. Cross, 1974); similar reflections have been articulated by a team of Polish researchers, including Adam Biela, Dorota Kornas-Biela, Mariola T. Kozubek, and Arkadiusz Wuwer (2021, pp. 38–42).

Central to our analysis of participation is a pivotal insight from Karol Wojtyła:

> If a person exists and acts "together with others," it means that they have some share in an entirety greater than themselves, that they therefore participate in it. … Participation is, in a way, a characteristic of the person acting and existing together with others. And it consists in the fact that, by existing and acting in this way, man fulfils himself in this." (Wojtyła, 1994, pp. 458–459)

Recalling and reflecting on this very inquiry into the phenomenon of participation, Marek Rembierz notes that:

> by participating "in an entirety greater than himself, man not only preserves himself (his own dignity but also, thanks to this participation, which is 'a property of his person" – fulfils himself and at the same time transcends (transcends, "outgrows") himself, as he strengthens his personal subjectivity (power over himself), positively shapes his agency (enhances his abilities) and opens himself more fully to reality in his relationships with others. (Rembierz, 2012, p. 225).

However, Rembierz adds a note of realism, suggesting that it is possible to "radically diverge from Wojtyła's orientation in actions carried out together with others, leading to the objectification of the individual and complete dependence of their way of existence on the functioning of the group" (Rembierz, p. 226).

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Let us explore Karol Wojtyła's ideas through some examples and examine moments when pupils/students discover themselves as agents of actions, which fosters self-development. When pupils/students see themselves as agents and can perceive their actions as successful, good, and useful, this enhances their perception of themselves as persons and fosters a personal and creative process simultaneously. This, in turn, likely boosts their self-esteem in both their knowledge (I know how to do something, I know what to do) and their emotional attitude towards themselves (I am worth something), as well as a favourable view of action for others' benefit and action as such (leading to joy from taking action, and satisfaction from social involvement).

From a personalist standpoint, this action – the act – serves as an opportunity to discover many social and moral values. That is to say, a broader dynamic emerges as the "we" comes into play, with multiple participants getting involved, and each student and beneficiary actively contributing to the relationship. Pupils/students begin to take part in the endeavour, in being together, representing what Karol Wojtyła termed the "second dimension of participation."

What defines the essence of this second dimension of participation? Wojtyła explains this concept of "we" in terms of the common good, which appears to encapsulate the essence of the educational (and developmental) outcomes not only for the student but also for the other beneficiaries involved in the SL process. Let us try to analyse the entire process by referring to Wojtyła's insights. He suggests that each "we" signifies a plurality of subjects, indirectly referring solely to a particular plurality. Each "we" is tangibly (albeit indirectly) defined. Thus, the "we" not only denotes a multitude of human subjects but also signifies that these individuals are interconnected in some way. This interconnectedness can be the source of their experience of unity. Paradoxically, the notion of unity seems to contrast with experiencing multiplicity. Clarifying this apparent contradiction is crucial for understanding the implications of SL implementation. Let us try to analyse its nature.

What is unity? According to the PWN *Dictionary Of The Polish Language* (1997), unity can be defined as harmonious coexistence and unanimous

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action. It represents a common thought that unites subjects (persons) sufficiently for them to undertake joint action. From a philosophical standpoint, unity can explain the essence of unanimity as being grounded in the same foundation, a common principle. Prudence Allen, in discussing the unity of thinking among multiple subjects, reduces it to the principle that "One plus one equal" (Allen, 2006, pp. 87–108; cf. Ecler-Nocoń, 2016, pp. 96–106). This suggests successive processes following the actions of multiple subjects, each being a unique and inimitable person, yet united by a common idea. However, this common idea, when internalised by each subject, transcends a mere sum of individual components. In the PWN Dictionary's explanation of the concept of unity (*jedność*), there is also a reference to the principles of classical drama composition: the unity of time, place, and action. This reference can also aid in understanding the essence of what can occur during the process of SL implementation. Essential to its implementation, after all, is the unity of these three principles – the process occurs simultaneously, in a specific place, and is connected by a particular action. However, with the virtual possibilities of transcending space, these three principles can manifest in another dimension, although still connected by a common thread.

In analysing the concept of unity (plurality), we might conclude that it is founded on a shared idea. Wojtyła believes that the essence of "we" derives from good, understood as values, which, by uniting many individuals, warrants the designation "common good." This common good is also described as a summons to community, which can be formed by people defining themselves with as "other." Thus, this pronoun inherently contains an invitation to community (Wojtyła, 1994, pp. 458).

From a personalist perspective, *participation*, as viewed by Wojtyła, cannot be achieved outside of human subjectivity. Participation must define the one who participates. If we refer to the SL projects  participation which aligns well with this notion, it is the student who defines how they participate, mindful of the shared values (common good) among themselves and the other beneficiaries. In essence, by existing and acting together with others, one achieves self-fulfilment. Wojtyła emphasises that participation must recognise that within any given "we," each "I" inherently

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possesses self-determination and a drive for self-fulfilment. By this very fact, a human being is a person. This inherent characteristic of humanity cannot be suppressed or eradicated by any human "we."

> By virtue of this attribute, man is capable of realising the personalistic value of his act, while simultaneously acknowledging the outcomes of communal action and existence. He is also empowered to do so. We advocate for personalism against individualism and totalitarianism, as both concepts undermine the possibility and, in a sense, the very capacity for participation, depriving man of the right to participate. (Wojtyła, 1994, p. 459)

This conviction situates SL-related pedagogy within personalism for a number of reasons, which will be elaborated upon later in this article. Suffice it to say, however, that when individuals act alongside others, they retain all that this collective action entails while simultaneously realising the personal value of their act. It is the individual who determines the nature and influence of their acts.

In a SL project named SenSkype (2022), conducted at Bel University, psychological support was extended to senior citizens in the wake of the COVID-19 pandemic. This initiative, guided by participatory theory, serves as a valuable illustration of the benefits derived from SL projects for all involved parties. The SenSkype project addressed the imperative to alleviate mental health issues among the elderly population, exacerbated by the isolating effects of the pandemic. Typically, senior citizens residing in nursing care facilities experience isolation, a condition that was further compounded by the pandemic-induced feelings of loneliness and fear of illness.

The objective of the project was to provide seniors residing in the "Viničky" nursing care facility in Nitra with a space to discuss personal concerns, their situation, family matters, individual interests, and life experiences. Through regular online interactions with psychology students, senior citizens found a meaningful substitute for in-person contact particularly beneficial for those in crisis. Importantly, each participant in the student-senior relationship was subjectively engaged in their own act, thereby contributing to the realisation of common good (values). However, owing to the individual subjectivity of each participant, the concept of common good assumed slightly different dimensions for each of them.

For psychology students, the project offered an opportunity to apply and enhance their psychological knowledge while developing qualities such as warmth, attentiveness, and listening skills. Seniors, on the other hand, were able to navigate their circumstances through the point of view of personal experience, finding solace amidst the pandemic situation. It is conceivable that the project also helped the nursing home staff to resolve the emotional tensions prevalent among senior citizens in relation to the pandemic. By catering to the needs of the elderly, the project simultaneously contributed to the realisation of common good while reflecting the subjective decisions made by those in charge. Consequently, it can be inferred that the well-being of nursing home staff, entrusted with the care of senior residents, was also positively impacted by the initiative.

The aforementioned line of reasoning unveils the essence of participation, as conceptualised by Wojtyła. Participation, in the context of SL projects, embodies a pedagogy rooted in personalism. It is a property of the person who, by existing "together with others," engages in action as a person. In this process, the individual retains all elements inherent in collective action while simultaneously realising the personalistic value of their own acts. Whether it be a student, senior, or caregiver, it is the individual who determines the nature and form of the act. Indeed,

> pupils and students who are able to apply the knowledge they have acquired, in the process of education, in solidarity-based action to solve real problems of the local community, not only contribute to the betterment of that community, but by maturing pro-socially are able to give a deeper meaning to the learning/study process. By decentralising themselves through discovering and caring for the common good, they strengthen their sense of self-worth and subjectivity (Biela et al., 2021, p. 41).

In essence, as Wojtyla asserts, "Man relinquishes the fulfilment of himself in action 'together with others'" (Wojtyła, 2021, p. 407).

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For a comprehensive grasp of participation within the discussed context, it is important to refer to the concept of community. What defines a community? A community can be defined as a collective of persons bound together by common interests, by a common life. However, a community transcends being merely the sum of its members. What is important for a community to come into existence is a new, redefined understanding of the relationships among its constituents, who are the true agents of action. If the community is not the simple sum of its members, it means that each member retains the autonomy to decide upon their own actions, and the decision to do so arises precisely from their participation in the community.

In the scenario under consideration, the community was made up of students, senior citizens, and nursing home staff. This leads us to the analysis of subjective action within the community. Subjective participation hinges on voluntary choice: a member of the community chooses what others choose, or even chooses it because others choose it, and at the same time, chooses it as their own good and as the goal of their own pursuit in the sense of self-fulfilment. Participation empowers individuals to make such choices and collaborate with others accordingly.

In the exemplified case, we observed the voluntary choices of all members of the community. While students voluntarily joined the SenSkype project, the needs of senior citizens were determined by themselves and their caregivers. Each party independently decided to act together, perceiving it as conducive to their own good, self-development, and self-fulfilment, while also benefiting their project partners. Each found self-fulfilment differently, demonstrating that the solution to the problem of community and participation lies not merely in acting "together with others," but in the pursuit of the common good.

In Wojtyła's view, the common good cannot be fully understood

> without also taking into account the subjective moment, i.e. the subjective moment of the action in relation to the persons acting. If we take this moment into account, the common good is not only the objective of an action fulfilled in a community, understood in a purely subjective

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> sense, but it is also and even primarily that which conditions and, as it were, triggers participation in persons acting jointly with others and thus forms in them a subjective community of action. If we can understand the good as an end, it is in this double sense: the objective and the subjective at the same time. The subjective meaning of the common good is closely linked to participation as a property of the person and the act. In this sense, too, we can maintain that the common good corresponds to the social nature of man (Wojtyła, 2021, p. 398).

To sum up, the common good constitutes the guiding principle for appropriate participation within a community, enabling individuals to fulfil themselves through their authentic acts in concert with others. According to Wojtyła, "The common good is the good of the community precisely because it creates in an axiological sense the conditions of existing together, and action follows this". (Wojtyła, 2021, p. 398). Within a community, individuals aspire to choose what others choose while recognising the choices as their own good. Furthermore, in communities where the common good is paramount, individuals expect their actions to benefit, sustain, and enrich the community, demonstrating a willingness to sacrifice individual goods for the community[3] (…). "This sacrifice is not 'against nature,' for it corresponds in every man to the property of participation and, on the basis of this property, opens to him the path toward fulfilment." (Wojtyła, 2021, p. 399).

## Principles of service through participation in the community

However, in order for participation to be fully realised, in other words, in order for the values of service to be realised in the individual and within the "we" of the community, certain attitudes are necessary. Obviously, when considering SL projects, we cannot guarantee, prejudge or assume that a community composed of three beneficiaries (students, institution

[3] Which fits in with the designations of the term "service."

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members, and individuals in need) will always develop effectively. However, if the attitudes indicated by Wojtyła are authentically embraced, such development may very likely take place. Wojtyła identifies both the attitudes by which the community can live up to its fullness and those that impoverish it.

Wojtyła highlights solidarity, opposition, and dialogue as key attitudes for development. In addition, he emphasises that the attitudes of solidarity and opposition must be considered together, as one is strictly necessary to understand the other. The attitude of solidarity arises from the fact that people live alongside others. It is an attitude of community in which the common good properly conditions and triggers participation; in turn, participation properly serves, supports, and realises the common good. Solidarity implies a constant readiness to accept and realise one's share as due to everyone by virtue of being a member of a particular community.

A student enrolled in an SL project is prepared to address the community's needs by virtue of their plenipotencies (education and abilities). They are ready to perform these tasks in solidarity with those who lack or are developing these abilities. They perceive the fulfilment of this task as a common good, uniquely defined for each community member, but recognised as their own by each member. Wojtyła states:

> Consciousness of the common good commands us to surpass the part that falls to us as a share, though in this intentional relation it fundamentally realises its part. In a sense, solidarity even prevents from trespassing on some-one else's obligation and appropriating as one's own a part that belongs to another. [Authors' note: This means that the student, in solidarity with those they serve – teaches them to meet their own needs rather than doing it for them.] Such an attitude is in conformity with the principle of participation, for participation taken objectively and "materially" indicates certain parts in the communal structure of human action and existence. The attitude of solidarity takes into consideration the parts that fall to every member of the community. Appropriating the part of the obligation that does not belong to oneself is fundamentally contradictory to community and participation." (Wojtyła, 2021, p. 401).

Solidarity, however, does not exclude opposition; on the contrary, opposition can often manifest as an attitude of solidarity. It can be a means of achieving the common good. For it is usually not those who oppose that exit the community but rather those who seek inclusion, a way of participating in it. They are looking for such a form of participation that will allow them to engage more effectively and more fully within the community. By its very nature, opposition must be seen as constructive. It is imperative for the proper functioning and structure of communities themselves, a condition for their correct system. Wojtyła underscores that "the human community possesses its correct structure when rightful opposition has not only the right of citizenship in it, but also the effectiveness demanded by the common good together with the right to participation." (Wojtyła, 2021, p. 403).

These insights seem to fit well with the essence of Service-Learning projects. Their success hinges on genuine participation in solidarity from all parties involved. If such solidarity is lacking (due to the inauthenticity of any one beneficiary), the common good remains unrealised. In such cases, the appropriate response, stemming from genuine solidarity, would be opposition.

Gary K. Clabaugh (1999, pp. 163–199) accurately discusses such scenarios where legitimate opposition becomes necessary. Let us examine the situation in relation to the following SL project. Clabaugh titles his reflections, *Service Learning: The Right Thing for the Wrong Reasons?* He asserts a profound truth (also applicable to SL projects) that when we help others, we simultaneously help ourselves. In SL, this assistance translates into knowledge, but the pupils/students also learn a great deal about themselves and others, and about interpersonal dynamics. Through SL projects, we hope to create situations that facilitate the realisation of these very goals. However, there is a risk that if students engage in assignments for the wrong reasons, entirely different personal and social goals may be achieved than intended.[4]

[4] For example, a student who pretends to work, learns to make a good impression with minimal effort. Thus, he / she rather masters the art of lying and manipulation. See A. Janowski (1998), *Uczeń w teatrze życia szkolnego*, WSiP.

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Clabaugh recounts an example: he asked a high school student to provide an honest account of a completed service task. The student admitted to not actually performing any service and confessed to fabricating data and forging signatures. In this case, as Janowski writes, the student became proficient in the use of evasions, deception and, more concerning, may now firmly believe that these tactics are effective.

Another student, as Clabaugh reports, was tasked with assisting individuals with Alzheimer's disease twice a week. At first he tried to handle the responsibility, but when it became overwhelming, he resorted to spending his time in the park, engaging in recreational activities and drinking. Subsequently, he wrote a moving diary entry, which formed part of the assignment, and received a B plus grade. Whatever he gleaned from this experience did not enrich his knowledge as academics anticipated, nor did it foster the development of his social and personal competencies in terms of discovering essential humanistic values.

Just these two cases clearly show how conformity and avoidance hinder the spirit of participation. Avoidance is withdrawal and thus, non-participation, which is, in a sense, a form of egoism. Conversely, the conformist allows themselves to be swept along by the collective, giving up the opportunity for self-fulfilment in acting "together with others." These attitudes often stem from an individualistic or totalised view of humanity and are the source of alienation, which represents everything that limits and prevents individuals from realising their full potential. When discussing self-fulfilment, we reject the subjective interpretation in favour of the most genuine aspirations of the personal subject. Therefore, from an educational standpoint, it is imperative that SL projects afford all participants the opportunity for holistic self-actualisation and minimise tendencies toward conformity and avoidance.

## Final reflection – service is participation

The objective of this article has been to explore the pedagogical concept of Service-Learning within the framework of Karol Wojtyła's theory of participation. Authentic implementation of SL projects, which occurs when project participants refrain from adopting conformist attitudes and evasive tactics, can bring many personal and social benefits. Throughout the project implementation process, students' knowledge is undoubtedly poised to develop and improve in a meaningful way. When students take action for the right reasons, the developmental outcomes can be invaluable. Such outcomes may include an internalised attitude of social solidarity, an ability to enter into dialogue, and a social sensitivity that prompts individuals to oppose violations of the common good within the human community. If projects are founded on an honest recognition of the common good, there is the potential for shared development among all beneficiaries throughout the project's duration. Discerning the common good is only possible if the members of the community serve one another with an attitude of genuine service. The most appropriate means of realising service is through active participation in the life of society. Learning through service, by participating in communities of individuals, fosters the realisation of the common good, benefiting everyone within these communities.

This study has unveiled new avenues for research within the pedagogical and broader educational categories. Establishing a connection between Service Learning and Karol Wojtyła's theory of participation presents certain challenges for both researchers and practitioners. In order to overcome these challenges, it is crucial to thoroughly understand all facets of participation within Wojtyła's theory and to integrate these principles into SL practice. This analysis requires not only the application of hermeneutics but also phenomenology in order to gain a deeper understanding of the essence of this phenomenon-experience, while simultaneously revealing its practical significance.

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# Spirituality and Religiousness of Secondary School Students in a Public and Catholic School

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## Abstract

**Research objectives:** The aim of this article is to investigate and analyse spirituality and religiousness in secondary school students of a public and a Catholic school.

**Research methods:** The diagnostic survey method with a questionnaire was applied in the empirical research. The empirical data was collected with the authors' original questionnaire on spirituality and religiousness of youth, based on publications by Janusz Mariański and Halina Mielicka. The following statistical methods were used to analyse the research material: Student's t-test, chi$^2$ correlation test, Fisher's exact test, one-way analysis of variance (ANOVA), Tukey's post hoc test and Fisher's linear trend test. a p-level of <0.05 was considered statistically significant and a p-level of <0.01 was considered highly significant.

**Structure of the article:** The spirituality and religiousness of young people is an important issue in school education. Therefore, the article discusses,

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with reference to the literature on the subject, the basic concepts of spirituality and religiousness. The status of the existing research is shown. The methodological assumptions of our own research are discussed, as well as the characteristics of the study group with respect to the division into a public and a Catholic school. The results and statistical analysis, as well as the limitations of the research, are presented. Finally, general conclusions from the research are presented.

**Research results:** The research was conducted in 2023. a total of 555 secondary school students participated in the study, including 341 (61.44%) from a Catholic school and 214 (38.56%) from a public school in Krakow. There were more females (58.74%) than males (41.26%) in the study group. Most of the young people (54.95%) declared that they are believers, and most of the believers (85.41%) declared that they are Catholic. The results on the spirituality scale differed significantly ($p<0.05$) between the groups; they were higher among the Catholic school students. Similarly, scores on the religiousness scale were highly significantly different ($p<0.01$) between the groups and higher in the Catholic school.

**Conclusions and recommendations:** Based on the study significant relationships were observed between the type of school and the level of spirituality and religiousness, as well as between the declaration of faith and the level of spirituality and religiousness. The results of the research indicate that spirituality and religiousness are related to each other. Undoubtedly, attending a religious school can be a valuable contribution to developing the religious/spiritual sphere in a young person. It would be worthwhile to conduct further, detailed research on adolescents' religiousness and spirituality in future in order to better understand and describe this issue.

***Keywords:*** spirituality, religiousness, secondary school youth, public school, Catholic school

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## Introduction

The modern "city without God" is transforming into a "city with many gods". Spirituality and religiousness mix with each other in the post-modern world, and the two forms often intermingle. This is particularly noticeable in the lives of young people. In Poland, Church-orientated religion is still present. The irreligious sacrum, on the other hand, appears and develops in those areas in which religion is not active. Therefore, it is worth asking about the spirituality and religiousness of secondary school students in public and Catholic schools.

## Basic notions

Spirituality can be understood in different ways. James Wiseman, for example, distinguishes between three ways of understanding the concept. The first defines spirituality as the ability to transcend oneself so as to attain ultimate value. The second is defined by the search for unity with the whole world, in experiencing one's true self. The third is related to the Christian understanding of mystical unity with God (Wiseman, 2009, p. 24). When describing the meaning of spirituality, Halina Mielicka distinguishes between three areas of the phenomenon. The first refers to the religious sphere, the second to the sphere of personality and the third to the sphere of intellect and knowledge. On this basis, she distinguishes three ways of understanding the concept of spirituality in the contemporary world: as religiousness (transcendent spirituality), as a developed personality (transgressive spirituality) and as intellect (gnostic spirituality) (Mielicka, 2017, p. 28). Spirituality encompasses very diverse content: self-acceptance, the search for the meaning of life, the ability to dedicate oneself to others and values, the intense experience of beauty, the recognition of the sacredness of nature, the bond with people, nature and the cosmos, the meditative experience, or the bond with the divine.

Religiousness is linked to experiencing a specific relationship with the sacrum. We can draw conclusions on religiousness from elements such as

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religious awareness and feelings, religious decisions, ties to the community, religious practices, morality, religious experiences and forms of religious life (Walesa, 2020, p. 18). Colloquially speaking, religiousness has two aspects: "supernatural", which is difficult to operationalise, and "natural", which can be studied empirically. Janusz Mariański, an outstanding Polish sociologist and researcher of religiousness, lists the following areas of research: denominational and religious affiliation, religious beliefs (the issue of dogma), religious practices (obligatory, such as attending Sunday services or confession, or optional, such as prayer or participating in religious lessons), as well as issues of marital and family morality (Mariański, 2023).

## Research status

A new trend regarding spirituality and religiousness, especially among young people, is the departure from "external" manifestations or institutional forms. This may entail different levels of spirituality and religiousness, especially with regard to declared religious affiliation. Mariański (2021) says:

> While, in the past, religiousness and spirituality were defined, to some extent, in a complementary manner, and religious and ecclesiastical institutions specified the limits of the manifestation of spirituality, as well as the forms and shapes in which it could appear, now the two realities are becoming separate, and the new spirituality no longer refers to any religious doctrines. It is shaped, to a certain extent, in the interior of a person, according to his/her individual needs. (p. 42)

Halina Mielicka (2011b) believes that "new religiousness" is inseparable from "the new spirituality". She writes that

> the so-called new spirituality, the spirituality of the late 20th and early 21st centuries, is understood as people's struggle with technicalization, secularization, economic and industrial globalization, media and political manipulation, cultural homogenization, and the ecological

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> disaster caused by environmental destruction. Young people are especially interested in spirituality perceived not so much as an idea, but rather as a spiritual experience. (p. 9)

This spiritual experience, connected with the sphere of feelings, promotes making a direct connection of a believer with supernatural forces which are defined by the notion of sacrum. A believer, through individual religious practices – which include contemplation and meditation – wants to make contact with the sacrum, wants to get closer to what they consider sacred. Thus, mysteriousness and the constant desire to discover the force that governs the world is the essence of spirituality understood as the religiousness of modern man. Because of modern people's interest in what is impossible to understand, spirituality becomes one of the parameters of postmodernity (Mielicka, 2011a, p. 217).

Sławomir Mandes and Maria Rogaczewska (2012) also claim that the so-called "internal religiousness", disconnected from institutions of any kind, is beginning to dominate among young people. Studying the religiousness of young Poles, these authors believe that we are not facing a crisis of faith, but rather a kind of "purification" of religiousness from feudalism, institutional pride, clericalism and hierarchical rigidity. They write that

> it's not that young people don't want to hear about God; on the contrary – they long for a living experience of God – but they want it not to be mediated by ecclesiastical formalism, bureaucracy, rigid ecclesiastical language, incomprehensible sermons, and extortion of power and authority which are unsupported by humility and wisdom. (Mandes & Rogaczewska, 2012, p. 23)

## Methodological assumptions

The main research question is expressed in the question, "What do spirituality and religiousness look like among secondary school students in a public and a Catholic school?" Also, the following detailed questions

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were formulated: Is there a significant difference in the levels of spirituality among secondary school students in a public school and a Catholic school? Is there a significant difference in levels of religiousness among secondary school students in a public school and a Catholic school? Do declarations of religious affiliation differentiate spirituality and religiousness among secondary school students in a public school and a Catholic school?

The following hypotheses were put forward: There are significant differences in the scales of spirituality and religiousness between the students of public school and Catholic school (the latter are more spiritual and religious). There is a significant relationship between spirituality and religiousness and declarations of religious affiliation.

The empirical research[1] used the method of diagnostic survey with a questionnaire. a questionnaire on the spirituality and religiousness of adolescents, based on the publications of Janusz Mariański and Halina Mielicka, was used. The original questionnaire for the analysis of spirituality and religiousness is based on the study of spirituality conducted by Halina Mielicka-Pawłowska and Sławomir Chrost (Chrost, 2013, 2020), on the study of religiousness carried out by the Centre for Public Opinion Research, and on the analysis of religiousness by Janusz Mariański (2023). For the purpose of our study, a four-degree measurement of four selected aspects of spirituality (bond with God, meaning of life, bond with people, and bond with nature and the cosmos), and three aspects of religiousness (participation in community and individual religious practices and contact with religious communities/groups or organisations) was adopted. Responses were given on a 4-point scale from *often* to *never.* Each answer was scored accordingly: *often* – 3, *sometimes* – 2, *rarely* – 1 and *never* – 0.

The research was conducted in October and November 2023 in compliance with all national and international ethical standards. Approval was obtained from the relevant authorities to conduct the survey in selected

[1] The authors' research dealt with a broader issue. This article presents selected research results relating only to the spirituality and religiousness of adolescents.

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Krakow secondary schools. The questionnaire was made available on the Google platform. The request to complete the questionnaire was preceded by a letter outlining the purpose and scope of the research and providing a link to the tool. Participation in the research was anonymous and voluntary, and the participants could opt out of completing and submitting responses at any time.

After verifying and selecting the data, a total of 555 correctly completed survey questionnaires were finally qualified for quantitative statistical analysis. Statistical analysis was carried out using the statistical package PQStat, version 1.8.4.152. Qualitative variables (e.g. religious affiliation) were compared between the two groups using the $chi^2$ correlation test and Fisher's exact test. Quantitative variables (e.g. spirituality and religiousness) were compared between the two groups using Student's t-test. Spirituality and religiousness scales with regard to religious affiliation were analysed by one-way analysis of variance (ANOVA), Tukey's post hoc test and Fisher's linear trend test. a p-level of $<0.05$ was considered statistically significant, and a p-level of $<0.01$ was considered highly significant.

### Characteristics of the study group

A purposive selection of people for the study was made: the request to fill in the questionnaire was addressed to adolescents studying at a selected Catholic secondary school and a public secondary school in Krakow. a total of 555 secondary school students participated in the study, including 341 (61.44%) Catholic high school students and 214 (38.56%) public high school students. Taking into account the variables of gender and age, detailed characteristics of the respondents are presented in Table 1.

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**Table 1. Basic data concerning the participants, by type of school**

| Variable | Total | | Type of school | | | |
|---|---|---|---|---|---|---|
| | | | Public | | Catholic | |
| Sex | N | % | N | % | N | % |
| Male | 229 | 41.26% | 100 | 46.73% | 129 | 37.83% |
| Female | 326 | 58.74% | 114 | 53.27% | 212 | 62.17% |
| Age (years) | | | | | | |
| 19 | 3 | 0.54% | 2 | 0.93% | 1 | 0.29% |
| 18 | 55 | 9.91% | 30 | 14.02% | 25 | 7.33% |
| 17 | 109 | 19.64% | 40 | 18.69% | 69 | 20.23% |
| 16 | 148 | 26.67% | 54 | 25.23% | 94 | 27.57% |
| 15 | 141 | 25.41% | 55 | 25.70% | 86 | 25.22% |
| 14 | 92 | 16.58% | 30 | 14.02% | 62 | 18.18% |
| 13 | 7 | 1.26% | 3 | 1.4% | 4 | 1.17% |

There were more girls in the group of young people, which accounted for 58.74% of the total number of respondents, and more girls in the Catholic school (62.17%). The respondents included 41.26% boys, with more boys from the public school participating (46.73%). The age of the young people ranged from 13 to 19 years. The largest proportion of the respondents was 16 years old (26.67%), followed by 15 years old (25.41%) and 17 years old (19.64%). Taking into account the type of school, it can be seen that the largest group (27.57%) were 16 years old and attended the Catholic school, whilst the largest number of people in a public school were 15 years old (25.70%).

Declarations regarding the religious affiliation of the respondents were determined. The results are shown in Table 2.

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**Table 2. Religious affiliation in the study group, by type of school**

| Religious affiliation | Total | | Type of school | | | |
|---|---|---|---|---|---|---|
| | | | Public | | Catholic | |
| | N | % | N | % | N | % |
| Deep believer | 94 | 16.94% | 29 | 13.55% | 65 | 19.06% |
| Believer | 305 | 54.95% | 86 | 40.19% | 219 | 64.22% |
| Indifferent | 93 | 16.76% | 51 | 23.83% | 42 | 12.32% |
| Non-believer | 63 | 11.35% | 48 | 22.43% | 15 | 4.4% |
| Cochran condition | | | fulfilled | | | |
| Pearson's chi-square | | | 64.2433 | | | |
| Degrees of freedom | | | 3 | | | |
| p-value | | | <0.0001 | | | |
| Fisher's exact test (p) | | | <0.0001 | | | |

The largest number of adolescents (54.95%) declared that they were believers; 16.94% described themselves as deep believers. In turn, 16.76% of the respondents described their religious affiliation as indifferent, and 11.35% declared themselves to be non-believers. Taking into account the type of school, it can be said that the largest number of young people in both the Catholic school (64.22%) and the public school (40.19%) declared that they are believers. Another 19.06% of the respondents in the Catholic school described themselves as deep believers. The same declaration was made by 13.55% of the young people in the public school. Indifferent religious affiliation was specified by 23.83% of the respondents from the public school, and in the Catholic school 12.32%. In turn, 22.43% of the respondents from the public school declared that they are non-believers, whilst in the Catholic school this answer was chosen by 4.4% of the young people.

In order to identify the differences in the distribution of the results regarding the religious affiliation of the adolescents with regard to the type

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of school, the statistical chi[2] test of correlation and Fisher's exact test were applied. Cochran's condition was met; the statistical difference that occurred in the distribution of responses with three degrees of freedom was statistically significant ($p<0.0001$); the value of chi[2] was 64.2433, also in Fisher's exact test ($p<0.0001$). Based on the analysis of the results, it can be concluded that between the two groups there was a highly significant ($p<0.01$) difference in the distribution of religious affiliation of the respondents. In the Catholic school, more respondents declared deep faith or belief than in the public school, whilst religious indifference or lack of faith were recorded more often in the public school than in the Catholic school, though such responses were observed. Also, the denomination of each young person was specified. The analysis of these results are presented in Table 3.

**Table 3. Denomination in the study group, by type of school**

| Denomination | Total | | Type of school | | | |
|---|---|---|---|---|---|---|
| | | | Public | | Catholic | |
| | N | % | N | % | N | % |
| Catholic | 474 | 85.41% | 151 | 70.56% | 323 | 94.72% |
| Agnostic | 5 | 0.9% | 5 | 2.34% | 0 | 0% |
| Atheist | 29 | 5.23% | 20 | 9.35% | 9 | 2.64% |
| Other | 21 | 3.78% | 17 | 7.94% | 4 | 1.17% |
| None | 26 | 4.68% | 21 | 9.81% | 5 | 1.47% |
| Cochran's condition | | | Not fulfilled | | | |
| Pearson's chi-square | | | 63.7569 | | | |
| Degrees of freedom | | | 4 | | | |
| p-value | | | <0.0001 | | | |
| Fisher's exact test (p) | | | <0.0001 | | | |

In the study group, most people (85.41%) declared that they were Catholic. In the religious school, this accounted for 94.72% of the respondents; in the public school it was 70.56%. The chi[2] statistical test of correlation (chi-square) and Fisher's exact test were used to determine the differences in the results concerning the denomination of the students. Cochran's condition was not fulfilled. The statistical difference that occurred in the distribution of responses with four degrees of freedom was statistically significant ($p<0.0001$); the chi$^2$ value was 63.7569, also in Fisher's exact test ($p<0.0001$). The analysis of the results shows that there was a statistically significant difference ($p<0.01$) in the distribution of the respondents' denomination.

## Analysis of the results

The original questionnaire was used to analyse the spirituality and religiousness of the secondary school students. In the aspect of spirituality, the questions concerned feelings of bond with God, the meaning of life, relationships with people, and bond with nature and the cosmos. The data characterising the spirituality of adolescents from the two schools were compared and Student's t-test was applied. Detailed data is shown in Table 4.

**Table 4. Spirituality in the study group, by type of school**

| Spirituality | Total | Type of school | |
|---|---|---|---|
| | | Public | Catholic |
| Mean | 6.8198 | 6.486 | 7.0293 |
| Median | 7 | 6.5 | 7 |
| Standard deviation | 2.4634 | 2.4336 | 2.4625 |
| Minimum | 0 | 0 | 1 |
| Maximum | 12 | 12 | 12 |
| Lower quartile | 5 | 5 | 5 |
| Upper quartile | 9 | 8 | 9 |
| Student's t-test (df=553) | t | 2.5416 | |
| | p | 0.0113 | |

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The analysis of the results shows that the arithmetic mean of spirituality scores in the public school group was 6.48 and the standard deviation was 2.433. In turn, in the Catholic school group, the arithmetic mean was 7.029 and the standard deviation was 2.462. The t-test revealed differences ($t(553)=2.54$, $p=0.0113$). Thus, it can be concluded that the spirituality scale scores differed significantly ($p<0.05$) between the two groups, being higher in the Catholic school.

In terms of religiousness, the questions on the survey concerned the frequency of participation in community religious practices (e.g. Sunday Mass), individual religious practices (e.g. individual prayer) and contact with religious communities/groups or organisations (e.g. liturgical altar service, the Light-Life Movement "Oasis" or the Neocatechumenal Way). The data was also compared and Student's t-test was applied. The results are shown in Table 5.

**Table 5. Religiousness in the study group, by type of school**

| Religiousness | Total | Type of school | |
|---|---|---|---|
| | | Public | Catholic |
| Mean | 4.9784 | 3.771 | 5.7361 |
| Median | 5 | 3 | 6 |
| Standard deviation | 2.8264 | 3.0672 | 2.3728 |
| Minimum | 0 | 0 | 0 |
| Maximum | 9 | 9 | 9 |
| Lower quartile | 3 | 1 | 4 |
| Upper quartile | 7 | 6 | 8 |
| Student's t-test (df=553) | t | 7.991 | |
| | p | <0.0001 | |

The arithmetic mean of religiousness in the public school group was M=3.77 and the standard deviation was 3.06, while in the Catholic school

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group the arithmetic mean was 5.73 and the standard deviation was 2.37. The t-test revealed differences (t(553)=7.991). Therefore, it can be concluded that the scores on the religiousness scale differed highly significantly (p<0.01) between the two groups, being higher in the Catholic school.

Correlations were sought between declared religious affiliation (non-believer, indifferent, believer or deep believer) and spirituality. For this purpose, one-way ANOVA, Tukey's post hoc test and Fisher's linear trend test were used. The results are summarised in Tables 6 and 7.

**Table 6. Public school spirituality scale scores, by religious affiliation**

| | Religious affiliation | | | |
|---|---|---|---|---|
| | Non-believer | Indifferent | Believer | Deep believer |
| Mean | 5.4375 | 6.1373 | 6.8605 | 7.7241 |
| Standard error of the mean | 0.3287 | 0.3384 | 0.2151 | 0.5786 |
| Standard deviation | 2.2776 | 2.4168 | 1.9951 | 3.1156 |
| -95% CI for the group mean | 4.7762 | 5.4575 | 6.4327 | 6.539 |
| +95% CI for the group mean | 6.0988 | 6.817 | 7.2882 | 8.9092 |
| ANOVA | F=7.0544, p=0.0002 | | | |
| Post hoc (Tukey HSD), Uniform groups | a | ab | bc | c |
| Linear trend (Fisher LSD) | F=19.9168, p<0.0001 | | | |

A one-way ANOVA was conducted to compare the mean scores of the four subgroups for religious affiliation. The F-statistic was 7.0544 and the p-value was 0.0002. Therefore, it can be concluded that the scores on the spirituality scale differed very significantly (p<0.01) in the public school according to religious affiliation, and that these differences reveal a highly significant (p<0.01) trend: the higher the declaration of faith, the higher the spirituality score.

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**Table 7. Spirituality scale score in the Catholic school, by religious affiliation**

| | Religious affiliation | | | |
|---|---|---|---|---|
| | Non-believer | Indifferent | Believer | Deep believer |
| Mean | 5.1333 | 5.8333 | 6.9087 | 8.6462 |
| Standard error of the mean | 0.5058 | 0.3988 | 0.1566 | 0.258 |
| Standard deviation | 1.9591 | 2.5843 | 2.3168 | 2.0799 |
| -95% CI for the group mean | 4.0484 | 5.028 | 6.6001 | 8.1308 |
| +95% CI for the group mean | 6.2182 | 6.6387 | 7.2172 | 9.1615 |
| ANOVA | F=18.1739, p<0.0001 | | | |
| Post hoc (Tukey HSD), Uniform groups | a | a | b | c |
| Linear trend (Fisher LSD) | F=14.3197, p=0.0001 | | | |

The F-statistic was 18.1739 and the p-value was <0.0001. The scores on the spirituality scale in the Catholic school differed very significantly (p<0.01) according to religious affiliation, and the differences show a highly significant (p<0.01) trend: the higher the declaration of faith, the higher the spirituality score.

Correlations were also sought between declared religious affiliation (non-believer, indifferent, believer and deep believer) and the religiousness of the respondents. For this purpose, one-way ANOVA, Tukey's post hoc test and Fisher's linear trend test were also used. Detailed results are summarised in Tables 8 and 9.

**Table 8. Scale of religiousness in the public school, by religious affiliation**

| | Religious affiliation | | | |
|---|---|---|---|---|
| | Non-believer | Indifferent | Believer | Deep believer |
| Mean | 0.9167 | 2.3922 | 4.7791 | 7.931 |
| Standard error of the mean | 0.2284 | 0.3419 | 0.2405 | 0.3289 |
| Standard deviation | 1.5823 | 2.442 | 2.2303 | 1.7714 |
| -95% CI for the group mean | 0.4572 | 1.7053 | 4.3009 | 7.2572 |
| +95% CI for the group mean | 1.3761 | 3.079 | 5.2572 | 8.6048 |
| ANOVA | F=81.3939, p<0.0001 | | | |
| Post hoc (Tukey HSD), Uniform groups | a | b | c | d |
| Linear trend (Fisher LSD) | F=135.3715, p<0.0001 | | | |

The F-statistic was 81.3939 and the p-value was p<0.0001. The scores on the religiousness scale differed highly significantly (p<0.01) in the public school according to religious affiliation, and the differences show a highly significant (p<0.01) trend: the higher the declaration of faith, the higher the religiousness score.

**Table 9. Religiousness scale in the Catholic school, by religious affiliation**

| | Religious affiliation | | | |
|---|---|---|---|---|
| | Non-believer | Indifferent | Believer | Deep believer |
| Mean | 1.6667 | 3.3095 | 5.9087 | 7.6615 |
| Standard error of the mean | 0.504 | 0.3151 | 0.1323 | 0.163 |
| Standard deviation | 1.9518 | 2.0421 | 1.9585 | 1.3143 |
| -95% CI for the group mean | 0.5858 | 2.6732 | 5.6478 | 7.3359 |
| +95% CI for the group mean | 2.7475 | 3.9459 | 6.1695 | 7.9872 |
| ANOVA | F=71.2934, p<0.0001 | | | |
| Post hoc (Tukey HSD), Uniform groups | a | b | c | d |
| Linear trend (Fisher LSD) | F=3.479, p=0.0315 | | | |

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The F-statistic was 71.2934 and the p-value was $p<0.0001$. Thus, the results on the religiousness scale differed very significantly ($p<0.01$) in the Catholic school according to religious affiliation, and the differences show a highly significant ($p<0.01$) trend: the higher the declaration of faith, the higher the religiousness score.

## Research limitations

The results of the study should be considered in light of the following limitations. Firstly, the study involved only students from one city (Krakow), and from selected secondary schools. Therefore, the analysis has only a local dimension. Secondly, the results represent only the opinions and declarations of those students who agreed to participate in the survey, so the results cannot be generalised to the entire population of young people in Krakow or Poland. Thirdly, the issue in question is very personal, difficult, and sensitive. Despite these limitations, it is worth conducting further research on the religiousness and spirituality of young people in future. It also seems advisable to broaden the research, especially with regard to gender and age differences and different types of spirituality.

## Summary of the research

A detailed analysis of the results obtained from the survey answered the research questions. Based on the study, the hypotheses regarding spirituality and religiousness in secondary school students were verified. Based on the analysis of the survey data, it was noted that the scores on the spirituality scale differed significantly ($p<0.05$) between the groups, and that they were higher in the Catholic school. Similarly, scores on the religiousness scale differed very significantly ($p<0.01$) between groups and were higher in the Catholic school. Regarding the correlation of spirituality and religious affiliation, it was found that in both schools the differences showed a highly significant ($p<0.01$) trend: the higher the declaration of faith among adolescents, the higher the spirituality score. Regarding the correlation of religiousness and religious affiliation, in the public school there was a highly significant ($p<0.01$) trend, and in the Catholic school the differences also showed a significant ($p<0.05$) trend: in both types of schools a higher declaration of faith meant a higher religiousness score.

The results of the survey among secondary school students from two types of schools (public and Catholic) in Krakow indicate that spirituality and religiousness are related to each other. Undoubtedly, attending a religious school can be a valuable contribution to developing the religious/spiritual sphere in a young person. However, such development is also possible in a public school. In this case, it may be connected more with a personal search and individual effort in this sphere. Certainly, the influence of the family, school and peer environments is a valuable contribution to an adolescent reaching full maturity.

There is no doubt that spirituality and religiousness are important components of human resources needed for development. It is thanks to them that it becomes possible to give life a fuller dimension, purposefulness, meaningfulness and stability. In light of the research, it is worth noting that the abandonment of Catholic schools or religious education or upbringing would be an irreparable loss from the point of view of the full development of a young person.

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# Confused or Deliberative: Narratives About the Birth of Islam in Polish History Textbooks[1]

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**Abstract:**

**Objectives of the research:** The aim of the article was to identify and analyse problematic areas related to how early Islam is presented and narrated in history textbooks, taking into account the local context.

**Research methods:** The data corpus consists of 12 history textbooks. The mixed methods approach applied in the study included cluster analysis and discourse analysis.

**A brief description of the context of the issue:** Islam and Muslims occupy limited space in the Polish school curricula, yet there is a plethora of information about the Islamic world in the public discourse. This puts a tremendous challenge on the shoulders of teachers and textbook authors to accurately present information about Islam and Muslims in schools.

[1] This study is part of the project called "EMPATHY: Let's Empower, Participate and Teach Each Other to Hype Empathy: Challenging Discourse About Islam and Muslims in Poland," which was funded by the European Commission within the Citizens, Equality, Rights and Values Program under Grant Agreement No. 101049389 CERV-2021-EQUAL. The scientific work is published as part of an international project co-financed by a programme of the Minister of Science and Higher Education entitled "PMW" in 2022–2023 (contract no. 5245/GRANT KE/2022/2).

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**Research findings:** Three problematic areas were discovered and analysed: (a) narrating Islam from a mainstream, non-Muslim perspective, which in the Polish case might be skewed into presenting Islam through the lens of Catholicism; (b) navigating between historical accounts and legends whilst presenting early Islam; and (c) explaining past events by interpreting them through contemporary events.

**Conclusions and recommendations:** The article concludes by indicating challenges of teaching different religions in a largely mono-religious school setting, from the perspective of the classroom majority and Muslim students. Due to the marginal presence of Muslims in the public sphere, these narratives call for a more balanced approach. Otherwise, they can only further alienate and otherise Muslim students in the classrooms – and Islam in mainstream society.

***Keywords*:** Islam, textbooks, Poland, teaching

## Introduction

Islam and Muslims occupy limited space in the Polish school curricula, yet there is a plethora of information about the Islamic world in the public discourse. This information is often biased, emotionally loaded and unprecedented in terms of its (mis)use for political gains, whilst Muslims are essentialised into a culturally distinct group (Horolets et al., 2021). As a result, the anti-migrant discourse has gradually become normalised, often with its racist and radical extremes becoming perceived as mainstream opinions (Krzyżanowski, 2020, p. 505).

This knowledge gap between the overwhelming negative discourse and the space available to present Islam and Muslims in schools puts a tremendous challenge on the shoulders of teachers and textbook authors to accurately present information about Islam and Muslims in schools. It should not only equip students with basic knowledge about Islam and its followers so that they can understand and interpret the contemporary world, but also teach about the beliefs of other people whom

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they might encounter at school or beyond. Presenting Islam is even more challenging if there are any Muslim students in the class, as being (usually) the only Muslim in the class or at school puts them in a particularly vulnerable position (Górak-Sosnowska, 2023).

Polish students encounter the history of Islam at school twice: in the fifth year of primary school and the first year of high school. In both cases, the textbooks cover more or less the same elements of the story: Arabia before Islam, the life of Muhammad, the main practices and dogmas of Islam, Arabic conquests and Arabic influence on the mediaeval sciences. This leaves the students with basic knowledge about early Islam, without bringing the story further across the curriculum. In other words, students learn about Islam from the times of Muhammad only. There are some excerpts about contemporary Islam in geography textbooks, but a narrative gap remains between the past and the present. Knowledge about Islam is presented as historical, within the history curriculum. That means that a history teacher should be skilled at not only presenting a religious doctrine, but also sensitive enough if there is a Muslim student in the classroom.

The image of Islam and Muslims in history textbooks has been extensively studied in Europe (e.g. Estivalèzes, 2011; Otterbeck, 2005) and North America (e.g. Oueslati, 2011). In most cases, these studies were of a context where significant Muslim minorities live. The Polish context is significantly different: the local Muslim community is tiny – far below 0.5% of the whole population – and Poland had limited contact with Muslim-majority countries and never had any colonies in Asia or Africa (thus there is no post-colonial presence that could be reflected in intellectual thought or demographics [Piela et al., 2023]). Moreover, the history curriculum seems to serve the purpose of teaching nationalism, and many history teachers seem to take these nationalist representations for granted (Jaskułowski et al., 2018). I argue that these characteristics frame narrations about early Islam in Polish history textbooks.

The article identifies and analyses problematic areas related to how early Islam is presented and narrated in history textbooks, taking into account the local context. Based on quantitative and qualitative analysis

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I discovered three such problematic areas. The first one is narrating Islam from a mainstream, non-Muslim perspective, which in the Polish case might be skewed into presenting Islam through the lens of Catholicism. The second challenge is about navigating between historical accounts and legends whilst presenting early Islam. The third problematic area stems from the need to link the past and the present, that is, explaining past events by interpreting them through contemporary events or giving meaning to the present by rooting it in the past. I will elaborate more on these three areas after briefly presenting our data corpus and methodology.

## Data and methodology

In this article, I analyse history textbooks that depict the birth of Islam. The sample comprises 12 textbooks: 5 for year 5 of primary school (Ciechanowski, 2018; Kowalewski et al., 2018; Małkowski, 2021; Trzebniak & Trzebniak, 2018; Wojciechowski, 2021) and 7 for year 1 of high school (Choińska-Mika, 2019; Faszcza et al., 2021; Kępski et al., 2021; Kulesza & Kowalewski, 2019; Pawlak & Szweda, 2019; Ustrzycki & Ustrzycki, 2019, 2021). Each book excerpt consists of 2–7 pages, 2–3 for year 5 and 3–7 for year 1. The textbooks were published between 2018 and 2021, and all had been accepted by the relevant ministry as of the 2022/2023 school year.[2]

The textbooks were scanned twice: as graphic files and as text (with OCR software) to enable a dual analysis of the textual and non-textual content. The data was coded in MAXQDA software for quantitative and qualitative analysis. The coding process combined auto-coding based on a MAXDictio dictionary and thematic coding to uncover the context, semantics and narrative patterns. Thus, the quantitative analysis allowed us to identify the main thematic clusters, whilst the qualitative one enabled us to unpack the narratives behind these patterns. The subsequent part of the article puts into the forefront the qualitative analysis, which serves as the preliminary analysis and is represented in Figure 1.

[2] This data was preliminarily analysed in Górak-Sosnowska et al. (2023).

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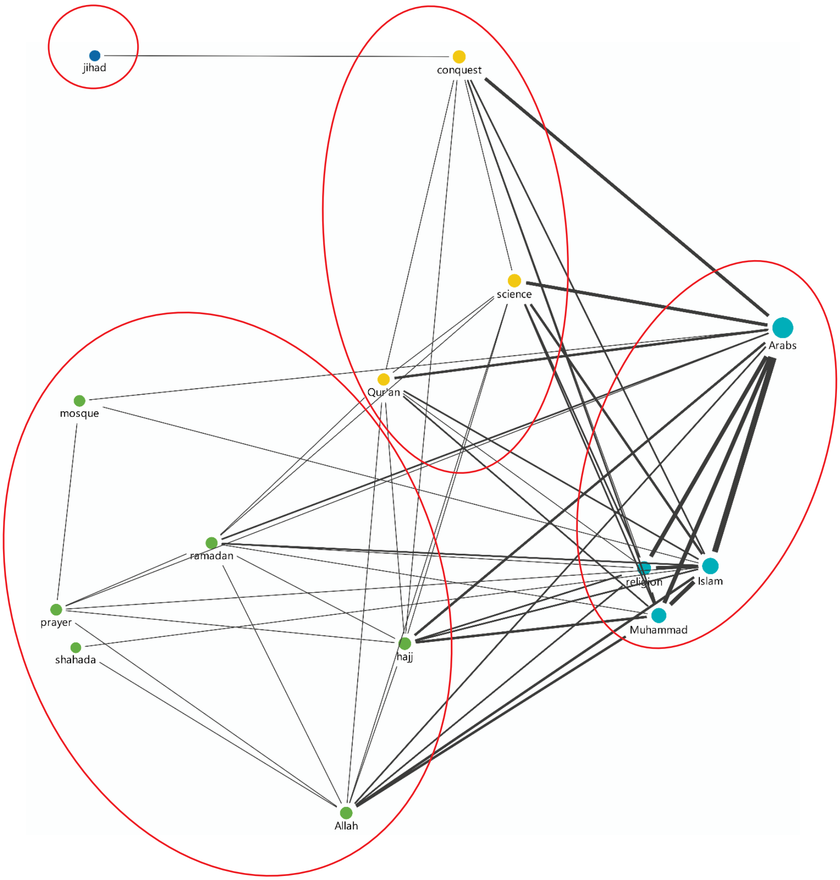
**Figure 1: Main thematic clusters of Islam and Muslims as presented in history textbooks**




The preliminary quantitative analysis revealed four main thematic clusters in the history textbooks. The first dominant one comprises codes related to Arabs (the core), Muhammad, Islam and religion. The code "Arabs" is in the centre, whilst the other three codes are closely interlinked; thus, Muhammad was the Prophet of Islam, and Islam is a religion. The second cluster covers the Qur'an, science and conquests. The two latter codes reflect an interesting intersection of Arabs conquering other lands and contributing to the mediaeval sciences, two narrations which were often located in the same section of the textbook (Górak-Sosnowska et al., 2023).

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The Qur'an is linked to the first cluster – as the Holy Book of Islam that was revealed to Muhammad – but at the same time is positioned close to the third cluster, which covers the religious dimension of Islam, i.e. the pillars of Islam, Allah and mosque. The pillars of Islam are positioned closely to each other since the textbooks usually list them one by one. The fourth cluster contains just one entry: jihad. It is linked to the conquests but seems unrelated to anything else. The quantitative analysis identified the main clusters but did not unpack the narratives about early Islam in history textbooks. They will be explored in the subsequent parts of the article.

## Between facts and legends

Narratives about the life of the Prophet Muhammad and the birth of Islam in history textbooks are hued with details. Apart from what is known as the "authoritative set" of biographic information about Muhammad,[3] the textbook authors added numerous minutiae that are rarely found in academic texts on early Islam. There are two difficulties related to this presentation, which will be further elaborated on in the course of this section. The first one refers to a general, undisturbed trust in the information as presented; thus, the biography of Muhammad is treated as if it was a real reflection of his life rather than a biography that depicts the knowledge and beliefs of people who wrote it two centuries after his death. The second one refers to the abundance of information that combines mainstream narratives with minutiae without differentiating them.

Historical sources related to the life of the Prophet Muhammad are very limited. Muhammad became a prophet as an adult, a middle-aged man. The early revelations brought him a growing, but modest number of followers. In 622 he had to leave Mecca with his followers because the situation became tense. Muhammad died in 632 and left a growing Arab-Islamic empire united by Islam. This story has two serious consequences

[3] I do not mean here evidence-based historical data, but rather what is usually presented in publications about the life of Muhammad – e.g. Danecki (2011) or Cook (1983).

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related to what we may know about his life. Firstly, there is hardly any reliable information about his childhood or adolescence, as Muhammad was orphaned soon after his birth and was an ordinary boy who had to earn his living by travelling with caravans. Not even the exact year of his birth is known. Secondly, when he proved to be the Prophet, his life became particularly significant for Muslims as a source of knowledge, an inspiration and a role model. This is where the reconstruction of Muhammad's life can easily melt with Islamic hagiography (Danecki, 2011, p. 25).

Sources relating to the origins of Islam pose many problems as evidence-based, as Donner (1998, p. 4) points out. They were not contemporarily written. The first biography of the Prophet Muhammad was finalised in the 8th century and later amended in the 9th century. This gives a two-century-long gap between the events reported and the time of writing. In the same manner the Qur'an – whilst being considered the word of God as revealed to the Prophet Muhammad – can hardly be considered an independent source that could be useful in reconstructing the life of Muhammad (Peters, 1994, p. 261).

Modern scholarship developed different approaches to studying early Islam. Donner (1998, pp. 5–20) enumerates four such approaches: descriptive – accepting the narrative about the origin of Islam as reported in Muslim sources; source-critical – aimed at exploring and critically assessing the historical sources with the ultimate goal of dividing them into credible and not so credible; tradition-critical – considering Islamic sources in an evolutionary manner, as a reflection of later interests; and sceptical – which questions the possibility of tracing any historical fact behind these traditions. When it comes to the life of the Prophet Muhammad, Shoemaker (2018, p. 50) lists three contemporary approaches: political and economic – which stresses the political leadership of Muhammad with religion submitted to unite Arab tribes; eschatological – focussed on the immanence of Judgement Day; and apologetic and theological – which present the Prophet Muhammad as a role model.

Whilst presenting Muhammad and his prophecy, Polish history textbooks use either the political and economic approach or the theological one. In other words, they either distance themselves from the prophecy

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(and thus indicate that according to Muslims the Qur'an contains the word of God) or write in the language of the faithful (and therefore assume that the Qur'an contains the word of God). Estivalèzes (2011, p. 50) noted the same challenge whilst analysing French textbooks. The theological approach is presented by Kowalewski et al. (2018, p. 97); accordingly, Muhammad "as a mature man had revelations".

Most textbook authors take a safe distance from the theological perspective, by reporting Muhammad's revelation. They do so in two ways – either by referring to Islamic tradition that acknowledges Muhammad's prophecy, or by referring to Muhammad's claim. The first way is illustrated by the following quotes:

> "According to the Muslim tradition, he received many divine revelations" (Kępski et al., 2021, p. 195).

> "According to Islamic tradition, in around 610 whilst staying in a mountain cave, Muhammad received a revelation" (Ustrzycki & Ustrzycki, 2021, p. 20).

> "According to the Arab tradition, it was [in the cave] that the archangel Gabriel first appeared to the 40-year-old Muhammad" (Małkowski, 2021, p. 90).

The second way of reporting the revelations seems to be much more problematic. Whilst technically it was Muhammad who started to transmit the revelations to his closest companions and later other Meccans, bringing this information to the forefront – without the relevant context that this is what teachers of Islamic tradition or Muslims believe – depicts Muhammad as if he was a usurper:

> "According to his words, he had revelations" (Choińska-Mika et al., 2019, p. 154).

> "Around 610 he began to claim that he had received revelations from the archangel Gabriel. Muhammad then declared himself a prophet

> (messenger of God) and began to claim that there is only one God…" (Wojciechowski, 2021, p. 109).

> "According to Muhammad's own testimony, the archangel Gabriel appeared to him and dictated the exact content of the revelation" (Kulesza & Kowalewski, 2019, p. 254).

It is therefore perhaps not so much an inappropriate way to present the birth of Islam, but rather a problematic selection of information (Otterbeck, 2005, p. 801).

The last type of narrative fits well into the political one. Accordingly, Muhammad acted deliberately, aiming to use religion for political goals.

> "He was not an educated man, but an enterprising man who knew the world. Once he announced that the archangel Gabriel had appeared in a dream, telling him the truth about God and appointing him a Prophet with divine commands to preach to people" (Pawlak & Szweda, 2019, p. 147).

> "Religious considerations and a desire to reform the relations prevailing among the Arabs led Muhammad to create his religion, called Islam" (Trzebniak & Trzebniak, 2018).

Whilst the textbook authors distance themselves from Islam and Muhammad's revelation, they seem to paradoxically follow the theological approach in other instances. According to Shoemaker (2018, p. 55), this approach is characterised by a "lack [of] any critical perspective regarding the traditional Islamic sources", which are treated "as if they were entirely unproblematic records of Mu ammad's life and teachings". Consequently, the textbooks offer information that is hard to find in the literature.

For instance, Małkowski (2021, p. 89) mentioned that 360 idol figures were standing around Al-Kaba. This piece of information is likely taken from one of the accounts of the fall of Mecca by Ibn Ishaq (cf. Peters, 1994,

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p. 236; Guillaume, 1967, p. 552), or Armstrong (2002, p. 11), but might also come from Polish Wikipedia. Only Armstrong states the number of idols without any hesitation. Other authors (e.g. Rubin, 1995; Danecki, 2011; Donner, 1998) mention idols worshipped by Meccans, yet do not specify their number, whilst Hawting (1999, p. 129) explicitly adds that this information "is matched by the willingness of some scholars to use the evidence […] to corroborate the traditional accounts".

Similarly, Polish history textbooks provide information about the Black Stone being originally white but changed its colour whilst absorbing the sins of pilgrims (Kulesza & Kowalewski, 2019, p. 255; if anything – not of pilgrims, but from the pagan era), or that Adam built Al-Kaba, but it was destroyed during a flood and only re-built by Abraham, or it was Gabriel who gave the Black Stone to Abraham (Pawlak & Szweda, 2019, p. 146). These details are not even fully described (only mentioned in the section "The Kaʿba in Legend and Superstition") in the monumental "Encyclopaedia of Islam" (Wensinck, 1997, p. 321), yet they paved their way into history textbooks for high school. Again, it might be Armstrong (2002, p. 17) or Polish Wikipedia (the English one is far more prudent in this regard). Wojciechowski (2021) included kissing Al-Kaba as an element of *hajj*. Danecki (2011) and Bianchi (1995, p. 89) provide a much more nuanced picture of the pilgrimage with "most pilgrims merely salut[ing] the Black Stone from a short distance as a gesture of their renewed covenant with God. Others struggle to touch or kiss the Black stone…".

Whilst studying the textbooks I also encountered two pieces of information that we could not relate to any other source. One is a description of an illustration by Al-Wasiti that depicted a caravan going to Mecca (c. 1240). According to the textbook authors, the banners indicated the religious character of the pilgrimage (Faszcza et al., 2021, p. 154). Robinson (1996, p. 141) describes the same miniature but does not mention the banners. The same authors also mention that Arabs preferred to ride mares over stallions for their comfort (Faszcza et al., 2021, p. 157). I was unable to substantiate this information.

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## Explaining Islam from a Christian perspective

When it comes to presenting Islam, Polish history textbooks are instruments of power (Estivalèzes, 2011, p. 48). They shape students' image of Islam and situate knowledge about Islam in a particular sociohistorical context. Because Poland is strongly embedded in the Catholic religion, Christianity becomes a natural lens through which to look at Islam. The textbook authors use this opportunity in two different manners: either as boundary-making – to indicate the difference between "us" (Christians) and "them" (Muslims) – or as a way to show how Christianity impacted Islam.

Boundary-making is manifested in different ways across Polish history textbooks. Direct manifestations are hard to spot. Only one textbook clearly distinguishes between "us" and "the Muslims":

> "This relocation – *hijra* in Arabic – was considered by the Muslims as the beginning of a new era. To this day, they count time from it, just as we do from the birth of Christ" (Małkowski, 2018, p. 91).

> "In 622, fearing for his life, he fled his hometown. This event was recognized by the followers of Islam as the beginning of the Muslim era (just like Christians from the birth of Christ)" (Kowalewski et al., 2018, p. 98).

The first textbook is written from a Christian perspective and addressed to Christian students, who constitute the majority. One could only wonder whether a Muslim student reading this statement would also feel included in the class. The second example does not take sides by describing how Muslims and Christians set the beginning of eras.

Another example of a direct difference – though not very visible – is the way of writing the word God. In Polish, "God" (*Bóg*) indicates a monotheistic deity, whereas "god" (*bóg*) is a polytheistic one. Some textbooks describe the God of the Muslims as a "god" and often add his name, Allah, as if it was a name:

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> "According to him [Muhammad], he had revelations in which the angel Gabriel told him the truth about the only god, Allah. He claimed that the followers of Judaism and Christians had not fulfilled God's message recorded in the Holy Scriptures" (Faszcza et al., 2021, p. 135).

> "Muhammad, the founder of the religion known as Islam, was born [in Mecca] in the 6th century. He preached the belief in one god called Allah. He recognized himself as one of the prophets who were to spread the will of god" (Ciechanowski, 2018, p. 85).

> "The name means submission to the will of the god named Allah" (Trzebniak & Trzebniak, 2018, p. 68).

All quotations seem to send two important messages to the students: firstly, that Muslims believe in a different God, and secondly, that this God seems to be worse (for he does not even deserve an uppercase letter). Moreover, the first quotation is particularly striking in terms of how the word God is spelt. The Muslim one is written with a lowercase letter, whilst God's message from the Holy Bible is written with a capital letter.

The tension between Christianity and Islam is presented from the Muslim perspective: namely, it was Muhammad who actively opposed Christian beliefs.

> "However, according to Muhammad, Jews and Christians have falsified the content of God's revelation. That is why God appointed Muhammad the last and most important prophet, to whom he gave the ultimate truths of faith" (Kowalewski et al., 2018, p. 97).

> "Muslims believed that Jews and Christians did not fully follow the divine commands and they falsified them. Christians are accused of not being true monotheists because they believe in the Holy Trinity and worship images of divine beings" (Ustrzycki & Ustrzycki, 2019, p. 23).

> “Muhammad recognized the Old and New Testaments, but claimed that they contained errors. For example, he considered Jesus to be a prophet, not the son of God” (Małkowski, 2018, p. 91).

Just as the life of the Prophet Muhammad is hard to reconstruct based on contemporary data, the same is true of his relations with the Peoples of the Book (*ahl al-kitab*), to which Christians belong. Donner (2019) identified several challenges whilst trying to establish Muhammad’s approach to Christianity. The first one is historical: whilst the Qur'an might provide some insights into Muslims’ attitudes towards the Christians, Muslim traditions about the origin of Islam were written after Muhammad’s death, and thus it is hard to establish how accurate they are. The second challenge refers to how Christians are defined in the Qur'an (which Christian denominations are meant). The third challenge is the references to the People of the Book in the Qur'an, which prove to be inconsistent: on the one hand, Christians are welcomed as a part of the community of Believers (since they believe in a monotheistic God); on the other hand, their beliefs and practices are criticised or even equated with denying the oneness of God.

These methodological challenges might fall beyond the scope of a textbook for primary school or high school pupils. Yet, they cast doubts as to whether Islam should be presented in terms of direct opposition to Christianity – as if that was the main goal of Muhammad. A similar approach is visible later in the chapters, where the organisation of the early Islamic state is presented. Here, the textbook authors usually mention taxes paid by non-Muslims, but some define them as taxes imposed on infidels, whilst others only mention Jews and Christians without labelling them infidels. The following examples illustrate the difference:

> “(protection) It was paid by the non-Muslims, whilst the Arabs believed that all the land belonged to God and only the followers of Islam had the right to cultivate it. Therefore, infidels should pay a special tribute” (Trzebniak & Trzebniak, 2018, p. 68).

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> "Jews and Christians (monotheists) could maintain their religion. However, they had to pay a special tax for Muslim rulers" (Kowalewski et al., 2018, p. 100).

Just as in the case of Christianity being considered a false religion by Muslims according to the Prophet Muhammad, labelling Christians as infidels also clearly sets the boundaries between Christians and Muslims. Interestingly, the authors who do it seem to follow the narratives of contemporary Islamic hardliners. However, they do not speak for the majority of Muslims, nor do they reflect what Muhammad could have meant whilst dealing with Christians.

References to Christianity are also used to indicate the links between the monotheistic religions. The common root of the three main monotheistic religions can provide a valuable reference point to describe Islam, depending on how it is presented. With few exceptions (e.g. Wojciechowski, 2021, p. 109), Muhammad's revelations are presented in relation to Judaism and Christianity. The two examples below illustrate these differences:

> "Muhammad's teachings alluded to the Bible – to the figures of Moses and Jesus, whom he regarded as prophets (but he did not treat Jesus as the Son of God)" (Kowalewski et al., 2018, p. 97).

> "Muhammad concluded that he was the last prophet after Abraham, Moses, and Jesus (whom he did not treat as the Son of God), and it was his duty to convey to people what had been revealed to him in visions" (Faszcza et al., 2021, p. 135).

In the first example, it seems as if Muhammad had been chiefly inspired by the Bible. The textbook does not mention Jibril – the angel that delivered the revelation to Muhammad from God. In the second example, the common monotheistic root is stressed but is not clearly linked to Muhammad's revelations.

Relating the Qur'an to other scriptures is a challenging task. David Cook (2019, p. 26) indicated at least three different types of influences:

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Jewish, Syriac Christian and Ethiopian. According to him, there are some similarities in how stories about prophets are narrated across the Qur'an and Jewish or Christian scriptures, but not in the case of the New Testament and Jesus. As he concludes, "we should be looking for the sources of the Qur'ān among the travellers and traders of Syria-Palestine and the Ḥijāz, rather than among the scholars and texts" (Cook, 2019, p. 34).

Similarly, Christian influences are also visible whilst mosques are discussed. Usually, the mosque is presented as a Muslim temple, although some authors mention its other functions – that it is also used for discussions, giving alms, etc. Both the illustrations and the instructions for students are dominated by one type of mosque – modelled on the architecture of Christian buildings. Mosques were built in this way in Syria or Palestine, but with the territorial expansion of the Arab-Muslim empire, the form of the mosque changed. In the world of Islam, at least three types of mosques can be distinguished: hypostyle mosques, mosques with domes (basilica and multi-dome types) and mosques with *iwans* (a high portal constituting its entrance, modelled on former Iranian palace architecture; Danecki, 2003, p. 253).

## Explaining the present

Polish discourse about Islam and Muslims is transplanted from elsewhere; it does not relate to local Muslim communities, but focusses on what is going on in the Middle East or Western Europe (Górak-Sosnowska, 2011). This makes Polish public discourse particularly vulnerable to assimilating unverified and emotionally loaded information about Islam and Muslims, and it invites reflections based on stereotypes that underpin the globally transplanted Islamophobic discourse (Piela et al., 2023). Moreover, limited reliable resources on Islam and Muslims that vanish in a plethora of anti-Muslim information seem to make the work of textbook authors particularly challenging. Not only are they supposed to provide accurate information, but also a meaning behind it.

The birth of Islam provided such an occasion. Almost all textbook authors focussed on jihad. This complex notion is usually problematised

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in martial terms, sometimes equated to a war against infidels or a holy war (this is particularly common in exercise books, in which students are asked about the name of "a holy war waged by Muslims" (Jurek, 2020, p. 5). The notion of jihad is discussed in almost every textbook. Some authors list it as an additional principle of Islam, whilst others dedicate a space in a subchapter on Arabic conquest. The term jihad is conceptualised in three ways: in a wider sense of the word, in a martial sense (but not the ultimate solution), and as a holy war.

The first conceptualisation is the rarest,[4] but at the same time the most accurate. Thus, Kępski et al. (2021, p. 201) describe jihad in a broader sense as a struggle, and indicate that this concept has been understood in various ways in the history of Islam: both as mobilisation to fight (lesser jihad) and a struggle with oneself or taking care of one's family (greater jihad). Other definitions of jihad focus exclusively on the martial aspect. Some of them stress the martial aspect but also leave room for other approaches:

> "spreading the faith, also through war" (Faszcza et al., 2021, p. 247);

> "holy war to expand and defend a state based on Islam. However, [Muhammad] did not convert anyone by force" (Małkowski, 2021, p. 91).

Other authors do not even leave that slight unambivalence, identifying jihad as an ultimate war that is an obligation of every Muslim:

> "In Medina, the prophet won many followers, and then called them to start a holy war with Mecca. The spread of Islam was, as the prophet taught, the duty of Muslims" (Ciechanowski, 2018, p. 86).

> "After [the caliphs], the Arabs went to conquer the neighbouring countries. They were ordered to do so by jihad, i.e. the obligation

[4] According to Oueslati et al. (2011, p. 14), such an approach is also rarely found in Canadian textbooks.

> to strengthen their faith, understood by them as an armed struggle" (Wojciechowski, 2021, p. 111).

> "Among other recommendations, there are strict moral norms (e.g. a ban on drinking alcohol or eating pork) and jihad – the duty to spread faith, including participation in the holy war waged against infidels (especially polytheists)" (Pawlak & Szweda, 2019, 149).

It is impossible to show the complexity of a concept such as jihad in a paragraph or a few sentences (Heck, 2004, p. 95). However, an attempt to build a coherent definition of this concept from bits and pieces leads to at least two simplifications: the first one is focussing solely on one type of jihad, and the second is equating it with a holy war. These two elements are nicely explained by Tyerman (2004, pp. 115–116):

> "Unlike the crusade, according to classical Islamic theory traditionally dating from the seventh and eighth centuries but possibly later, the jihad takes two forms, the greater (*al-jihad al-akbar*), the internal struggle to achieve personal purity […], and the lesser (*al-jihad al-asghar*), the military struggle against infidels. […] Unlike the crusade and Christian holy war, to which the Islamic jihad appears to have owed nothing (and vice versa), jihad was fundamental to the Muslim faith, a sixth pillar. The essence of jihad remained as a spiritual exercise."

Authors who study jihad very carefully navigate between the plethora of meanings given to this concept that has been changing the history or rather histories of Muslims. According to Cook (2005, p. 2) the early conquests of Muhammad could be called jihad, but the Prophet never formally declared one. Bonner (2006, pp. xvii, 5) navigates between the two concepts known from Christian history – that of just war and holy war – and points to their similarities and differences with jihad, stressing that the doctrine of jihad as we know it today was created only at the end of the 8th century.

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It is evident that the notion of jihad as a holy war against infidels regained popularity with the 9/11 terrorist attacks in the United States and was further metastasised by Islamist activity. However, building the historical definition of this concept on what can be observed today can only substantiate the conviction that Islam was distinctly and unequivocally a violent religion, from its very beginning. Moreover, since waging a holy war is a religious obligation – as narrated in some textbooks – all Muslims are automatically suspected of engaging in war.

## Discussion

The birth of Islam – as narrated in history textbooks – is one of the few encounters Polish students ever have with the religion at school. It usually does not occupy more than one class during their whole school career, which makes this encounter rather brief. Whilst the textbooks provide a general overview of early Islam, the life of the Prophet Muhammad, the pillars of the Islamic faith and the development of the early Islamic caliphate in great detail, it seems that they follow certain interpretations that either confuse the narrative or deliberatively pursue a certain agenda. The three areas analysed above provide challenges to navigating the textbooks, for both non-Muslim and Muslim students.

The textbooks provide a narrative that seems coherent, yet also mixes up hard-to-find details from Muhammad's life with what is more or less acknowledged as his tradition. This might lead to content overload and students' inability to pick out important information from the abundance of hardly known details. For Muslim students, many of these underreported details might come as unfamiliar and thus confusing.

Many textbook authors implicitly or explicitly take a Christian perspective whilst describing Muhammad's revelation and Islam as a monotheistic religion. It seems to be a reasonable strategy that might serve non-Muslim students by making Islam a more familiar religion. However, Islam is often juxtaposed against Christianity, with Muslims being those who accused Christians of falsifying religion and being infidels. Such harsh vocabulary seems only to strengthen existing boundaries and dichotomies between Islam and the West (to which Christian tradition belongs). Similarly, some textbooks indicate Christian influences on Islamic doctrine and architecture. Also, in this case such influences might serve as bridge-building or as proof of the superiority of one religion over the other. For Muslim students, the binary division of "us" vs "Muslims" can be particularly difficult.

For some reason, the concept of jihad is present in almost every textbook. Often the way it is presented seems to echo the activities of contemporary Islamists rather than how the concept could have been understood in early Islam. For many Muslim students fixation on jihad is not only irritating, but also a tough choice between believing the textbook and their faith – especially during exams, when they are asked about the Arabic word that indicates the "Islamic holy war" (Górak-Sosnowska, 2023).

The narrative challenges listed above are by no means evident only in Polish textbooks. They seem to occur more or less frequently across textbooks in other national and cultural contexts (Oueslati et al., 2011; Otterbeck, 2005; Estivalèzes, 2011). In Poland, however, due to the marginal presence of Muslims in the public sphere, these narratives call for a more balanced approach. Otherwise, they can only further alienate and otherise Muslim students in the classrooms – and Islam in mainstream society.

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# Religious Education of the Child as Part of Parental Duties – Comparative Legal Analysis of National Reports Submitted to the Commission on European Family Law

(pp. 113–130)

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## Abstract

**Research objectives and problems:** This article presents a comparative analysis of legal regulations in 21 European countries regarding parents' rights and obligations towards their children's religious education and upbringing. The author seeks answers to the following questions: Does religious upbringing and education of the child fall under parental rights and duties? What is the legal basis for this right and duty? Does a child have the right to choose his or her religion?

**Research methods:** The author carries out legal analysis of reports from 21 countries concerning parental responsibility, submitted to the Commission on European Family Law.

**Structure of the article:** By analyzing the provisions in the internal legislation of 21 European countries, based on reports submitted to the Commission on European Family Law, the author presents the legal solutions regulating issues of children's religious upbringing.

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**Research findings and their impact on the development of educational sciences:** The analysis indicates that in each of the 21 legal systems examined, religious upbringing of the child is considered an element of parental responsibility. The most common legal sources for parental rights to a child's religious upbringing are constitutions, civil codes, and legal acts on family/children's rights, education, and freedom of religion. National legislation typically grants parents the exclusive right to decide on their child's religious upbringing for younger children. As the child matures, their right to self-determination in religious matters increases. The study shows that, despite national cultural and ideological differences, European countries have more in common than divides them regarding religious education of children within the context of parental responsibility. This study expands our understanding of the shared European belief among legislators about the appropriateness of entrusting such an important task as the religious upbringing of a child to the child's parents.
**Conclusions and/ or recommendations:** The presented considerations offer a general overview of the regulations in individual countries and serve as an introduction to a more in-depth analysis of the issue of religious upbringing of the child. Further research is needed to examine other aspects of religious upbringing, such as religious education in schools and possible legal remedies in case of conflicts between parents, parents and children, or families and the state.

***Keywords*:** parental authority/responsibility, parental duties, child education, school

## Introduction

This article is based on a legal analysis of reports from 21 countries concerning parental responsibility, submitted to the Commission on European Family Law. The study focuses on one specific aspect of child-rearing: religious upbringing.

The care and raising of children are the parents' natural right and foremost obligation. Therefore, parents have the fundamental right to determine the upbringing of their children as they believe is best for the

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child's welfare. The care of minor children, as part of parental responsibility (authority/ power) primarily "encompasses protection of the child's physical welfare and health, as well as direct supervision and upbringing, particularly the development of the child's physical, mental, psychological, and moral strengths, the fostering of its aptitudes, abilities, inclinations, and developmental capabilities, and its education in school and in an occupation" (Roth, 2004).

In this article, the author presents legal solutions from 21 countries that illustrate the scope of parental rights and obligations regarding the crucial aspect of a child's religious education and upbringing.

The author seeks answers to the following questions: Does religious upbringing and education of the child fall under parental rights and duties? What is the legal basis for this right and duty? Does a child have the right to choose his or her own religion?

## Analysis of legal solutions in European countries

### AUSTRIA

In Austria, the legal framework guiding parental responsibilities is the *Austrian Civil Code* (*Allgemeines Bürgerliches Gesetzbuch*). Religious education for children is governed by the *Federal Act on the Religious Education of Children* (*Bundesgesetz über die religiöse Kindererziehung*) (Roth, 2004). According to § 144 of the *Austrian Civil Code*, parents jointly determine the child's religion and can jointly change it. In case of their disagreement on this matter and if one parent wishes to remove a child from religious instruction, the court may intervene to substitute the necessary consent of the other parent (Roth, 2004).

### BELGIUM

In Belgium, the primary legal foundation for parental responsibilities is the *Belgian Civil Code*.

According to Articles 203 and 374 of the *Belgian Civil Code*, parental responsibility encompasses the right of parents to decide on their child's

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religious upbringing. Parents are expressly prohibited from imposing a religion that may jeopardize the child's development and autonomy once they reach the age of discernment. In the event of conflict, the paramount principle that guides the courts is the best interests of the child (Pintens & Pignolet, 2004).

**BULGARIA**

In Bulgaria, parental responsibilities are governed by the *Bulgarian Family Code* of 1985, with religious matters regulated by the *Bulgarian Law of Religious Beliefs* of 2002. The *Bulgarian Child Protection Act* of 2000 plays a crucial role in safeguarding children's rights.

According to Article 6 § 2 of the *Bulgarian Law of Religious Beliefs*, parents and legal guardians have the right to raise their children according to their own religious beliefs. Article 14 of the *Bulgarian Child Protection Act* grants parents and legal guardians sole authority over the religious upbringing of children under 14 years of age. Decisions on the religious upbringing of children between 14 and 18 years of age require mutual consent between the child and his/her parents or guardians. In case of disagreement in this matter, the child may refer, through the relevant bodies such as the State Agency for Child Protection and Child Protection Departments in municipalities), to the District Court to settle the dispute. According to Art. 21 § 1 and § 14 of the Bulgarian Child Protection Act, the Child Protection Department may resolve disputes or can instigate court proceedings if the child is at risk, but it cannot substitute missing parental consent. Article 11 § 4 of the *Bulgarian Law of Religious Beliefs* mandates protection of children from coerced participation in religious activities, stating that religious denominations or institutions may only involve minors with the consent of their parents. (Todorova, 2004)

**DENMARK**

In Denmark, the main source of law for parental responsibilities is the *Danish Act on Parental Authority and Contact* of 1995.

The holder(s) of parental authority has/have the right to decide on: the child's religion, baptizing the child; allowing the child to join a particular church/religion; and withdrawing the child from a particular church/religion. As indicated by Lund-Andersen & Gyldenløve Jeppesen de Boer (2004), "according to the regulation on the establishment or cession of membership of the Danish State Church, a child of 15 must consent to this."

**ENGLAND & WALES**

Parental responsibilities in England and Wales are primarily regulated by *The Children Act* 1989.

There is no legal obligation to provide a child with a religious upbringing. However, parents with parental responsibility have the authority to determine their child's religious education. According to Section 71 of the *School Standards Framework Act* of 1998, parents can demand that their child be excused from religious studies lessons and school assemblies (Love, 2004).

**FINLAND**

In Finland, parental responsibilities are governed by the *Finnish Child Custody* and the *Right of Access Act* of 1983, with regulations on a child's religion and church membership or membership in another religious group are regulated in the *Finnish Religious Freedom Act* of 2003 (Kurki-Suonio, 2004). According to this legislation, the religious affiliation of a child under 12 years of age is determined jointly by the parents. Changing the religious affiliation of a teenager aged between 12 and 17 requires a joint decision of the child and their parents or guardian.[1]

**FRANCE**

In France, the main source of law for parental responsibilities is the *French Civil Code* of 2016.

Within this framework, decisions regarding the religious upbringing of a child are considered part of parental responsibilities and are integral to the child's education (Ferrand, 2004).

1 Freedom of religion – OKM – Ministry of Education and Culture, Finland

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**GERMANY**

In Germany, parental custody is primarily regulated by the *German Civil Code* of 1986.

The basic concept in German family law is parental custody which encompasses the care of the child, including religious upbringing. Parents with custody can jointly determine the religious upbringing of the child. In cases of disagreement, the Guardianship Court may intervene to resolve disputes. Under Section 5 sentence 1 of the *German Act Concerning the Religious Upbringing of Children* of 1921, a child of 14 has complete religious freedom. At the age of 12, a child cannot be coerced to adopt a different religion against their will, and at the age of 10, the child must be heard (Dethloff & Martiny, 2004).

**GREECE**

In Greece the main source of law for parental responsibilities is the *Greek Civil Code* of 1940/46.

The concept of parental responsibilities in Greece encompasses both parental care and guardianship. Parents are both entitled and obligated to determine their child's religious upbringing. While there is no strict legal definition of maturity,[2] if a child is deemed sufficiently mature they may form their own religious beliefs (Koutsouradis, 2004).

**HUNGARY**

Hungary's legal framework for parental responsibilities draws from several key legislations, including *The Hungarian Child Welfare Act* of 1997, *The Hungarian Family Act* of 1952, and *The Hungarian Order of Guardianship* of 1997. In Hungary, the religious upbringing of a child falls under joint parental responsibility. The Hungarian law, guided by the *Hungarian Constitution*, prohibits state intervention in religious upbringing. According to Weiss & Szeibert, parents cannot seek court or public guardianship authority intervention in religious matters. However, the

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2 Some authors claim a child reaches maturity at age 10, while others suggest ages 12 or 14.

*Child Welfare Act* states that children under state care "have the right to freedom of religion, conscience, (to declare and exercise it) and religious education" (2004).

**IRELAND**

In Ireland, parental responsibilities are governed primarily by *The Irish Child Care Act* 1991. Central to Irish law governing parental responsibilities are concepts of guardianship, custody, and access, which encompass the rights and duties of parents, including religious upbringing. In custody matters, courts consider the child's religious upbringing, with a general tendency not to disrupt the child's religious and moral formation (Shannon, 2004).

**ITALY**

In Italy, the main sources of law for parental responsibilities are the *Italian Constitution* of 1947 and the *Italian Civil Code* of 1942. The fundamental concept in Italian family law is "parental authority" which encompasses the rights and duties of parents in the interests of the child. Parents are responsible for making all decisions necessary for the care and moral support of the child, including their educational and religious upbringing. Parents of children in lower school levels are entitled to choose their children's religious education. However, all decisions regarding the child's education (including religious education) must be consistent with the child's capacity, natural inclinations, and aspirations. Parents must satisfy their children's preferences as long as they are consistent with societal norms, even if the parents do not share these preferences (Patti et al., 2004). According to Article 1 of the Law of 18 June 1986 on the *Capacity to choose the type of the school and enrolment in high schools*, secondary high school students[3] have the right to choose whether to take part in religious education and optional classes.

[3] Generally over the age of 14.

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**LITHUANIA**

In Lithuania, the main sources of law for parental responsibilities are the *Constitution of the Republic of Lithuania* of 1992, the *Lithuanian Civil Code* of 2000, *the Law on the Protection of the Rights of the Child* of 1996, and the *Law on Education* of 1991. According to Articles 26 and 40 of the Lithuanian *Constitution*, parents are entitled to educate their children, including to provide religious education. "Parents and guardians shall, without restrictions, ensure the religious and moral education of their children and the children under their guardianship, in conformity with their own convictions." Article 17 of the *Law on Education* states that "upon the wish of parents (or guardians), children may have religious instruction in school by individuals authorized by church dignitaries of the chosen denomination. Children in ward shall be instructed in the religion which is professed by their families or relatives." (*National Report*: Lithuania, 2004).

**THE NETHERLANDS**

In the Netherlands, the main source of law for parental responsibilities is the *Civil Code of the Netherlands*, reformed in 1992. According to Dutch law, parental responsibilities include the duty and the right of the parent to care for, raise, and protect their child. Parents are free to determine the religious upbringing of their children (Boele-Woelki et al., 2004). By virtue of Article 60 § 1(a) of the *Juvenile Assistance Act*, when the court appoints a legal person as guardian of the child, it must take into account the religion of the child (Boele-Woelki et al., 2004)

**NORWAY**

In Norway, the main sources of law for parental responsibilities are the *Constitution of Norway* of 1814 and the *Norwegian Children Act* of 1981. Individuals with parental responsibilities have both the duty to care for the child and the right to make decisions on behalf of the child. Parents who are members of the Church of Norway have a duty to educate their children in the Evangelical-Lutheran religion (Article 2 of the *Constitution of Norway*) until the child reaches the age of 15. According to Article 6, Section 1 of the *Norwegian Act on Religious Societies* of 1969, parents who do not belong to the Church of Norway can enroll the child in religious societies or discontinue his/her membership. Parents must consult a child aged 12 or older. A child aged 15 or older has the right to self-determination in religious matters (Lødrup & Sverdrup, 2004)

**POLAND**

In Poland, the main sources of law for parental responsibilities are the *Constitution of the Republic of Poland* of 2nd April 1997 and the Statute of 25th February 1964 – the *Polish Family and Guardianship Code* (Mączyński & Mączyńska, 2004) According to the *Polish Family and Guardianship Code*, a minor child remains under parental authority. Parents are both entitled and obliged to care for and raise a child. According to Article 48, Section 1 of the *Polish Constitution*, parents have the right to raise their children in accordance with their own beliefs, taking into account the child's level of maturity, freedom of conscience, religion, and beliefs. According to Article 53, Section 3 of the *Polish Constitution*, parents have the right to provide their children with moral and religious upbringing and teaching in accordance with their beliefs. Pursuant to Article 53, Section 4 of the *Polish Constitution*, the religion of a church or other religious association (with a regulated legal situation) may be taught in schools. Public kindergartens and primary schools offer religious education at the request of parents, and public secondary schools offer it at the request of parents or students. After reaching the age of majority, students decide for themselves whether to continue religious education (Article 12, Section 1 of the *Act on Education* of 1991).

**PORTUGAL**

In Portugal, the main sources of law for parental responsibilities are *the Constitution of the Portuguese Republic* of 1976, the *Portuguese Civil Code* of 1966, and the *Portuguese Child Protection Law* of 1999. Parental responsibility (parental power) is seen as a collection of rights and duties imposed upon both parents, who are obliged and entitled to look after, raise, and educate their child. This education includes moral and religious upbringing (De Oliveira Rosa Martins, 2004) Parents are free to choose their

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child's religion and decide how it should be taught and practised. Article 1886 of the *Portuguese Civil Code* recognizes the child's freedom of self-determination in matters of religion stating that a child over sixteen has complete freedom to decide upon their religion.

**RUSSIA**

In Russia, the main source of law for parental responsibilities is the *Family Code of the Russian Federation* of 1995. Religious upbringing of the child is considered an element of the parental right to educate the child. The law (Article 5(5) of the *Federal Law On the Freedom of Conscience and Religious Organisations* states that "the religious education and upbringing of children is carried out by their parents, taking into consideration the right of the child to freedom of conscience and the freedom of choice of religion." Therefore, parents are obliged to allow their child to express their opinion on this matter (Antokolskaia, 2004).

According to Article 57 of the *Russian Family Code*, parents must consider the opinion of the child if they are 10 years old or older. Parents cannot impose their decisions concerning religious upbringing on a child against their wishes. In case of parental disagreement on the religious upbringing of the child, parents can bring their dispute to the Guardianship and Curatorship Department. However, the Department cannot choose a religion for the child. Ultimately, it is the child who makes their own choice on religious matters once they are mature enough (Antokolskaia, 2004)

**SPAIN**

In Spain, there is no single law that contains all the relevant rules concerning parental responsibilities. However, important sources of law include the *Constitution of Spain* of 1978 and the *Civil Code of Spain* of 1889. The *Spanish Civil Code* uses the concept of *patria potesta*, understood as "a function, established in the interests of children, whose contents consist more of duties than rights" (González Beilfuss, 2004)

According to Article 27.3 of the *Spanish Constitution*, parents have the right to educate their child according to their religious convictions

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and moral beliefs. If the child has attained a sufficient degree of maturity,[4] they have the right to exercise their freedom of conscience and religion. In cases where there is a conflict between the parents and the child, the child's opinion prevails (González Beilfuss, 2004).

**SWEDEN**

In Sweden, the main source of law for parental responsibilities is the *Children and Parents Code* of 1949. Unlike many other European legislations, Swedish law uses two terms – custody and guardianship – to define parental responsibility. The term *custody* encompasses the parents' right and obligation to care for, secure, educate, and bring up their children.

If the child is under joint custody, decisions concerning religious upbringing and membership in a religious community must be made jointly by both parents (custodians). In case of disagreement, it is not possible to register the child as a member of a religious community or as a pupil in a religious school. A child aged 12 years or older has the freedom to make decisions regarding religion on their own; from that age, the child's consent is necessary for entry into or withdrawal from a religious community (the *Swedish Act on Religious* Communities, 1998:1593) (Jänterä-Jareborg et al., 2004).

**SWITZERLAND**

In Switzerland, the main source of law for parental responsibilities is the *Swiss Civil Cod*e of 10 December 1907. The *Swiss Civil Code* obliges parents to care for, raise, and protect their child as well as to support their physical, mental, and moral development

Article 301 § 4 of the *Swiss Civil Code* entitles parents to give their child a Christian name. Parents are entitled to the religious upbringing of their child until the child reaches the age of 16. From that point, the child has the freedom to make decisions regarding religion (Article 303 §§ 1 and 3 of the *Swiss Civil Code*) (Hausheer et al., 2004).

[4] Generally, children over the age of 12.

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**Research findings**

The study enabled the author to find answers to the questions posed at the beginning of the study.

Q1: Does religious upbringing and education of the child fall under parental rights and duties?

The analysis of legal provisions regulating the religious upbringing of children indicates that in each of the 21 legal systems examined, religious upbringing is regarded as an element of parental responsibility (authority) and often falls within the parental right to decide on the child's education.

Q2: What is the legal basis of this right and duty?

The most common legal sources of parental rights to a child's religious upbringing in the analyzed legal systems are provisions found in constitutions (stating freedom of conscience and religion and often granting parents the right to decide on their children's religious upbringing) in each examined country, in civil codes (Austria, Belgium, France, Germany, Greece, Italy, the Netherlands, Portugal, Spain, Switzerland) and legal acts on family/children's rights/education/freedom of religion (Bulgaria, Denmark, England and Wales, Finland, Hungary, Ireland, Lithuania, Norway, Poland, Russia, Sweden).

Q3: Does a child have a right to choose his/her religion?

The parents' right to decide on their children's religious upbringing is strongly connected with the child's right to freedom of thought, conscience, and religion (expressed in Article 14 of the UN Convention on the Rights of the Child of 1989).[5] According to Article 14.2 of the Convention, parents are entitled "to provide direction to the child in the exercise of his or her right in a manner consistent with the evolving capacities of the child."

[5] All European countries are Parties to the Convention.

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Typically, national legislation grants parents the exclusive right to decide on their child's religious upbringing when the child is young. As the child matures, their right to self-determination in religious matters increases.

Legal acts in some countries specify concrete solutions in these matters:

In Greece, if the child is sufficiently mature (which is not strictly defined in law),[6] they may form their own religious beliefs.

In Norway, a child of 15 or older has the right to self-determination in religious matters.

In Poland, while raising their children, parents should consider the child's level of maturity, freedom of conscience, religion, and beliefs.

In Portugal, a child over sixteen has complete freedom to decide upon their religion.

In Russia, parents are obliged to consider their child's opinion on religious upbringing, with the weight of the child's opinion increasing with age.

In Spain, as the child attains a sufficient degree of maturity,[7] they have the right to exercise their freedom of conscience and religion.

In Sweden, a child aged 12 years or older acquires the freedom to make decisions regarding religion on their own.

## Conclusions

The study clearly shows that, despite national cultural and ideological differences, European countries share more similarities than differences regarding the religious education of children within the context of parental responsibility. This study highlights a shared European belief among legislators of the indicated countries that entrusting the important task of a child's religious upbringing to their parents is appropriate.

[6] Some authors claim that a child reaches maturity at the age of 10, while others suggest ages 12 or 14.

[7] Generally children over the age of 12.

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The presented considerations provide a general overview of the regulations in force in individual countries and serve as an introduction to a more in-depth analysis of the issue of religious upbringing. Due to editorial constraints on the article's length, the author limited the scope to a general analysis of the legal regulations in 21 European countries concerning this research problem. In the longer term, a deeper analysis of the presented legal provisions and other aspects of religious upbringing, such as for example religious education in schools and legal remedies in case of conflicts between parents, parents and children, or families and the state, seems justified.

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# Does Tutoring Develop Reflexivity?

(pp. 131–151)

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**Abstract**

**Research objectives (aims) and problem(s):** The article presents the results of research on the development of students' reflective thinking. The purpose of the research was to determine the level of students' reflexivity when they began participating in a tutoring project, and then to verify it after the project ended.

**Research methods:** The first phase of research was conducted in October 2020. Two groups of students took part in the research: those undergoing tutoring (n = 70) and those not undergoing tutoring (n = 77). The tool used was the Polish adaptation of the Reflective Thinking Questionnaire. The four scales of the questionnaire are habitual action, understanding, reflection and critical reflection. The research – in the same groups – was repeated in 2023.

**Structure of the article:** The article has a classic layout. First, the concepts of tutoring and reflectivity in education are presented. Then the research method and results are presented.

**Research findings and their impact on the development of educational sciences:** The importance of the tutoring method for the development of reflexivity was recognised by analysing the results of both the tutored and non-tutored groups. The tutored group developed in terms of reflexivity

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and critical reflection, but also in habitual action. Students who did not participate in tutoring did not make such progress. The research also established relationships between other educational and sociocultural variables and students' levels of reflexivity. Academic performance, knowledge of foreign languages and parents' education were taken into account.

**Conclusions and/or recommendations:** The research made it possible to better identify the attributes of the most talented students, and to further identify possible opportunities for their development. An additional added value of this study is that the participants will be better able to understand themselves in terms of development. Those from the tutoring group were especially interested in their individual results.

***Keywords***: reflectiveness, academic tutoring, reflective thinking, student development

## Introduction

In October and November 2021, 77 students from the Academy of Special Education in Warsaw began a tutoring programme, which was to last five semesters. This was made possible by the Academy's participation in the Ministry of Education and Science's "Masters of Didactics" programme. The main aim of the project was to conduct a full cycle of education at universities using the tutoring method. Students who applied and qualified for the project were provided with individual tutoring support. The situation was unique for two reasons: firstly, a unique methodological intervention was to be applied to a specific group of students, and secondly, it was during the pandemic. Students faced unprecedented demands for self-discipline and regularity. Suddenly they were deprived of the physical space of the university and the need to commute every day – something that imposed a rhythm, motivated them and sometimes forced them to behave in a certain way.

Taking up the research problem, which is the recognition of the educational potential of students participating in tutoring in university practice, is part of the discussion on the quality of higher education learning and teaching which has been taking place in recent years. Both tutoring and reflexivity are elements of the concept of learning, which is an active, individualised process that serves to bring out the unique attributes of each student and to emphasise their responsibility for their own education. Looking for the paradigmatic roots of tutoring, we link it to constructivism, especially in its social (Jendza, 2016) and critical (Perkowska-Klejman, 2022) varieties, personalised education (Adamski, 2005), the community learning trend (Bruffee, 1999) and communicative action theory (Habermas, 1981). Reflexivity has very similar roots, to which pragmatism and progressivism should be added (Dewey, 1972, 2014). A common feature of the aforementioned approaches is the focus on the individual, whose qualities are supposed to be outstanding intellect and responsibility.

## Reflexivity and education

Students' reflexivity will be defined in this research as self-referencing their own knowledge, learning and education and careful, in-depth, conscious reflection on beliefs, cognitive processes and other educational experiences. The topic addressed in the research is new: there has been no longitudinal research in Poland on the reflexivity of students participating in tutoring. However, it is worth adding that both tutoring and reflexivity are becoming increasingly popular areas of research.

It is understood that reflective thinking was first defined by John Dewey in 1910 as an active, persistent and careful consideration of a belief or supposed form of knowledge, the grounds that support that knowledge and the further conclusions to which that knowledge leads (Dewey, 1910, p. 6). The key elements of this definition are using evidence, reasoning, challenging beliefs and knowledge and actively pursuing balanced conclusions. Kurt Fischer and Ellen Pruyne (2003), who research the development of reflective thinking, are convinced that it depends on abstract thinking and is associated with more advanced stages of development.

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Their cumulative conclusions are supported by the results of numerous behavioural and brain function studies. Thus, reflective thinking may emerge in adolescence and then develop in adulthood. Importantly, the emergence and development of reflective thinking are not automatic and do not occur in everyone. Instead, it depends on individual experiences, the most important of which is attributed to education.

Fischer and Pruyne (2003) emphasise that human development in general, and the development of reflective thinking in particular, is not linear and progressive as is commonly assumed. Instead, it occurs non-linearly and dynamically. Individuals of the same age may therefore differ in both cross-domain and intra-domain skill levels (Fischer & Bidell, 1998; Thelen & Smith, 1998; van Geert, 1991). Thus, a couple in their twenties and a couple in their fifties may have different levels of reflective thinking skills. Fischer and Pruyne (2003) distinguished the so-called functional and optimal tendency of reflexivity development. In the context of tutoring, we are interested in the optimal development path. Following this path involves strong environmental support combined with the use of personal intellectual potential.

Previous research on reflexivity has most often focussed on assessing its level in a functional context. Static evaluations were made of the characteristics of individuals at a particular age (e.g. Dawson, 2002; Kegan, 1982; King & Kitchener, 1994). In the present study, we consider optimal development. Given the characteristics and the "power" of tutoring, it can be assumed that we are dealing with both strong environmental support and the personal potential of the tutees who were selected for the programme.

Fischer and Pruyne (2003) compared the development of reflective thinking to the development of advanced stages of morality. It would depend on fostering abstract thinking with multiple perspectives (Dawson, 2002; King & Kitchener, 1994). Kathy Beland (2003) adds that reflection is the key that opens the door to understanding oneself in relation to core ethical values. The authors (Fischer & Pruyne, 2003) point to a number of professionals who can support reflective thinking: teachers, coaches, tutors, therapists, supervisors and spiritual and religious leaders. Among

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the educational and intellectual stimulators of reflexivity, a highly stimulating learning environment is mentioned first and foremost. Considering the maturity for the development of reflexivity – an abstract ability – a high school can be such an environment, and certainly a university should be. In academies and universities, we encounter a position that is far from looking at knowledge as dichotomous: unequivocally good or bad. Universities are spaces for discussion, self-determination, expressing one's views and openness to various interpretations. This has traditionally been fostered by the high intellectual capital of the participants. Nowadays, with the increasing popularity of university studies, this factor may be losing its importance. So far, the experience of today's students – the so-called background that feeds cognitive perspectives – can be very diverse.

Adults deprived of development opportunities in stimulating environments will be left behind. Tutoring, which is based on reflexivity, is about awakening the attitude of effort and confronting cognitively ambiguous problems, i.e. those that do not have a single, verifiable solution in every context. Aysun Gurol (2011) defines reflective thinking as a directed, precise process that includes analysis, evaluation, the need for deep understanding, cognitive motivation and a positive attitude towards learning. Jozua Sabandar (2013) states that the ability to think reflectively includes the ability to think critically and creatively. He conducted empirical research on the subject with a group of future teachers. A clear relationship was established between reflective thinking and critical thinking (r = 0.68). Reflective thinking requires a constant evaluation of beliefs, assumptions and hypotheses and a comparison with other plausible interpretations.

Reflective thinking is a major step towards understanding oneself. The individual is aware of what they already know and what they need to learn. Reflective thinking gives them a chance to interpret their own thoughts and actions. The process of self-reflection makes it possible to relate new information to previous experience and knowledge. Reflective thinking also involves personal reflection on one's achievements and failures and asking what has worked well and what areas should be

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improved. Self-reflection enables individuals to understand personal concepts of reality.

In tutoring, reflective thinking must be applied by both partners: tutor and tutee. Both actors have reflections, which includes retrospective analysis whilst solving problems and reflection on themselves – their own convictions, beliefs and efficacy. Critical reflection can lead to questioning past experiences in the context of broad issues such as ethics, personal learning theory and technological development. The tutor not only evaluates themselves, but also reflects on the tutees' past experiences because they affect current learning.

Tutoring and reflexivity define education based on human emancipation and broadening of experience. Such education is the "essential weapon" for eliminating ignorance and contributing to someone becoming productive, useful and of value to both oneself and society.

## Tutoring and education

Tutoring is most often carried out in the form of an academic teacher working individually with a student. It usually takes the form of conversations or creative discussions during which intellectual inspiration takes place, personal potentials are activated and the student develops cognitively, socially and personally. Adrianna Sarnat-Ciastko (2017, p. 81) states that tutoring allows the student to take responsibility for their learning, whilst contact with a master – an expert in the field – shapes the student's analytical and critical skills, as well as rhetorical skills. The intellectual development that occurs thanks to tutoring has also been noted by Katarzyna Czayka-Chełmińska (2007, p. 51) and Piotr Czekierda (2015, p. 20). In the first case, it is about maximising the potential of relationships in the context of knowledge development. Importantly, "in a relationship understood in this way, the tutor and the student are equal partners, for each of them is equally important and unique" (Czayka--Chełmińska, 2007, p. 43). Partners benefit from each other's resources and better cope with cognitive challenges. In the second case, an integral view of the human being comes to the fore. Tutoring ensures the full development of the student's potential, thanks to reflection – deeper forms of thinking, in-depth analysis of problems and contextual considerations. The reflexivity-related aspects of tutoring are highlighted by Beata Karpińska-Musiał (2012, p. 58), who claims that the basis of education using the tutoring method is subjective decision-making and reflection on one's own cognition. The self-determination in question also means a deeper insight into one's own learning processes. Of utmost importance is self-awareness, which Richard Barrett (2011) sees as the beginning of what he calls *personal transformation,* which involves discovering one's potential and capabilities, learning about one's strengths and weaknesses and recognising one's relationships with others. Tutees analyse themselves not only in the context of personal characteristics, but also in terms of their environment. Reflexivity is crucial in this process because it allows one to not only rethink the social structures to which one belongs, but also to free oneself from them. Scott Lash, Ulrich Beck and Anthony Giddens (2009) discuss this in the pages of their iconic *Reflective Modernisation*. They emphasise the importance of fully realised subjectivity – in-depth consideration of one's decisions, autonomy in thought and action and freedom from the aforementioned structures, especially if they are rigid, collective and of little value to the individual.

In tutoring, student activity is highly stimulated. Talents and gifts are found, as well as interest in scientific careers. In the whole process – in the context of developing reflexivity –the figure of the tutor is extremely important, whose involvement consists in the ability to ask questions and bring out from the student tacit knowledge: possessed but previously unconscious knowledge. It is also important to pay attention to the context and teach critical thinking, the art of argumentation and the ability to build conclusions. These issues are highlighted by Bartosz Fingas (2015), who emphasises the "master" skills of motivating and intensifying students' efforts in achieving their goals.

The research of the tutoring method and its usefulness at different levels of education is a popular area of research in Poland (e.g. Brzezinska

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& Rycielska, 2009; Brzezinska & Appelt, 2013; Czekierda, 2007; Czekierda, 2015). The concept of tutoring involves a developmental approach to education, which means that both the student and the education are subject to evolution and change. At the academic level, it is not regarded merely as the transfer of information and skills, but as the transfer of patterns and methods of scientific reflection and research (Kohlberg & Mayer, 2008). Active learning also requires commitment and taking responsibility for one's learning (Reschly & Christenson, 2012; Skinner et al., 2009). The multidimensional concept of student involvement (Reeve, 2011, 2013) implies the expectation that students play a key role in the teaching process. The role of the tutor is to share their experiences, encourage exploration and asking questions, as well as to provide feedback (Cowie & Harrison, 2016). Daria Hejwosz (2010) points out that the role of the tutor is a non-dominant participant in the discussion, not impos-ing their beliefs and interpretations as a partner.

## Description of the method

Let us recall that the aim of the research was to determine how participation in academic tutoring impacts the development of students' reflective thinking. Students' reflexivity in this research is understood as self-referencing their own knowledge, learning and education. It is a careful, in-depth, conscious reflection on one's beliefs, cognitive processes and other educational experiences. The place of research was the Academy of Special Education in Warsaw, which participated in the project entitled "Masters of Didactics".

The aim of the research was to identify the students' level of reflexivity immediately after they began the tutoring project, and then to verify it after five semesters. The first round of research was conducted in the autumn of 2020, whilst the second round took place in early 2023. Establishing a link between the development of reflexivity and tutoring was possible after comparing the results with those of a control group. Therefore, students not benefiting from individual tutor support also took part

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in the research. In both groups of students, attempts were made to identify a relationship between the level of reflexivity and selected educational and sociocultural variables: academic performance, knowledge of foreign languages and parents' education.

The main research questions were:

- What levels of reflexivity are shown by Academy of Special Education students when beginning tutoring?
- Do these students differ in their level of reflexivity from students who did not enter the tutoring programme?
- Have the levels of reflexivity of both groups of students – those taking part and those not taking part in the tutoring – changed after five semesters, and if so, to what extent?
- How do the selected educational and sociocultural variables relate to the reflexivity of the participants, and is the relationship, if any, the same after one year of being tutored?

The research was exploratory in nature; therefore, no research hypotheses were formulated related to the possible increase in reflexivity among students participating in the tutoring at the Academy of Special Education in Warsaw. However, expectations were formulated about the relationship between the level of reflexivity and some educational and sociocultural variables. It was assumed that academic performance would not be related to the reflexivity of the respondents. On the other hand, students who speak foreign languages at a higher level were expected to show higher levels of reflexivity and higher education of their parents to translate into greater reflexivity in the respondents. These suppositions were based on previous research conducted in Poland (Perkowska-Klejman, 2019; Perkowska-Klejman & Odrowaz-Coates, 2019) and worldwide (King & Kitchener, 2004; Kember et al., 2000; Boyd, 2008; Fischer & Pruyne, 2002).

The students' reflexivity was measured using the Polish adaptation of the *Reflective Thinking Questionnaire* (Kember et al., 2000; Perkowska--Klejman, 2014, 2019). The questionnaire consists of four scales: habitual

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action, understanding, reflection and critical reflection. Sociocultural variables were determined through the students' declarations on a questionnaire.

**Table 1. Characteristics of the four scales of the *Reflective Thinking Questionnaire***

| Name of the scale | Description of the scale | Sample statements from the questionnaire |
|---|---|---|
| habitual action | These are activities with a fixed, previously learned and repeatedly used procedure. They are performed mechanically, with little awareness on the part of the subject, who does not think about what they are doing. | When I am working on something, I can do it without thinking about what I am doing. In college, we do some things so many times that I started doing them without thinking about them. |
| understanding | Understanding is a "prudent" action based on the use of existing knowledge without attempting to evaluate it. Learning in the case of understanding uses existing cognitive perspectives and widely used systems of meanings and concepts. | In my studies, it is necessary that I understand the concepts that the teachers use. I need to understand the material taught by the lecturers in order to complete practical tasks. |
| reflection | Reflection is defined as the ability to question assumptions about the content or way of solving problems. This criticism, in turn, leads to the awakening of new cognitive doubts. The subject wonders whether the problem has been solved well and with the best methods. The analysis of an issue leads to the adoption of a kind of problem-solving attitude, which involves asking questions about the validity of solutions. | I like to think about what I will be doing and consider alternative ways of doing it. Sometimes I think about how others have done something and try to think of a better way of doing it. |
| critical reflection | The advancement of thinking at this stage consists in changing the way of looking at a given issue under the influence of reflection, which results in new problems to be solved. People capable of critical reflection make knowledge-related assumptions at the highest level. For example, they reflect on the nature of knowledge, the areas of its application and the nature of its evidence. | Studies have changed some of my previous beliefs. During my studies, I discovered errors that I had previously accepted as truth. |

## Research results

Before proceeding with the analysis to answer the research questions, the reliability of the individual scales of the questionnaire was determined.

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**Table 2. Reliability of individual scales of the *Reflective Thinking Questionnaire***

| Reliability of scales, Cronbach's alpha coefficient | | |
|---|---|---|
| Name of the scale | 1st round of research | 2nd round of research |
| habitual action | .72 | .67 |
| understanding | .61 | .75 |
| reflection | .71 | .70 |
| critical reflection | .76 | .80 |

The results of the internal consistency analysis of the various scales of the questionnaire should be considered satisfactory. Importantly, they do not differ from analogous results obtained in other studies (Gülşah & Evin Gencel, 2013; Tehran et al., 2023; Kember et al., 2000).

**Table 3. Size of the study groups in the 1st and 2nd rounds and the respondents' fields of study**

| | 1st round of research | | 2nd round of research | |
|---|---|---|---|---|
| Participation in tutoring | YES | NO | YES | NO |
| Psychology | 23 | 21 | 21 | 6 |
| Sociology | 7 | 8 | 6 | 7 |
| Pre-school and early childhood pedagogy | 5 | 3 | 5 | 3 |
| Pedagogy | 16 | 21 | 16 | 18 |
| Special needs education | 16 | 25 | 12 | 25 |
| Art education | 2 | 0 | 2 | 0 |
| **Total** | **70** | **77** | **62** | **59** |

A total of 147 students took part in the first round of the research. The research was repeated in a group of 121 students. The first round of research included almost all students participating in the tutoring

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programme. According to the assumptions of the "Masters of Didactics" project, the students who were tutored had to meet certain criteria: be a laureate of a national or international scholastic competition (*olimpiada przedmiotowa*), be a laureate of the "Diamentowy Grant" programme or have a high number of points in the recruitment process for first-cycle studies or long-cycle Master's studies. In practice, these stricter criteria were not a barrier to joining the programme because the number of applicants was only slightly larger than the number of places in the programme. Only a few people did not qualify. The control group was selected purposively, according to the criterion of the field of study – in such a way that the different fields of study were as equally represented as possible among the respondents in both groups. In the second round of the research, the same students were asked to participate. The percentage of completed questionnaires was 89% in the group participating in tutoring and 77% in the group not participating in tutoring. In fact, it was psychology students without tutoring who did not repeat the survey after 5 semesters. Almost all respondents in the first round were between 18 and 20 years old, and in the second round between 20 and 22 years old. Only three people were older, but they did not exceed the age of 30 even in the second round. Due to the nature of the university, where the employees and students are predominantly in the area of education, a social science, the number of women in the project was higher than the number of men. This proportion is similar to the proportion for the university as a whole and was maintained in the second round of the research. Thus, 133 women and 24 men participated in the first round of the research, with similar proportions in the second.

The first research questions concerned the level of reflective thinking demonstrated by the students who were tutored in comparison with that of the students not in the programme. Again, this was the first round of research.

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**Table 4. Levels of reflective thinking of students tutored and not tutored**

| Levels of students' reflective thinking, 1st round of research | | | T test |
|---|---|---|---|
| Name of the scale | Tutoring – YES | Tutoring – NO | |
| habitual action | 2.33 | 2.74 | t = -3.42; p < .001 |
| understanding | 4.32 | 4.14 | t = 1.78; p = .038 |
| reflection | 4.02 | 3.64 | t = 3.26; p < .001 |
| critical reflection | 4.24 | 3.66 | t = 4.81; p < .001 |

The students undergoing tutoring differed from the control group in terms of thinking described on all four scales of the *Reflective Thinking Questionnaire*. They showed higher levels for understanding, reflection and critical reflection, and lower levels for habitual action.

After five semesters, the research was repeated. The goal was to investigate whether the levels of reflexivity of both groups of students had changed after five semesters, and if so, to what extent.

**Table 5. Levels of reflective thinking of students tutored and not tutored**

| Levels of students' reflective thinking, 2nd round of research | | | T test |
|---|---|---|---|
| Name of the scale | Tutoring – YES | Tutoring – NO | |
| habitual action | 2.89 | 2.83 | t = 0.39; p < n.i. |
| understanding | 3.97 | 3.91 | t = 0.46; p = n.i. |
| reflection | 4.18 | 3.75 | t = 3.89; p < .001 |
| critical reflection | 4.44 | 3.83 | t = 5.19; p < .001 |

Students participating in tutoring achieved significantly higher scores on the reflection and critical reflection scales compared to the students who were not participating in the programme. The following steps attempt to resolve the key issue of these studies. It was examined whether students' level of reflective thinking had changed over the course of their studies. In the tutored group, there was an increase in

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scores on the critical reflection scale and a decrease in scores on the habitual action and understanding scales (Table 6). In the group not undergoing tutoring, only a decrease in the scores on the understanding scale was observed (Table 7).

**Table 6. Comparison of the levels of reflective thinking of students participating in tutoring at the beginning and at the end of the programme**

| Levels of reflective thinking of students participating in tutoring | | | T test |
|---|---|---|---|
| Name of the scale | 1st round of research | 2nd round of research | |
| habitual action | 2.33 | 2.89 | t = - 4.13; p < .001 |
| understanding | 4.32 | 3.97 | t = 2.65; p = .004 |
| reflection | 4.02 | 4.18 | t = -1.59; p = .56 |
| critical reflection | 4.24 | 4.44 | t = -2.08; p = .02 |

**Table 7. Comparison of reflective thinking levels of students not participating in tutoring at the beginning of their studies and after five semesters**

| Levels of reflective thinking of students not participating in tutoring | | | T test |
|---|---|---|---|
| Name of the scale | 1st round of research | 2nd round of research | |
| habitual action | 2.74 | 2.83 | t = -0.67; p = .25 |
| understanding | 4.14 | 3.91 | t = 2.03; p = .02 |
| reflection | 3.64 | 3.75 | t = - 0.91; p = .18 |
| critical reflection | 3.66 | 3.83 | t = -1.20; p = .11 |

The research considered selected educational and sociocultural variables in the context of their potential relationship to the reflexivity of the participants. Several educational variables were used in the first round of the research: the students' results on the *matura* exam in Polish, mathematics and a foreign language. These variables were chosen because they

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applied to all respondents – everyone took the *matura* exam in these subjects and obtained a certain score. In the second round of the research, the educational variable was the average marks earned by the respondents in the semester preceding the research.

**Table 8. Academic performance vs levels of students' reflective thinking**

| | 1st round of research | | | 2nd round of research |
|---|---|---|---|---|
| | Polish | mathematics | foreign language | grade point average from previous semester |
| habitual action | F = 0.46; p = .83 | F = 0.90; p = .49 | F = 0.90; p = .49 | F = 1.01; p = .38 |
| understanding | F = 0.64; p = .69 | F = 1.91; p = .08 | F = 0.60; p = .72 | F = 0.86; p = .46 |
| reflection | F = 2.45; p = .02 | F = 1.23; p = .29 | F = 2.1; p = .04 | F = 5.13; p = .002 |
| critical reflection | F = 1.2; p = .27 | F = 0.79; p = .57 | F = 0.87; p = .51 | F = 1.48; p = 22 |

In general, academic performance made little difference in the students' reflective thinking. What is noticeable, however, is that the results obtained on the Polish and foreign language *matura* exams were related to the results from the reflection scale. The analysis of descriptive statistics allows us to draw the conclusion that the people who earned better exam scores in Polish and in a foreign language had higher results on the reflection scale. Scores on the reflection scale were also differentiated by educational achievement as expressed by the grade point average earned by students at the end of their second year of studies. Higher scores on the reflection scale were achieved by students with better marks during their studies.

The level of English proficiency did not differentiate the results obtained by the students in either round of the research.

Let us recall that the first round of the research involved 70 people being tutored and 76 people not being tutored. The vast majority of students who signed up for tutoring had mothers with higher education (n = 47) or high school education (n = 13). The control group included

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children of parents with varying levels of education: 29 had mothers with higher education, 19 had mothers with high school education and 20 with vocational education.

The educational distribution of the respondents' fathers was similar in many respects. The fathers of students from the tutoring group most often had higher (n = 36), secondary (n = 12) or vocational (n = 20) education. The fathers of the students in the non-tutoring group most often had vocational education (n = 34), less often higher education (n = 20) and the least often secondary education (n = 14).

No relationship was established between the respondents' reflective thinking and their parents' education at the beginning of their studies in the first round of the research. Nevertheless, this changed over the course of the studies.

**Table 9. Parents' education and students' levels of reflective thinking**

| Level of students' reflective thinking (second round of research) vs parents' education | | |
|---|---|---|
| Name of the scale | mother | father |
| habitual action | F = 6.39; p = .003 | F = 6.06; p = .001 |
| understanding | F = 0.85; p = .43 | F = 0.87; p = .45 |
| reflection | F = 0.28; p = .75 | F = 0.37; p = .77 |
| critical reflection | F = 0.97; p = .38 | F = 1.90; p = .13 |

An important result of the F-test can be noticed on the scale of habitual action. A look at the descriptive and post hoc analyses leads to the conclusion that those whose mothers and fathers had vocational education showed, on average, the highest scores on the habitual action scale. Those whose mothers and fathers had a high school education achieved average scores on this scale. The higher education of the respondents' parents was associated with the lowest average scores on this scale.

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## Conclusions and significance of research results

Taking up the research problem of recognising and verifying the levels of reflective thinking of students participating in tutoring is part of the discussion on the quality of teaching in higher education which has been taking place in recent years. Increasingly common and free access to information obliges universities to use modern, diversified teaching methods. Both reflexivity and tutoring fit into the concept of active, individualised learning that brings out the unique attributes of each student and emphasises the student's responsibility for their own education. Tutoring is considered an elite method, which has been introduced into the practice of the Academy of Special Education in Warsaw to a limited extent. Let us recall that 77 students took part in the programme covering almost the entire cycle of bachelor's studies or half of the long-cycle Master's studies, which represented only 1.3% of all Academy students. Did it pay off? The project's budget was nearly PLN 1,200,000, or about PLN 15,000 per student. It can certainly be said that this group was subject to higher learning standards, willing to develop and make an effort and open to change. These advantages, however, clash with systemic factors that favour mass education and basically ignore the quality aspect, but are cheaper. The inclusion of tutoring means that the university places a greater emphasis on the cognitive and personal development of the individual student. An expression of this development is the increase in reflexivity found in this research. Comparisons of the results of the tutored vs non-tutored groups show that young people who receive individual tutoring develop better in the course of their studies. Nonetheless, it should be noted that these were people with significantly higher reflective potential at the beginning of their studies. It is likely that even without the participation of the tutor, these individuals would have developed cognitively. The results can also be commented on by comparing them to previous studies. Although the previous measurements of reflexivity were made on a one-time basis, higher results were usually obtained in groups of older students compared to groups of younger students (e.g. Kember et al., 2000; Fischer

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& Pruyne, 2003; Perkowska-Klejman, 2019). Older students also scored higher in these studies, but only those undergoing tutoring.

Of cognitive interest is the relationship between academic performance and scores on the reflection scale. The results show that students who score well in external exams are more concerned about rethinking aspects of their own learning. In practice, they may look for innovative ways to solve a problem and reflect on their actions.

It would seem that socialisation variables indexed by parental education would co-occur with reflexivity. This link, however, has not been confirmed. It was noted that students of parents with lower education think and act at a habitual level to a significantly greater extent compared to students of parents with higher education.

The research revealed that not taking advantage of tutoring did not work out well for the students in terms of developing reflexivity. Data on the intellectual development of adolescents subject to individualised learning methodologies can be extremely useful for designers and implementers of didactics in higher education. The research also made it possible to better identify the attributes of the most talented students and to further identify possible opportunities for their development. An additional added value of these studies is that people participating in the research are better able to understand themselves in terms of development. The respondents, especially from the tutoring group, were very interested in their individual results.

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# Interdisciplinary Cooperation for the Support of Families With School-Age Children

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## Abstract

**Research objective:** The aim of this article is to demonstrate the role and importance of interdisciplinary cooperation in supporting families with school-age children.

**The research problem and methods:** Two research questions were posed in response to the research objective: What is the role of interdisciplinary cooperation for the support of families with school-age children? What are the benefits of interdisciplinary cooperation for the support of families with school-age children? The answers to those questions were obtained through the qualitative method, namely focus group interviews.

**The process of argumentation:** The research process is epistemic and comprises an analysis of the author's research. It refers to the characteristics of the functioning of families with school-age children and the difficulties and challenges faced by those families. This presentation of the theoretical and research assumptions of interdisciplinary cooperation among family support institutions addresses the need to support families with school-age children.

**Research results:** The analysis of the research data revealed the significant role and benefits of interdisciplinary measures to support families with

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school-age children. The analysis and synthesis of the literature on the subject and of the author's research focused on school education and the family support system.

**Conclusions, innovations, and recommendations:** The research presented herein aligns with the recommended development of social policy, including the development for the benefit of the family, for building readiness and openness in the family support services, and for undertaking interdisciplinary cooperation. Another important result of this analysis is recommendations for the effective development of an interdisciplinary model of action in education and family support.

***Keywords*:** interdisciplinary cooperation, partnership, cooperation, family support, family support system, family with a school-age child, functioning of a family with a school-age child

## Introduction

Identifying temporary difficulties, crises, or conditions defined as dysfunction in the life of the family is a daily activity performed by family support services. The preamble of the Polish Act on Family Support and the Foster Care System (2011) states that cooperation among individuals, institutions, and organizations working with children and parents is essential for providing effective assistance to families facing challenges in child-rearing and for ensuring the protection and support of children (Polish Journal of Laws of 2023, items 1426 and 1429). Building effective interdisciplinary cooperation is currently the main direction of the family policy and its implementing instruments. The main objective of the state's family policy is to foster the establishment and development of families and to create conditions for them to fulfill their functions. The family's ability to develop and strengthen its sense of self-efficacy and empowerment is a particularly important aspect of its functioning (Błasiak & Dybowska, 2021). Multiple institutions support the family. School is one of the most important institutions in a child's schooling. If there are dysfunctions

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in a family, the education system alone is not capable of addressing the diagnosed issues and needs.

The aim of this article is to demonstrate the role and importance of interdisciplinary cooperation in supporting a families with school-age children. The analysis revealed the nature of the family's functioning in this phase of life and the challenges faced by the family support system. The article also includes the findings from a focus group interview with professionals engaged in interdisciplinary efforts to assist families with school-age children in Zielonki Gmina, Krakow County, Poland. The study concludes with recommendations from experts who participated in the focus group interview, with an emphasis on bolstering interdisciplinary cooperation.

## Functioning of the family with school-age children

The family is a child's primary living environment. The family setting is where the child is raised and where their personality develops. This process involves a system of relationships between the individual, the family, and the environment. The environment, including the family setting, encompasses all biological, social, and material conditions that determine the individual's life and activities (Kupisiewicz & Kupisiewicz, 2009). The family is a small, informal, institutionalized social group that is part of a complex system of interrelationships and dependencies between the family as a microstructure and the society as a macrostructure (Rembowski, 1986). The family, as a social group, functions by a process referred to as the family life cycle. The family functions and its needs go through natural and inevitable changes brought about by the phase of its life cycle, with tasks to be performed and problems to be addressed that are specific to each stage of life.

By the late 1940s, Evelyn Duvall and Reuben Hill identified eight phases of family life (which they later expanded to ten) that are characteristic of the developmental changes taking place in families. Phase four refers to families with school-age children. At this stage, a child begins

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mandatory schooling, which presents numerous challenges for both the child and their parents. These challenges greatly impact children's experiences during crises, such as difficulties in peer group interactions, coping with new obligations, and adhering to social norms. Discrepancies between a child's behavior and their parents' expectations, disagreements in parenting attitudes, varying parenting techniques, or symptoms that, in a systemic view, are indicative of dysfunction within the family structure become apparent (Wasilewska, 2011). Thus, the functioning of the family, the values, norms, and behavioral patterns passed on to children, as well as the arrangement of the roles of each parent and the position of the child in the family, manifest themselves externally (Żernik, 2018). The child's broader functioning outside the family, in the school system, also reveals the parents' attitudes toward the child – the way the parents behave toward their child. As Maria Ziemska (1975) states, it is crucial that parents realize the importance of the role they play in the lives of their children, particularly when they start school.

Entering the school education phase is both an important event and a challenge for the child and their family. The child faces the challenge of finding their place in an unfamiliar environment and of meeting the school requirements. How a child responds to these challenges depends greatly on not only the child and their abilities, intelligence, or aptitude, but also on the support they receive from their parents and other family members, decisions made in the family, parenting attitudes, styles of upbringing, and the functioning of the family system. This is the stage of the family life cycle in which family dysfunctions are most likely to manifest themselves. Starting school often marks the first step in a child's engagement outside the family. The child reflects the upbringing climate in the family: the conditions under which they are being raised. Therefore, the school plays a crucial role in assessing the family's functioning, its resources, relationships, the fulfilment of parental responsibilities, and the atmosphere within the family. Diagnosing the family becomes particularly important in the case of dysfunctional families, referred to as problematic or parentally inefficient. Children raised in such a family have generally unsatisfied biological and psychological needs, and the way the parents treat them is a source of suffering for them, which may lead to underachievement and difficulties functioning in the school environment from the very start of school education (Krzesińska–Żach, 2007). This leads to care-taking and upbringing issues, domestic violence and conflicts, disrupted family relations, parents neglecting the child, or other family issues.

Therefore, it is vital that, when the child enters school, the family ensures proper conditions for the child's development, shapes the child's positive habits, instils the principles of social functioning, and creates a family environment conducive to the optimal development of the child (Tyluś, 2019). If the family is unable to meet these requirements, it must be provided with support from relevant institutions.

## Interdisciplinary cooperation in the family support system

Practitioners in child and family support, as well as theorists, are seeking efficient support system models. Nowadays, it is generally acknowledged that effective actions and assistance provided to families, especially to those with multiple issues, requires the involvement of various specialists and institutions. To this end, inter-sectoral, inter-ministerial, and inter-institutional cooperation is essential. It should be systemic, in the form of a sustainable partnership of entities and services operating in the local environment. This approach is conducive to holistically identifying needs, addressing social issues, encouraging joint initiatives, and planning courses of action. This approach has been developed, tested, and published as Cooperation Models.[1]

[1] Recognizing the need to foster cooperation in activities for the benefit of local communities, the Polish Ministry of Family, Labor and Social Policy has launched a project as part of Priority Axis II – "Effective public policies for the labor market, economy and education", Measure 2.5 – Effective Social Assistance of the Knowledge Education Development 2014–2020 Operational Program. The main objective of the project is to design and implement a model of cooperation between social assistance and social integration institutions and the entities dealing with other sectoral policies

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The interdisciplinary model is based the assumption that cooperation should adopt the form of systemic action instead of interventionist, occasional, and selective actions taken by individual institutions – as is frequently the case. Therefore, interdisciplinary action involves collaboration between public and non-public entities at the municipal, *gmina*, and voivodeship levels, with those entities being committed to addressing social concerns such as poverty and preventing social exclusion. Interdisciplinary cooperation for the benefit of the family should also involve the family in planning and action, since its social and axiological functioning depends on the conditions generated by the surrounding socioeconomic macro-system (Cudak, 2017). Besides taking into account the complexity of the system by determining the variety of conditions affecting the assistance process, this systemic approach also entails identifying the interrelationships between the co-existing factors as well as the nature of the relationships (Duda, 2022). Thus, the idea of an interdisciplinary team is to bring together representatives of all institutions and services, whose joint activities are intended to contribute comprehensively to minimizing undesired issues and creating a system of support for individuals and families (Model współpracy interdyscyplinarnej, 2011). As set forth in the Polish Act on Family Support and Foster Care (2011), there should be cooperation between government and local government entities, relevant non-governmental organizations, and other organizations and individuals working for the benefit of children and families. Therefore, the parties should include local communities, in particular, *powiat* family assistance centers, social welfare centers, social services centers, courts of justice and their auxiliary bodies, educational institutions, healthcare institutions, churches and religious societies, and civil society organizations (Polish Act on Family Support and Foster Care, 2011).

Such cooperation in support of children and families should consider contemporary concepts of social policy:

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relevant to social inclusion and poverty prevention, as well as to promote the deinstitutionalization and growth of social services. The project was implemented nationwide from 2018 to 2023 and was divided into three levels: in rural municipalities, in urban/rural municipalities, and in towns/cities with over 20,000 inhabitants.

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- the concept of multi-sectoral social policy, which assumes that responsibility for the implementation of social services is distributed among entities from various sectors and involves the search for new mechanisms for the implementation of social policy (cooperation of multiple entities from diverse sectors, having at their disposal a variety of resources necessary to meet social needs)
- the concept of inter-sectoral cooperation in the form of cooperative partnership as the most effective way of performing tasks within the public remit, enabling joint analysis of needs and decisions on the type of activities, an approach which also fosters contact at the institutional and personal levels, builds trust and promotes networking, contributing to stronger social capital in local communities
- the concept of governance which, among other things, assumes that the state is not the only entity performing tasks within the public remit and that the effectiveness of the state is demonstrated primarily by its ability to create space for cooperation and that the essence of governance is to provide conditions to enable the public sector and non-state entities to take joint action towards specific goals
- the service perspective in social policy, in which public services are organized by the public sector and provided by all sectors, including the informal sector, understanding services as a central, activating, investment, and integration area of social policy and assuming that recipients should be involved in the creation and provision of services. Increased commitment to the provision of public services can improve their quality and reduce their costs, while greater participation in the creation of services increases the influence of citizens on the work of public institutions (Modele kooperacji, 2021).

Interdisciplinary cooperation enables effective intervention, thus building a support system that addresses the real needs of the child and the family. The integration and coordination of local institutions and entities around jointly agreed objectives reduces the likelihood of redundant activities, promoting a reasonable allocation of duties and facilitating the sharing of resources, responsibilities, risks, and achievements among part-

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ners. The experience of such a partnership serves as the foundation for advancing teamwork within and between institutions or organizations and as the basis for establishing fresh, fulfilling interpersonal connections. Such an exchange between the partners contributes to a higher level of support, as the partners contribute their capabilities and resources to the cooperation. Communication channels expand and partners develop trust in one another, leading to more public trust in the cooperating entities.

The effectiveness of cooperation and activities depends significantly on the attitudes, knowledge, competence, and experience of those involved. In its essence, partnership aims at cooperation with another person or group, without resorting to orders and regulations (Torończak, 2001). Partnership is one of the more effective means of solving social, economic, and environmental problems and of overcoming institutional divisions and isolation. Thus, it leads to joint, integrated, and long-term endeavors of entities seeking to achieve, firstly, adequate efficiency of action by joining forces and resources, and secondly, synergy (Kalisiak-Mędelska, 2013).

Cooperative activities are assumed to be applied to individuals or families, or for entire communities with multiple unsatisfied needs or in crisis, in which cases the activities will be long-term. The essence of cooperative teams' work is to undertake such multi-professional cooperation with and for the benefit of the individual and the family so as to satisfy their needs. When examining cooperation models in the family assistance system, it is important to highlight the joint efforts of institutions and organizations, especially in areas such as preventing domestic violence, aiding families in care-giving and child-rearing responsibilities, and facilitating the reunification of a foster child with their biological family. Parties to the cooperation most often include a social worker, family assistant, school counselor, police officer, healthcare representative, foster care coordinator, addiction therapist, and probation officer.

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## Methodological assumptions and analysis of results

A study utilizing a focus group interview was undertaken to investigate the role and benefits of interdisciplinary cooperation in supporting families with school-age children. A focus group interview is a research method used in qualitative research in psychology, sociology, and marketing research (Banaszak, 2017). The interaction taking place within the research group, between the participants themselves, is crucial for a focus group interview. The discussion takes place in a broader social context, using projection techniques. The participants do not always have fully defined opinions on the subject. Rather, their opinions are largely influenced by the views expressed by others. The moderator plays a significant role in conducting the interview by managing the discussion. The discussion is held according to a pre-written script that describes the course of the various stages of the interview. The discussion is recorded, which enables an in-depth analysis of the material.

To achieve the objective, the group focus interview involved specialists working to support families with school-age children in an interdisciplinary capacity in Zielonki Gmina, Krakow County, Poland. Nine respondents participated in the interview, representing specialists with long-standing experience who are active in child and family support. The group comprised representatives of the Gmina Committee for Solving Alcohol Problems, a non-governmental organization: a logotherapist and a school counsellor (education), the head of a social assistance center, a family assistant, and a day support center caregiver (social assistance), and a probation officer (the judiciary). The study was conducted in June 2023.

The following research questions were formulated in connection with the research objective:

1. What is the role of interdisciplinary cooperation for the support of families with school-age children?
2. What are the benefits of interdisciplinary cooperation for the support of families with school-age children?

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The interview data revealed univocal agreement among the respondents on the importance of interdisciplinary measures to support families with school-age children. The participants' assessment was that "effective work with families, especially with those manifesting difficulties in their functioning, is not possible on one's own." While noting the value of cooperation, the respondents revealed that they are aware it is lacking. They stated that "the work of an individual institution or a specialist requires great effort that may not bring tangible benefits… one can say that the risk of failure is high" and that "sometimes the system, through its uncoordinated actions, brings chaos to the family life, which is ultimately harmful to the affected family, while our role is to assist the family and support it in pursuing its aspirations, child-rearing."

The respondents attributed the special role of interdisciplinary cooperation to information exchange, joint diagnoses, and family assistance planning. The respondents noted that an "exchange of information allows for a more accurate assessment of the family, beyond the ideal image of itself it might present, and helps in diagnosing the family and its members." "The team's role is to establish a unified method when working with the family. The team is supposed to speak with one voice and pursue a jointly defined goal." They also emphasized the comprehensiveness of such an approach. According to the respondents, "the joint work of representatives of all institutions and organizations involved in working with the family provides an opportunity to implement a comprehensive and holistic approach to working with families." The experts participating in the focus interview also referred to the principles of teamwork, stating that "for the benefits to be quantifiable, cooperation must be integrated. This requires the interdisciplinary team to define the purpose, methodology, and model of work be followed, and who will coordinate the team. Furthermore, the role of institutions and their legal obligation should be to commit to interdisciplinary cooperation to achieve objectives set for individual institutions and the collective objectives of the support system, including the objectives set by families."

When considering their role, the respondents prioritized the welfare of the family. They stated that "our actions need to be guided by the welfare of the family. In particular, we have to plan actions aimed at the sustainability of the family and the quality of the child-rearing environment." They added that "the role of the system is to build our credibility… We frequently work with families that are not *pathological* or *poor*, but rather are typical families with strong qualifications and social standing… We need to show ourselves as a group of professionals who know what they are doing, are familiar with the system and can effectively utilize it for the support of the family."

The analysis of the collected research data also revealed the benefits of interdisciplinary cooperation in assisting families with school-age children. The respondents stressed that "a family going through a crisis needs action to be undertaken by multiple institutions: welfare, educational, justice institutions… These actions are often perceived by the affected family as a threat… It responds in a defensive, manipulative manner… Only by sharing information and working together are we able to address such attitudes." They added that "cooperation brings tangible benefits, for both the family and the assistance system… Professionals working with the family are not 'alone' in this work. They also know the support system better, are perceived by families as more credible, and provide more effective assistance… Families gain partners who implement the joint assistance plan rather than duplicating one another's actions. Stressing the benefits for families, the respondents do not forget about themselves. They emphasize that cooperation among professionals fosters mutual trust in one another's actions, increasing their determination to implement the action, promotes openness to cooperation as the parties involved see the benefits it brings… These benefits are vital and represent the fundamental operational standard for the entire child and family assistance system today." Also, through "joint action, our openness to undertake communication increases, relationships are forged, trust and a sense of security are fostered, as are flexibility and willingness to make sacrifices and seek experts… One can see that this work is meaningful. The family sees it, too." The respondents also pointed out that "through cooperation, we use our resources, improve services, increase their availability and flexibility."

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The experts who participated in the focus group interview have many years' experience in fostering partnerships and interdisciplinary cooperation for the support of children and families. This study demonstrates that only when institutions cooperate and adopt a systematic approach can they effectively meet the demands of supporting the child and family, therefore providing opportunities to overcome the diagnosed crises.

## Summary

The findings from the focus group interview unambiguously demonstrate the importance and advantages of engaging in interdisciplinary cooperation for the benefit of family assistance. The results align with the proposed path to develop a support system that provides assistance to individuals, families, and entire communities. Until now, the work of institutions responsible for assisting people in crisis has often been performed without "exchanging information on actions taken," or treated as the joint work of a group of people performing tasks for which they are individually responsible. In both this research and as part of the social policy solutions being implemented, interdisciplinary cooperation is comprehensively portrayed as purposeful and conscious, free from rivalry, whereby team members complement one another (Modele kooperacji, 2021).

The family setting is an important environment, but not the only one that stimulates a child's development. Therefore, when family support institutions are willing and able to take joint, planned, coordinated actions, they provide the family with an opportunity to establish an environment conducive to child-rearing. Otherwise, there is a real threat to the child's safety, necessitating their placement in the foster care system.

The focus group study also provided recommendations for successfully developing an interdisciplinary action model. The respondents identified the following as crucial for establishing good interdisciplinary cooperation:

- creating conditions for joint interdisciplinary supervision of activities, training, regular "working" meetings and expert meetings
- building partnerships through clearly defined rules and coordinated cooperation
- consistently fostering and developing mutual openness to cooperation by analyzing any difficulties, resolving conflicts, jointly evaluating activities, assessing the results, and celebrating successes
- including the family as much as possible, as the subject and a partner in action
- treating the family as expert in its own case, as the system is not omnipotent.

This analysis is a voice in the discussion on the directions for developing an effective family policy. It does not fully exhaust the subject, but it can significantly contribute to the process.

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# The Pedagogical Model of Thought and Activity in the Social World of Interaction Rituals, in the Thought of Erving Goffman

(pp. 169–190)

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## Abstract

**Research objectives (aims) and problem(s):** The purpose of the article is to point out the pedagogical implications of selected elements of Erving Goffman's thought.

**Research methods:** To achieve this goal, the author used the methods of hermeneutic interpretation and existential problematisation.

**Structure of the article:** The topic may be boiled down to the essence of the ethos which underlies authentic pedagogical thought and activity. This issue has been problematised in terms of Erving Goffman's theory of the presentation of self in everyday life and social interaction rituals. In this context, reference is made to the heuristic semantic potential of the metaphorical figure expressed in the concept of the "schoolboy model" and "schoolboy's world." In fact, it symbolises the essence of the ethos of pedagogical thought and activity, which always paves the way to authentically acquiring personal and social competencies – requiring time, effort and self-discipline. On this path, individuals gain genuine respect and recognition in society whilst acquiring the skills needed to fulfil their social roles. In this meaning, the heuristic figure

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of the "schoolboy model" mainly depicts the authentic, honest effort needed to follow the path that leads to personal and social development by facing the challenges and demands of education with integrity. Therefore, the metaphorical figure of the schoolboy model, referring to the rule of fairness (i.e., evaluating students based on their actual merits and achievements), assumes the validity of facts that can only be produced by means of diligent and honest work.

**Research findings and their impact on the development of educational sciences:** Thus, the subject matter calls for the application of selected categories of Erving Goffman's work in contemporary pedagogical discourse and its key categories: the subjectivity, autonomy, self-education and self-realisation of the pupil.

**Conclusions and/or recommendations:** The model of pedagogical thought and action inspired by selected aspects of Goffman's thought can be linked with the ways of understanding pupils' status which express beliefs about individuals' ability to create their own social and cultural status through their choices, reflexivity, activity, commitment and subjective agency. Thus, the heuristic figure of Goffman's schoolboy model exposes the authentic acquisition of subjective competence for personal and social human development.

***Keywords*:** everyday life, thought and activity education, schoolboy model, interaction rituals, reality of facts, philosophy of education, subjective agency

## Introduction

The issue addressed herein is the sociological theory of the presentation of self in everyday life or the presentation of a performance (Goffman, 1956, p. 113) and social interaction rituals. The metaphorical figure itself, expressed in the concept of the "schoolboy model" and the "schoolboy's world" (Goffman, 1967, pp. 42–43),[1] should be closely linked with

[1] Goffman emphasises that in his method of describing social phenomena he refers to peculiar linguistic figures, expressed in imagery that clearly appeal to the

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the theoretical contexts surrounding "the syntactical relations among the acts of different persons mutually present to one another" and the context in which these people directly participate in "the moments and their men" (Goffman, 1967, p. 3) or refuse to participate as the actors in "face-to-face interaction in natural settings" (Goffman, 1967, p. 1) that are social in the framework of particular interaction rituals. Therefore, social interaction rituals are always associated with the

> class of events which occurs during co-presence and by virtue of co-presence. The ultimate behavioural materials are the glances, gestures, positionings, and verbal statements that people continuously feed into the situation, whether intended or not. These are the external signs of orientation and involvement – states of mind and body not ordinarily examined with respect to their social organization. (Goffman, 1967, p. 1)

From this perspective, the issue mentioned in the title is heuristic in nature. It is connected with the search for a specific line of thought and linguistic figures that enable us to describe and explain in a sense-creative way the social and cultural significance of that which is pedagogical in nature and irreducible in its positivity (constructivity), in contrast to that which is devoid of the qualities of pedagogical thought and action.[2] Therefore, both that which is pedagogical in nature, expressed in Goffman's metaphorical figure of the schoolboy model and schoolboy's world, and that which is non-pedagogical, but at the same time takes on a formal

imagination. Some of them unmistakably take the linguistic form of metaphors (Goffman 1967, pp. 19, 100, 234; see also Jacobsen, 2017, pp. 213–215).

[2] With reference to the formula of pedagogical thinking and action, I allude to the meaning that Dietrich Benner ascribed to it. This formula implies two fundamental questions: firstly, the indissoluble nature of the action of thought and action itself, which, in this case, is pedagogical, and secondly, the specific identity of pedagogical practice, which is expressed in specific thought and action. In this way, pedagogical thought and action, as such, can be distinguished from other types of human *praxis* and the rationality that accompanies it, e.g., artistic or political thought and action (Benner, 2015, pp. 11–14, 33–67; see also Gara & Stępkowski, 2024, pp. 9–11).

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(institutional or structural) form of educational activity (formation and teaching activities), always conveys a specific manner of thought and action and is reflected in the social space of interaction rituals.[3]

## Selected models of understanding children and the status of pupils in the education process as a context for situating Goffman's figure of the "schoolboy model"

There are four ways of perceiving a child's status that reflect four specific pedagogies, considered from the perspective of children's learning models: seeing children as imitative learners, as learning from didactic exposure, as thinkers and as being knowledgeable. In the first case, children are perceived as being unable to learn something independently. However, by following certain patterns, pupils can learn what they cannot do. In the second case, children are perceived as passive recipients whose minds are like a *tabula rasa*. As a result of the learning process, pupils' minds are filled like vessels, thus accumulating knowledge. In the third case, children are seen as beings capable of interpreting their own experiences with the ability to reflect on their thinking, and thus are treated as reflective participants in cognition and learning. Finally, in the last case, children are perceived as beings who understand their surrounding world, and thus are treated as people who can distinguish personal and subjective knowledge from universal and objective knowledge (Bruner, 1999a, pp. 53–63; see also Bruner, 1999b, p. 70).

Pupils, as participants in pedagogical interaction, may also be considered from the perspective of various assumptions that affect the manner

[3] Goffman's work has essentially been adopted and applied in the context of educational issues, mainly in light of the problems he addresses concerning "interactive order" and "interactive rituals" that refer to the aspects and questions of interpersonal relations in the school environment. It is these issues that are most often raised in the context of the pedagogical implications and applications of his thought (see DeMeulenaere, 2023; Gourlay, 2022; King, 1973; Mifsud, 2018; Tomczyk, 2022; Vanderstraeten, 2004).

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in which a system of pedagogical interaction itself is determined. Furthermore, a specific system of pedagogical interaction determines how both the status and role of teacher and pupil are determined. In this context, three basic and contemporary ways of determining the status and role of the pupil can be identified. In this regard, we may refer to images of children related to three basic educational ideologies: "romantic", "transmissive" and "progressive". The *romantic* ideology views children and their development through the prism of self-actualisation and individual autonomy. The *transmissive* ideology regards children and their development according to patterns of socialisation and acquired social roles. Finally, the *progressive* ideology views children and their development from the perspective of integrating subjective experience as action and agency whilst interacting with their surrounding environment (Kohlberg & Mayer, 2000, pp. 23–16; see also Śliwerski, 2001, pp. 31–37).

The way of defining the pupil's status in the educational process may also be considered from the point of view of the general sociocultural changes that have taken place in the contemporary world. These changes indicate a fundamental shift in the perception of pupils from passive participants in the learning process to active subjects of learning and the authors of their own development. In the first case, therefore, we can speak of an instrumental model of perceiving the status of children, which requires a directive shaping it in accordance with an arbitrary pattern. Pupils, as passive and receptive beings in the education process, are therefore trained to be obedient and imitate and adopt static models of social roles and related adaptability skills. The second case is a model for the subjective perception of children's status based on their activity and agency as authors of their own development and the process of building relationships with the surrounding world. Thus, pupils are treated as creative individuals, capable of seeking knowledge and developing their own way of acting, and thus capable of agency and creating their own activities and ways of entering into social and cultural roles (Bałachowicz, 2009, pp. 198–212).

It should be assumed that the model of pedagogical thought and action inspired by selected aspects of Goffman's thought, in line with

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the general assumptions of symbolic interactionism in terms of how sociocultural practices are constructed (Carlin 2022, p. 51; see also Karkowska, 2011, pp. 211–238), can be directly linked with the ways of understanding pupils' status, which express beliefs about individuals' ability to create their own social and cultural status through their choices, reflexivity, activity, commitment and subjective agency. In this context, the categories of Goffman's thought that emphasise the way of shaping one's own way of being and personal competencies, allowing one to enjoy authentic credibility and recognition in social relations and related interactions, play a key role. First of all, such categories indicate subjective agency and the authentic shaping of one's own biography, including "to have face" and "to take a line".

## The metaphorical nature of Erving Goffman's thought as the heuristic context of explaining the interactive "ritual order"

In Goffman's work, one may notice the inspiration of Alfred Schütz's phenomenological sociology and his concept of "multiple realities", or, more broadly, inspirations associated with the general attitudes and cognitive perspectives of Edmund Husserl's phenomenological philosophy and his concept of "the life world" (*Lebenswelt*) (Husserl, 1970, 1973; Schütz, 1945; Schütz & Luckmann, 1974; see also Goffman, 1986, pp. 2, 251–252, 347). This is exemplified by the research orientation found in Goffman's books, which is expressed in attempting to investigate the essence of specific phenomena by describing the basic structure of the experience related to these phenomena. In such categories, one may also consider Goffman's cognitive attitudes outlining the conceptual layer of his research on sociological theory by referring to two of his famous books: *The Presentation of Self in Everyday Life* (Goffman, 1956) and *Frame Analysis: An Essay on the Organization of Experience* (Goffman, 1986). In this context, it is also worth noting that Goffman refers so often in these books to various examples related to school as a social institution, or to problems related to school in general, that it can hardly be regarded as casual or

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insignificant. And although Goffman did not directly address the problems of pedagogical theory and practice, the presence of such examples seems to contain a lot of pedagogically valuable inspiration (Goffman, 1956, pp. 23, 30, 56, 63, 70, 76, 80, 96, 101, 103, 119, 127, 128, 134, 141, 145; Goffman, 1967, pp. 109, 138, 201, 220, 225, 232, 254).

As a result, in my attempt to conceptualise the fundamental problem articulated in this article's title – "the pedagogical model" of thought and activity in the social world of "interaction rituals" – I refer to selected problems and solutions related to them, which reflect broadly understood phenomenological inspirations, both hermeneutic and existential.

The heuristic contexts of Goffman's work may also be rightly considered from a cognitive perspective, which Polish philosopher Józef Tischner (2002) described as "thinking from within a metaphor" (p. 462). Therefore, the methodical procedure of metaphorical thinking may be perceived as a particular thought process that enables us to closely examine the object of cognition, which is difficult to grasp directly and emerges from experiencing the world of everyday life. This metaphor involves "perceiving a certain similarity" (Ricoeur, 1984, p. X) and allows us to apply a way of thinking about one cognitive subject to a completely different one. At the same time, this metaphor represents a linguistic utterance in which specific "semantic transformations" are applied. Moreover, the metaphorical utterance thus opens a particular horizon of understanding as a certain "clue" or "system of meaning" (Stępnik, 1988, pp. 36–37). A metaphor as a linguistic figure of speech therefore creates a collocation with a meaning different to the literal meanings of the words invoked because metaphorical expressions always indicate something other than their literal significance as a phrase (Konersmann, 2009, p. 7).

Therefore, metaphors possess a semantic surplus in the layers of their meanings that may demonstrate or reveal the specific nature of something else that is difficult to understand or ambiguous in the forms or manners in which it appears and exists. For this reason, metaphorical thinking – "thinking from within a metaphor" – allows us to understand and reveal that which is significant, subtle and hidden in its ambiguity in the world of human affairs. All this cannot be fully expressed and grasped

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in objectified reasoning (behavioural script or empirical scheme). As a result, investigating something specifically human may require metaphorical thinking (Tischner, 2002, p. 468). In thinking from within a metaphor, one searches for ways to comprehend that which cannot be expressed directly. In this meaning, it is thinking from deep within the experiences encoded in the symbolic form "of fundamental and unchangeable truths". Therefore, if a metaphor becomes the most evocative way of expressing the content of human existential experience, metaphoricity is a linguistic way of expressing that which is specifically human.

As Hannah Arendt notes, metaphors as "transferring" consist in "the transition from one existential state, that of thinking, to another, that of being an appearance among appearances, and this can be done only by analogies" (Arendt, 1978, p. 103). Metaphors therefore reveal "an intuitive perception of similarity in dissimilars" (p. 103). Thus, as Paul Ricoeur indicates, metaphors as a specific figure of speech allow us to introduce a "semantic innovation" which takes place at the level of linguistic discourse and consists in "producing … a new semantic pertinence by means of an impertinent attribution" (Ricoeur, 1984, p. IX). As such, metaphors as "a new pertinence in the predication" constitute "the new thing – the as yet unsaid, the unwritten" (p. IX) in linguistic utterances. For this reason, as Ricoeur (1984, p. XI) states, metaphorical utterances are a new way of "seeing-as", thanks to which that which cannot be described non-metaphorically may be expressed and described in another way, revealing incomprehensible or unknown dimensions of human experience and reality.

When reflecting on the role and significance of metaphorical utterances in the history of philosophy, Arendt pointed out two fundamental groups of metaphors of thinking that originated in antiquity: the metaphor of vision and the metaphor of hearing. The former was relevant in Greek philosophy, whilst the latter appeared in the Hebraic religious tradition. Similarly, as truth in Greek philosophy was only "seen", truth in the Jewish tradition was only heard (Arendt, 1978, pp. 110–111). Therefore, truth conveyed in the categories of hearing requires one to hear what is being said, and truth expressed in the categories of seeing requires one to see the nature of a given object personally. Just as the

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"invisibility of truth" serves as an axiom in the Jewish faith, so the "ineffability of truth" is also axiomatic in Greek philosophy (Arendt, 1978, p. 119).

The sources of the metaphorical thought that we often encounter – not only in philosophy but also, as it can be assumed, *per analogiam* in the humanities and social sciences – also appeal to a great extent to the order of the metaphor of vision (that which can be seen and what may be identified and considered obvious when viewed directly) (Arendt, 1978, p. 121). Since philosophers, along with researchers in the humanities and social sciences, strive towards rationally exploring their areas of interest, metaphors of vision inherently prove to be more accessible and precise. They are not as fleeting as something that resonates and can be heard, slipping away from the attention of those engaged in observation and cognition (Arendt, 1978, p. 122).

In the issue mentioned above, associated with the work of Goffman, it appears that we also encounter "metaphors of seeing". They play an essential heuristic role in the layer of narrations of phenomena and processes associated with social "interaction rituals" and the corresponding "ritual order". Linguistic figures, including metaphors such as "interaction ritual", "to have face", "to maintain face", "to lose face", "to take a line" or "a front region and a back region" play a key heuristic role here. These figures and metaphors refer to the habitus of certain behaviours subject to social perception and the behavioural schemes of those behaviours.

## The ritual principle of the interactive order of having, maintaining or losing "face"

In Goffman's view, the metaphoric figure of "face" is closely related to the category of "social role". The fundamental importance of understanding the concept of "face" and its various configurations of meaning in the scope of interpreting and describing specific rituals and codes of interaction – "having face", "maintaining face" or "losing face" – should be attributed to this category (Goffman, 1967, pp. 7, 9). According to such metaphorical specification, face is "an image self-delineated in terms

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of approved social attributes" (Goffman, 1967, p. 5), which may refer to both a desired "collective image" and a desired "individual image". The former refers to an image that reflects (embodies), for example, a given profession or religion. In contrast, the latter refers to an image that reflects a person's attitude or conduct as a representation of themselves and thus underlies their reputation and how other members of society perceive them. As a result, the concept of face expresses "the positive social value a person actively claims for himself by the line others assume he has taken during a particular contact" (Goffman, 1967, p. 5).

The participants in various forms of social interaction always enter into specific interactions because, by definition, they live "in a world of social encounters" (Goffman, 1967, p. 5). This social "world of encounters" thus manifests itself in certain people entering into "face-to-face" relations or "mediated contact" (p. 5). In this manner, people who "have face" or would like "to maintain face" make efforts within the framework of particular social interactions to stick to their proper social role. "To take a line" is "a pattern of verbal and nonverbal acts by which he expresses his view of the situation and through this his evaluation of the participants, especially himself" (p. 5). As a result, the extent to which and how particular actors in society should or can participate in "mediated contact" whilst undertaking actions to "rescue" it in specific situations constitute an integral part of specific codes of interactions for a given society (p. 9). At the same time, Goffman argues that in such a system of complex dependencies, which are directly associated with social codes and rituals, "ordinarily, maintenance of face is a condition of interaction, not its objective" (p. 12). In this context, the very need to maintain face becomes an impulse to initiate activities that, as a result of "an interchange" (p. 20), are intended to eliminate the threat of losing face, thus "re-establish[ing] ritual equilibrium" (p. 19) in relations with other members of society.

The category of "interaction ritual" also assumes the existence of separate, special zones that Goffman describes as the "front region" and "back region" (or "backstage"). The roles played in the front region and back region also underlie attitudes demonstrated in various ways regarding the need to respect assumed rules of conduct. Whilst the principles of an interaction ritual enacted in the front region are pressurised to respect them, they can be waived or suspended in the back region. In a manner more or less explicit, these rules are thus subject to intentional violation. The ritualisation of social roles is based on the need to maintain face or the fear of losing it socially (Goffman, 1967, p. 7). Therefore, man as a causative agent is entangled in a game of interactive rituals in both the front region and the back region. The problematic nature of daily life, its goals and strategies, are played out here as part of a game between authentic and stimulated being, between the spectacular scenario of the front region and the "naked" scenario of the back region and between the need to maintain face and the irreversible danger of losing it.

In the logic of dramatising the forms of social interaction, to the extent that the front region is based on recognising the need for clear rules for playing roles, there are also places in the back region where such rules are not only blurred but have been entirely neutralised. The back region is therefore based on "silently" eliminating that need, and the validations that officially accompany them, according to which the recognition of such a need is an element of the socially desired (image) "game", which occurs in the open front region. The attitudes and facts about people that come to the fore and are made visible in the back region remain generally unseen or are hidden in the front region. Goffman (1956) concludes that "it is here that the capacity of a performance to express something beyond itself may be painstakingly fabricated; it is here that illusions and impressions are openly constructed" (p. 69). In line with this logic, what is respected in the front region is necessary in terms of image, whilst in the back region it no longer applies in the rituals of dramatisation and maintenance of the dramaturgy of the assumed meanings. For this reason, the back region becomes a regressive hiding place in relation to the front region itself (Goffman, 1956, pp. 152, 156).

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### "The pedagogical model" of thought and activity in the social world of the interaction "ritual order"

Goffman defines and specifies "the pedagogical model" of thought and activity in the context of the categories of "ritual order" and "ritual code" (Goffman, 1967, pp. 42, 44) by which individuals employ "accommodative lines" in terms of social expectations, and at the same time go a long way to meeting difficult expectations which demand effort and self-discipline. Along the way, individuals acquire specific competencies associated with their social roles in an authentic and not falsified way. Furthermore, these patterns related to this way of thinking and activity are exemplified by Goffman with the assistance of the "schoolboy model" mentioned above. This metaphor reflects "a hard, dull game" (Goffman, 1967, p. 42) undertaken by students to gain authentic recognition and respect in their community. Such attitudes should be distinguished from thinking and activity demonstrated in the "social game" based on "half-truths, illusions, and rationalizations". The goal of the social game thus understood is that "the person insulates himself" (Goffman, 1967, p. 43) or maintains a fictitious notion of his image in others' perception. The metaphor of the schoolboy's world claims that if "a person wishes to sustain a particular image of himself and trust his feelings to it, he must work hard for the credits that will buy this self-enhancement for him" (Goffman, 1967, p. 42).

In this sense, the heuristic figure of the schoolboy model first and foremost depicts an authentic and honest effort to follow the path leading to meeting the requirements of recognising and respecting students' socially defined roles and related school obligations through their own honest engagement. Understood in such a way, "the pedagogical model" (a pattern of pedagogical thought and action), related to ways of adjusting to the obligations of school life (e.g. sports games and competitions), by definition refers to appropriate (in terms of social patterns of affirmation and recognising behaviour as well as morally desirable ideals of behaviour and exemplary values) and pedagogically accepted means to achieve educational goals. Achieving goals in inappropriate means (from the point of view of social patterns of affirmation and recognising behaviour; e.g. fraud or theft) dooms students to potential "disqualification" and the need to perform their tasks once again within the framework of socially established and accepted rituals for the role of students.

In view of the above, Goffman distinguishes two fundamental worlds: the reality of "facts" and that of "communications". At the same time, communications also "belong to a less punitive scheme than do facts" (Goffman, 1967, p. 43). Therefore, the schoolboy model metaphor alludes to the principle of fairness (evaluating and promoting students based on their actual merits and achievements). Thus, it assumes the validity of the reality of the facts that can only be produced by diligent and honest work. The reality of facts, understood in this way, cannot be simulated or denied. However, the social reality of the ritual order itself is paradoxically not based – as Goffman implies – on the principle of fairness, but rather on the fact that "the ritual order" is "face". Moreover, in line with the "ritual code" of this order, a participant in social interactions receives "not what he deserves but what will sustain for the moment the line to which he has committed himself, and through this the line to which he has committed the interaction" (Goffman, 1967, p. 44). For this reason, the reality of communications, in contrast to the reality of facts, may be expressed in ignoring facts, withdrawing from communications, not believing facts, or distorting those facts in the interactive ritual order. Thus, communications may be expressed in both deforming and falsifying facts (Goffman, 1967, pp. 43–44).

The heuristic figure of the schoolboy model, and thus the model of pedagogical thought and activity, which this figure represents and illustrates, refers us to the problem that Goffman describes as "rules of conduct". These rules are mainly actualised unconsciously through internalising a specific habitus that reflects socially binding or desired behavioural patterns. At the same time, respecting or ignoring specific rules of conduct impact the formation of a person's self-image and creates one's own social image as a person who affirms or denies particular rules of conduct and expresses (or not) the expectations of their actualisation (Goffman, 1967, p. 50). Therefore, the rules of conduct play a vital role in all spheres of human activity, including that related to pedagogical thought and activity. The rules of conduct always pertain to specific

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guidelines that reflect socially accepted, and therefore socially desired, values and related expectations. Understood this way, rules of conduct also constitute one of the main "source[s] of regularity in human affairs". The conduct of particular participants (individuals) in collective life who comply with a given set of rules of conduct without simulating their actual recognition and observance thus becomes a "constancy and patterning of behaviour" in social perception (Goffman, 1967, pp. 48–49).

Social rules of conduct may take the form of "directly" manifested (communicated or implied) "obligations" or "indirectly" manifested "expectations". In both cases, it is also crucial to respect or affirm the moral commitment in terms of conduct that is considered necessary or desirable (Goffman, 1967, p. 49). Therefore, the rules of conduct, seen in categories of obligations or expectations, also demonstrate their irreducible interpersonal character. What some participants in social interactions expect from others may simultaneously be an obligation of the latter and vice versa.

An example of this dependence depicting the realities of education, to which the heuristic figure of the schoolboy's world belongs – and which is simultaneously analogical in its significance for the example of nurses and patients, as cited by Goffman – is the relationship between the obligations and expectations that occur between teachers and students. Therefore, by transposing Goffman's example, it could be said that teachers are obliged to implement specific educational content in their lessons, and students may reasonably expect teachers to provide them with the required educational content throughout their learning process. This example therefore illustrates the rule of conduct, which takes different forms for those involved in educational interactions (teacher/pupil). The obligations of the teacher and the expectations of the pupils simultaneously express or deny the value or state of the socially desired rule of conduct, particularly teachers providing pupils with a specific standard of knowledge within the school's teaching process (school lessons) in a competent and accurate way.

Of course, exceptions to such an ideal educational situation are possible. Either the obligation met by the teacher or the pupil's expectations may affirm the assumed standard expressed in the educational relationship of teaching (implemented by the teacher) and learning (by the pupil). Furthermore, an "act that is subject to rules of conduct but does not conform to them is also a communication – often even more so – for infractions make news and often in such a way as to disconfirm the selves of the participants. Thus 'rules of conduct' transform both action and inaction into expression, and whether the individual abides by the rules or breaks them, something significant is likely to be communicated" (Goffman, 1967, p. 51). An example of this may be seen in three hypothetical educational situations in which the rules of conduct, taking the form of an obligation or expectation, are expressed in the following types of dependence:

1. When fulfilling their obligations, teachers actualise the pattern of competent and accurate implementation of educational standards (and therefore educationally assumed/desired "rules of conduct"), during which the pupil shows no interest or any expectations that the teacher will competently and accurately familiarise them with the required content.
2. When fulfilling their obligations, the teacher fails to actualise the pattern of competently and accurately conveying the educational content, whilst the pupil expects that the teacher will do so.
3. The teacher, as part of their obligations, fails to actualise the pattern of competently and accurately implementing the education, and the student shows no interest or any expectations that the teacher will do so.

Therefore, the source of indolence and ignorance in terms of the educationally assumed/desired rules of conduct in the examples provided are as follows: in the first case, it is the way the pupil's educational role is actualised; in the second case, the manner the teacher's educational role is actualised; and in the third, how the educational role of both the teacher and pupil is actualised.

When exploring the various socially constructed aspects of the rules of conduct, at least three fundamental distinctions should be taken into

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consideration that enable us to distinguish their separate classes: "symmetrical rules" versus "asymmetrical rules", "formal rules" versus "informal rules" and "substance rules" versus "ceremony rules". When referring to these distinctions, the author of *Interaction Ritual* also focusses on them to some extent, citing examples of certain types of rules of conduct.

Therefore, the *symmetrical rules* refer to a situation in which specific individuals have the same obligations and expectations in relation to other participants in social interaction as others have towards them (e.g. both teachers and pupils share obligations and expectations in showing mutual respect). In contrast, *asymmetrical rules* indicate a manner of conduct in which specific individuals are treated by other participants in given interactions differently than they treat them (Goffman, 1967, pp. 52–53); for instance, it is the teacher's prerogative – and not the pupils' – to oblige pupils to complete particular tasks from the curriculum and to expect them to perform these tasks.

On the other hand, it should be assumed that *formal rules*, although Goffman does not specify them, are established and regulated by binding laws, statutes, regulations or official guidelines, to be respected by all concerned. For example, a school trip guide is obliged to follow the itinerary of a school trip, whilst the participants have the right to expect the same from the organiser and school trip guide. In turn, *informal rules* are usually customary and not directly formulated and also express a specific social practice or related tacit knowledge (Goffman, 1967, p. 53). For example, a school trip guide whose participants are disciplined and interested in the trip suggests an additional place not on the official itinerary to visit in their free time. This type of practice always results from specific arrangements made in various environments that are not found in any official declaration or commitment. They may also serve various departures from standard routine activities (favourable or otherwise) subject to specific codifications and directly verbalised (Collins, 2010, p. 158).

Finally, both *substance rules* and *ceremony rules* relate to a specific aspect of given activities or functions attributed to them. It should also be noted that substantial activities such as rules of conduct also have or may have ceremonial meaning. In contrast, it cannot be said that ceremony rules of conduct contain substantive meaning or are somehow correlated with them. Moreover, *substance rules* are always of primary importance and refer to principled decisions (e.g. legal, moral or ethical) because they define these aspects of conduct, which, as Goffman states, "guides conduct in regard to matters felt to have significance in their own right, apart from what the infraction or maintenance of the rule expresses about the selves of the persons involved" (Goffman, 1967, p. 53). These principles may be exemplified by a pupil who does not copy from other pupils during an exam because they adhere to such values and not because they do not have the opportunity to cheat. Furthermore, the ceremony rules of conduct are of secondary importance and are associated with specific polite or social conventions. As a result, they serve the purposes of self-presentation and expressing one's opinions concerning other participants engaged in social interaction. For this reason, the basic forms of ceremonial activities include showing respect and self-presentation (Goffman, 1967, pp. 54–56). These principles could be illustrated by a teacher who informs pupils beforehand of the official rules for sitting an exam and makes it clear that copying always has been an aspect of coping during an exam.

## Conclusion – pedagogical implications of the heuristic figure of the "schoolboy model"

Bearing in mind the various types of rules of conduct, it should be pointed out that the heuristic figure of the schoolboy's world and the related pedagogical model of thought and activity refer us in a particular way to the rules of conduct in their asymmetrical, informal and substance dimensions. It should be assumed that, considering the structure of everyday life in human experience, these types of rules of conduct play an essential role in shaping the attitudes expressed in the thought and activities in line with the moral and ethical ethos of diligent and honest work to meet educational requirements. Consequently, they also encourage authentic efforts to gain certain competencies and finally acquire social

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recognition and respect, as reflected in the metaphorical figure of the schoolboy model.

Whilst investigating these issues in a somewhat broader context, from the perspective of phenomenologically conceived fundamental structure of human experience in the life-world,[1] several basic points can substantiate the arguments and conclusions in this summary. Of course, first and foremost is the pedagogical model of thought and activity, taking into account the specific, constructive role of the rules of conduct in its actualisation, as assumed in the context of this problem.

Thus, asymmetrical rules are most significant in explaining the process of shaping the attitudes embedded in a pupil's conduct regardless of what they could expect from their social environment or the demands generally made of others in the same social environment. Therefore, the schoolboy model represents rules of conduct within which the pupil themselves (based on the interior locus of control) takes advantage of an educational situation to diligently learn and acquire specific skills even though their teacher paradoxically does not display an ambitious approach to conveying the content or subjectively activating their pupils within the scope of the curriculum.

In turn, informal rules, in reference to the sphere of tacit knowledge, sensitise the pupil to those practices that – although they are not

[1] The "life-world", both in Jan Patočka's view and according to the original intention of phenomenology by Husserl, is given "directly". It is a subjective world, "lived in its concrete whole" as a world of concrete existence "here" and "now". Thus, it is a world of everyday situations and practical action, a world in which people meet, learn and work (Patočka, 2016, pp. 28, 116; Landgrebe, 2016, p. XXVII). Goffman touches upon the phenomenological idea of the "life-world" in his own way and adopts it for his own research perspective by employing the concept of "everyday life" (Goffman, 1956). It is worth mentioning here that in his phenomenology of life-world, Jan Patočka indicated several basic dimensions of it and the related experience – time (man as *homo temporalis*), carnality (man as *homo copus*), home (man as *homo domemsticus*) or work (man as *homo laborans*) – that constitute human experience in "everyday life" (Patočka, 1996, pp. 1–52; Patočka, 2016, pp. 52–84; Gara, 2021, pp. 67–75). These dimensions of the life-world should therefore be closely linked to the spheres of experience that also play a key role in shaping the attitudes relevant for the schoolboy model.

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officially prescribed or required – outline certain expectations stemming from an environmental ethos, proven methods or moral patterns concerning how socially and culturally necessary goals (ambitions and aspirations) are to be implemented to achieve success and gain full social recognition and respect. An example of the importance of such rules could be a pupil who achieves outstanding results in sports competitions yet may or may not enjoy the common opinion that they have a "fair play" attitude towards their colleagues and other athletes.

Finally, substance rules not only play an important role but are even essential to the schoolboy model because they refer to fundamental decisions regarding socially and culturally esteemed values (e.g. a solid education, showing manners, knowledge of one's environment or being specially prepared to fulfil specific social and professional roles) and situations acknowledged to be morally valued (e.g. diligent and persistent work, a conscientious approach to one's duties or striving for self-improvement and personal development). Therefore, the pedagogical model of thought and activity considered herein is based on precisely defined values and situations which are significant for one's social and cultural condition, the quality of one's attitudes and social involvement and one's personal development.

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# Evaluation of the Educational and Preventive Programme for Students of the Fourth Year of Primary School and Recommendations for Practice

(pp. 191–211)

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## Abstract

**Research objectives (aims) and problem(s):** The aim of the article is to present the results of an evaluation study of an educational and preventive programme implemented in eight year 4 groups in six Krakow primary schools. The programme, entitled KOTWICA, ran from December 2021 to June 2022. The evaluation was external and comprehensive. During the programme, the evaluation of the process and of the outcome were carried out in the pre-test–post-test format. The research question is "what are the results of the evaluation of the KOTWICA educational and preventive programme for students of the fourth year of primary school?"

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**Research methods:** Eight proprietary tools were used to evaluate the process, and two standardised tools were used to evaluate the result. The collected material was subjected to statistical processing, whilst the qualitative data was encoded, categorised and analysed using tools for qualitative data analysis.

**Structure of the article:** At the beginning, the authors justify the undertaking of the research and introduce the subject of the study on the basis of theoretical findings and the state of research in the field of school prevention. Then the research objectives are described and the research problem is defined. In turn, the research method, the selection criteria for the study group and the principles of data collection and processing are described. The results of the research and the limitations of the research process were also described. Finally, the conclusions of the research and recommendations for the theory and policy of school prevention are described.

**Research findings and their impact on the development of educational sciences:** The results of the evaluation allow us to conclude that the objective of the educational and preventive programme conducted in year 4 was achieved and that it met the needs of the participants. However, they do not allow us to draw clear conclusions as to the effectiveness of the educational activities, due to the limitations of the collected research material.

**Conclusions and/or recommendations:** In the light of the results, the authors drew conclusions regarding the methodology of evaluation studies and recommendations for preventive and educational practice.

***Keywords*:** process enaluation, outcome evaluation, primary school, preventive programs, students

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## Introduction

The subject of the article is the results of an evaluation study of an educational and preventive programme entitled KOTWICA [Anchor], implemented in the 2021/2022 school year in primary schools in Krakow. The programme was planned to directly cover 200 students (eight year

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4 groups) and their parents as indirect recipients; it was carried out by 14 teachers and six school specialists. The programme was run by specialist educators and psychologists from the Specialised Psychological and Pedagogical Counselling Centre "Krakowski Ośrodek Terapii", who are highly qualified and have many years of professional experience in the education system for children and adolescents.

Schools and educational institutions conducting preventive activities is the basic function of the education system in Poland, next to the didactic (educational), upbringing and care functions. "The provisions of the Education Law, by introducing the legal institution of an educational and preventive programme, meet the need for an integrated view of educational and preventive activities at school as an environment for the teaching, upbringing and development of a young person" (Turczyk, 2020, p. 86). Implementing the educational and preventive programme in schools and educational institutions in Poland is a statutory obligation resulting from Article 26 of the Education Law (2016). The educational and preventive programme is a

> legally guaranteed tool with which all schools and institutions […] secure the educational space of students. This programme should include both content and activities addressed to students of an educational nature, as well as those addressed to students, teachers and parents with a preventive function. (Turczyk, 2020, p. 81)

The educational and preventive programme should be based on an annual diagnosis of students' needs, risk factors and protective factors, and should include content and activities addressed to students, their parents and teachers. The Education Law (2016) does not describe how the programme should be evaluated. The guidelines for preparing an educational and preventive programme recommend that conclusions from the evaluation of the programme from the previous school year should be included in the educational and preventive programme in a given school year (Serwis Rzeczypospolitej Polskiej, n.d.). In the absence of a legal obligation to evaluate the educational and preventive programme in schools,

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it can still be assumed that preventive activities should be evaluated, because it is also required to be based on scientific grounds and programmes with proven effectiveness (Barczykowska & Dzierzyńska-Breś, 2013, p. 132). Schools can use recommended prevention programmes, and these programmes – implemented by external groups or specialists – are evaluated in accordance with their assumptions (KCPU, n.d.). Above all, however, the obligation to evaluate the prevention programme is included in the European Quality Standards in Drug Addiction Prevention, according to which evaluation is the "systematic collection, processing and analysis of data needed to assess the degree and ways of achieving the objectives of a given intervention" (Europejskie Centrum Monitorowania Narkotyków i Narkomanii & Krajowe Biuro ds. Przeciwdziałania Narkomanii, 2011, p. 259). Evaluation is important in ensuring the quality of the programme, and "these standards indicate the individual elements that should characterise research in the field of process evaluation and evaluation of the result at the basic and specialist level" (Piasecka, 2022, p. 35). Referring to the highest methodological requirements of evaluation, it is recommended to conduct research in the pre-test–post-test format with a deferred measurement with a control group (Borucka & Kehl, 2021, pp. 37–52; Sharma et al., 2022; Shek et al., 2016).

An analysis of the contemporary literature on the subject of school prevention and the prevention of risky behaviours or addictions, specifically the ways of defining evaluations depending on the goals (Guyadeen & Seasons, 2016, pp. 99–100; Hawkins & Nederhood, 1994, p. 14), it can be stated that

> conducting evaluation studies contributes to strengthening preventive and therapeutic services by increasing their effectiveness, as well as adapting them to the needs of their recipients, whilst giving the opportunity to plan and implement activities with respect for their subjectivity, dignity and autonomy. Authentic evaluation also becomes the basis for conscious reflection on one's own actions, on the basis of which a space for development is created. (Piasecka, 2022, p. 35)

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## The aim of the research and research issues

The process was evaluated in order to determine the scope of coverage of the target group and the participants' acceptance of the programme (including the appropriateness of the content and materials, the strengths and weaknesses of the programme and the level of satisfaction with it), as well as to assess the compliance of the programme structure with the assumptions. Such goals made it possible to monitor possible disruptive factors resulting from incorrect implementation of the programme that could affect the programme's effectiveness.

The evaluation served to answer the research questions: 1. To what extent did the participants represent the target group? 2. To what extent was the programme carried out in accordance with the plan? 3. What are the opinions of the participants and teachers/specialists about the programme? The following qualitative variables were selected from the research issues for the evaluation: the structure of the programme, the course of the programme implemented by teachers in school classes, the course of training for teachers and pedagogues/school psychologists, the course of meetings between parents and pedagogues/school psychologists, the programme's strengths and weaknesses and the appropriateness of the proposed support to the organisers' expectations. The indicators for the research variables were responses on questionnaires and observation questionnaires addressed to the organisers, trainers and students (i.e. direct addressees) and their parents.

The outcome evaluation addressed the research question about the change caused by the programme: What is the sense of personal competence among the year 4 primary school students, including their skills in understanding, naming and expressing emotions and recognising conflict situations and constructive conflict resolution strategies? In the research plan for evaluating the outcome, the KOTWICA programme was defined as the independent variable. It was assumed that participating in the programme would affect the dependent variable, the personal competence of students, whilst the indicators for the variables were the respondents' answers to the questionnaires.

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## Criteria and method of recruiting the subjects

The recruitment criterion for the study as part of the evaluation was the addressees' and organisers' prior participation in the programme. The exclusion criterion was a lack of consent to take part in the research. The research covered teachers who conducted classes with year 4 students, psychologists and educators from primary schools (specialists) where the programme was implemented and students – the direct addressees of the programme – who were covered only by the research as part of the evaluation of the result. Sixteen women were qualified for the KOTWICA programme in the recruitment process: 10 teachers and six specialists (three psychologists and three educators).

Six primary schools from Krakow took part in the programme, which was implemented in eight year 4 groups, as one of the primary schools had three participating groups. The year 4 groups were not equal in number, ranging from 13 to 28 students, with teachers in the recruitment process indicating classes up to 25 students. This high number of students is related to the influx of students from refugee families.

## Data collection and analysis methods

The evaluation study was carried out using the survey method, to collect opinions on the programme in schools, and the qualitative observation method. The tools used in the evaluation process were proprietary and prepared only for the purposes of evaluation: (1) recruitment questionnaire – 16 forms were collected, (2) observation forms for teachers (concerning classes with students) – 45 were collected, (3) observation forms for teachers (concerning meetings with parents) – 5 were collected, (4) observation forms for trainers (concerning training for teachers) – 7 were collected, (5) evaluation surveys concerning the programme addressed to teachers – 0 were collected, (6) evaluation surveys regarding meetings addressed to parents – 15 were collected, (7) a list of teachers and specialists attending the training (analysed together with the

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recruitment sheet) – complete research material from 4 meetings was collected and (8) trainer interview questionnaires – 1 questionnaire of the interview with the coordinator was completed after the training for teachers.

The analysis of data collected using observation forms for teachers after meetings with parents included 5 observations, which means that almost all specialists reported on meetings with parents, as it was part of the KOTWICA programme. In total, 115 parents attended school meetings, and it was planned that all parents of participating students would be informed of the programme.

Seven observations were included in the analysis of data collected using observation forms intended for trainers (after training for teachers).

The evaluation surveys from meetings with parents indicate relatively low involvement of parents in the KOTWICA programme, as evidenced by the fact that 15 statements were collected from parents after the end of the programme. Five meetings were planned for parents during the programme (four informational meetings and one summary meeting). These meetings did not take place; in some classes it was possible to organise a final meeting, and in one of the classes it was possible to organise an initial and a final meeting, with some parents present at only one. It was assumed that more observation forms would be returned.

A total of 45 observation sheets from teachers after classes with students were analysed, which was in line with the assumptions.

The following research tools were used to evaluate the result:

1. The Anger Expression Scale (SEG) by Zygfryd Juczyński and Nina Ogińska-Bulik (Juczyński, 2001; Ogińska-Bulik & Juczyński, 2012) – "The SEG is a tool for children aged 11 and over and for teenagers. It consists of 20 statements included in two subscales: external anger (10 items), inner anger (10 items)". Reliability for external anger was $\alpha = 0.78$ and for inner anger $\alpha = 0.72$.
2. Zygfryd Juczyński's Personal Competence Scale (KompOs) (Juczyński, 2001; Juczyński, 2012) – "KompOs measures generalised self-efficacy; it also allows to obtain results in two subscales concerning having the force necessary to initiate action and the perseverance necessary

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to continue the action". Reliability for the force factor was $\alpha = 0.74$, for the persistence index $\alpha = 0.62$ and for the overall score $\alpha = 0.72$.

In the methodological assumptions of the outcome evaluation, about 150 observations in the pre-test and 150 in the post-test were planned to be collected. However, due to the low return rate, a clear disproportion was observed between the sample size in the first and second measurements. At the start of the intervention, between 128 and 143 complete observations were collected. On the other hand, in the second measurement, it was only 37 to 51. This factor significantly hindered full conclusions about the effectiveness of the KOTWICA programme.

The analysis of quantitative data included statistical description and statistical inference samples (dependent samples t-test). Calculations were made in IBM SPSS Statistics 28.

Quantitative and qualitative data were collected with the help of programme organisers and trainers. During the recruitment process, the subjects completed a recruitment questionnaire, which included questions about their expectations, and the trainers prepared attendance lists during the training meetings. During the first training session, teachers received observation sheets, which they were to complete after each class with students, as well as after meetings with parents. After each training module, trainers were required to fill in observation sheets. At the end of the whole series of training for teachers, they filled in evaluation questionnaires concerning the training in which they had participated. During meetings between teachers and parents, the parents were asked to complete an evaluation questionnaire regarding their satisfaction with the programme, its strengths and weaknesses and whether it met their expectations. Questionnaires for outcome evaluation were distributed to students before the first classes and after the last classes by the teachers running the programme.

In the course of the research, it was not possible to obtain a complete set of data from all planned sources.

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## Results

The results illustrate the answers to the research questions: (1) To what extent did the participants represent the target group? (2) To what extent was the programme carried out as planned? and (3) What are the opinions of the participants/organisers about the programme?

The implementation of the programme among year 4 pupils (the target group) proceeded in accordance with the plan, maintaining the structure of the scenarios and the exercises provided for within them. Meetings with parents, an integral element of the programme, were not carried out in accordance with the initial assumptions. Thus, irregularities in this respect should be considered a disruptive factor and may have impacted the effectiveness of the programme.

The teachers positively assessed the programme in terms of both content and didactic materials. The weakness of the programme – according to the teachers – was the amount of content to be completed in a predetermined time. The strength of the programme was its narrative layer and methodological attractiveness being adapted to the age of the addressees. The teachers indicated that the students were involved and interested.

Due to deficiencies in the collected data, it is impossible to determine the parents' level of acceptability of the programme. Parental involvement in the programme was relatively low, and not all scheduled meetings were carried out.

An integral part of the programme was the training system for the teachers. However, due to the fact that the trainers did not conduct the training in line with a single, universal training plan, it is difficult to determine whether it was conducted in accordance with the assumptions.

The outcome evaluation illustrates the answer to the research question: What is the sense of personal competence among the year 4 primary school students, including the skills in understanding, naming and expressing emotions and recognising conflict situations and constructive conflict resolution strategies?

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## Statistical description of the sample

Due to the large data gaps, the sample size should be understood as the number of complete observations allowing for the calculation of individual parameters. This means that the sample size changed depending on the scale in question.

Table 1 presents basic statistics describing the results from the KompOs and the SEG before the intervention. These parameters do not indicate any major issues. Although the empirical distribution differs in shape from the normal distribution, its skewness and kurtosis do not indicate significant deviations of the empirical distribution from the theoretical.

**Table 1. KompOs descriptive statistics for the pre-test**

| Scale name | n | m | me | sd | skewness | kurtosis | min | max | p[a] |
|---|---|---|---|---|---|---|---|---|---|
| **Force factor** | 139 | 16.58 | 17 | 3.61 | -0.490 | -0.278 | 7 | 24 | <0.001 |
| **Perseverance factor** | 136 | 17.89 | 18 | 3.54 | -0.387 | -0.347 | 9.00 | 24.00 | 0.005 |
| **Overall score** | 128 | 34.45 | 35 | 5.80 | -0.414 | -0.164 | 19.00 | 47.00 | 0.013 |

[a] Significance is given for the Kolmogorov–Smirnov test.

**Table 2. Descriptive statistics of the SEG scale for the pre-test**

| Scale name | n | m | me | sd | skewness | kurtosis | min | max | p[a] |
|---|---|---|---|---|---|---|---|---|---|
| **External anger** | 143 | 21.86 | 21 | 7.61 | 0.793 | 0.391 | 10 | 49 | <0.001 |
| **Inner anger** | 135 | 32.93 | 35 | 7.73 | -0.495 | -0.163 | 10 | 46 | 0.001 |

[a] Significance is given for the Kolmogorov–Smirnov test.

Similar parameters were generated for the second measurement (post-test). In this case, for the force factor, excessive "slenderness" of the distribution (leptokurtic distribution) was observed, with simultaneous left-skewness. On the other hand, the persistence factor is characterised by a shape close to normal. Similarly, the results for the SEG test do not deviate from the normal distribution either.

**Table 3. KompOs descriptive statistics for the post-test**

| Scale name | n | m | me | sd | skewness | kurtosis | min | max | p[a] |
|---|---|---|---|---|---|---|---|---|---|
| Force factor | 51 | 17.96 | 19 | 3.87 | -1.421 | 2.450 | 6 | 24 | <0.001 |
| Perseverance factor | 51 | 18.04 | 18 | 3.10 | -0.181 | -0.254 | 10 | 24 | 0.431 |
| Overall score | 47 | 36.11 | 37 | 5.85 | -0.747 | 0.447 | 22 | 46 | 0.015 |

[a] Significance for the Shapiro–Wilk test is reported.

**Table 4. Descriptive statistics of the SEG scale for the post-test**

| Scale name | n | m | me | sd | skewness | kurtosis | min | max | pa |
|---|---|---|---|---|---|---|---|---|---|
| External anger | 41 | 25.32 | 25 | 7.40 | 0.045 | -.680 | 11 | 41 | 0.701 |
| Inner anger | 37 | 33.19 | 33 | 5.80 | 0.250 | -.869 | 24 | 45 | 0.255 |

[a] Significance for the Shapiro–Wilk test is reported.

As part of the statistical description, a Pearson's r correlation matrix was also generated for all scales.

**Table 5. Correlation coefficients**

| Scale name | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| 1. Force factor (KompOs) | 1 | 0.305* | 0.812* | -0.304* | 0.428* |
| 2. Persistence factor (KompOs) | | 1 | 0.803* | -0.309* | 0.335* |
| 3. Overall score (KompOs) | | | 1 | -0.382* | 0.489* |
| 4. External anger (SEG) | | | | 1 | -0.587* |
| 5. Inner anger (SEG) | | | | 1 | |

* p < 0.01

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As a result of the correlations presented above, negative relationships can be observed between the KompOs test scales and external anger, with the strength of these relationships as moderate. An inverse relationship was observed in the case of positive associations between the KompOs test scales and inner anger. The higher the sense of competence was, the higher the inner anger was.

### Comparison of pre-test and post-test results

Although in some cases the shape of the distribution differed from the normal one, it was decided to use Student's parametric t-test. This decision was dictated by the robustness of this test in breaking the assumption of normal distribution in the case of larger samples (n>30). This property makes the result unbiased.

**Table 6. Dependent t-test for the KompOs scale**

| Scale name | Pre-test | | Post-test | | t | df | p |
|---|---|---|---|---|---|---|---|
| | m | sd | m | sd | | | |
| **Force factor** | 17.03 | 3.92 | 17.83 | 3.92 | -1.156 | 35 | NS |
| **Perseverance factor** | 18.33 | 3.74 | 18.39 | 3.40 | -0.096 | 35 | NS |
| **Overall score** | 35.38 | 6.50 | 36.26 | 6.29 | -0.838 | 33 | NS |

As a result of the analysis, it was concluded that the level of personal competence did not change as a result of participating in the programme. Both the overall result for the test and the results for individual scales (strength factor and perseverance factor) turned out to be statistically insignificant. It should be noted, however, that the analysis was conducted on a small sample of 34 to 36 observations, taking into account the huge loss of observations compared to the initial sample (during the pre-test period, the KompOs questionnaire was completely filled in by 128 to 139 people).

Student's t-test was also performed to compare the significance of differences between measurements for the SEG scale. The results are presented in Table 7.

**Table 7. Dependent t-test for the SEG scale**

| Scale name | Pre-test | | Post-test | | t | df | p |
|---|---|---|---|---|---|---|---|
| | m | sd | m | sd | | | |
| **External anger** | 21.14 | 5.85 | 25.27 | 6.96 | -3.526 | 36 | <0.001 |
| **Inner anger** | 32.94 | 7.59 | 32.64 | 5.49 | 0.268 | 32 | NS |

In light of these results, it can be concluded that there was an increase in external anger among the students participating in the programme. Compared to the pre-test (m = 21.14; sd = 5.85), in the post-test period (m = 25.27; sd = 6.96) this feature increased on average by 4.13 points. However, the explanation of this relationship is difficult due to the large loss of observations. However, in the case of inner anger, the average difference turned out to be statistically insignificant.

## Limitations of the research plan

In terms of the quantitative empirical material, the greatest barrier to drawing conclusions was the significant lack of data, which is presented in Table 8.

**Table 8. Number of observations in individual measurements for the KompOs test**

| Scale name | n pre-test | n post-test | n analysis |
|---|---|---|---|
| **Force factor** | 139 | 51 | 36 |
| **Perseverance factor** | 136 | 51 | 36 |
| **Overall score** | 128 | 47 | 34 |

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The greatest data loss was observed between the pre-test and the post-test. For the strength factor, the loss was 63.3%, which means that only 36.7% of students took the second measurement. In the case of the persistence factor, 37.5% of students took part in the post-test. On the other hand, for the general result, meaning the level of self-efficacy, 36.7% took the measurement made after the end of the intervention. Further data loss was observed at the stage of statistical inference. Student's t-test was used for repeated measurements, which required pairing of individual observations between the first and second measurements. In this case, the loss was also significant, which to some extent resulted from incorrectly conducting the research in one of the class divisions (providing students with the KompOs test only in the post-test).

A similar loss of data was observed in the case of the SEG test, which is presented in Table 9.

**Table 9. Number of observations in individual measurements for the SEG test**

| Scale name | n pre-test | n post-test | n analysis |
|---|---|---|---|
| **External anger** | 143 | 41 | 37 |
| **Inner anger** | 135 | 37 | 33 |

For the external anger scale, only 28.7% of the respondents took part in the second measurement, and for the inner anger scale it was 27.4%. In the case of the first scale, 90.2% of respondents were included in the analysis, whilst for the second scale it was 89.2%. With such significant data losses, statistical inference was burdened with a huge margin of error. For this reason, it would be necessary to determine what factors were decisive for the lack of a second measurement (post-test). Was this related to a significant part of the students opting out of the programme? Or was the intervention carried out, but for some reason the students did not complete the questionnaires? In addition, in future, teachers should be obliged to check the completeness of the questionnaires.

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## Conclusions and recommendations for practice

After analysing the data collected in the course of the evaluation using evaluation questionnaires addressed to teachers, trainers and parents of students involved in the programme, it can be concluded that the programme participants fully represented the target group of the programme. As a rule, the KOTWICA programme was implemented in schools according to the programme's design. In one of the schools, the programme was launched in December 2021; in other schools it was implemented from the second semester of the 2021/2022 school year.

The structure and content of the programme were not disturbed in any of the schools, although sometimes due to a lack of time, not all exercises were carried out according to plan. Another area of non-compliance with the assumptions of the programme was classes aimed at maintaining the effect of the programme, i.e. those involving children and parents, and the parents themselves. The organisers likely did not oversee these elements of the programme, which can be concluded from the parents' statements and the interview with the trainer.

The programme implementation plan included recruiting implementers, training them for three modules and (after each module) implementing it. Teams consisting of year 4 teachers (tutors) and a school specialist (at least one) took part in the recruitment process. The evaluation failed to identify whether and what activities the school specialists performed during the implementation of the programme.

An integral part of the programme was its evaluation, and although its course was planned in accordance with quality standards, both in relation to the evaluation of the process and the evaluation of the result, the evaluation study was not carried out as planned. Irregularities can be identified even at the stage of training with trainers, and as a consequence, the feedback of evaluation surveys, documentation of cooperation with parents and limited feedback of tests for evaluating the outcomes (SEG and KompOs) resulted in the practical impossibility of drawing conclusions about the effectiveness of the programme.

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The opinions of the organisers about the programme were definitely positive, as were the few opinions of parents (the indirect recipients). In terms of raising the students' knowledge, the programme responded to the expectations of parents and the organisers themselves, i.e. teachers and school specialists.

After analysing the answers on the questionnaires for teachers, it can undoubtedly be concluded that the support offered by the KOTWICA programme met their expectations. An in-depth analysis of the recruitment form, forms for trainers and questionnaires for teachers indicated the need to support teachers in their educational and preventive work in year 4. Positive evaluations of the programme, both at the stage of its presentation during training and at the stage of its implementation and evaluation, clearly indicated the adequacy of the support provided to them in this respect.

The results from the two research tools, the SEG and KompOs, in principle answer the research question regarding the sense of personal competence of year 4 primary school students, including the ability to understand, name and express emotions and recognise conflict situations and constructive conflict resolution strategies.

The results of the quantitative research did not clearly determine the effectiveness of the KOTWICA educational and preventive programme, which was largely due to the missing data. However, in order to understand the results, ranges were prepared taking into account the intensity of personal competences and ranges for the subscales of the strength factor and the perseverance factor. The overwhelming majority of the children in the study had a moderate or high score. This property may partly explain the lack of change in personal competences as a result of participating in the programme, as the initial level of self-efficacy was relatively high. Detailed data are presented in Table 10.

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**Table 10. Ranges for the KompOs scale**

| Scale name | *Low level* | | *Moderate level* | | *High level* | |
|---|---|---|---|---|---|---|
| | *n* | *%* | *n* | *%* | *n* | *%* |
| Force factor | 14 | 10 | 80 | 57.6 | 45 | 32.4 |
| Perseverance factor | 6 | 4.4 | 69 | 50.7 | 61 | 44.9 |
| Overall score | 6 | 4.7 | 70 | 54.7 | 52 | 40.6 |

Similarly, ranges were prepared taking into account the intensity of anger. In the case of external anger, most of the respondents obtained low or moderate results. Only 5.6% of the respondents obtained a high score. From this perspective, one can understand why the score for external anger was higher in the second measurement (post-test). The so-called “floor effect” may have played a role here, as there is a risk that if low values predominate, subsequent measurements may yield higher results, i.e. results closer to the population average. In contrast, for inner anger, the scores were more evenly distributed. Detailed data are presented in Table 11.

**Table 11. Ranges for the SEG scale**

| Scale name | *Low level* | | *Moderate level* | | *High level* | |
|---|---|---|---|---|---|---|
| | *n* | *%* | *n* | *%* | *n* | *%* |
| External anger | 89 | 62,2 | 46 | 32,2 | 8 | 5,6 |
| Inner anger | 14 | 10,4 | 71 | 52,6 | 50 | 37 |

The intensity of the individual variables in the first measurement and the large loss of data in the second made it much more difficult to demonstrate the degree of effectiveness of the KOTWICA programme. In this context, the sample size was estimated based on the parameters obtained from children who took part in both measurements. For the standard significance level ($\alpha = 0.05$) and a test power of 0.8, the sample should consist

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of 217 pairs of observations (for the force factor), i.e. people completing the questionnaires in both measurements. For the persistence factor, the sample should contain 26,038 pairs, and for the overall score, 389 pairs. Of course, these figures, especially with regard to the persistence factor, are difficult to achieve in practice. They only show that collecting a sample from the range of about 200–400 observations could give more satisfactory results on the effectiveness of this intervention.

The results allow us to assume that external anger increased significantly among the students participating in the programme. Compared to the pre-test (m = 21.14; sd = 5.85), this feature increased on average by 4.13 points in the post-test (m = 25.27; sd = 6.96). This relationship is difficult to explain unequivocally due to the large loss of data. In the case of inner anger, the average difference turned out to be statistically insignificant. Similar assumptions were made for the estimation of the sample size for the SEG test. In this case, only the value for a statistically insignificant scale, i.e. inner anger, was estimated. The differences between the means for the pre-test and post-test were so small that obtaining a statistically significant result would have required the inclusion of 4,530 pairs of observations.

Based on the collected data and their interpretation, the following recommendations can be made:

– Develop a coherent and repeatable training system for programme organisers, including materials and a manual for trainers, which will help unify the competences transferred to run the programme in each session of the training.
– During training sessions for organisers, emphasise the role of activities addressed to parents, motivate future organisers to encourage parents to actively participate in the programme and clearly define the tasks of the specialists involved in the programme and the scope of cooperation between them and the teachers.
– During training sessions, add an element related to the need to carry out an evaluation study and emphasise its usefulness for improving practice.

– Before the next implementation of the programme, refine the elements indicated in these recommendations. The justification for this recommendation is the fact that during the evaluation, incomplete implementation of the programme in accordance with its course was noted (deviations in the implementation of scenarios for students and marginal implementation of activities addressed to parents), which means that it is not possible to fully identify the reasons for the failure to achieve the objectives.
– Re-test in order to determine the effectiveness of the programme.
– Incorporate recommendations from previous programmes into subsequent programmes, conducting research in the experimental scheme (experimental group/control group with measurement before the start of the programme, immediately after its completion and 3 months after the end of the programme).

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# The Replacement of the Mentor/Educator Archetype With the Pseudo-Father Figure and in the Video Game Narrative

# La sustitución del arquetipo del mentor/educador por la figura seudopaterna en la narrativa del videojuego

(pp.213–230)

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## Abstract

**Research objectives (aims) and problem(s):** This manuscript investigates the reproduction of the classic figure of the mentor/educator and how, in recent times, it has transformed into the archetype of the circumstantial father in video games.

**Research methods and structure of the article:** Through the discourse analysis of the narrative of four popular video games: God of War, The Last of Us, Bioshock Infinite and The Walking Dead, we propose: identify the plot conflicts derived from the fact that the character is a father circumstantial and discern the identifying features of this pseudo-father figure from the

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structural patterns of the monomyth or hero's journey and relate its characteristics with those of the classic figure of the mentor/educator.

**Brief description of the context of the problem:** Do video games show educational models in their stories? The characters in the audiovisual narrative are a representation of the particular and universal dimension of the environment and the social context of their time. This conception of multicultural humanity allows us to understand the potential of the narrative elements that are developed in different stories and stories, such as archetypes or tropes. In the video game industry in particular, the advances in animation techniques and the community's interest in social and human issues have meant greater depth in the construction of characters and the inclusion of figures away from conventional patterns.

**Research findings and their impact on the development of educational sciences:** The findings allow us to conclude that there is a trend towards replacing the classic archetype of the mentor with the figure of the circumstantial father.

**Conclusions and/or recommendations:** This new character moves away from the classic pattern of Joseph Campbell's hero's journey and is more similar to the characteristics of contemporary antiheroic characters. However, this new archetype bases its teaching on resilience and sacrifice, a relevant fact as it is a figure designed to educate and instill values in young people.

***Keywords***: Archetype, mentor, educator, father figure, video game narrative

**Resumen**

**Objetivos (fines) y problema(s) de la investigación:** Este manuscrito investiga la reproducción de la clásica figura del mentor/educador y cómo, en los últimos tiempos, se transforma en el arquetipo del padre circunstancial en los videojuegos.

**Métodos de investigación y estructura del artículo:** Mediante el análisis del discurso de la narrativa de cuatro populares videojuegos: God of War, The Last of Us, Bioshock Infinite y The Walking Dead, se plantea identificar los conflictos de la trama derivados del hecho de que el personaje sea un padre

circunstancial y discernir los rasgos identificativos de esta figura seudopaterna a partir de los patrones estructurales del monomito o viaje del héroe y relacionar sus características con las de la clásica figura del mentor/educador.
**Problema de la investigación:** ¿Los videojuegos muestran modelos educativos en sus historias? Los personajes en la narrativa audiovisual son una representación de la dimensión particular y universal del entorno y contexto social de su tiempo. Esta concepción de la humanidad multicultural nos permite entender el potencial de los elementos narrativos que se desarrollan en las diferentes historias y relatos, como los arquetipos o los tropos. En la industria de los videojuegos en particular, los avances de las técnicas de animación y el interés de la comunidad por temas sociales y humanos, han supuesto una mayor profundidad en la construcción de los personajes y la inclusión de figuras alejadas de los patrones convencionales.
**Resultados de la investigación y su impacto en el desarrollo de las ciencias de la educación:** Los hallazgos permiten reflexionar sobre la posible existencia de una tendencia hacia la sustitución del arquetipo clásico del mentor por la figura del padre circunstancial.
**Conclusiones y/o recomendaciones:** Este nuevo personaje se aleja del patrón clásico del viaje del héroe de Joseph Campbell y se asemeja más a las características propias de los personajes antiheroicos contemporáneos. Finalmente, este nuevo arquetipo basa su enseñanza en la resiliencia y el sacrificio, un dato relevante en tanto que se trata de una figura destinada a educar e inculcar valores en los jóvenes.

***Palabras clave*:** Arquetipo, mentor, educador, figura paterna, narrativa de videojuegos

## Introducción

En el monomito del *viaje del héroe* descrito por Joseph Campbell en 1949 y en el que subyacen innumerables patrones narrativos de las historias modernas y contemporáneas, se describe el arquetipo jungiano de la sombra como una alegoría a aquella identidad del ser construida

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sobre la base de aquellos aspectos de la personalidad de cada individuo que se han ido mitigando durante su crecimiento, y que no son visibles a simple vista (Rohde-Brown, 2023). Por lo general, el ser humano busca corregir o mejorar su conducta mediante estos códigos educativos, éticos y cívicos para ser aceptado o para evitar caer en lo que Durkheim acuña anomia social o estado de disociación en el que no se siente parte de la estructura social, sino siente rechazo social y un perpetuo escepticismo ideológico. En este sentido, para Ayodele (2013) se trata del debilitamiento de las reglas de conducta y la frustración generalizada ante la incapacidad de alcanzar objetivos culturales.

En relación con la reproducción de las sombras, tanto en series como en películas se observa un creciente interés por personajes profundos, complejos, oscuros y ambivalentes, que suelen presentar intensos conflictos internos como traumas o vicios, se sienten desasociados o sufren problemas de salud mental (Martínez-Lucena y Cambra-Badii, 2020). Estos personajes son considerados antihéroes en tanto que presentan rasgos alejados de las virtudes heroicas (Sánchez-Escalonilla, 2002) y antiheroicos que los alejan del clásico del citado monomito o patrón narrativo (Cappello, 2007; Favaro, 2022; Freire-Sánchez y Vidal-Mestre, 2022; Frye, 2006; Gil y García, 2016; Sosa, 2015).

La industria del videojuego no está exenta de este cambio en el diseño de los personajes. Esta profundidad se ve reflejada en los arcos argumentales y un mayor peso en la trama (Martín-Núñez y Navarro-Remesal, 2021), resultando productos audiovisuales que prestan más atención a aspectos narrativos y a temas sociales (Gómez-Tarín, 2011), redundando en las opciones jugables y en la calidad global del videojuego (Fernández-Vara, 2015). La mayor complejidad de las capas narrativas también se ve proyectada en la expansión y profundidad de los universos transmedia a los que pertenecen (Selva-Ruiz, 2021), hecho que estimula el *fandom*, que tiene un papel activo y constante en el mismo desarrollo de la trama. Paralelamente, ha crecido el interés de la comunidad por aquellos videojuegos que abordan realidades y problemas sociales (Navarro-Remesal, 2016; Cuadrado-Alvarado, 2020) como *Life is Strange* (Dontnod Entertainment, 2015) que trata la ausencia de figuras paternas, el acoso sexual o el suicidio

(Martín-Núñez et al., 2016) o *Bully* (Rockstar Vancouver, 2006) que profundiza sobre el bullying. En algunos casos, como *Life is Strange 2* (Dontnod Entertainment, 2018), se exponen problemas como el racismo o la desigualdad social, lo que coincide con las hipótesis de Venegas y Moreno (2021) sobre el uso del videojuego como herramienta de crítica social. Otros, visibilizan enfermedades como la psicosis y la esquizofrenia, como sucede en *Hellblade Senua's Sacrifice* (Ninja Theory, 2017), mientras que *Night in the Woods* (Finji, 2018) o *Sea of Solitude* (Electronic Arts, 2019) centran su argumento en el padecimiento de la ansiedad y depresión.

Una de las principales características de esta nueva complejidad narrativa es el arquetipo del padre circunstancial, muy alejada de la dicotomía clásica del imaginario cinematográfico entre el padre heroico y el padre villano. El arquetipo de padre circunstancial es aquel que en primera instancia tiene un objetivo propio, generalmente egoísta, pero debido a circunstancias extraordinarias del argumento, en contra de su voluntad se verá forzado a adoptar esta figura paternal y paulatinamente erigirse como mentor/educador. Teniendo en cuenta que la figura paterna es clave en la educación de los jóvenes, resulta interesante detectar qué elementos educativos y qué valores se sustraen de esta relación paterno-filial tan representada en los últimos años en este sector. Por ello, este manuscrito se centra en su estudio puesto que, si bien las consideraciones narrativas en relación con los problemas sociales en el videojuego es un tema recurrente y el estudio de personajes antiheroicos es prolijo, no se han encontrado estudios que exploren los rasgos antiheroicos en la figura paterna circunstancial en el videojuego.

## Metodología

Por su complejidad interdisciplinar, se ha hecho un planteamiento metodológico basado en una investigación cualitativa en la que los investigadores se focalizan en un tema concreto y analizan los datos recogidos a partir de estudios de casos u observaciones (Ponce et al, 2022; Ríos, 2016). Concretamente, el manuscrito propone un análisis del contenido

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del videojuego desde la vertiente de la ludonarrativa, que se refiere a la relación entre el juego, el diseño y el relato en las narrativas digitales interactivas de los videojuegos (Roth et al., 2018). Este método se ha aplicado, combinando la observación y la interacción, en cuatro videojuegos de éxito donde el protagonista es un padre circunstancial. Asimismo, siguiendo la propuesta del estudio *Content Analysis in the Research Field of Video Games* de Wulf, Possler y Breuer (2022), se han tenido en cuenta otros elementos en cuenta como fuentes adyacentes al objeto de estudio procedente de plataformas de streaming como YouTube y el videoanálisis de especialistas del sector sobre dichos videojuegos.

Respecto a los referentes, se contrapone la evolución de los protagonistas a los pasos del viaje del héroe establecidos por Campbell en 1949 y actualizados por Vogler (2002) y, posteriormente, se analizan las características de los cuatro protagonistas para compararlas con las virtudes del héroe según Sánchez-Escalonilla (2002): sabiduría, fortaleza, autodominio y justicia. Paralelamente, se analiza la capacidad de transmisión de valores educativos y de la transferencia de la capacidad de resiliencia de padres a hijos, puesto que es una competencia que está intensamente vinculada al crecimiento humano, la educación y el desarrollo (Forés y Grané, 2008). Consecuentemente, se analiza el rol de la figura paterna circunstancial presente en los videojuegos con relación a los dilemas éticos (Zagal, 2009), los conflictos derivados de la trama y de la capacidad de elección del jugador (Fernández-Vara, 2020), elementos imprescindibles en el análisis y desarrollo del lenguaje del videojuego (Pérez-Latorre, 2012) entendiendo que el videojuego puede ser un poderoso camino para mejorar la comunicación y adaptar el lenguaje a la educación (Rodríguez-Ponga, 2021, p. 155).

En lo que respecta a los casos de estudio elegidos, son los cuatro videojuegos o sagas más exitosas de la última década que incluyen como protagonista el arquetipo de padre en la forma de padre circunstancial (Video Game Troopers, 2021). Estos personajes son Kratos de *God of War* (Sony Santa Monica, 2018), Lee Everett de *The Walking Dead* (Telltale, 2012), Joel Miller de *The Last of Us* (Naughty Dog, 2013) y Booker DeWitt de *Bioshock Infinite* (Irrational Games, 2013). A continuación se detallan los requisitos de inclusión de las obras analizadas:

**Tabla 1. Criterios y elementos de inclusión de los casos analizados**

| Tipología | Criterio |
|---|---|
| Tipo de obra audiovisual | Videojuego |
| Fecha | Publicado entre 2012 y 2022 |
| Elementos narrativos | Debe incluir un personaje protagonista que ejerza el rol de padre circunstancial y, por consiguiente, de un hijo o hija que (protagonista o no) ejerza el rol de hijo adoptado o circunstancial |
| Elementos jugables | El punto de vista de los jugadores es el punto de vista del padre adoptivo o circunstancial Fuente: Elaboración propia. |

Fuente: Elaboración propia.

En cuanto a la elección de los personajes de los citados videojuegos analizados, se propone el siguiente esquema para permitir seguir la lectura sin haber experimentado la narrativa de los casos tratados:

**Tabla 2. Resumen de los videojuegos y personajes escogidos**

| Videojuego | Figura paterna circunstancia | Figura filial | Parentesco de consanguinidad | Cumple con el arquetipo de padre circunstancial |
|---|---|---|---|---|
| *God of War* (Sony Santa Monica, 2018) | Kratos | Atreus | Sí | Sí, puesto que Kratos no quiere asumir el rol de padre; es la muerte de la madre la circunstancia que le obliga a hacerlo. |
| *The Last of Us* (Naughty Dog, 2013) | Joel | Ellie | No | Sí, al principio considera que Ellie es solo *mercancía* para conseguir sus objetivos. |
| *Bioshock Infinite* (Irrational Games, 2013) | Booker | Elizabeth | Sí, pero se desconoce inicialmente. | Sí, en un primer momento Booker ayuda a Elizabeth para poder cumplir su misión. |
| *The Walking Dead s1* (Telltale, 2012) | Lee | Clementine | No | Sí, son las circunstancias extraordinarias las que empujan a Lee a cuidar de Clementine. |

Fuente: Elaboración propia.

Como se puede observar, en algunos casos existe parentesco y en otros no, pero en todos ellos se produce un punto de unión muy característico en la construcción narrativa de este tipo de arquetipos: las circunstancias extraordinarias obligan a un personaje de mayor edad a cuidar

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de otro en contra de su voluntad y, en todos los casos, se acaba creando un vínculo afectivo muy intenso orientado hacia una relación donde el padre circunstancial también ejerce de mentor/educador.

## Resultados

Las historias de los hijos tienen en común la tragedia y la ausencia de las figuras materna y paterna reales, menos en Atreus y Elizabeth, en cuyos casos solo la figura materna está ausente. Asimismo, todos se encuentran en una situación límite y necesitan la irrupción de esta nueva figura de padre circunstancial para poder sobrevivir o conseguir su objetivo. En los cuatro casos requieren de la ayuda de ese personaje que deberá hacer las veces de protector, mentor/educador y guía; ambos aprenderán a valorarse y a superar los conflictos, aunque su conexión no está exenta de conflicto y desconfianza. Las primeras conexiones paterno filiales no se producen de forma natural en ninguna de las historias, sino que estas necesitan de un principio de protección y demostración de valor y altruismo por parte de la figura paterna para empezar a desarrollarse.

En los cuatro relatos se deja patente que no se trata de la tradicional historia heroica de la figura del padre que protege al hijo, sino todo lo contrario; las respectivas historias demuestran la independencia de los personajes hijos, que llegan incluso a asumir un rol protagonista y jugable en el videojuego en algunas etapas de la historia, como sucede con Clementine y con Ellie. Este tipo de elecciones y de alteración de los personajes jugables, son elementos trascendentales en el diseño de los videojuegos (Fernández-Vara, 2020) que pueden afectar a la capacidad decisiva de los usuarios (Navarro-Remesal, 2016). En cualquier caso, se aleja de las etapas evolutivas del monomito (Campbell, 2020) y suponen un sacrificio o una transfiguración de roles justo en el tramo final de las narraciones.

A continuación, se resumen las principales características que se han detectado en el análisis de los videojuegos señalados en la metodología:

**Tabla 3. Resumen de los videojuegos y personajes escogidos**

| Variable | Kratos (God of War) | Joel Miller (The Last of Us) | Booker DeWitt (Bioshock Infinite) | Lee Everett (Walking Dead) |
|---|---|---|---|---|
| Pasado oscuro del que huye | Engañado por los dioses del Olimpo, mató por error a su primera familia. | Tras la muerte de su verdadera hija, se convierte en contrabandista y mercenario muy violento. | Vendió a su propia hija para pagar deudas de juego. | Condenado por el asesinato del amante de su pareja. |
| Brutalidad | Es temido por su ira incontrolable y el caos extremo que desata. | Es capaz de cualquier cosa por proteger a Ellie. No muestra compasión ni escrúpulos. | La única forma que conoce para conseguir sus objetivos es la fuerza bruta. | Aunque intenta evitarla, todas sus decisiones acaban orientadas a la violencia. |
| Realismo e imperfección | Comete errores, su ira a menudo le lleva a situaciones difíciles. | Toma decisiones impulsivas y peligrosas. | Es impulsivo, se muestra como un personaje adicto al juego y al alcohol. | La narrativa se esfuerza en mostrar que nada es objetivamente bueno o malo y que cada decisión acarreará consecuencias. |
| Conflicto interno y Redención | Está atormentado por su pasado. Su redención pasa por no cometer los mismos errores con Atreus ni que él imite su conducta violenta. | Está atormentado por su pasado y quiere evitar perder a Ellie como perdió a su hija, esa sería su única redención. | Está atormentado por su pasado y por las decisiones que ha tomado. Salvar a Elizabeth es su redención. | Está atormentado por su pasado y ve en Clementine una posibilidad de redimirse. |
| Mentor/educador | Kratos enseña a Atreus a sobrevivir, luchar y forjar su personalidad para que no cometa los mismos errores que él cometió. | Joel enseña a Ellie a valerse de sí misma, a ser más precavida y escéptica con otros supervivientes, mientras va ejerciendo de protector. | Booker enseña a Elizabeth la crudeza del mundo, mientras le ayuda a canalizar sus poderes y a sobrevivir. | Lee enseña a Clementine a sobrevivir, a cuidarse, a tratar con otros y a ser fuerte y resiliente ante la adversidad. |
| Resiliencia y valores educativos | La resiliencia, el no rendirse y el intentar que Atreu no cometa sus mismos errores, pese a la adversidad, son los grandes valores educativos del personaje. | En el caso de Joel, es Ellie quien aporta los valores educativos y morales. Aunque Ellie es resiliente, Joel le inculca el no rendirse y poder sobreponerse a cualquier situación. | Booker le intenta enseñar a Elizabeth la importancia de ser resiliente en un mundo aún más inhóspito del que ella conocía. | Gracias a la perseverancia y su capacidad para no rendirse ante la adversidad, provoca que una niña vulnerable y con pocas posibilidades de sobrevivir, se convierta en una superviviente al holocausto zombi. |

Fuente: Elaboración propia.

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Otro de los aspectos comunes en este atípico patrón narrativo que se reproduce en las cuatro historias es la revelación de la figura del hijo como pieza esencial de la trama y pieza contraria a las motivaciones primarias del padre circunstancial. Este hecho genera un distanciamiento entre los dos personajes durante la aventura.

## Discusión

Al analizar los cuatro personajes que cumplen con la característica principal del *corpus* de estudio (ser padre circunstancial, independientemente de su vínculo sanguíneo), se puede apreciar que todos parten de un estado de represión o mitigación de su respectiva sombra jungiana (Jung, 2013). En este sentido, todos se esconden de la oscuridad de su pasado e intentan ocultar aquellos rasgos, conductas y hábitos que pueden considerarse condenables éticamente. Los cuatro personajes sufren un cambio radical en sus vidas, las circunstancias les obligan a erigirse como figuras paternas y no dudan en eclipsar ese lado oscuro del que reniegan. Otro aspecto común es que, de forma progresiva, verán surgir a la luz dichas sombras del pasado sin poder hacer nada para evitarlo. Este hecho da constancia al tropo del *pasado que siempre vuelve*; ya sea porque tendrán que usar la brutalidad y la violencia extrema y dar rienda suelta a esa oscuridad que habían reprimido con fuerza; o bien porque en su camino deberán aceptar parte de esa identidad formada por sombras para aceptarse a sí mismos. Esta aceptación propia es lo que, comúnmente, les habilitará para poder ejercer la auténtica figura paterna que el hijo y la propia historia requieren, siendo el hecho de ser padre uno de sus mayores miedos y el rasgo que había más escondido en su personalidad.

En todo momento los cuatro relatos muestran a un personaje que, lejos de ser bondadoso y vivir en su mundo en armonía (o, como mínimo, adaptado), es alguien muy alejado del estereotipo virtuoso (Sánchez-Escalonilla, 2002). De la misma forma que los cuatro potenciales padres comparten el huir de los crímenes y sucesos del pasado, los cuatro respectivos hijos también tienen en común una tragedia que los sitúa en el centro de la trama y en el camino de evolución de sus nuevas figuras paternas. Por ende, la tragedia pasa a ser un motor narrativo nuclear en el desarrollo de la aventura en videojuegos (Cuadrado-Alvarado, 2020). Además de la mitigación de las sombras, los cuatro padres circunstanciales cumplen con los principales rasgos o características antiheroicas contemporáneas (Freire-Sánchez y Vidal-Mestre, 2022; Gil y García, 2016; Sosa, 2015): rompen con el estereotipo clásico de héroe tradicional virtuoso, imponen un código ético propio sin atender a las leyes, ocultan un pasado que les atormentan, están cuestionados por su entorno, parten de motivaciones egoístas y muestran una personalidad contradictoria y en constante conflicto interno.

Por otra parte, para Sánchez-Escalonilla (2002), la virtud de un personaje heroico dependerá de su fortaleza, sabiduría, templanza, así como su sentido y respeto por la justicia. Estos elementos no pueden contemplarse en valores absolutos (es decir, cumple o no cumple), sino en valores relativos, respondiendo a cómo actúa un personaje en gran parte de su viaje o en el desarrollo global de su arco narrativo. Analizando la evolución de los cuatro personajes, se observa que todos cumplen con la virtud de la fortaleza puesto que son resilientes, no se rinden ante la adversidad ni retroceden ante el peligro, aunque estén en minoría o tengan pocas posibilidades de sobrevivir. Sin embargo, las otras tres virtudes no están muy presentes en la mayor parte de sus viajes narrativos. En primer lugar, ninguno puede ser considerado un personaje sabio, aunque sean inteligentes, pero cometen errores constantemente, no siempre escogen el camino correcto o la opción más coherente y son incapaces de desarrollar el rol paterno de forma natural, sino forzada. Tampoco poseen la capacidad de templanza, pues son irascibles, destructivos y, normalmente, se moverán de forma impulsiva cuando sean provocados o sembrarán el caos a su paso. Finalmente, no son personajes movidos por la justicia sino, contrariamente, huirán de la ley (Lee), no responderán ante la ley divina (Kratos) o actuarán al margen de las autoridades e instituciones (Joel y Booker). Por consiguiente, incumplen con las virtudes heroicas que deben poseer los héroes según Sánchez-Escalonilla, salvo por la fortaleza.

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En cuanto a las motivaciones, coinciden con una clara "dicotomía entre el objetivo o fin último del antihéroe y sus propósitos iniciales" (Freire-Sánchez y Vidal-Mestre, 2022, p. 251), en tanto que inician su viaje motivados por propósitos propios como puede ser la venganza, la búsqueda de la verdad o intereses materiales, aunque finalmente acaben anteponiendo el bienestar de los respectivos hijos al suyo o a sus intereses. En los casos analizados, ninguno de los cuatro protagonistas inicia su aventura de forma desinteresada y buscando el bien común. En el caso de Kratos, el espartano viene de una odisea marcada por su sed de venganza, aunque (re)inicia esta aventura como padre circunstancial de forma obligada. Por su parte, Lee inicia su aventura huyendo de la policía y, posteriormente, intentando sobrevivir. Mientras que Joel lo hace por motivos materiales y Booker ante la necesidad de buscar la verdad y cumplir un contrato que había contraído. Por consiguiente, estos personajes no inician la aventura por una motivación heroica sino por un propósito egoísta, sin embargo, todos acabarán anteponiendo los intereses de los hijos adoptivos a los suyos, aunque tengan que poner su propia vida en peligro o sacrificarse por ellos.

Es posible afirmar que ninguno de ellos sigue el patrón narrativo del *viaje del héroe campbelliano* y que, por contra, sí emprenden un camino antiheroico en tanto que estos cuatro personajes están lejos de entrar en la consideración de virtuosos y heroicos, sino que pueden considerarse antihéroes en prácticamente su totalidad. Como se puede apreciar en la tabla 3, sus principales rasgos corroboran esta antiheroicidad: empiezan su viaje por motivos egoístas; presentan un pasado que les atormenta; se encuentran inadaptados socialmente, pues su entorno les rechaza o les es hostil; tienen grandes conflictos internos, adicciones o ciertos problemas de salud mental; sus métodos son brutales e inquisitivos, aunque, finalmente, se encaminan a una causa mayor que ellos; erigiéndose como la única solución posible y anteponiendo la vida del hijo circunstancial a la suya. Del mismo modo, mantienen ciertos elementos comunes en la relación paternofilial y en cómo ésta evoluciona durante la trama, partiendo de un punto de unión totalmente forzado y circunstancial, un distanciamiento que va *in crescendo* y que precede a la confrontación

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y puesta en escena de secretos, por una de las partes o por las dos, y que provoca un cambio en la conducta paterna impulsando la generación de unos vínculos intensos que se vuelven inquebrantables hasta el punto en que el padre circunstancial ocupará el lugar de un padre convencional y se sacrificará por su hijo.

Finalmente, si la resiliencia es un factor relevante para el crecimiento, la educación y el desarrollo del ser humano (Forés y Grané, 2008) y se manifiesta intensamente en las situaciones de adversidad (Rojas, 2010) como las que están sometidos los protagonistas, es interesante ver que los cuatro comparten la transferencia de la capacidad resiliente de forma constante tanto en su discurso oral como en sus acciones. De esta forma, si atendemos al decálogo de resiliencia propuesto por Kazmierczak y Carlos-Buján (2022, pp. 49–61), se observa que los cuatro personajes cumplen con la mayoría de los pilares de la resiliencia, siendo especialmente claros el *centro interno de control*, los *motivos para luchar* y el *pensamiento positivo*. Por tanto, la ausencia de elementos pedagógicos y virtuosos en la construcción de estos cuatro personajes como arquetipo de mentor/educador, se intenta paliar con la transmisión de la resiliencia como principal motor narrativo del arco argumental de los personajes y, en segundo lugar, con el sacrificio de sus propias vidas que todos ellos realizan o están dispuestos a hacer por salvar la vida de su respectivo hijo/a.

## Conclusiones

Resulta relevante el hecho de que los cuatro videojuegos más representativos de la última década de todos cuantos presentan una narrativa donde el protagonista principal reproduce el rol o arquetipo de padre circunstancial, no sigan el patrón narrativo del monomito o viaje del héroe. Del mismo modo, también es interesante que sus narrativas rompan conceptualmente con la polarización clásica y maniqueísta entre el bien y el mal, proponiendo tonos claroscuros o semitonos, donde los villanos no son tan viles y los protagonistas no son ni ideales ni virtuosos y, por tanto, están alejados de lo que entendemos como héroes clásicos

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y tradicionales. El hecho de que este cambio se haya producido en la última década coincide con el avance en la animación de los personajes, la dirección artística, la técnica y la composición que permiten una mayor profundidad en los aspectos narrativos que influyen directamente en la construcción de los personajes, así como posibilitan potenciar el realismo y la dramatización. Esta conjugación de hechos ayuda a la empatización de los usuarios para con estos personajes, con su sufrimiento, sus dolencias y su imperfección antiheroica. Asimismo, también es una consecuencia directa del interés de la comunidad *gamer* por ver representados y tratados temas sociales y psicológicos mediante los protagonistas de los videojuegos y sentir que forman parte de una historia que no es lineal y estereotipada, sino que tiene la capacidad para representar metafórica y alegóricamente aspectos de la realidad y del conflicto humano donde ellos puedan ser parte activa y decisiva. En este sentido, la evolución de una parte del sector del videojuego se encamina a la profundidad y complejidad narrativa, incluso alejándose de los grandes patrones literarios, arquetipos y relatos clásicos, y esta profundidad responde a su vez a intereses, demandas, gustos y tendencias de los jugadores y jugadoras.

¿Pueden considerarse, por tanto, mentores/educadores idóneos para el proceso de crecimiento y aprendizaje de los hijos o hijas? En lo concerniente a la actual reproducción de la figura del padre circunstancial, que se ha considerado aquí como antiheroico, es necesario resaltar que, aunque las dinámicas transversales, coetáneas y múltiples no conllevan una paridad universal ni a un entendimiento uniforme de la concepción moral y social de la relación paternofilial estudiada, sí existe cierto universalismo significante del que se sustraen elementos comunes a los casos analizados. Estos elementos, una vez abstraídos del paradigma del medio videojuego, también se reproducen en otras manifestaciones artísticas como, por ejemplo, la literatura y cinematografía contemporáneas. Por consiguiente, cabe preguntarse si este nuevo arquetipo del parte circunstancial que, por consecuencias extraordinarias ajenas a él, acaba siendo una figura que ejerce los roles de mentor, educador y protector, es positiva para la transmisión de valores educativos y pedagógicos y, paralelamente, si puede ser idónea únicamente para la transmisión de la resiliencia como principal núcleo narrativo del *leitmotiv* de los citados personajes. Por otro lado, será interesante observar las tendencias venideras en la industria y comprobar así si se está produciendo la irrupción de un nuevo y categórico rol en el diseño y construcción de personajes ficticios desplegados en diferentes narraciones y mundos transversales o, por el contrario, este fenómeno se antoja fruto de la mímesis y el *imitatio* ante el éxito de las obras estudiadas y la favorable acogida que ha suscitado en el público en general.

De esta manera, se abren nuevas líneas de estudio que podrían responder a la dicotomía presentada en el sector del videojuego, pero que también se está produciendo al unísono en series y películas como *The Mandalorian* (Disney, 2020-actualidad) o *The Samaritan* (Amazon Prime, 2022), entre otras. En este sentido, sería interesante proseguir la investigación sobre esta nueva figura del padre circunstancial y los elementos pedagógicos y educativos que la conforman en los distintos ámbitos para poder observar si la representación responde a una inquietud sobre las nuevas estructuras familiares o bien a las dificultades de integrar y ejercer la paternidad en un medio que se caracteriza por la dirección de arte, las mecánicas jugables y las construcciones lúdico-narrativas.

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# Dispositional Coping Strategies as Factors Explaining Various Aspects of Teachers' Well-being

(pp. 231–249)

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**Abstract**

**Objectives of the research**: The aim of the study was to explain various aspects of teachers' well-being through their ability to use personal resources, such as strategies for coping with stress.

**Research methods**: The research survey was completed by 382 teachers from the Lublin Voivodeship. An original tool, the Teacher's Well-Being Scale (TWS), with satisfactory psychometric properties, was used. Additionally, the Satisfaction with Life Scale (SWLS) and the Brief COPE Inventory were used. To explain the relationship between various dimensions of teachers' well-being and coping strategies as an explanatory variable, a canonical analysis was carried out.

**A short description of the context of the issue:** The role and profession of a teacher are associated with numerous stressors and difficult situations that may impact teachers' well-being.

**Research findings:** Teachers' active approach to dealing with difficult and problematic situations and avoiding the strategy of denial promotes well-being related to the their work (especially in the dimensions of social relations

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and self-fulfillment). It is also important for life satisfaction in areas unrelated to the professional role of teachers.

Coping strategies based on acceptance and seeking social support promote life satisfaction and professional well-being among teachers, who note satisfactory conditions at school for work and professional and personal development.

**Conclusions and/or recommendations:** Research showing links between coping skills and the well-being of teachers and their students would be interesting. The current research results on teachers' well-being explained by their self-efficacy and coping skills seem satisfactory. However, they do not correspond with the disturbingly limited research on student well-being, school satisfaction, and the results of teachers' work.

***Keywords*:** well-being, teachers, coping, health, life satisfaction

## Introduction

The concept of well-being is rooted in the World Health Organization's (1948) definition of health. It is understood as a synonym for feeling well in various spheres of human life: physical, mental, and social. In the social sciences, research into well-being began several decades later. Initially, psychological well-being was considered synonymous with happiness (Diener et al., 1985). Over time, the study of well-being has evolved into two strands: hedonic (Diener et al., 2002; Seligman, 2002, 2012) and eudaimonistic (Ryan & Deci, 2001; Ryff, 1989; Ryff & Keyes, 1995; Waterman, 2010). Some concepts, such as the onion theory of happiness, are an attempt to combine hedonistic and eudaimonistic well-being (Czapiński, 2004).

Research into teachers' well-being has also been conducted (e.g., Acton & Glasgow, 2015; Benevene et al., 2020; van Horn et al., 2004; Spilt et al., 2011; Turner & Thielking, 2019). Swiss researchers Hascher and Waber (2021) analyzed empirical data on teachers' well-being in scientific publications from 2000 to 2019. In 98 research projects carried out in over

40 countries, the authors drew attention to a variety of theoretical assumptions underlying the definition of teachers' well-being. In Poland, research was undertaken on the determinants of teachers' well-being based on the Scale of Factors Enhancing Teachers' Occupational Wellbeing (Woynarowska-Sołdan & Węziak-Białowolska, 2012). This tool does not diagnose the construct of teacher well-being itself, but a group of its possible correlates. Teachers' well-being should be analyzed in the broader school context in connection with students' well-being. This challenge was taken up by researchers from Finland, led by Kanou, who adapted Allardt's (1973, 2003) concept of well-being to the school environment. They developed tools for assessing the school well-being of students and teachers, including four dimensions of well-being: school relationships (loving), school conditions (having), self-actualization (being), and health (Konu & Rimpela, 2002; Konu et al., 2010).

The role and profession of a teacher are associated with numerous stressors and difficult situations that may impact teachers' well-being. Therefore, dispositional coping – a strategy for reacting to stressful and problematic situations – is important (Kwiatkowski, 2018). The variety of strategies available to an individual and the individual's ability to adapt them to the current situation increase the possibility of using them effectively. Coping is an important resource for teachers' well-being. Generally, confrontational strategies are believed to be more effective than avoidance coping. However, in many difficult situations that teachers deal with, strategies such as avoidance or denial can be perceived as functional (Juczyński & Ogińska-Bulik, 2012). Research among primary school teachers showed that 69.9% of respondents experienced work-related stress and 36% experienced burnout (Ozoemena et al., 2021). Teachers' stress can be caused by rapid changes in the education system, being subject to constant evaluation, low social status, dissatisfaction with remuneration, excessive workload – including non-teaching duties related to professional development – gaining subsequent levels of professional promotion, bureaucratization, and administrative work (Cîrligeanu, 2017). Qualitative research referring to Bandura's social cognitive theory identified the main coping strategies used by teachers: engaging in one's work, regaining

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strength and energy, reducing workload, creating one's work environment, and seeking support. Researchers emphasized that the stress and emotional exhaustion accompanying a teacher's work lead to a deterioration in health. Despite using coping strategies, teachers see few opportunities to control important aspects of their professional work, which means that their efforts are often ineffective (Skaalvik & Skaalvik, 2021). Many current research reports focus on the relationship between coping and well-being of teachers during the pandemic. Among their coping strategies, respondents listed social support from family and friends, physical activity, healthy eating, and recreational activities (including reading, watching movies, time with family, and devoting time to hobbies). Research using the Brief COPE questionnaire showed that teachers most often used positive reappraisal, active coping, and planning (Rajesh et al., 2022).

## Research goal

The aim of the research was to explain various aspects of teachers' subjective well-being through their ability to use personal resources, such as strategies for coping with stress and problems of everyday life, including those related to professional work.

## Data and method

The method of diagnostic survey was used. An original tool was designed, the Teacher's Well-Being Scale (TWS), distinguishing four dimensions of subjective well-being in an exploratory factor analysis and referring to Allardt's concept of well-being adapted to the study of school well-being by Konou and colleagues (2010).

The construct of teachers' well-being is understood here as an attempt to capture the relationship between teachers' well-being (whose dimensions include school relationships, health/vigor, school conditions,

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and self-fulfillment), and life satisfaction (understood as general mental well-being independent of the teacher's work). Diener and colleagues' Satisfaction with Life Scale (SWLS), adapted by Juczyński (2012), was used in this study. It is a short, one-dimensional, five-item tool whose result determines general life satisfaction.

The Teachers' Well-Being Scale (TWS) consists of 16 items in the form of statements which respondents rate on a 5-point Likert scale. The tool has a four-factor structure reflecting the four dimensions of teacher well-being: Factor I: school relationships (four items, e.g., "I can communicate well with my students"); Factor II: health/vigor (three items, e.g., "I wake up in the morning feeling refreshed and have a lot of energy to work all day"); Factor III: school conditions (five items, e.g., "My school is a friendly place to work for me and I like its atmosphere"); and Factor IV: self-fulfillment (four items, e.g., "Working as a teacher is a source of satisfaction for me; it makes me feel happy and fulfilled"). The tool has satisfactory psychometric properties (total explained variance: 55.24%; reliability: $\alpha = 0.811$, $\alpha_{fI} = 0.732$, $\alpha_{fII} = 0.697$, $\alpha_{fIII} = 0.639$, and $\alpha_{fIV} = 0.617$).

Carver's Brief COPE inventory, adapted by Juczyński and Ogińska--Bulik (2012), was used to study dispositional coping, or the assessment of typical ways of reacting and feeling in situations of severe stress.

### Research procedure and characteristics of the sample

The online survey was conducted in November 2022 using Google Forms with 382 teachers from the Lublin Voivodeship. The respondents' age ranged from 21 to 60 years (M = 37.2; M = 37, SD = 10.67). Other information about the respondents is summarized in Table 1.

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**Table 1. Information About the Sample (N=382)**

| Sample characteristics | N | % |
|---|---|---|
| Gender | | |
| Female | 316 | 82.7 |
| Male | 66 | 17.3 |
| Place of residence | | |
| City | 244 | 63.9 |
| Countryside | 138 | 36.1 |
| Workplace | | |
| City | 265 | 69.4 |
| Countryside | 117 | 30.6 |
| I work as a: | | |
| Special educator | 23 | 6.0 |
| Kindergarten teacher | 50 | 13.1 |
| Early childhood education teacher | 103 | 27.0 |
| After-school teacher, librarian | 7 | 1.8 |
| High school teacher | 46 | 12.0 |
| Teacher of grades 4–8 | 153 | 40.1 |
| Education | | |
| Bachelor's degree | 58 | 15.2 |
| Master's degree | 324 | 84.8 |
| Level of professional development | | |
| Junior teacher | 57 | 14.9 |
| Contract teacher | 51 | 13.4 |
| Appointed teacher | 125 | 32.7 |
| Certified teacher | 125 | 32.7 |
| No level of professional development | 24 | 6.3 |
| Financial situation | | |
| Very good | 37 | 9.7 |
| Good | 191 | 50.0 |
| Average | 132 | 34.6 |
| Poor | 22 | 5.8 |

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An analysis of the data presented in Table 1 shows that the sample is dominated by women (82.7%). As both the place of residence and the place of work, the respondents statistically significantly more often indicated the city than the countryside. The largest groups were people working in primary schools as teachers of grades 4–8 (40%) or early childhood education teachers (27%). Nearly 85% of the respondents hold a master's degree and about 65% are appointed or certified teachers. Half of the respondents assessed their financial situation as good, and one third as average.

Table 2 summarizes the descriptive statistics for the variables, including life satisfaction (SWLS total score), teacher well-being (TWS total score) and its four dimensions, as well as the 14 coping strategies constituting the Brief COPE subscales.

**Table 2. Descriptive Statistics of Teachers' Well-Being, Life Satisfaction, and Coping Strategies**

| | N | Scores | Score range of the subscale | M | SD | Skewness | Kurtosis |
|---|---|---|---|---|---|---|---|
| Satisfaction, total score (SWLS) | 382 | 6–35 | 5–35 | 20.6597 | 6.29997 | -0.114 | -0.477 |
| Well-being, total score (TWS) | 382 | 36–80 | 16–80 | 53.9974 | 4.67500 | 0.182 | 2.780 |
| School relationships, Factor I (TWS) | 382 | 8–20 | 4–20 | 14.1361 | 1.57817 | -0.669 | 0.979 |
| Health/vigor, Factor II (TWS) | 382 | 3–15 | 3–15 | 9.3228 | 2.84757 | 0.133 | -0.472 |
| School conditions, Factor III (TWS) | 382 | 5–25 | 5–25 | 15.6535 | 3.94844 | 0.247 | -0.261 |
| Self-fulfillment, Factor IV (TWS) | 382 | 8–20 | 4–20 | 16.2388 | 2.36157 | -0.375 | -0.272 |
| Planning (Brief COPE) | 382 | 1–6 | 0–6 | 3.6859 | 1.28212 | 0.010 | -0.372 |
| Positive reframing (Brief COPE) | 382 | 0–6 | 0–6 | 3.1859 | 1.43430 | 0.046 | -0.562 |
| Active coping (Brief COPE) | 382 | 1–6 | 0–6 | 3.8953 | 1.24210 | -0.122 | -0.523 |
| Acceptance (Brief COPE) | 382 | 0–6 | 0–6 | 3.8168 | 1.29523 | -0.304 | 0.197 |
| Humor (Brief COPE) | 382 | 0–6 | 0–6 | 2.1545 | 1.25270 | 0.374 | 0.018 |
| Turning to religion (Brief COPE) | 382 | 0–6 | 0–6 | 1.9136 | 1.38244 | 0.455 | -0.367 |
| Seeking emotional support (Brief COPE) | 382 | 0–6 | 0–6 | 3.3298 | 1.46386 | 0.066 | -0.647 |
| Seeking instrumental support (Brief COPE) | 382 | 0–6 | 0–6 | 3.3560 | 1.58369 | -0.208 | -0.532 |
| Self-distraction (Brief COPE) | 382 | 0–6 | 0–6 | 2.7775 | 1.45455 | 0.047 | -0.480 |

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| | N | Scores | Score range of the subscale | M | SD | Skewness | Kurtosis |
|---|---|---|---|---|---|---|---|
| Denial (Brief COPE) | 382 | 0–5 | 0–6 | 1.1675 | 1.14015 | 0.981 | 0.752 |
| Venting (Brief COPE) | 382 | 0–5 | 0–6 | 1.8665 | 1.23615 | 0.122 | -0.944 |
| Substance use (Brief COPE) | 382 | 0–5 | 0–6 | 0.9529 | 1.11674 | 0.798 | -0.560 |
| Refraining from action (Brief COPE) | 382 | 0–5 | 0–6 | 1.5733 | 1.16539 | 0.502 | -0.533 |
| Self-blame (Brief COPE) | 382 | 0–6 | 0–6 | 2.4686 | 1.47696 | 0.435 | -0.466 |

An analysis of the data presented in Table 2 shows that score distributions for the variables were close to a normal distribution (only the value of kurtosis for the total TWS score was higher). Among the coping strategies, the highest mean scores were observed for active coping, acceptance and planning, and strategies related to seeking support. The lowest average scores were recorded for the strategy of using psychoactive substances. In conclusion, the surveyed teachers more often choose confrontational, task-oriented coping strategies and refrained from avoidance coping.

To better understand the well-being of the respondents, an analysis of the relationship between the following elements was carried out: life satisfaction (SWLS), teacher well-being (TWS total score), school relations (TWS Factor I), health/vigor (TWS Factor II), school conditions (TWS Factor III), and self-fulfillment (TWS Factor IV). Pearson's r correlation coefficients are listed in Table 3.

**Table 3. Structure of the Well-Being of the Respondents – Pearson's r Correlations**

| Dimensions of teacher well-being, Pearson's r correlation coefficient | Satis-faction | Well-being, total score | TWS Factor I, school relationships | TWS Factor II, health/vigor | TWS Factor III, school conditions | TWS Factor IV, self-fulfillment |
|---|---|---|---|---|---|---|
| Satisfaction | 1 | | | | | |
| Well-being, total score | 0.575** | 1 | | | | |
| TWS Factor I, school relationships | 0.319** | 0.481** | 1 | | | |
| TWS Factor II, health/vigor | 0.263** | 0.517** | -0.019 | 1 | | |
| TWS Factor III, school conditions | 0.306** | 0.655** | 0.065 | 0.273** | 1 | |
| TWS Factor IV, self-fulfillment | 0.382** | 0.534** | 0.234** | -0.044 | -0.058 | 1 |

**Correlations significant at p = 0.01

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The analysis of the data presented in Table 3 shows that life satisfaction was highly correlated with teachers' school well-being (TWS total score) and all its dimensions. The results in the TWS subscales partially correlated with each other. The well-being related to school relationships (Factor I) among the teachers shows a statistically significant positive relationship with well-being in the area of self-fulfillment (Factor IV). Self-assessment of physical health and life energy (Factor II) significantly correlated with the subjective assessment of school conditions, which are the source of teachers' well-being (Factor III). School relationships, health, school conditions, and self-fulfillment are not only dimensions of teachers' well-being at school, but also the source of teachers' life satisfaction. Teachers' professional well-being is an important element of their life satisfaction.

The literature on the subject presents various models of the relationship between teachers' coping strategies and their well-being. For example, Parker and Martin (2009) showed that direct coping strategies are better predictors of teachers' well-being than palliative coping strategies, which often work in the short term or their effect is only indirect or very delayed. At the same time, cognitive strategies are more conducive to teachers' well-being and engagement in their work than behavioral strategies. To check the relationship between various dimensions of teachers' well-being and coping strategies, a correlational analysis was conducted. Pearson's r correlation coefficients are presented in Table 4.

**Table 4. Teachers' Well-Being and Coping Strategies – Pearson's r Correlations**

| Dimensions of teacher well-being and coping strategies, Pearson's r correlation coefficient | Well-being, total score | Factor I, school relationships | Factor II, health/vigor | Factor III, school conditions | Factor IV, self-fulfillment | Satis-faction |
|---|---|---|---|---|---|---|
| Active coping | 0.338*** | 0.155** | 0.176*** | 0.181*** | 0.226*** | 0.256*** |
| Planning | 0.219*** | 0.141** | 0.125* | 0.090 | 0.139** | 0.191*** |
| Positive reframing | 0.245*** | 0.119* | 0.046 | 0.131 | 0.224*** | 0.197*** |
| Acceptance | 0.189*** | 0.161** | 0.013 | 0.051 | 0.197*** | 0.298*** |
| Humor | 0.046 | 0.038 | 0.040 | 0.013 | 0.028 | 0.174*** |
| Turning to religion | -0.124* | -0.039 | 0.001 | -0.045 | -0.168*** | -0.079 |
| Seeking emotional support | -0.159** | -0.071 | -0.175*** | -0.085 | -0.038 | 0.037 |

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| Dimensions of teacher well-being and coping strategies, Pearson's r correlation coefficient | Well-being, total score | Factor I, school relationships | Factor II, health/vigor | Factor III, school conditions | Factor IV, self-fulfillment | Satis-faction |
|---|---|---|---|---|---|---|
| Seeking instrumental support | 0.012 | 0.124* | -0.046 | -0.057 | 0.042 | 0.188*** |
| Self-distraction | 0.060 | 0.002 | 0.074 | 0.083 | -0.034 | 0.043 |
| Denial | -0.347*** | -0.232*** | -0.117* | -0.173*** | -0.241*** | -0.273*** |
| Venting | -0.259*** | -0.055 | -0.099 | -0.223*** | -0.147** | -0.117* |
| Substance use | -0.163** | -0.124* | -0.018 | -0.009 | -0.216*** | -0.096 |
| Refraining from action | -0.032 | -0.034 | 0.019 | 0.015 | -0.070 | -0.038 |
| Self-blame | -0.212*** | -0.112* | -0.097 | -0.074 | -0.183*** | -0.115* |

* Correlations significant at p = 0.05
** Correlations significant at p = 0.01
*** Correlations significant at p = 0.001

The analysis of the data presented in Table 4 shows that task-oriented strategies based on problem-solving and the acceptance strategy were highly positively correlated with both teachers' well-being and life satisfaction. At the same time, data shows statistically significant negative relationships between teachers' well-being and life satisfaction as well as some strategies based on emotions and avoidance. Less statistically significant relationships were visible between coping strategies and each of the four dimensions of teacher well-being. However, interestingly, only active coping correlated highly positively, and denial negatively, with each of the four factors of teachers' school well-being. Moreover, seeking emotional support had a statistically significant negative relationship with only the dimension of health-related well-being.

Correlational analysis using Pearson's r coefficient identified statistically significant relationships within the structure of well-being among the respondents (see Table 3), as well as between its elements and coping strategies (see Table 4). To explain the relationship between different dimensions of teachers' well-being and coping strategies as an explanatory variable, a canonical analysis was performed. This procedure is a generalization of linear multiple regression with two sets of variables (it is used to examine relationships between two sets of variables). Two sets of canonical variables were created. The first set of explained variables was

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the teachers' overall well-being, life satisfaction, and four dimensions of teacher well-being (relationships, health, school conditions, and self-fulfillment). The second set of canonical variables were the coping strategies (14 variables from the Brief COPE inventory). Two pairs of highly statistically significant canonical variables were obtained with satisfactory canonical correlation coefficients (Rc=0.549 and Rc=0.385) and a quite low proportion of the variance of Set I (well-being) explained by Set II (coping). The results of the canonical analysis are summarized in Table 5.

**Table 5. Teachers' Well-Being and Coping – Results of the Canonical Analysis**

| | Criteria/predictors | RcI | RcII |
|---|---|---|---|
| Well-being | Teacher's well-being, total score | -0.958 | 0.193 |
| | Satisfaction | -0.670 | -0.601 |
| | Factor I, relationships | -0.535 | -0.272 |
| | Factor II, health | -0.034 | -0.312 |
| | Factor III, school conditions | 0.095 | -0.423 |
| | Factor IV, self-fulfillment | -0.704 | -0.139 |
| | Rc | 0.595 | 0.385 |
| | Λ (Wilks' lambda) | 0.482 | 0.747 |
| | F | 3.349 | 1.672 |
| | P | <0.001 | 0.001 |
| | Rd (in %) | 14.7 | |
| | Rd/c (in %) | 12.8 | 1.9 |
| Coping | Active coping | -0.581 | -0.024 |
| | Planning | -0.389 | -0.105 |
| | Positive reframing | -0.452 | -0.072 |
| | Acceptance | -0.414 | -0.542 |
| | Humor | -0.113 | -0.385 |
| | Turning to religion | 0.252 | -0.024 |
| | Seeking emotional support | 0.214 | -0.475 |
| | Seeking instrumental support | -0.088 | -0.654 |

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| | Criteria/predictors | RcI | RcII |
|---|---|---|---|
| Coping | Self-distraction | -0.073 | 0.096 |
| | Denial | 0.609 | 0.139 |
| | Venting | 0.412 | -0.320 |
| | Substance use | 0.331 | 0.063 |
| | Refraining from action | 0.085 | 0.101 |
| | Self-blame | 0.378 | -0.076 |

The analysis of canonical loadings shows that in the first pair of canonical variables, teachers' well-being (total score), life satisfaction, and well-being related to school relationships and self-fulfillment have the greatest contribution among the variables from Set 1. These variables related to areas of well-being can be explained by the use of active coping strategies and refraining from the strategy of denial. To conclude, an active, task-oriented approach to teachers' coping with difficult and problematic situations promotes well-being related to the teacher's work (especially in the dimensions of social relations and self-fulfillment). It is also important for life satisfaction in areas unrelated to the teacher's professional role.

The analysis of loadings in the second pair of canonical variables suggests that life satisfaction and well-being associated with a positive assessment of school conditions are explained by coping strategies such as acceptance and seeking both emotional and instrumental support. Presumably, the attitude of acceptance and the social support one receives contribute to life satisfaction and professional well-being of teachers, who can perceive satisfactory conditions at school for work and for professional and personal development. Social acceptance and support probably contribute to well-being for teachers who focus more on the positive aspects of their work rather than the inconveniences related to, for example, the underfinancing of the education system.

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## Discussion

Scientists in many countries have analyzed teachers' strategies for coping with stress and problems in the context of well-being. Despite sociocultural and economic differences, a teacher's work is associated with many difficulties that require them to develop ways to maintain their well-being, which is conducive to effective teaching. For the sake of their well-being, teachers seek support from family, friends, and colleagues (as coping strategies). They also expect professional psychological support, undertake personal development, and try to avoid situations and people that generate stress. Common coping strategies are spending free time in nature, relaxing, and eating healthily. Sometimes it is even necessary to change jobs or use pharmacological agents (Cîrligeanu, 2017). Analyzing the coping strategies of primary school teachers, researchers found that 76.7% used dysfunctional strategies, while only 42.3% used problem-focused strategies (Ozoemena et al., 2021). Kwiatkowski (2018) demonstrated the advantage of task-oriented coping over emotional and avoidance coping among teachers to manage stress, and thus increase well-being. In the current research, teachers most often showed a readiness for active coping strategies, acceptance, planning, and seeking support. Therefore, task-oriented strategies (active coping and planning) predominated among the sample. Acceptance is also an important approach, i.e. "accepting the situation and learning how to live with it" (Juczyński & Ogińska-Bulik, 2012, p. 55). Although acceptance expresses a lack of active coping, it is a functional behavior and can be treated as the opposite of denial. Support-seeking strategies may be related to both active coping (looking for instrumental support, i.e., help/advice from others) and emotional coping (seeking emotional support, i.e., reassurance and understanding). A common element for both support-seeking strategies is pursuing a relationship with another person.

Austin et al. (2005) pointed out that the level of stress and health problems correlate positively with avoidance strategies and negatively with seeking social support, active coping, and planning. In this study, the level of stress and health problems were not examined, but only that

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of subjective well-being in its various dimensions. Nevertheless, the data showed that strategies based on active coping correlated highly positively and avoidance strategies negatively with teachers' well-being. Moreover, in the first pair of canonical variables, teachers' life satisfaction and well-being related to school relationships and self-fulfillment were explained by the use of active coping strategies and avoidance of the strategy of denial. The active approach to coping showed no relationship with subjective well-being in terms of physical health, life energy, or vigor. It would be interesting to pose and verify the hypothesis that severe teacher stress and serious health problems lead to avoidance strategies, while moderate or low levels of stress and relatively good health contribute to active, task-oriented coping.

Parker and Martin (2009) recognized the importance of "everyday resilience" (buoyancy) as a mediator of the relationship between coping strategies and teachers' well-being. Buoyancy is teachers' ability to adapt to difficult situations that they experience in everyday life at school. This approach is proactive rather than reactive and is a "positive version" of resilience. Everyday resilience was not analyzed as a variable in this study. However, in the second pair of canonical variables, a relationship was noted between the coping strategy consisting of acceptance and seeking support and well-being in the dimension of life satisfaction and satisfaction with school conditions. The attitude of acceptance and openness to social support is an expression of adaptation to the conditions of everyday life at school. It does not have to mean passive acceptance of difficulties, but learning to live with them every day with the support of colleagues (head teachers and fellow teachers), students, and their parents.

Research into teachers' coping strategies in the context of their well-being suggests taking practical preventive and interventional actions. Despite numerous studies on teachers' health, which result in theoretical models and programs for dealing with stress and health problems in this professional group, the fact that teachers do not know about such programs is surprising. The variety of theories for developing teachers' coping strategies and of research reports evaluating preventive and interventive projects does not translate into practical activities for

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supporting teachers in dealing with stress and health problems (Blumenthal & Blumenthal, 2021).

Current research on coping strategies as a factor of teachers' well-being, including this one, will hopefully encourage researchers to continue and take up topics that have been omitted or insufficiently investigated:

1. In research on the relationship between coping strategies and teachers' well-being, it is worth considering mediating variables (both mediators and moderators), such as resilience, self-assessment of professional competencies, personality traits, cultural differences, and the related teacher status (Klassen & Chiu, 2010).
2. It seems interesting to build a construct of a teacher's well-being, including the well-being–ill-being continuum. Research to date has focused either on the positive dimension of well-being (most often mental well-being in the hedonic or eudaimonic dimension) or on teachers' health problems (stress, burnout, or occupational diseases) (Hidalgo-Andrade et al., 2021; Ortan et al., 2021).
3. It is worth conducting research that demonstrates the connections between coping skills and the well-being of teachers and their students. Our results on teacher's well-being explained by their self-efficacy and coping skills seem satisfactory, but they do not correspond with the disturbingly limited research on student well-being, school satisfaction, and the results of teachers' work (Aelterman et al., 2007; Engels et al., 2004; Matteucci et al., 2017; McCallum & Price 2015).

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# Miscellaneous Articles

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# Some Challenges for the Teaching Profession

(pp. 253–271)

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**Abstract**

**Purpose and problems:** The purpose of this article is to investigate some challenges for working teachers and to present selected issues that are not always known and understood, but which concern one of the key problems of education: the profession of teaching.

**Research methods:** In this article, the "teacher" aspect is examined in a comparative context: from the perspective of social, economic and political conditions. For this purpose, methods of comparative analysis relating to a number of indicators and information from an international perspective are used (based on a critical choice of data from different studies). This helps clarify some relationships that can be found.

**Structure of the article:** The article consists of three parts. The first part focusses on inclusive education (here limited mainly to the inclusion of culturally and linguistically diverse students). The second addresses the financing of education and the work of the teacher (with a focus on student performance against this background), whilst the third part covers issues such as digital transformation and scientific capital.

**Research findings and their impact on the development of educational sciences**: The information and theses presented herein allow one to look at the teaching profession in a way that is less pedagogical and more political or social.

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**Results/recommendations:** Firstly, the paper shows that many teachers are not well-prepared to teach students from different ethnic backgrounds, speaking foreign languages etc. A second, somewhat more widely discussed point is that teachers generally earn less than workers with similar education. Furthermore, in some cases, it is not always more funding for education or higher salaries for teachers that result in better student performance. Thirdly, teachers should keep up with the digital transformation and teaching needs connected with science capital.

***Keywords*:** teaching profession, inclusive education, expenditure on education, teachers' salaries, student performance, scientific capital

## Introduction

In this article the "teacher" aspect is examined in a comparative context – not from the perspective of didactics or upbringing, but primarily from the perspective of social and political conditions. This approach does not exclude consequences for teaching work. This is the reason why teachers, candidates for the profession and education policymakers should know not only about pedagogical ideas and new trends emerging in the educational sciences, but also about certain facts, processes and comparative research that concern the teaching profession. The article only discusses and analyses , which is due not only to the limited length of the article, but also to the fact that the author's point of view is not always widely known. This analysis is based primarily on large international reports, each of which takes into account data from dozens of countries and concerns students, teachers, employees and expenditures on education. Reports and studies supervised by the OECD, such as PISA, TALIS and Education at a Glance, were helpful here. UNESCO's studies devoted to inclusive education were also used. These data are worth analysing because they are comparable, based on the same methodology, and – above all – they allow current and not always visible trends to be "read". They also constitute a starting point for predicting the development of these processes in the future.

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## Inclusive education

Two main trends can be distinguished in research on inclusive education. The predominant one refers to the inclusion of students with various disabilities in the public school system. The assumption is that the degree of disability does not qualify these students for special schools; this strand of inclusive education complements or replaces special education. In addition to the benefits that accrue to all students in this system, financial aspects are sometimes decisive (teaching in special schools is significantly more expensive than including several students with disabilities in a public school classroom). Parental pressure for their children to develop in an environment of non-disabled students sometimes occurs, as do financial issues, resulting in valid opinions that there are too many disabled students in the inclusive education system.

Therefore, inclusive education concerns students with certain developmental deficits as well as those who are diverse culturally, linguistically, religiously, etc. It is the second strand of inclusive education, which – due to the large number of such students – predominates in many countries. In both cases (strands), we can define inclusive education as "such a way of organizing the educational environment, the educational materials, and the way the classes are conducted that enables the participation of a diverse group without special adjustments" (Olechowska, 2022).

In recent years, a second strand of inclusive education has become increasingly important in pedagogical theory and practice, as shown in publications/reports and webinars (e.g. UNESCO, 2020, 2022). The foundation of inclusive education is to ensure that all teachers are prepared to teach all students (UNESCO, 2020, p. 137). This simple but not always easy principle is implemented differently mainly because teachers are unevenly prepared for such teaching. Standards and qualifications vary depending on the country, and a gap in school systems' identification of difficulties faced by students remains a common problem in many countries. In particular, this concerns access to learning, participation in education and finding solutions to overcome these difficulties (UNESCO, 2020).

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Inclusive teaching requires teachers to recognise each student's life experiences and abilities to be open to diversity. In 2012, the European Agency for Special Needs and Inclusive Education identified four key teacher values and competence areas within inclusive education:

- to support all learners (promote academic, practical and social learning)
- to cooperate with others (parents, professionals and other teachers)
- to value and respect student diversity
- to engage in professional development (starting from infant teaching) (European Agency for Special Needs and Inclusive Education, 2012, as cited in UNESCO, 2020).

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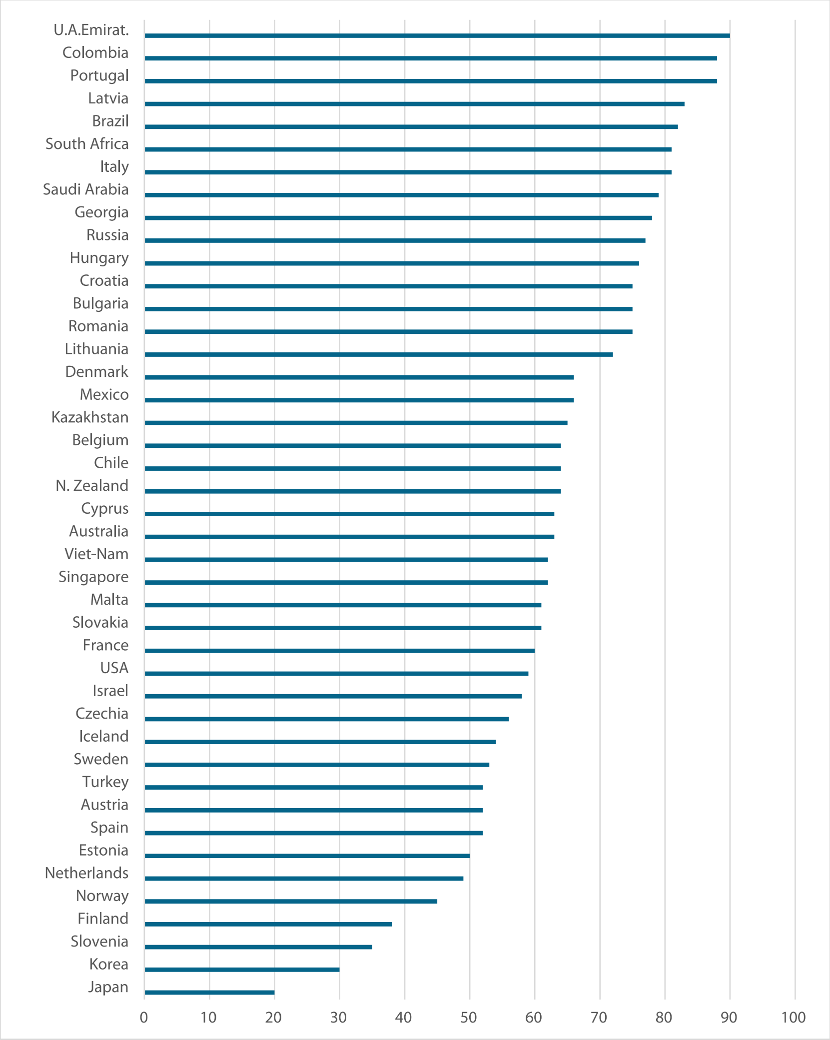
**Figure 1. Percentage of teachers who adapt their teaching to the cultural diversity of students (UNESCO, 2020)**




Source: UNESCO (2020). *Global Education Monitoring Report 2020: Inclusion and education: All means all.* Retrieved from: https://gem-report-2020.unesco.org/ figure 6.1, p. 140

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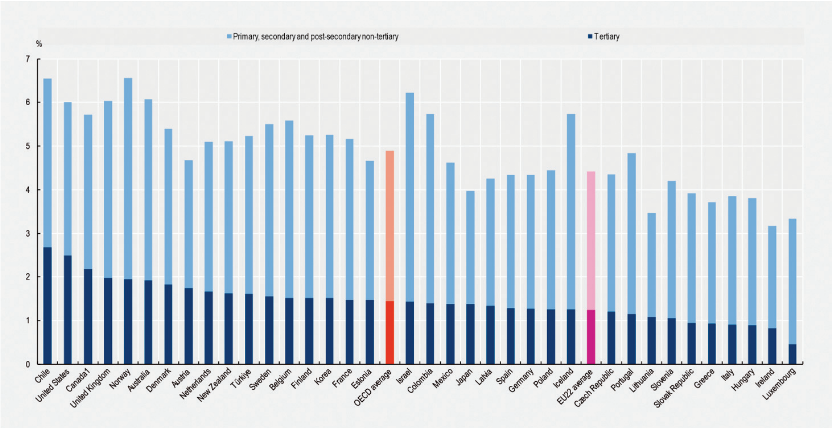
According to these reports, teaching practice often deviates from the declared demands and principles. This is indicated by the data provided in UNESCO reports (2020, 2022; referring to 2019 OECD sources): among the 43 average and "very rich" countries surveyed, many teachers failed to meet the diversity challenge. In Norway, Finland, Slovenia, South Korea and Japan, less than 50% of teachers indicated that they had adjusted their teaching to the cultural diversity of their students (in Japan it was only 20% – there may be no need there), whilst in Portugal, Colombia and the United Arab Emirates, the rate was around 90% of teachers (see Figure 1; UNESCO, 2020, p. 140). In another survey, only 35% of teachers from 48 countries stated that teaching in a multicultural or multilingual environment was included in their formal education and professional preparation, whilst only 25% felt that they were well or very well-prepared for such a task (TALIS, 2018, Table 1.4.20). More than 50% of teachers stated that they were not well-prepared to teach in a multicultural/multilingual environment (TALIS, 2018, p. 99). It is also important to mention that few countries provide initial courses for teachers (before they join the workforce) on inclusive education. Thus, teachers feel a great demand for professional development regarding the teaching of students with special educational needs, which corresponds to inclusive education.

In Poland, inclusive education, understood in the second sense, encounters much fewer difficulties than in racially, religiously and culturally diverse countries. However, many educational institutions have faced this problem along with the arrival of children from Ukraine – generally addressing them in a positive manner. In April 2023, according to the Polish Ministry of Education and Science, the number of Ukrainian children in Polish kindergartens and schools was 187,900 (of which, 43,800 where in kindergartens). Outside the Polish education system, there are also Ukrainian students studying online within the Ukrainian education system.

## Education and teachers funding and student performance

**Expenditure on education** (primary, secondary, and post-secondary education) is not only the result of individual countries prioritising education, but also of their capabilities (due to their economic development or wealth). Total spending on education and tertiary education – as a percentage of gross domestic product (GDP) estimated by the OECD (Figure 2) – ranged from just over 3% (Ireland, Luxembourg and Lithuania) to around 6.5% (Norway and Chile). In Poland, this indicator has remained at 4%–4.5% for many years. Poland had a similar level of educational expenditure "effort" as, for instance, Estonia, Spain, Latvia, Germany and Czechia, for which total expenditure on education ranged from just over 4% to 4.4% (OECD, 2022, p. 254).

**Figure 2. Total expenditure on educational institutions as a share of GDP (2019)**




Source: OECD (2022). *Education at a Glance*: *OECD Indicators.*
Retrieved from: https://www.oecd.org/education/education-at-a-glance/ figure C2.1, table C2.1

Issues related to – and just as important as – education and funding post-secondary and tertiary education are expenditures **per** primary and secondary school **student**, expressed in USD. They are correlated

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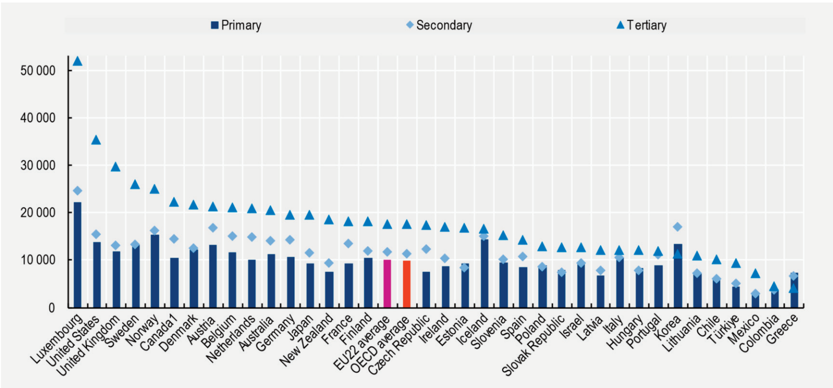
positively with per capita income, as indicated by a comprehensive OECD report, among others (*Education at a Glance*, 2022, p. 259). However, these relationships are not always clear in their interpretation. Spending per student is generally much higher than per school attendee (Figure 3). In the richest countries, the former is generally well over USD 20,000 (in Luxembourg over USD 52,000 and in the USA USD 35,000). The highest spending per student, on the other hand, is only several thousand USD (except for Luxembourg: USD 22,000–25,000). Polish expenditure per school attendee and per student places it among countries with much lower unit expenditure (among the dozens of OECD countries compared, not among the poorest countries – quite the opposite). The estimates for Poland were over USD 8,000 per school attendee and approximately USD 13,000 per student (OECD, 2022, p. 238).

**Figure 3. Total expenditure per full-time equivalent student by level of education**




Source: OECD (2022). *Education at a Glance*: *OECD Indicators*.
Retrieved from: https://www.oecd.org/education/education-at-a-glance/ Figure C1.1, Table C1.1

An analysis of the average **annual earnings** of lower secondary public school **teachers** (years 7–9), assuming that these are average earnings for all teachers, shows that they vary greatly, as does the level of material affluence in these countries. The annual average for OECD countries is

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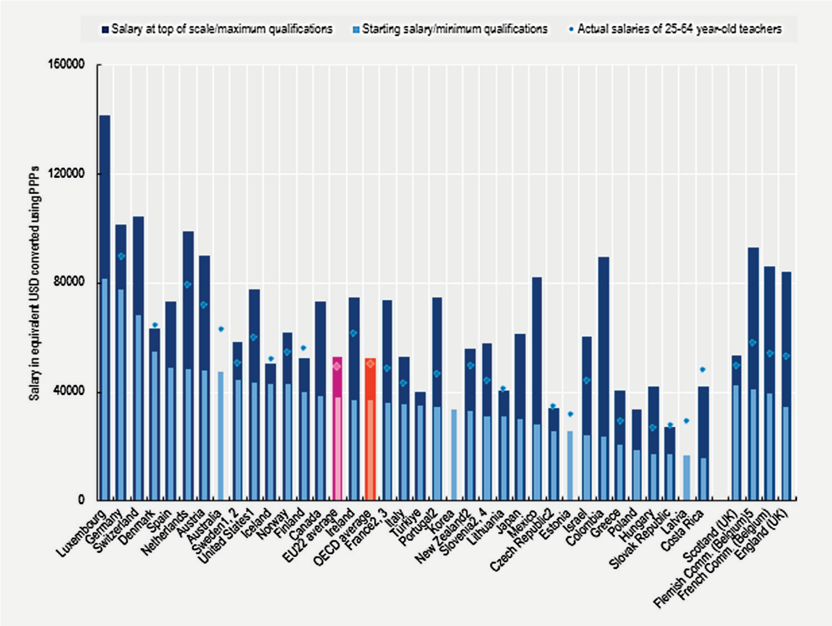
USD 50,000 in terms of the purchasing power of that currency in that country (Figure 4); moreover, the average annual salary in the 22 countries of the European Union is similar: USD 49,000.

**Figure 4. Lower secondary teachers' average actual salaries compared to the statutory minimum and maximum salaries (2021) Annual salaries of teachers in public institutions, in equivalent USD converted using PPPs**




Source: OECD (2022). *Education at a Glance* : *OECD Indicators*.
Retrieved from: https://www.oecd.org/education/education-at-a-glance/ Figure D3.2

By far the highest paid teachers were found in Luxembourg, Switzerland, Germany and the Netherlands, where the average annual earnings of teachers in lower secondary schools in 2021 were USD 99,000–104,000 and even exceeded USD 141,000 (Luxembourg). Significant variations in teachers' salaries are mainly due to a country's economic development, often expressed in terms of per capita income. As such, they are a reflection

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of a country's capabilities, but also of its policies towards teachers' salaries. There are countries where teacher salaries are lower than the per capita national product, for example, Sweden, Norway, Latvia, Czechia, the USA and Ireland, where per capita income in 2021 was almost double the average annual salary of a teacher in a lower secondary school (tradingeconomics.com, n.d.). Perhaps the affluence and labour market do not force the governments of these countries to overcompensate teachers. There are also countries where teachers' salaries far exceed the per capita income – e.g. Germany, the Netherlands, many other European countries, Australia and some South American countries (e.g. in Costa Rica, teachers' salaries are more than double the material well-being index as measured by per capita income). This may be evidence of the importance that the governments of these countries attach to the remuneration of teachers for their work; it may also be presumed that there is a high prestige of the teaching profession there.

**Comparing teachers' salaries** in schools equivalent to lower secondary schools (years 7–9) **with the earnings of employees with an education level similar to that of a teacher or above secondary** (tertiary education) is a very meaningful indicator of the teachers' earnings. a few countries have developed indicators that provide at least some insight into the positioning of teachers' salaries in relation to professions that require a similar level of education as teachers. A comparison of the average annual salaries of teachers to those of workers with a similar level of education shows that among the countries analysed, there were none in which teachers' salaries exceeded the earnings of similarly educated workers. Only in Germany, New Zealand and Flanders (Belgium) was the ratio 0.92–0.95; in the USA it was only 0.54 (OECD, 2022, p. 346).

Considering a similar indicator, where the benchmark is the earnings of workers with tertiary education, the position of teachers is slightly better. However, in only four countries (of the 20+ analysed) were teachers' salaries higher (in Costa Rica it was 1.47, in Portugal 1.33, in Lithuania 1.31 and in Ireland almost equal: 1.03; OECD, 2022, pp. 328, 346). The pay gap between teachers entering the profession and teachers with the highest qualifications is generally no longer determined by the economic situation

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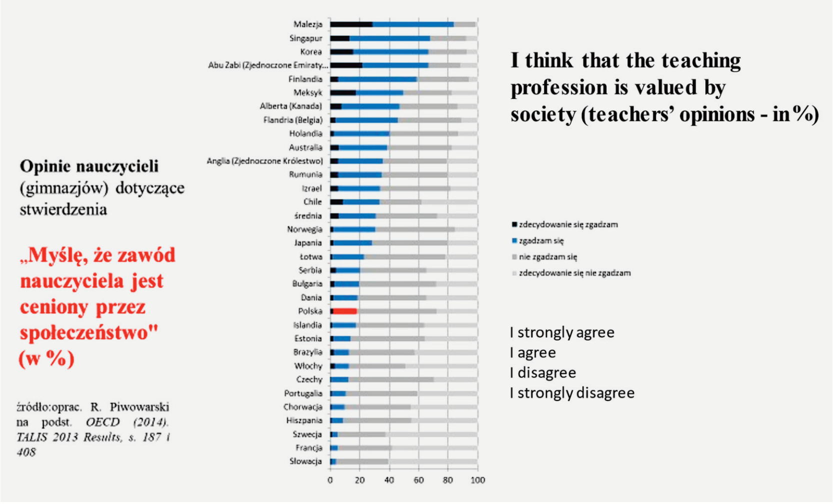
or "wealth" of individual countries. For example, salaries of beginning teachers in Turkey, Denmark or Iceland are only slightly lower than those of the teachers with the highest qualifications and the longest seniority in the profession. In Colombia, Costa Rica and Israel salaries of beginning teachers are less than half of those of the best paid (Figure 4).

It is worth mentioning that, despite the considerable variation in teachers' salaries in most of the countries analysed in this article, the pay of teachers (in this case, lower secondary school teachers) is worse than that of all workers with education above secondary level; remuneration policies for teachers' work – which are the result of multiple determinants – are similar.

Is the inferior pay of teachers in relation to other professions a factor making the teachers themselves feel undervalued? It seems that an excerpt from the 2013 TALIS survey may shed some light on this issue. It is interesting to compare the opinions of 105,500 surveyed teachers from lower secondary schools in 34 countries and regions regarding the statement, "I think the teaching profession is valued by society."

**Figure 5. Teachers' view of the way society values the teaching profession**



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It is worth pointing out that teachers from South-east Asian countries were the most convinced that they are valued by society. Out of the European countries, Finland ranked the highest; nearly 60% of the teachers surveyed there believed that the teaching profession is valued by society. Perhaps it is no coincidence that students from these countries also ranked in the highest positions in school achievement surveys. Furthermore, in most of the surveyed countries, the percentage of teachers who felt that society values them was less than 40% – and in a few even less than 10%.

As such, teachers feel frustrated, probably because they are underpaid and undervalued, among other things. These feelings are not always consistent with the evaluation of the prestige the teaching profession has compared to other professions. For instance, in Poland, there is an emphasis on the quite high rank of the teaching profession in society (7$^{th}$–8$^{th}$ place among dozens of professions), though the feelings of teachers themselves differ. This process seems to be influenced by a number of factors, one of which is the rapidly growing number of people with a higher education, which once automatically gave access to a narrow circle of elites, the intelligentsia. Today, university degrees have become devalued and outdated, and their quality is often called into question. New, faster, but also superficial sources of knowledge are appearing all the time, competing with the knowledge provided by teachers. In certain circles, homeschooling is becoming more and more popular and parents use it to express a lack of confidence in school teaching, and thus to some extent in teachers.

Are teachers too poorly prepared and motivated for their professional work? Do they feel too little responsibility? To what extent is their frustration a result of a lack of relevant knowledge and skills, and to what extent is it a result of relatively low salaries? These are difficult and debatable questions to which there are no clear answers. Some opportunities for relevant changes may be created by the current and future unfavourable demographic situation in many countries, especially in Europe (declining number of children). Fewer students and less demand for teachers should force tougher selection mechanisms for candidates

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to the teaching profession (and university) than now, but at the same time it should raise teachers' salaries at least to the average earnings of professionals with similar education.

Some of the characteristics presented above regarding teachers' salaries and the funding of education at all levels are worth addressing in relation to **student performance**. Does higher investment in education, including higher teacher salaries, result in better student performance? Based on the performance of 15-year-olds in the PISA programme, the answer is unclear. Assuming that there are no better comparative measures than the position of individual countries in terms of the performance of their students, criticism of similar programmes comes down to the idea that teachers are mainly teaching how to pass the tests which these major international programmes examining student achievement are based on. Among OECD countries, the ranking of their students in terms of their performance within the three segments that make up the PISA survey (reading, mathematics and science) compared to education inputs was as follows: Ireland's students ranked fourth in 2018[1] and 3.2% was spent on all education in 2019 (OECD 2022); Estonia's students ranked first and the expenditure was 4.7%; and Poland's ranked sixth with education and higher education inputs of 4.5% (OECD, 2022). In Chile and Israel these inputs were 6.5% and 6.2%, and students in these countries ranked further down; their scores in each of the three parts were well below 500 (the best results were above this level). In Luxembourg, where teachers earned the most and the expenditure per student and per school attendee was also the highest (see Figures 3 and 4), 15-year-olds in PISA 2018 were in 30$^{th}$ place (scores ranging from 470–483 points). It is also worth mentioning here that the best results in PISA tests were achieved by the students from provinces (mainly China) and South-east Asian countries (Taiwan and Singapore) which are not affiliated with the OECD. Similarly, students and future mathematics teachers from this region dominated the TEDS-M programme. It appears that these examples are an important

[1] The study scheduled to take place in 2021 was postponed due to the COVID-19 pandemic until 2022 (results were published in December 2023).

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contribution to the debate, particularly on teachers' salaries in relation to student performance, as a debatable thesis is put forward by some teachers that "they will teach better if they earn better" (such opinions occasionally appear in Poland). Examples from South-east Asia indicate that other factors, such as a different social discipline, attitude to work and learning than European culture may determine student performance.

At this point, it should also be added that in many countries (including European countries) students achieved just over 400 in the PISA tests, or even below. In these cases, student performance is generally correlated with the economic position of the countries the students come from.

### Other Challenges

Teachers should also be aware of other phenomena and processes that may be more or less challenging for some practitioners of the teaching profession. These certainly include **digital transformation** and more and more information on artificial intelligence (AI), which are creating the need for teachers to continuously develop their digital skills. Perhaps it is a trivial statement, but it is worth remembering. Teachers should be aware that not only are their students often more familiar with these new technologies, but there are some impacts of students' use of AI. It is known that students in dozens of OECD countries spend an average of 26 hours per week using the internet outside of school (i.e. an average of 3 hours and 42 minutes per day) and an additional average of 8 hours at school (OECD, 2019a). All in all, it seems incredible that students collectively spend almost 7 hours a day surfing the internet. These are average rates, meaning that some students spend even more time on the internet. Of this surfing, only 20% is somehow targeted, and only 12% is active exploration (OECD, 2019a).

Even more important and worrying is the analysis of students' use of computers. The 15-year-olds who use the computer most frequently at school scored the lowest in reading (both print and digital text). Analysis of the PISA 2018 results also indicates that students who use a computer at school very often tend to achieve the worst results in the other

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PISA test tasks. The moderate use of new technologies – in the light of the PISA data (and common sense) - has a positive impact on learning outcomes, though, it should be stressed again, they do not always (or at all) measure qualities such as creativity or individualism. It may also be added that the educational authorities of some countries and school headmasters are beginning to introduce restrictive policies towards students using electronic devices at school.[2]

Also, the educational policies of many countries during the COVID-19 pandemic, aimed largely at online learning, resulted in the need to improve teaching competencies. The pandemic paradoxically contributed to greater knowledge of commonly used communication technologies/platforms, as well as the capabilities of the devices themselves (computers, laptops, smartphones, etc.). This applies to students, teachers, lecturers and parents (the latter often having to be involved in the education of younger children).

The issue of **scientific capital** has been discussed in research and publications for a relatively short period of time, but it is becoming increasingly interesting and, despite its "newness", also subject to polemics (some treat this concept as a component of cultural capital). The scientific capital of young people largely determines their entry into professions, which are the "driving wheel" of the civilisational, economic and innovative development of the state or region. At the basis of the considerations and introduction of the term "science capital" and its subsequent elaboration, not only through theoretical analysis but also as a result of the research undertaken by Louise Archer, was a belief or conviction of many governments, important organisations and economic associations (often international) that too few young people (over 16 years of age) choose university programmes and professions in the fields of science, technology, engineering and mathematics (STEM; Archer 2015). Recruitment in certain fields of study in recent years and expert opinions

2 In Japan, for example, such decisions were discussed on 8 May 2023 by Professor Hirofumi Hamada of the University of Tsukuba, Japan at a conference organised in Krakow by the University of Pedagogy.

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show that this problem also affects Poland. Apart from the fact that the criterion of some future students for choosing their studies is the "ease/difficulty" of studying, a certain factor in this situation may be the secondary education policy. So far, the relatively short exploration of the issue of scientific capital, which began in 2010, allows us to define academic (student) capital with the following elements (Archer et al., 2014, 2015):

- Personal dispositions of the individual, such as interests, beliefs about one's competences (e.g. "I can/would like to become a scientist in the future") and ability to use one's abilities to make discoveries
- Students' knowledge (and preferences) about science-related professions and understanding of science and its functioning, which together can be described as scientific literacy
- Social contact with the scientific community (e.g. having someone in the family who is involved in science or knowing someone who works in a profession related to science or scientific research)
- Extracurricular science-related behaviour (e.g. familiarity with science journals, watching science TV programmes or going to museums and science centres)

It is important to promote and build science capital among students (and families) through the family, the school, the teachers and the curricula, and it is important to start doing so as soon as possible. Louise Archer's research (Archer et al., 2014, 2015) has also shown that there is little chance that those who had low scientific capital at the age of 10 have "increased" it by the age of 14–16; it is relatively permanent and not very susceptible to change. This was pointed out by English teachers, who felt that the impact on the student at 14 was overdue, whilst after the age of 16 the only and major role can only be played by the teacher or school.

Perhaps the thesis below concerning the **professional development** of teachers, in the form of declared strategies regarding **teachers with high/low professional competence**, seems debatable. It comes down to the question of "Which is better more effective: putting more energy into recruiting, preparing and supporting quality teachers or finding ways to improve working with, or simply dismissing, low-performing teachers (which for various reasons is not easy)?" This question is likely to elicit both acceptance and opposition from the reader; it is also possible to have the opinion that both strategies should be pursued in parallel.

The text addresses only a few issues (which is due to the interests and knowledge of the author, among other things) and focusses primarily on issues concerning inclusive education in relation to culturally diverse students and education funding/teacher salaries. The data cited herein shows that many teachers are not well-prepared to teach students from different ethnic backgrounds, speaking foreign languages etc. The second, somewhat more widely discussed point is that teachers generally earn less than workers with a similar education (who should earn at least the same, in the author's opinion). Furthermore, more education funding or higher teacher salaries do not always result in better student performance, which is likely to be influenced by other factors. Teachers should be sensitive to the processes that have been occurring and changing for many years, including digital transformation, and newer ones such as the role of scientific capital.

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# A Systematic Literature Review on Cultural Arts Education and the Cultivation of Cultural Values

(pp. 273–294)

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## Abstract

**Objectives of the research:** This study investigates art education as a means of cultivating cultural values and aims to address questions regarding the methodologies employed in previous research on cultural values. The research

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presented herein constitutes a Systematic Literature Review (SLR) on cultural education, utilizing the PRISM method adopted in 2020.

**Research methods:** This article conducts a Systematic Literature Review (SLR) on cultural education using the PRISM method adopted in 2020. The search was conducted using Perish or Publish (PoP) for Scopus-indexed international journals and the Garuda portal from the Ministry of Education and Culture, focusing on journals indexed in Sinta.

**Contextual Background:** Because the cultural processes continually evolve in response to the forces that influence culture, cultural acculturation serves as a foundation for arts and cultural workers' efforts to inculcate the values of local wisdom within educational settings.

**Research findings:** Data collection spanned from 2010 to 2022, resulting in the retrieval of 14 international articles and 16 national articles based on their titles and abstracts, totaling 30 articles. These articles originated from various countries, including Belgium, the Czech Republic, Germany, Korea, Poland, Taiwan, China, Istanbul, Slovenia, Turkey, Estonia, and Indonesia. Analysis of the articles revealed that music arts education constituted 27%, arts and culture 33%, local wisdom 14%, dance education 17%, art education 3%, and theatre education 3%. In terms of research methodologies, the study identified action research at 5%, Research and Development at 10%, quantitative research at 10%, qualitative case study research at 7%, literature review at 7%, and qualitative research at 56%.

**Conclusions and recommendations:** Through this SLR, the researcher aims to pave the way for future in-depth research in arts and culture education or for exploring novel approaches.

***Keywords***: systematic literature review, cultural arts education, article publication

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## Introduction

Education is a deliberately planned endeavor to help students develop their potential in areas such as spirituality, self-control, personality, intelligence, and noble character, along with other qualities required by society, the country, and the state. As Rosala (2016) puts it, education is essentially an educator's effort to convey societal information and values so that students can adapt properly. Through education, people can cultivate mutual respect and understanding, which is essential for societal harmony. As Christina (2013) notes, humans, who are inherently social beings, can adapt to changing circumstances. However, the evolution of a society's culture will inevitably face challenges, testing whether individuals can adapt to or resist new cultural influences.

Through arts and culture education, students and teachers who are aware of the importance of culture can transform their mindsets and ideas, thus helping to preserve current cultural practices from an early age. Zuriatina (2021) suggests that cultural consistency can be maintained by continually teaching cultural arts to students. Although changes are inevitable, younger generations can become aware of their cultural heritage. According to Ulfah (2014), local wisdom is a way of life and knowledge that emerges within a society and a life strategy for fulfilling physical and spiritual needs. This wisdom is passed down from generation to generation, evolving along a fluid cultural journey.

In arts and culture education, cultivating local wisdom values is essential for preserving Indonesia's rich culture, which is increasingly at risk of being forgotten due to modern developments. As cultural processes constantly change under various influences, the concept of cultural acculturation becomes relevant. Arts and cultural educators work to inculcate the values of local wisdom within the educational context, aiming to preserve and honor this cultural heritage.

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## Method

The research method is a Systematic Literature Review (SLR), which involves including the findings of previous research to present facts comparably and comprehensively (Pati & Lorusso, 2018). SLR is applied in this study to examine arts and culture education by identifying, analyzing, selecting, and summarizing related studies. This process aims to generate a summary that enhances theoretical understanding and provides more practical and empirical techniques based on published literature (Mathew J. et al., 2011). The primary reason for implementing SLR is to adopt a thorough literature review approach in learning arts and culture educational research.

The PRISMA diagram pattern is used for collecting research data in the Publish or Perish application version 8 (https://harzing.com/resources/publish-or-perish/) for Scopus-indexed journals and in the Garuda Portal (https://garuda.kemdikbud.go.id/) developed by the Ministry of Education, Culture, Research, and Technology of Indonesia for Indonesian language publications. The data collection process is illustrated as follows:

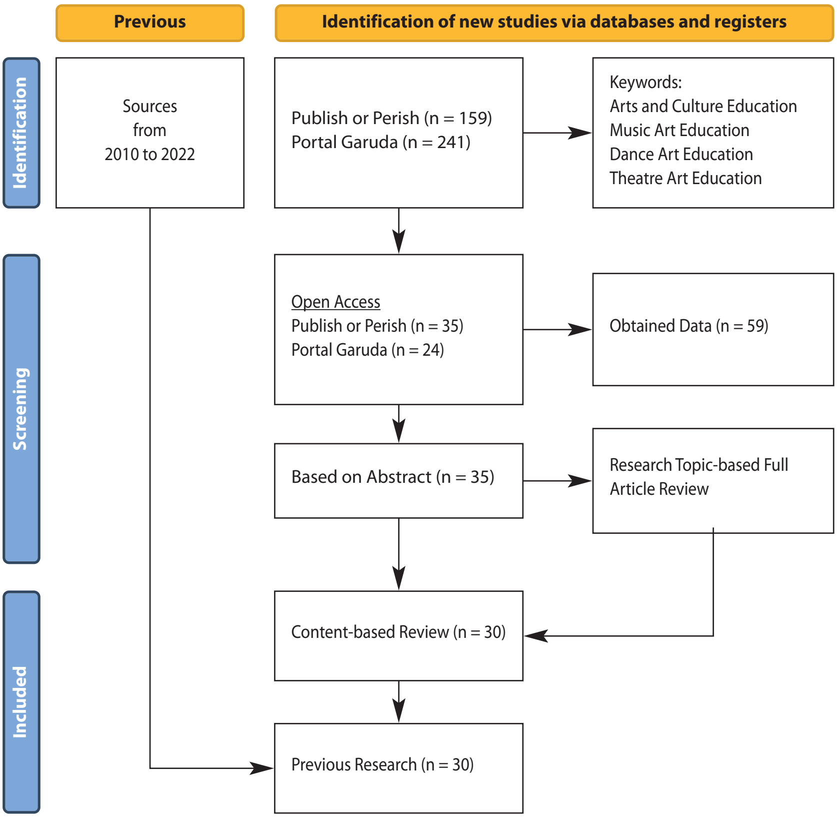
**Table 1. Source Criteria**

| Sources | Exception |
|---|---|
| Articles From 2010 to 2022 | Similar Topic and Author |
| Arts and Culture Education/Art Music Education, Dance Art Education/Drama and Art Education Research | Arts and Crafts, Extra Curricular, Art Gallery Learning or Education |
| Open Access Publication | Non-Open Access Publication |
| Oriented Art Education | Heritage Education |

The first stage involves filtering articles from 2010 to 2022 using the keywords "Arts and Culture Education," "Music Art Education," "Dance Art Education," and "Drama and Arts Education." At this point, there are 159 articles from Publish or Perish (PoP) and 241 articles from the Garuda Portal. The number of articles is refined based on (a) publications that cannot be fully accessed by the researcher and (b) search results that do not correspond to the focus of research in the field of arts and culture education (local genius).

The second stage involves filtering the articles by reviewing the entire accessible text, resulting in 35 articles from PoP and 24 articles from the Garuda Portal, for a total of 59 articles. Subsequently, 35 articles were selected by thoroughly reviewing the abstracts, and 30 articles were chosen by reviewing the complete text of each article based on content. The PRISMA chart adapted in 2020 illustrates this process as follows:

**Figure 1. PRISMA (2020) Diagram Chart of Article Sources**

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## Results and discussion

### A. Source Result

In detail, the source results of Arts and Culture Education-related articles based on PoP and Kemendikbud's Portal Garuda can be seen as follows:

**Table 2. Source Results**

| No | Date | Year | Source | Keyword | Whole Data | Duplicate Data Removal | Open Access Research Title | Based on Topic |
|---|---|---|---|---|---|---|---|---|
| 1 | 11 November 2022 | 2010-2022 | Publish or Perish version 8 | Arts and Culture Education/ Arts and Music Education/ Dance and Art Education/ Drama and Arts Education | 159 | 110 | 35 | 13 |
| 2 | 11 November 2022 | 2010-2022 | Kemendikbud's Portal Garuda | Arts and Culture Education/ Arts and Music Education/ Dance and Art Education/ Drama and Art Education | 241 | Reviewed Each Article | 24 | 17 |
| Total | | | | | 400 | | 57 | 30 |

Detailed source results from the years 2010 to 2022, based on the author's search, include 13 articles from PoP and 17 articles from Kemendikbud's Portal Garuda.

**Table 3. Data by Year**

| No | Year | Article | Publish And Perish | | Kemendikbud's Portal Garuda | |
|---|---|---|---|---|---|---|
| | | | Total | Author | Total | Author |
| 1 | 2010 | 1 | 1 | A. Okvuran | 0 | A. Okvuran |
| 2 | 2011 | 0 | 0 | - | 0 | - |
| 3 | 2012 | 2 | 0 | - | 2 | Ardipal & Ardipal, Lokasari & Novian |
| 4 | 2013 | 0 | 0 | - | 0 | - |
| 5 | 2014 | 0 | 0 | - | 0 | - |
| 6 | 2015 | 1 | 0 | - | 1 | Herlinah |

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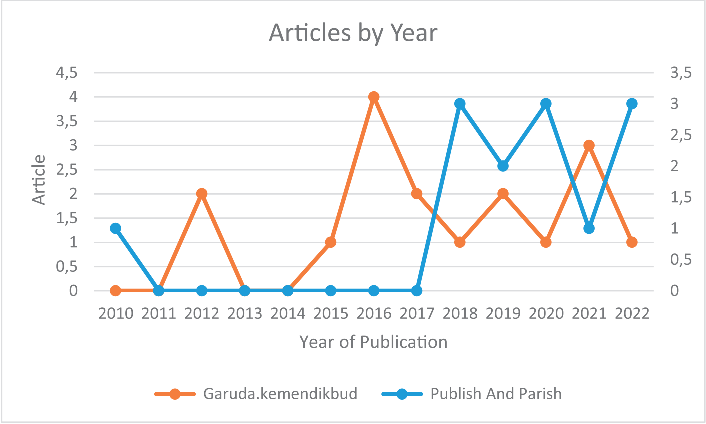
| No | Year | Article | Publish And Perish | | Kemendikbud's Portal Garuda | |
|---|---|---|---|---|---|---|
| | | | Total | Author | Total | Author |
| 7 | 2016 | 4 | 0 | - | 4 | Dedi Rosala, Rusdewanti & Panca Putri, Diah K & Francisca Xaveria, Ramlan & Permana & Jaka |
| 8 | 2017 | 2 | 0 | - | 2 | Ritonga & Danny Ivanno, Destrinelli |
| 9 | 2018 | 4 | 3 | D. Zheng, N. Liu, Mayarovskaya, Galina V. Rodionova, Daria G. & Muldma, MaiaKiilu, Kristi | 1 | Hadi, Harsinal & Sudarman Yos & Madilla Renovica |
| 10 | 2019 | 4 | 2 | W. Song, Petra Martinková | 2 | Agustina & Inna, Matitaputty & Jenny Koce, Latuheru & Chrisema Ramayona & Jazuli & Muhammad |
| 11 | 2020 | 4 | 3 | A.A. Nogaj, J. Žnidaršič, K. Witczak, | 1 | Ridwan, Narawaty Taty & Karwati Uus & Sukmayadi & Yudi Nikawanti Gia |
| 12 | 2021 | 4 | 1 | A. Christ, C.S. Hung, | 3 | Silalahi & Eccles Rianda & Gunara, Sandie Gunawan & Iwan, Nurhidayati, I K A, Imam Catur Pratomo |
| 13 | 2022 | 4 | 3 | L. Vermeersch, M. Lu, M.T. Arnold | 1 | Tysha, Artara Sella Handayaningrum, Warih |
| Total | | 30 | 13 | | 17 | |

A detailed graphical chart of research articles from 2010 to 2022 is presented below:

**Figure 2. Article Chart by Year**

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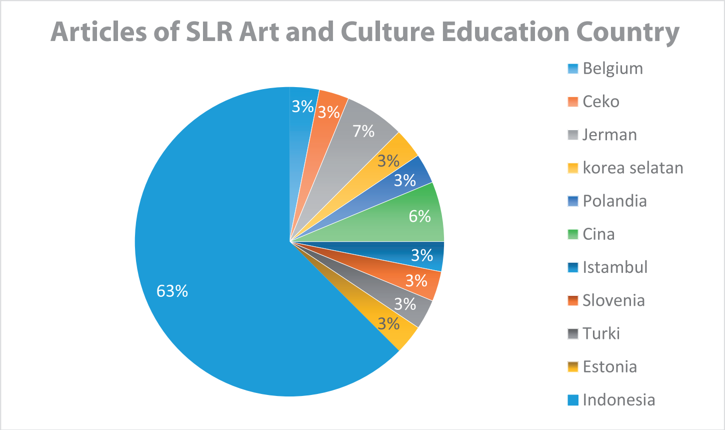
## B. Geographic Distribution of Articles

Based on the analysis of 30 articles, the geographical distribution of publications includes Belgium, the Czech Republic, South Korea, Poland, Taiwan, Istanbul, Slovenia, Turkey, and Estonia, accounting for 3.12% of the total. Conversely, Germany and China contribute 7% of the total articles. Publications indexed by Sinta in Indonesia, totaling 17 articles, represent 63.50% of the total. See the details below:

**Figure 3. Percentage of Articles by Geographic Area**




The geographical distribution of international journal articles indexed by Scopus and articles indexed by Sinta Journal in Indonesia consists of 14 and 16 articles, respectively. For a detailed breakdown, refer to the following:

**Table 4. Geographical Distribution of Articles**

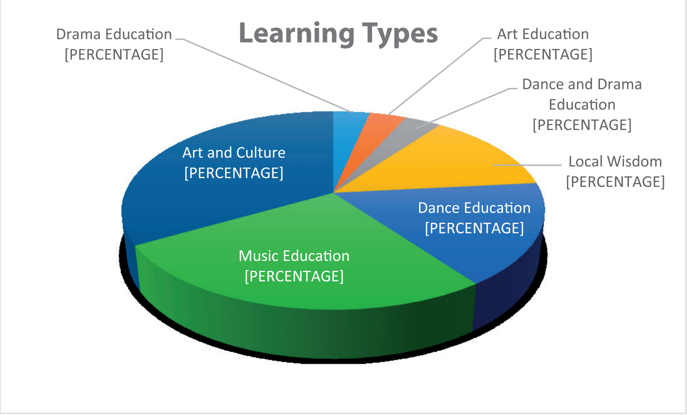
| Indexed Journals and Countries | | Total |
|---|---|---|
| Scopus-Indexed International Journal | Belgium | 1 |
| | Czech Republic | 1 |
| | Germany | 2 |
| | South Korea | 1 |

| Indexed Journals and Countries | | Total |
|---|---|---|
| Scopus-Indexed International Journal | Poland | 1 |
| | Taiwan | 1 |
| | China | 2 |
| | Istanbul | 1 |
| | Slovenia | 1 |
| | Turki | 1 |
| | Estonia | 1 |
| | Indonesia | 1 |
| SINTA-Indexed Indonesia Journal | | 16 |
| **Total** | | **30** |

### C. Types of Arts and Culture Learning

In particular, based on the SLR analysis of Arts and Culture education contained in 30 articles, the distribution of research methods is as follows: action research at 10%, research and development at 10%, quantitative research at 10%, qualitative case study at 7%, literature review at 7%, and qualitative research at 56%. This breakdown is illustrated below:

**Figure 4. Learning Types in Arts and Culture Education**

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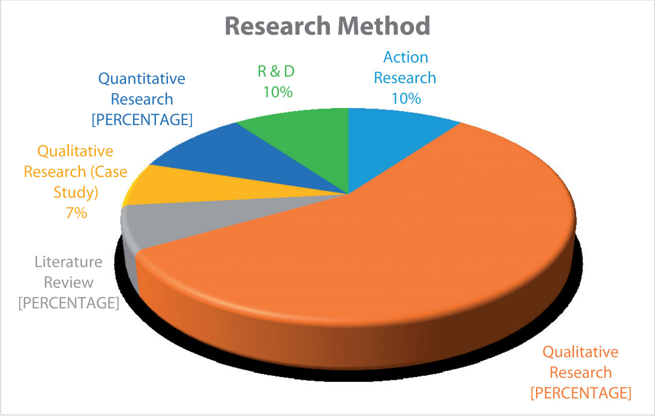
### D. Research Method

In particular, based on the SLR analysis of Arts and Culture education contained in 30 articles, I found that action research accounts for 10%, research and development for 10%, quantitative research for 10%, qualitative case study for 7%, literature review for 7%, and qualitative research for 56%. This breakdown is illustrated below:

**Figure 5. Research Method**




### E. Research Implications for Arts and Culture Learning

The implications of the analysis of 30 articles on arts and culture education indicate an increase in arts and culture knowledge, students' characteristics, cultural values, learning models, and methods of arts and culture teaching, as well as the contribution of arts and culture education to students' cultural development and their understanding of culture in arts and culture learning. Arts and culture are taught through educational technologies.

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**Table 5. SLR on Implications of Arts and Culture Learning**

| Year | Author | Research Title | Implication |
|---|---|---|---|
| 2010 | A. Okvuran | The Relationship Between Arts Education, Museum Education, And Drama Education in Elementary Education | Drama and museum education can be a field or method for teaching (Okvuran, 2010) |
| 2012 | Ardipal, Ardipal | Kurikulum Pendidikan Seni Budaya yang Ideal bagi Peserta Didik di Masa Depan | The 2013 Curriculum, with an emphasis on art activities and local culture, helps students appreciate artworks, express themselves through art and cultural activities, and produce creative artworks, either individually or in groups (Ardipal, 2012). |
| 2012 | Lokasari, Novian | Proses Pembelajaran Mahasiswa Seni Tari Pada Siswa Kelas VIII SMP Dalam Mata Kuliah Tari Pendidikan Di Fakultas Bahasa Dan Seni Universitas Negeri Semarang | Authors provide information about the dance art learning process for junior high school students in the Dance Education Course, which helps students master dance material and develop good body alignment and body movements. Students can determine and apply appropriate materials, methods, and learning media based on school level, curriculum, age, and student characteristics (Lokasari, 2012). |
| 2012 | Muldma, Maia Kiilu, Kristi | Teacher`s view on the development of values in music education in Estonia | The development of values, the teacher's role, cultural identity, and repertoire selection based on values (songs, musical-rhythm activities, and song creation), in music education significantly influence the development of emotional and humanity values, social skills, and creativity (Muldma & Kiilu, 2012). |
| 2015 | Herlinah | Upaya Peningkatan Kemampuan Menari Tari Topeng Gunungsari Pada Mahasiswa Jurusan Pendidikan Seni Tari Dengan Pendekatan Apresiasi Seni Dan Latihan Secara Rutin | By routinely practicing using masks and watching the Gunungsari Mask Dance performance on video, students can improve their dance moves by using masks better. (Herlinah, 2015). |
| 2016 | Dedi Rosala | Pembelajaran Seni Budaya Berbasis Kearifan Lokal Dalam Upaya Membangun Pendidikan Karakter Siswa Di Sekolah Dasar | Local wisdom-based dance education can be an alternative learning method in schools to build national character (Rosala, 2016). |
| 2016 | Ramlan, Ramlan Permana, Jaka | Pendidikan Budaya Dan Karakter Bangsa Pada Proses Pembelajaran Seni Tari & Drama | A dance and drama learning model for teaching these subjects in schools based on effective cultural education and national character development (Ramlan & Permana, 2016). |
| 2016 | Diah K. F | Permainan Duet Piano Empat Tangan Sebagai Upaya Peningkatan Kemampuan Mahasiswa Pada Pembelajaran Praktek Instrumen Mayor II Piano Di Jurusan Pendidikan Seni Musik | Playing piano battles with four hands can enhance students' skills in Instrument Mayor 2 Practice in the Music Education study program, directly improving learning quality (Diah K., 2016). |

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| Year | Author | Research Title | Implication |
|---|---|---|---|
| 2016 | Diah K., Francisca Xaveria | Upaya Peningkatan Hasil Belajar Piano 2 Melalui Metode Sight Reading Di Jurusan Pendidikan Seni Musik FBS UNY | The use of the sight-reading method can improve students' learning outcomes in the Piano 2 course in the 2013/2014 academic year at the Music Education study program of FBS UNY (Rusdewanti, 2016). |
| 2017 | Destrinelli | Pengembangan Model Pembelajaran Seni Tari Untuk Pendidikan Guru Sekolah Dasar (Analisis Terhadap Kemampuan Praktek Menari Mahasiswa PGSD FKIP Universitas Jambi) | A dance learning model using a creative approach, explorative method, task technique, improvisation, and group work has a positive impact on dance learning outcomes for PGSD students (Destrinelli, 2017). |
| 2017 | Ritonga, Danny Ivanno | Suatu Upaya Dalam Pelaksanaan Pengajaran Dan Pembelajaran Pendidikan Seni Musik Berbasis Pendidikan Budaya Dan Karakter Bangsa Di Sekolah - Sekolah Maupun Lembaga-Lembaga Pendidikan Di Indonesia | Music art learning should integrate cultural values innovatively to develop students' personalities (Ritonga, 2017). |
| 2018 | D. Zheng | Innovative education method of the integration of cultural communication and dance art design | An innovative method for Chinese dance classes makes pupils passionate about learning. Integrating dance and Chinese language teaching improves students' oral learning and practical application, which is critical for traditional communication and legacy (Zheng & Zhao, 2018). |
| 2018 | Hadi, Harsinal, Sudarman Yos, Madilla Renovica | Pelaksanaan Pembelajaran Pendidikan Seni Budaya (Musik) Di Kelas X SMAN I Nan Sabaris Kabupaten Padang Pariaman | The primary role of the teacher is to provide varied knowledge that will benefit each pupil as they progress to higher levels of life (Hadi, Harsinal, Sudarman Yos, 2018). |
| 2018 | N. Liu | Research on the role of college art education in protection and inheritance of intangible cultural heritage | Constructive interaction between mothers and teachers improves children's school adjustment behavior (Liu, 2018). |
| 2019 | W. Song | Culture and art education to promote cultural welfare in civil society | Arts and culture education can improve social welfare in Seoul South Korea. (Song & Kim, 2019). |
| 2019 | Latuheru, Chrisema Ramayona | Efektivitas Kurikulum Tingkat Satuan Pendidikan Dalam Pembelajaran Seni Musik Pada Smp Negeri 4 Ambon Maluku | Teachers must address the obstacles of learning art by incorporating their ideas and strategies, considering the children's abilities, time allocation, and available facilities and infrastructure (Latuheru, 2019). |
| 2019 | Petra Martinková | Financování multimediální výchovy v hudebním oboru na základních umÿleckých školách | Arts and music education in the Czech Republic demonstrates how multimedia can be used by basic art schools and discusses funding options (Martinková, 2019). |

| Year | Author | Research Title | Implication |
|---|---|---|---|
| 2019 | Agustina, Inna Jazuli, Muhammad | Revitalization Strategy of Laweut Dance Through Art Education in Indonesian Institute of Arts and Culture, Aceh | The revitalization strategy for Laweut dance by the Indonesian Arts and Culture Institute, which aims to conserve and revitalize this great dance among the Aceh people must be maintained and cultivated (Agustina & Jazuli, 2019). |
| 2020 | Ridwan, Ridwan Narawaty, Taty Karwati, Uus Sukmayadi, Yudi Nikawanti, Gia | Arts and Culture in Character Education | Songah, the local wisdom of Citengah in the Sumedang District, embodies character values that can be used as a basis for enhancing the quality of human resources. Art education positively impacts pupils as it instills character--building values (Ridwan et al., 2020). |
| 2020 | A.A. Nogaj | Emotional Intelligence and Strategies for Coping With Stress Among Music School Students in the Context of Visual Arts and General Education Students | Students can express their emotions more easily through music and effectively use their knowledge of the emotions they experience (Nogaj, 2020). |
| 2020 | Setyawan, Dedy Dopo, Florentianus | Strengthening national identity through the learning of east culture-based art education | Arts education in higher education can improve students' overall competency and enhance the protection and inheritance of intangible cultural heritage (Setyawan & Dopo, 2020). |
| 2020 | J. Žnidaršič | The impact of arts and cultural education on pupils' opinions of musical culture – an interdisciplinary project | Experiments conducted in four Slovenian schools on cultural arts education. Learning contributes to raising awareness about the importance of collaboration between schools and artists (Žnidaršič, 2020). |
| 2021 | A. Christ | Big Data and Digital Aesthetic, Arts, and Cultural Education: Hot Spots of Current Quantitative Research | Authors collect and compile documents related to digitization in aesthetic, arts; cultural education is defined by quantitative research (Christ et al., 2021). |
| 2021 | Nurhidayati, I K A | Pembelajaran Seni Tari Berbasis Kearifan Lokal Dalam Peningkatan Pendidikan Karakter Siswa Sekolah Dasar | Local wisdom, which contains many noble national cultural values remaining a strong part of the identity of its community members is often ignored due to being considered out of step with modern times, despite its usefulness (Nurhidayati, 2021). |
| 2021 | Imam Catur Pratomo | Pendidikan Seni Tari Sebagai Alternatif Pendidikan Multikultur Bagi Siswa Sd | Indonesian traditional dance arts in multicultural education are designed to develop social sensitivity and awareness of cultural differences which fosters a sense of pride in pluralist cultural diversity and respect for one's own and other cultures (Imam Catur Pratomo, 2021). |
| 2021 | Silalahi, Eccles Rianda Gunara, Sandie Gunawan, Iwan | Penggunaan Whatsapp Dalam Pembelajaran Daring Mata Pelajaran Seni Budaya Oleh Mahasiswa Program Pengenalan Pengalaman Lapangan Satuan Pendidikan (PPLSP) | Cultural arts learning using Whatsapp has a positive impact on online learning supported by sharing links, sharing PDF files, documents, spreadsheets, and slideshows (Silalahi et al., 2021). |

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| Year | Author | Research Title | Implication |
|---|---|---|---|
| 2022 | L. Vermeersch, E. Storme | Arts And Cultural Education During Early Childhood: A Critical Analysis Of Effects And Impacts | Authors show that instrumental arts and culture education has a positive effect on the development of on very young children (0y–6y). (Vermeersch & Storme, 2021) |
| 2022 | M.T. Arnold | Expectations of Cross-Sector Collaboration in Cultural and Arts Education | Expectations of preliminary collaborations in cultural and arts education in Germany. The findings show that cultural actors participate with expectations starting from varying levels of closeness and distance from other actors (Arnold et al., 2022). |
| 2022 | Tysha, Artara Sella Handayaningrum, Warih | Pendidikan Karakter Melalui Pembelajaran Seni Tari Di SMAN 8 Malang | Authors describe the PBL learning model with a scientific approach, group discussions, Q&A sessions, assignments, and assessments based on the 2013 curriculum. In the learning process, character-building values include discipline, politeness, respect, hard work, and tolerance. In learning materials, they include cooperation, responsibility, discipline, and self--confidence (Tysha & Handayaningrum, 2022). |
| 2022 | M. Lu | Research on Moral Education Function of Music Art in College Students Based on Bayesian Learning Algorithm | Author d of Aesthetic Education which not only enhances students' skills and abilities but also provides moral education through specific teaching methods (Lu et al., 2022). |

## Discussion

Comprehensive analysis of SLR results provides a broad overview of existing research, paving the way for scientific progress in the future. One area that has captured the interest of researchers is cultural arts learning, particularly in its role in cultivating local wisdom values. Thus, this discussion of SLR outcomes focuses on art education and a review of research methodologies used by previous scholars.

### Educational Values in Arts and Culture Learning

#### a. Art Education

Art education has the potential to encourage students' creativity and innovation during the learning process in order to enhance their intellect and imagination. According to Rokana et al. (2021), art ed-

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ucation in elementary schools should be taught as a foundation for children's development, emphasizing their capacity to recognize and preserve the culture prevalent in their society. Today young people focus strongly on learning science from various sources. If the present young generation does not pass on cultural legacy to the next generation, this legacy will be abandoned and lost. Eventually, it may become completely forgotten, as it cannot be inherited as an artifact. Therefore, as sophisticated technological advancements continue to evolve rapidly, it is crucial to preserve existing cultural heritage. Utilizing appropriate multimedia may help students learn quickly in a practical and creative way. In elementary school, art education should employ diverse strategies and media, including multimedia, to sustain the transmission of local knowledge values.

**b. Drama Education**

Drama education, an integral part of art education, allows students to explore their identities through role-playing. Recently, it has been incorporated as a distinct component of learning arts in the elementary school curriculum in Indonesia, particularly within the autonomous curriculum framework. This platform offers an opportunity to impart national and local wisdom values. Now, the wealth of the Indonesian culture whose folklore is brimming with these values can be taught to the younger generation at school as stated by Srisudarso & Nurhasanah (2018). The artistic process involved in drama education has the potential to enrich individuals' character and cultural values, fostering the development of humanist-oriented individuals. Drama education, employed as a learning method, can yield various benefits (Okvuran, 2010). The themes and plots explored in dramas can deepen students' understanding of the human values ingrained in Indonesian society drama as a form of national culture. For elementary school students with a strong inclination toward learning, it can serve as a motivator for embodying civilized sensibilities and behaving in accordance with their cultural characteristics.

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**c. Dance Education**

Art appreciation and creation in elementary school can increase pupils' cognitive, affective, and psychomotor skills (Lokasari, 2012). Dance exercises for pupils may also influence their attitudes regarding skills (Herlinah, 2015). Through regular and persistent practice, students indirectly explore their cultural beliefs to attain proficiency in various dance activities. This understanding does not always manifest abruptly but evolves over time through a gradual process. For instance, students can embody cultural elements by wearing traditional attire during dance performances. Through such practices, they inherently grasp various aspects such as patterns, decorations, ornaments, and appropriate attire. Students can be energized by learning to dance through direct dance practice (Zheng & Zhao, 2018). Excitement means students' desire to dance and learn about their existing culture. As a fundamental aspect of human life, traditional dance movements embody cultural heritage, reflecting life experiences from the past.

**d. Music Education**

According to Diah (2016), proficiency and fluency in a musical game are based on consistent practice. Through persistent engagement in music, students gain familiarity with the sounds they hear during the process and develop an appreciation for cultural values which can instill a sense of love for their culture. Music education differs greatly from other arts education in terms of general emotional intelligence, with students becoming more conscious of both positive and negative emotions on a broader scale (Nogaj, 2020).). Therefore, the messages conveyed through music can aid students in developing their cultural understanding. Due to the challenges and complexity inherent in music performance, music teaching must take into account factors such as time, facilities, and available infrastructure. Students will be able to be creative in music lessons if effective practice techniques are used and sufficient time, attention, and infrastructure are provided (Latuheru, 2019). Similarly, Ritonga

(2017) noted that music education integrates various values into students' personality development by interpreting cultural education and national characteristics.

**e. Arts and Culture Education**

According to Tysha & Handayaningrum (2022), national character values such as discipline, caring, hard work, responsibility, self-confidence, and tolerance, which form the nation's identity, must be guarded and maintained by the people, primarily through arts and cultural education. These values should serve as a barrier against shifts in new civilizations. As noted by Setyawan & Dopo (2020), these characteristics constitute an intangible cultural legacy, which is continuously preserved in various aspects, one of which is education, which may strengthen the safeguarding of this intangible legacy. As a form of intangible heritage, broad aesthetic value has a highly positive influence on students' development.

**f. Local Wisdom**

Ardipal (2012) argues that local wisdom, as a resource that must be protected and preserved, should be given more attention by the younger generation. This highly valuable asset can only be retained by others if they are willing to learn and study it. To uphold national dignity, the principles inherent in local wisdom must be instilled and taught to students from elementary through tertiary levels, as they encompass many noble cultural values that can shape the identity of community members. However, Nurhidayati (2021) noted that local wisdom is often overlooked because it seems out of step with modern times and technology.

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## Conclusion

A literature review serves as a foundation for identifying future research paths. Arts education encompasses various forms, including art education, music education, dance education, drama education, cultural education, and education on local wisdom. Extensive research on cultural education has been conducted from multiple perspectives, such as pioneering cultural education research, learning development with an emphasis on cultural values, experiments incorporating local culture into learning, case studies of cultural phenomena, action research on cultural arts learning, quantitative research generalizing cultural arts education, and literature reviews on existing cultural phenomena.

As a recommendation for art education educators and researchers, it is essential to study existing local wisdom values. Without the involvement of practitioners in managing culture, the wealth of a people or nation is at risk of being lost. One essential thing we must remember is that if we do not preserve our culture, we risk losing our national identity.

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# Developing Local Wisdom-Based Teaching Materials on "Family Addressing Terms" for Elementary School Students: Validation Analysis Using the 4D Model

(pp. 295–315)

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## Abstract

**Objectives of the research:** The utilization of media in teaching materials serves to impart knowledge of local wisdom by incorporating visuals tailored to students' characteristics. Local wisdom as part of national identity should be recognized by the next generation through learning. Each culture in every region possesses unique characteristics that distinguish it from

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others. Hence, appropriate teaching materials on local wisdom should be developed for elementary school students. This study aims to design teaching materials focusing on addressing terms used in several regions in Riau.

**Research methods:** Employing a Research and Development (R&D) approach, this study follows the 4D model, which consists of defining, designing, developing, and disseminating phases.

**A short description of the context of the issue:** This article underscores the importance of developing local wisdom-based teaching materials for elementary school students. It emphasizes the need for elementary school materials aligning with the local wisdom that are relevant to the local community and facilitate students' understanding and appreciation of their culture. In today's digital millennium, many elementary school students lack awareness or appreciation of local wisdom, including familial terms of address.

**Research findings:** In addition, experts in teaching materials, media, and linguistics analyzed the data using descriptive percentage-based methods to validate the findings. Experts evaluated four key aspects: content, language, presentation, and appropriateness. Results indicated high feasibility, with content scoring 95%, language 96.87%, presentation 97.5%, and graphics 93.75%, culminating in an overall average score of 95.78% in the "very feasible" category. These findings suggest potential for broader application and study.

**Conclusions and recommendations:** The development and testing of local wisdom teaching materials for elementary school students have demonstrated their suitability for use. Based on the validation results by experts in teaching, media, and language, the materials are highly feasible, so, further exploration and dissemination of these materials on a larger scale are recommended.

***Keywords*:** teaching materials, local wisdom, addressing terms

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## Introduction

Local wisdom represents the identity and cultural characteristics of a nation in order to make it understand and cultivate its culture while distinguishing it from the cultures of other nations (Sylviani, 2020). As a defining cultural trait, local wisdom highlights the differences between one and another culture. Local wisdom in every culture should be recognized and cultivated by each nation to underscore these distinctions. Fallahnda (2021), describes local wisdom as the ethical and cultural values of a society, which is passed down through generations.

Despite the rapid development of technology and information, students often overlook the significance of local wisdom (Hidayati, 2020), both within the family and in social contexts (Elbaar, 2020), including the proper use of family addressing terms. Today, the presence of local wisdom is diminishing (Lyesmaya, 2020), largely due to the dominant influence of capitalism (Wijijayanti, 2020). Hutagalung (2020), notes that under capitalism, profit and loss analysis often takes precedence over knowledge within society (Wijijayanti, 2020). Sukadari (2020) adds that capitalism undermines the fulfillment of local needs, as it does not support the sustainability of local communities.

In the third-millennium era, local wisdom faces erosion, marked by changes in social systems, a decline in humanity and moral values, increased dependency, and degradation of natural resources and the environment (Juhadi, 2021). This erosion is further influenced by the behavior of Indonesians, who fail to maintain their culture, morals, and respect for their environment (Greenbaun, 2020). The lack of appreciation for local wisdom, coupled with the effects of globalization reaching even remote areas, exacerbates this issue (Thamrin, 2013).

According to Renjaan (2013), the addressing terms used within families represent a form of wisdom related to the habits and ethics that guide human behavior in ecological community life. Local wisdom encompasses not only knowledge and understanding of human relationships but also the habits and practices that foster connections within and between ecological communities (Sari, 2014). Preserving the local wisdom of family

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addressing terms is essential, as it is deeply intertwined with the values of manners and politeness in society.

Learning about local wisdom is minimally applied and taught in schools. Therefore, students have a limited understanding of appropriate addressing terms used with parents to increase their modesty within the family context (Effendi, 2020). According to Wati (2022), media tools can be used in teaching materials to transfer knowledge about local wisdom by providing images suitable for the students' level.

Successful teaching and learning can be achieved when teachers develop and apply various components such as teaching and learning outcomes, materials, strategies, and evaluations. One key aspect is developing teaching and learning materials that encourage students' interest in learning (Hosnan, 2016) along strategies for teaching and learning, and evaluation. These materials should serve as external factors to reinforce students' internal motivation (Nurafni et al, 2020). Teaching materials based on local wisdom are specifically developed to overcome students' obstacles at school., such as the lack of resources that reflect local environmental conditions.

The development of these materials should be appropriate for the student's competencies as outlined in the curriculum (Tinja et al, 2017). In elementary schools, students can concretize learning concepts through teaching materials that include engaging picture presentations provided by the teacher (Munjiatun et al., 2022).

Today, elementary school students often struggle to recognize ethics and traditions, particularly family addressing terms, which are essential for maintaining courtesy through meaning, understanding, and practice within the family. According to Kurniman et al. (2022), the shift away from local wisdom is due to modernization, leading Gen-Z children to underestimate its significance. In addition, children tend to follow trending issues, which unfortunately causes them to forget the local wisdom of their culture (Kurniaman et al., 2022).

Therefore, designing teaching and reading materials that incorporate local wisdom is essential for teachers and the entire school team to enhance elementary students' knowledge and understanding. Specifically,

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the teaching material focuses on the family addressing terms used by the Riau people. Clearly, the aim of this research is to assess the validation and feasibility of teaching materials based on local wisdom.

## Research method

The research discussed in this article is developmental research (R&D), or process or stages aimed at creating effective products such as learning materials, media, and teaching strategies for schools. This type of research focuses on learning/teaching materials, rather than theoretical review. Specifically, this study develops teaching materials on the family addressing terms used by Malay Riau people, incorporating local wisdom for elementary school students. The research follows the 4-D model outlined by Thiagarajan in Mulyatiningsih (2011), which includes the stages of defining, designing, developing, and disseminating. Here is a breakdown of these stages as applied to the development of teaching materials on family addressing terms used by Malay Riau people for elementary school students:

### Defining Stage

The defining stage is designed to identify and define the needs in the teaching and learning process and gather relevant information about the product. This stage includes:

1) Preliminary Analysis
Preliminary analysis identifies the basic issues in developing elementary-level teaching materials on the local wisdom of family addressing terms used by Malay Riau people. It provides the necessary facts and alternatives to help determine the appropriate steps for developing these materials for elementary school students.

2) Student Analysis
It is crucial to conduct analysis of students in the preliminary stages. This involves observing students' characteristics in order to determine whether the teaching materials are suitable for them.

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3) Teaching and Learning Material Analysis
   This analysis identifies the subject matter for students, selects relevant teaching and learning materials, and organizes them systematically.

4) Concept Analysis
   This analysis assesses whether the content of the teaching materials on the local wisdom of family addressing terms in the Tapung district is suitable or whether it or diverges from the developmental goals.

**Designing Stage**

After the problems in the defining stage are identified, the designing stage focuses on creating the teaching materials to be presented to students.

**Development Stage**

This stage involves producing and revising teaching materials based on expert recommendations and development testing, which is tested for students. It includes two following stages:

1) Expert Appraisal Expert
   Expert appraisal validates the teaching materials before development testing. Experts review the materials to ensure they are suitable, and their feedback is used to revise the initial product. Subsequently, the teaching materials are assessed by both appraisal and media expert lecturer to determine whether their feasibility for use. The validation results are then used to further revise the teaching materials in order to ensure that they are complete.

2) Development Testing
   Development testing involves distributing the teaching materials to elementary school students and conducting limited trials with 10 students to gauge their responses to the teaching materials.

**Dissemination Stage**

After revising the teaching materials, this stage involves disseminating them. In this research, limited dissemination is applied to promote and distribute the final product to elementary school teachers.

## Results and discussion

In this section, we delve into the development of teaching materials based on local wisdom concerning family terms of address used by the Malay Riau people, as outlined in Chapter III. The developmental stages are categorized into defining, designing, developing, and disseminating, as elaborated below:

### Defining Stage

The defining stage encompasses two key analyses: need analysis and student characteristic analysis. Need analysis focuses on curriculum, concepts, and roles, while student characteristic analysis aims to align teaching materials with students' developmental levels. The breakdown is as follows:

### Need Analysis

A needs analysis is conducted to identify all the essential elements required for developing teaching materials. The analysis includes the following aspects:

a) Curriculum Analysis
The curriculum analysis is conducted to identify the curriculum, teaching methods, and strategies used in learning. This process aims to achieve learning objectives and support the development of teaching materials. In this research, Curriculum 2013 serves as the reference. The analysis involves determining the learning theme, sub-theme, core competencies, achievement competencies, and learning objectives. The theme is "My Family" with the sub-theme "My Family Members". based on KD 3.10 and KD 4.9 for Indonesian language subjects. Conversely, the sub-theme "My Big Family" is determined by KD 3.1 and KD 4.1 for Civic Education subjects. The analysis of the curriculum covers the following aspects.

b) Core Competency Analysis
For instance, the theme is "My Family" with the sub-theme "My Family Members" based on KD 3.10 and KD 4.9 for Indonesian language

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subjects. Conversely, the sub-theme "My Family," is based on KD 3.1 and KD 4.1 for Civic Education subjects. The curriculum analysis focuses on the following aspects:

The theme analysis focuses on the sub-theme "My Family Members" within the broader theme of "My Family," encompassing both Indonesian and Civic Education subjects. This theme, explored in the research, is developed into teaching materials that incorporate local wisdom.

In this research, the basic competencies developed are KD 3.10 and KD 4.9 for Indonesian subjects, and KD 3.1 and KD 4.1 for Civic Education subjects. The content covers family terms such as father, mother, brother, sister, and younger siblings. Specifically, the addressing terms used by the people of Kampar, Kuantan Singingi, and Bengkalis are examined. Each sub-district, representing remote areas within these districts, is reviewed. The sub-districts are Kuok in Kampar, Banjar Island in Kuantan Singingi, and Pematang Duku in Bengkalis. The study identifies the addressing terms used in both extended and nuclear families in each sub-district.

The teaching materials are developed based on the analysis of core competencies. These materials are divided into two sub-sections: addressing terms in the extended family and addressing terms in the nuclear family, based on the father's and mother's sides. These sub-teaching materials are detailed with specific indicators and learning objectives. The core competencies (KD) for the sub-theme of nuclear family members can be described as the ability to:

3.10 Specify vocabulary and terms related to family members and residents, both orally and in writing, with the assistance of local language vocabularies.

4.9 Use appropriate vocabulary and terms for self-introduction, as well as introducing family members and residents, both orally and in writing.

3.1 Introduce the values represented by the Pancasila symbols and the national emblem, "Garuda Pancasila."

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4.1 Describe the Pancasila symbols featured on the national emblem, "Garuda Pancasila."

The sub-theme for core family members that consists of the indicators from Indonesian and Civic Education subjects can be broken down as follows:

3.10.1 Identify family addressing terms for core family members used by the Kampar, Kuantan Singingi, and Bengkalis people
1.9.1.1 Apply the local languages to introduce core family members from Kampar, Kuantan Singingi, and Bengkalis.
3.1.1 Recite the first principle of Pancasila.
4.1.1 Describe the symbol of Pancasila as depicted in the state emblem, "Garuda Pancasila."

For the sub-theme of my extended family, the core competencies for Indonesian and Civic Education learning subjects include the ability to:

3.9 Specify vocabulary and terms for introducing yourself, your family, and people who live in the community, both orally and in writing, assisted by local languages
4.9 Use appropriate vocabulary and terms for introducing yourself, your family, and community members, both orally and in writing
3.3 Identify the diversity.
4.3 Share your experiences in family life.

For Civic Education learning subjects, the core competencies include the ability to:

3.9.1 Indicate vocabulary and terms for introducing extended family members, both orally and in writing.
4.9.1 Apply the methods for introducing extended family members based on pictures or figures described by the students.

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3.3.1 Write data regarding the roles of family members.
4.3.1 Share experiences from visiting relatives.

Based on the analysis of core competencies, indicators of competency achievement (IPK), and learning outcomes, the researcher developed teaching materials on the local wisdom of addressing terms used by the Malay Riau people. These materials include a lesson plan and specific teaching content. For the lesson plan, a discovery learning approach was utilized. Additionally, social science teaching materials on the local wisdom of family addressing terms used by the Malay Riau people can be structured into stages of reading, writing, retelling, and practicing. These stages are essential for ensuring that students understand the content of the teaching and learning materials.

**Analysis of a Concept**

The concept within this research pertains to the stages incorporated in teaching materials for students. These concepts can be described as follows:

Reading
Reading involves techniques for comprehending and extracting messages conveyed by the author. Within this research, reading concepts encompass reading aloud, understanding content, and comprehending learning materials. This activity is conducted in pairs, allowing students to exchange knowledge and interpretations of the learning material.
Writing
This concept encourages students to reinforce their understanding by writing vocabulary related to the reading text. Additionally, writing helps students remember what they read better. The writing activity involves rewriting the names of family members based on the core and extended family structures used by the Malay Riau people.
Retelling
Retelling involves students sharing their experiences within the core or extended family. This storytelling process involves dividing students

into groups to share their experiences with their classmates, facilitating discussions on family addressing terms across different cultures.
Practicing
The final stage, practicing, entails students engaging in activities such as matching words with pictures, rewriting words, and asking and answering short questions.

**Analysis of Students' Characteristics**

An analysis of students' characteristics is crucial for developing teaching materials and learning activities, especially when it comes to first-grade elementary school students' academic skills. To develop appropriate teaching materials, it is essential to examine these students' academic skills to align the content with their cognitive levels. Additionally, analyzing students' language development is necessary to structure the language used in teaching materials appropriately. On the other hand, understanding students' motivation is important for presenting material in a way that encourages engagement and enthusiasm for learning.

Further analysis of the needs for teaching materials is also essential. This can be achieved by directly interviewing students about the learning materials they use. These interviews should be unstructured, allowing the interviewer to expand on questions based on students' responses to gain deeper insights.

Based on the issues described above, teaching materials should be developed to minimize these problems by comprehensively considering students' developmental skill levels. Therefore, teaching materials should be easy to understand and include pictures related to the learning content, specifically tailored to the Malay Riau culture. The family addressing terms used by Malay Riau people should be arranged systematically and color-coded, with figures or pictures to reinforce understanding. This approach makes the content more engaging for students.

As regards the problems described, the researcher aims to develop teaching materials that incorporate local wisdom, and address terms used by Malay Riau people. This instructional resource aims to make students aware of the diverse addressing terms within both nuclear and extended

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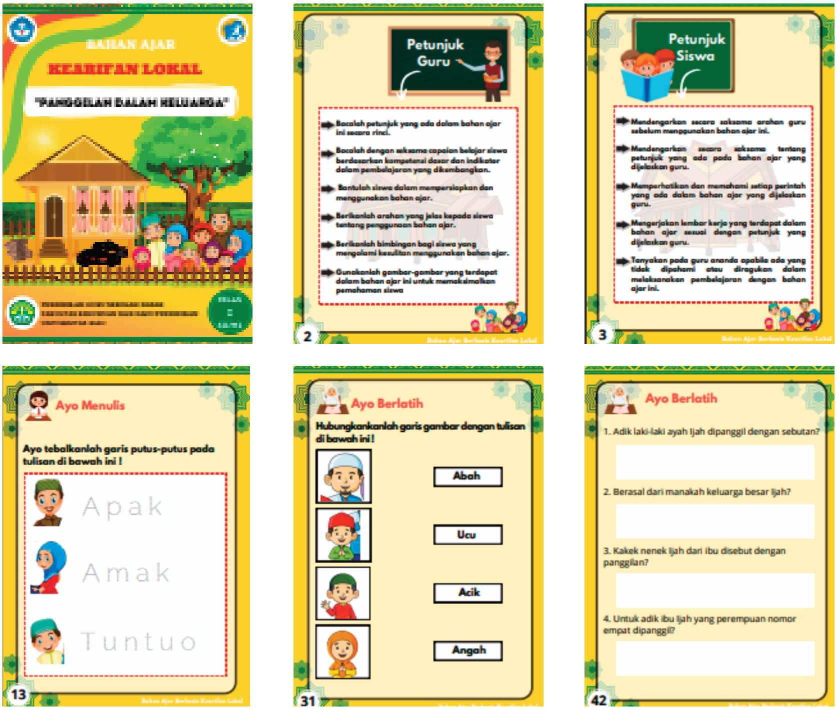
families, which are at risk of becoming extinct. The teaching material introduces characters from different locations: Ijah from Kampar, Raziq from Kuantan Singingi, and Tami from Bengkalis. The implementation of learning activities is divided into four stages: reading, writing, and practice. This comprehensive approach ensures effective learning outcomes.

### Designing Stage

Teaching and learning materials are developed based on students' characteristics, considering the analysis of standard competencies (SK), core competencies (KD), and specific indicators. The materials are designed with a yellow and green background featuring family and house pictures, with full-color headers and footers. They are created using Canva and use the Tahoma font in size 14 to ensure the text is large and clear for easy reading. Additionally, the materials include exercises. It can be illustrated as follows:

**Figure 1. Teaching and Learning Materials – Conveying Local Wisdom**



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### Development Stage

The development stage concerns validating the teaching and learning materials and lesson plans through product testing to assess their practicality and effectiveness. Carried out by experts and practitioners, this validation ensures that the materials are appropriate. Based on the suggestions and recommendations from these validators, the materials are revised to ensure that they are feasible, effective, and appropriate. The validation involves experts and practitioners from diverse backgrounds. Practitioners are selected based on their teaching experience and academic skills. Their assessments provide recommendations for revising lesson plans to meet technical requirements. The overall validation results are summarized as follows:

**Table 1. Validation of Lesson Plans by Practitioner**

| No | Aspects | Assessment Score from Validator | | | | | Total | Average |
|---|---|---|---|---|---|---|---|---|
| | | V1 | V2 | V3 | V4 | V5 | | |
| 1 | Identity | 8 | 8 | 8 | 8 | 8 | 40 | 100 |
| 2 | Indicator | 13 | 16 | 16 | 13 | 16 | 74 | 92.5 |
| 3 | Learning Objectives | 10 | 11 | 11 | 12 | 12 | 56 | 93.33 |
| 4 | Teaching and Learning Materials | 10 | 12 | 12 | 11 | 12 | 57 | 95 |
| 5 | Method | 8 | 8 | 8 | 8 | 7 | 39 | 97.5 |
| 6 | Media | 9 | 11 | 12 | 12 | 12 | 56 | 93.33 |
| 7 | Learning Activity | 16 | 16 | 16 | 15 | 15 | 78 | 97.5 |
| 8 | Assessment | 11 | 11 | 12 | 11 | 12 | 57 | 95 |
| Total | | | | | | | | **764.16** |
| Average | | | | | | | | 95.52 |

Validation of the teaching material is achieved by paying close attention to several key aspects: content feasibility, language, presentation, and visual aspects. Both experts and practitioners validate the teaching materials and lesson plans. Generally, the content feasibility validation conducted by experts can be described as follows:

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**Table 2. Validation of Teaching Materials based on Content Feasibility**

| No. | Aspects | Average % | Category |
|---|---|---|---|
| 1 | Indicator-based Core Competency | 100 | Frequently Valid |
| 2 | Student Development-based Teaching Materials | 91.66 | Frequently Valid |
| 3 | Needs for Teaching Materials | 91.66 | Frequently Valid |
| 4 | Appropriateness of Substantial Learning Materials | 100 | Frequently Valid |
| 5 | Teaching Materials for Student Knowledge | 100 | Frequently Valid |
| Average Score | | 96.66 | Frequently Valid |

Based on the table above, the average score for all components ranges from 91.66 to 100, placing them in the "frequently valid" category. The overall average score for content feasibility is 96.66, categorized as "valid." This indicates that the teaching material content is appropriate for the core competency and indicator, aligns with students' development, meets the needs for teaching material, is substantial, and effectively enhances students' knowledge. Next, the teaching material assessment is examined based on linguistic aspects. The validation of language aspects can be illustrated as follows:

**Table 3. Validation of Teaching Materials Based on Language Feasibility**

| No. | Aspects | Average % | Category |
|---|---|---|---|
| 1 | Legibility | 100 | Frequently Valid |
| 2 | Clear Information | 83.33 | Frequently Valid |
| 3 | Appropriateness of Indonesian Language Rules | 91.66 | Frequently Valid |
| 4 | Effective and Clear Language Use | 100 | Frequently Valid |
| Average Score | | 93.75 | Frequently Valid |

Based on Table 3 above, the average score ranges from 83.33 to 100, placing it in the "frequently valid" category. The average validity score for language feasibility is 93.75, categorized as "highly valid." This means that

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the teaching material meets language feasibility standards, ensuring readability, clarity of information, appropriate use of Indonesian language, and effective, clear communication. The next aspect is the presentation, which can be presented as follows:

**Table 4. Validation of Teaching Materials Based on Presentation**

| No. | Aspects | Average % | Category |
|---|---|---|---|
| 1 | Indicator | 100 | Frequently Valid |
| 2 | Systematic Presentation List | 100 | Frequently Valid |
| 3 | Students' Motivation and Interest | 91.66 | Frequently Valid |
| 4 | Students' Stimulus and Response | 83.33 | Frequently Valid |
| 5 | Detailed Information | 91.66 | Frequently Valid |
| Average Score | | 93.33 | Frequently Valid |

Based on Table 4, the range of scores for presentation is 83.33 to 100, falling within the highly valid category. The overall average score for presentation is 93.33, also in the highly valid category. This indicates that the teaching material has been based on indicators, systematically promoting motivation, interaction, and providing detailed information for students.

**Table 5. Validation Based on Graphical Aspects**

| No. | Aspects | Average % | Category |
|---|---|---|---|
| 1 | The Use of Font and Size | 91.66 | Frequently Valid |
| 2 | Layout | 100 | Frequently Valid |
| 3 | Image Illustration and Sources | 83.33 | Frequently Valid |
| 4 | Interesting and Varied Design | 100 | Frequently Valid |
| Average Score | | 93.75 | Frequently Valid |

The next aspect is the visual element, which is detailed in Table 5. The average scores for each aspect range from 83.33 to 100, again in the

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highly valid category. The overall average score for the graphical aspect is 93.75 with the highly valid category. This indicates that the teaching material has an interesting and varied design.

Assessment of the designed teaching material includes validation from both experts and practitioners. According to educational practitioners, who are typically teachers, validation covers content, language, presentation, and graphical aspects. This can be illustrated as follows:

**Table 6. Validation of Teaching Material by Practitioner**

| No. | Aspects | Average % | Category |
|---|---|---|---|
| 1 | Content | 95 | Frequently Valid |
| 2 | Language | 96.87 | Frequently Valid |
| 3 | Presentation | 97.5 | Frequently Valid |
| 4 | Graphics | 93.75 | Frequently Valid |
| Average | | 95.78 | Frequently Valid |

As regards the teaching materials validated by the practitioner, the average score achieved is 95.78, placing it in the highly valid category. Breaking it down by aspect, the content scored an average of 95, the language aspect scored 96.87, the presentation scored 97.5, and the graphical aspect scored 93.75, all within the highly valid category. This indicates that, according to the educational practitioner, the overall teaching materials on the local wisdom of family addressing terms used by Malay Riau people are valid.

## Discussion

The development of teaching materials on addressing terms used by the Malay Riau people as local wisdom, based on stages and technical development, aligns well with the 4D model. According to Septyanti et al. (2020), media tools in teaching materials are developed by teachers to

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facilitate knowledge. As stated by Kurniaman et al. (2020), the development of teaching materials involves considerations of content, presentation, language, and legibility. The development of teaching materials incorporating local wisdom has shown to be "highly valid" in terms of content feasibility, presentation, language, and graphics, making them suitable for further testing.

Practitioners' assessments, based on the characteristics of elementary school students, emphasize the importance of using pictures and stories (Lestari & SB. Nugraheti, 2022). Indriani (2022) asserts that achieving the eligibility of teaching materials on local wisdom regarding terms of address can help teachers to teach local wisdom to students. Hidayah et al. (2019) further suggest that teaching materials on addressing terms should be integrated into students' daily lives to help them recognize and understand the addressing terms used by the Malay Riau people, thus fostering cultural values and local identity.

According to Jumriani et al. (2021), local wisdom encompasses a broad and comprehensive phenomenon. As a result, it is extensive and diverse, with no limitations (Safitri et al., 2018). Local wisdom comprises all aspects of social life, whether inherited or newly developed (Toharudin et al., 2021). It includes valuable local ideas, beliefs, and perspectives that are ingrained and followed by community members (Relin et al., 2018). Therefore, local wisdom should be an intrinsic element of the educational curriculum at every level and in every context. Above all, it should be passed down and recognized by students to ensure they understand it comprehensively.

## Conclusion

The development of teaching material on family addressing terms as local wisdom for students has been validated as effective by both experts and practitioners. This validation ensures that teachers can easily introduce and teach local wisdom to students, specifically recognizing the addressing terms used by the Malay Riau people, especially in Kampar,

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Kuantan Singingi, and Bengkalis. Family addressing terms are categorized into two groups: those used for the core family and those used for the extended family, which includes both the father's and mother's families. With validated learning materials on local wisdom, elementary school teachers can effectively teach about family addressing terms, especially in Grade 1 under the theme of "My Family."

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# Selected Factors Determining the Adaptability of the Gdańsk School Under Sails Participants and Their Temperamental Correlates

(pp. 317–347)

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## Abstract

**Research objectives and problems:** The purpose of the study was to test the impact of a high seas cruise on a traditional sailing ship, during which sail training is implemented, on selected characteristics of the participants. It was thought that significant, positive changes would emerge in terms of decision-making, perception of the future, resistance to change, and proactivity – and that these changes would be related to temperament.

**Research methods:** Using the General Decision Making Style instrument, the Consideration of Future Consequences Scale, the Resistance to Change Scale, and the Proactivity Scale, a questionnaire with repeated measurement was administered to two groups of adolescents taking part in a sea cruise (Group 1: 14-day cruise, 11 boys, 8 girls, M age=17.1; Group 2: 7-day cruise, 13 boys, 7 girls, M age = 21.9). Measurements were taken on the first and last day of

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the cruise and one month after the cruise. Multilevel modeling was used to examine how temperament moderates changes in decision-making style, consideration of future consequences, resistance to change, and level of proactivity.
**Structure of the article:** The text provides information on sail training, including the historical context, previous research, and impact on youths' development. The role of temperament in shaping behavior and its relevance to sail training are introduced. The theoretical constructs investigated, and the tools used in the research are described. The research objectives are stated and the sample and procedure are explained. The results are presented and discussed. Limitations and conclusions are indicated.
**Research findings and their impact:** Emotional reactivity significantly moderated the increase in dependent and avoidant decision-making styles and short-term focus, while it decreased cognitive rigidity and proactivity. Activity counteracted growth in avoidant decision-making style, reduced resistance to change, routine seeking, and emotional reactivity to change, lowered short-term focus, and supported growth in proactivity. Resilience counteracted the positive development of proactivity.
**Conclusions and recommendations:** Temperament traits can be mediators of change in terms of the constructs discussed herein. The results allow us to look at sail training from a new perspective, though further research on a regular School Under Sails and aboard other sailing ships is needed to formulate indisputable conclusions.

***Keywords***: Gdańsk School Under Sails, adaptability, temperament, decision-making, consideration of future consequences, resistance to change, proactivity

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## Introduction

The idea of sail training was instilled in Poland by General Mariusz Zaruski in the 1920s (Romaniuk, 2018) and was developed subsequently (Drucka, 1969; Stępień, 1997). Zaruski's goal was to teach young people to sail the seas, but also to use sailing for education. Intuitive application of the then-unknown social learning theory (Bandura, 2007) allowed Zaruski to use his authority among young people to be effective (Wędzinski, 1990; Zaruski, 1925; Zaruski, 1933).

The idea has evolved over the years (Bublewski, 1992; Glowacki, 1972; Jasser, 2012; Śliwko, 1982; Woźniak, 1989; Zaruski, 1958). The new definition of sail training is more in line with modern needs. "Sail training in pedagogical terms is an organized and purposeful process that influences personality, attitudes […] in a socially desirable way, […] through which transgression and developmental leaps occur" (Romaniuk, 2020c, p. 14).

## School Under Sails and its impact on youths

The participants of Schools Under Sails are adolescents aged 15–20 years. The aims and itineraries of the cruises help to achieve the goals of adolescence (Romaniuk, 2015b, 2016). Their impact on young people is valuable and positive, as can be seen in the studies mentioned below. Adolescents show significant improvement in confidence in social interactions and group cooperation skills. The positive value of sail training transcends national and cultural boundaries. Particular and purposeful action is important in implementing a specific program, which increases its effectiveness (Allison et al., 2007). Passion for sailing is also passed on in an intergenerational transfer (Romaniuk & Łukasiewicz-Wieleba, 2020). Significant increases in generalized self-efficacy (Hunter et al., 2010), mental toughness, and self-esteem have been shown (Romaniuk, 2021b, 2020b). Elevated levels of self-esteem persist for 4–5 months (Kafka et al., 2016) and even a year after the cruise (Hunter et al., 2013). Because these features are important in the context of youth development, shaping them through sail training is advisable.

Self-efficacy reflects adolescents' actual control of behavior and skills (de Vries et al., 1988). It helps predict self-efficacy in schooling (Gore, 2006) and university studies (Andrew, 1998; Choi, 2005) and it helps in coping with stress (Jerusalem & Schwarzer, 1992). One of its strongest determinants is the experience of mastery, which is particularly supportive

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because it provides direct proof of the effectiveness of one's actions (Bandura, 1977), which occurs on a ship (Romaniuk, 2020a). It is a protective factor against risk-taking behavior (Ogunyemi & Mabekoje, 2007).

Mental hardiness is a resource of resilience when faced with a stressful situation (Kobasa, 1979). Its three components, or interrelated dispositions – commitment, a sense of control, and openness to challenge – are important not only in the life of an adolescent, but also in the life of an adult (Bartone et al., 2016). Adventures, difficulties, and weaknesses overcome while struggling with the elements during a cruise provide a sense of pride and turn into a desire to take on further challenges. Cruises also provide an opportunity to effectively include people with disabilities (i.e., visual impairments or physical disabilities) into groups of young people (Romaniuk, 2014; 2015a).

The positive impact of sail training on many characteristics and competencies indicated above have been mentioned in the following studies. a qualitative study by Henstock et al. (2013) showed the development of social competence, as well as overall self-concept, motivation to learn, and a sense of purpose. Participation in an adventure education-based development program promotes ego identity building (Bennion & Adams, 1986), mainly through significantly lowering levels of exclusion and distraction (Kally & Heesacker, 2003). Mental resilience, a positive personality trait that enhances individual adaptation (Wagnild & Young, 1993), increases significantly (Koni et al., 2019). A study following a three-month Atlantic cruise showed that the participants had developed ways to cope with stress in the form of positive reinterpretation and development skills (Norris & Weinman, 1996).

The above-mentioned qualities in which positive changes occur are desirable and valuable in life. These changes may result from the need to face the elements and being in extreme or limit situations, allowing the person to overcome their own weaknesses, experience the feeling of flow, and to develop through transgression (Romaniuk, 2021a). Sailors perceive a sailing ship as a space for experiencing freedom that is conducive to development, thus providing a suitable educational environment (Romaniuk & Łukasiewicz-Wieleba, 2021), consistent with the ideas and

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expectations of adolescents on this subject (Romaniuk & Łukasiewicz--Wieleba, 2019). This makes the space of a sailing ship a friendly place for the effective development of young people.

Existing research on sail training has explored the topic, but despite its growing popularity, the area is rather niche. The cited studies concern single features and only indicate changes in their scope; they do not contain advanced statistical analysis. The natural course of events is to develop research on sail training and to attempt to describe more precisely what actually happens to participants in terms of their development. There is no analysis of participants' adaptability and the topic is not framed from the perspective of their temperamental traits. It can be hypothesized that the synergistic effect of the interactions of the staff, setting an example of "decent work," the environment of the ship on a full-sea cruise, and their own experiences, experiences, and reflections will be positive.

## Temperamental factors in shaping behavior

Temperament is one of the regulators of human–environment relationships and a major source of stimulation (Strelau, 1983). The study was embedded in the Regulative Theory of Temperament (RTT) because it is multidimensional, focuses on the causes of behavior, and is concerned with behavior as a whole. The RTT can be applied to survey cruise participants: adolescents over 15 years of age (Cyniak-Cieciura et al., 2016). According to the RTT, traits are general dimensions of behavior encompassing its specific temporal and energetic characteristics, as well as the relationships relating to them or trait structures (Zawadzki & Strelau, 1997). The regulatory function of temperament is to moderate the stimulation and timing of behavior depending on individual characteristics; the role of regulating relations with the external world is evident in difficult and/or extreme situations (Strelau, 2009).

Temperament refers to formal behavioral traits (Strelau, 1974), so biological mechanisms that make up neurohormonal individuality (Strelau & Plomin, 1992) can differentiate behavior in psychologically demanding

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situations (Wright & Mischel, 1987). A sailing ship is a unique environment for the crew, and the situations are highly stimulating. The inability of participants to regulate the stimulus value of the situation should reveal individual differences between low- and high-activity individuals in terms of behavior (Friedensberg, 1985; Klonowicz, 1986). There is a direct correlation between activity and the characteristics of the individual (Elijah, 1981), which may translate into differences in the other measured constructs. Temperament may moderate changes in decision-making, perception of the consequences of one's actions, adaptability, and proactivity, which may be provoked by the participants' experiences on the cruise.

## Theoretical constructs used in the study

Decision-making style is a learned, habitual pattern of response manifested by an individual when confronted with a decision-making situation (Scott & Bruce, 1995). It is not a personality trait, but a habit-based tendency to react in a certain way in a certain context. Situations can influence decisions, while personality traits tend to be inter-situationally consistent (Michel, 1968). During the cruise, the participants perform the rotating role of watch leader, which involves managing their peers under the supervision of an experienced officer. They receive tasks from the officer that they must complete on their own. This is an opportunity to practice decision-making, which implies a desire to test whether temperament moderates the change in decision-making style after the experience of the cruise. It is desirable to shape a rational decision-making style in participants through modeling because it is a predictor of rationality and because an avoidant style can predict indecision (Curşeu & Schruijer, 2012).

Consideration of Future Consequences (CFC) is the degree to which one considers the distant consequences of one's current behavior and how it will affect oneself (Strathman et al., 1994). It involves an ongoing, intrapersonal struggle between current behavior intended to result in one set of immediate and one set of future consequences. The way the dilemma between present and future is resolved is a relatively stable trait.

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People with low CFC focus on immediate needs and their satisfaction. Those with high CFC use distant goals as a guide for their current actions. a change in attitude under the influence of education is possible (Toepoel, 2010), but the outflow of significant events on CFC is unknown. A significant event in a young person's life may be a high-sea voyage on a sail training ship. In addition to situations in which the participants practice making decisions for which they are responsible, they also participate in educational activities and have a lot of time to talk to each other and to the sailing ship staff, as well as space to reflect on their current and future lives. This can provide an incentive to develop CFC.

Resistance to Change (RtC) is an indicator of the degree to which an individual (fails to) adapts to change. Resistance to change derives from an individual's personality and can be traced back to an unwillingness to lose control, cognitive rigidity, lack of mental toughness, etc. (Oreg, 2003). RtC can mediate changes in other measured traits. The atmosphere on board includes contextual variables that mitigate resistance to change, such as an appropriate climate and leadership style (Hon et al., 2011). Educational interactions can reduce resistance by properly preparing for change and managing the entire process (Bruckman, 2008). Resistance to change may decrease among the participants due to their experiences during the cruise, and they may become more flexible.

Proactivity (PA) is the desire to act and create reality (Pitt et al., 2002). It involves taking control rather than passively observing (Kanten & Alparslan, 2013). PA involves being self-reliant, change-oriented, and future-focused (Parker et al., 2010; see also Belschak et al., 2010; Ohly & Fritz, 2007). Shaping proactivity in young people increases their chances of taking their careers into their own hands (Dimitrios, 2008) and building their own businesses (Crant, 1996); it allows them to anticipate events (Bar, 2009) and learn and socialize more effectively (Cooper-Thomas et al., 2014). On a ship, apart from the crew's duties, there are many opportunities to show initiative. After a few days of the cruise, the participants begin to treat the ship as their home, so they want to take care of it, are interested in it and show initiative not only in learning sailing skills, but also in actively participating in running the ship. This supports a positive change in proactivity.

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## Research problem, questions, and hypotheses

The aim of the study was to investigate the adaptability of participants in the Gdansk School Under Sail (GSUS) cruise. The existence of correlations between participating in the GSUS cruise and changes in selected characteristics (decision-making styles, consideration of future consequences, resistance to change, and proactivity level) were verified. The role of temperament in changing these attributes was examined. The constructs discussed above are important traits for a sailor, but also for an adult, so it is useful to know whether and how they develop during the sail training cruise. Sailing is a demanding discipline. Actions must be preceded by an analysis of their potential consequences and decisions should result from rational calculation. Knowledge and experience make it possible to anticipate events, but success is guaranteed by quick, efficient, proactive prediction. Proactivity is a desirable trait, as it avoids many undesirable events. However, not everything can be predicted, so a sailor should adapt efficiently to dynamic situations.

Based on the above-mentioned literature review and observations made during previous cruises of the School Under Sails, the following research hypotheses were formulated. Participation in the GSUS leads to (1) a decrease in decision-making disorder among participants, who become more concrete after the cruise, (2) the formation of a more specified vision of their future among participants, (3) better adaptation to dynamic situations, (4) an increase in the proactivity of the participants, and (5) which is moderated by the temperament of participants.

## Research tools

Five research tools were used: the General Decision-Making Style questionnaire (GDMS), the Consideration of Future Consequences questionnaire (CFC), the Resistance to Change questionnaire (RTC), the Proactive Attitude Scale (PA), and the Formal Behavioral Characteristics – Temperament

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Inventory, revised version (FCB-TI(R)). All scales are self-report measures and can be used for selected respondents.

The GDMS scale (Scott & Bruce, 1995) has 25 items, rated on five-point scale from "Strongly disagree" to "Strongly agree," and it assesses attitudes toward decision-making situations, distinguishing between five styles. The rational style (RDS) emphasizes "careful search and logical evaluation of alternatives," the avoidant style (ADS) emphasizes postponing and avoiding decisions, the dependent style (DDS) emphasizes "seeking advice and guidance from others," the intuitive style (IDS) emphasizes "relying on hunches and feelings," and the spontaneous style (SDS) emphasizes "a sense of immediacy and a desire to move through the decision-making process as quickly as possible" (Scott & Bruce, 1995, p. 820).

The Consideration of Future Consequences (CFC) scale (Strathman et al., 1994) has 12 items describing behavior, rated on five-point scale from "Definitely unusual" to "Definitely usual," and it assesses the degree to which short-term or long-term consequences are emphasized (Toepoel, 2010).

The Resistance to Change (RTC) scale (Oreg, 2003) has 17 items, rated on six-point scale from "Strongly disagree" to "Strongly agree." It assesses individuals' tendencies to "resist or avoid making changes, to devalue change in general, and to experience aversion to change in its various contexts and types" (Oreg, 2003, p. 680). It includes four subscales: Routine Seeking (RS) is the behavioral component of resistance to change, "the tendency to adopt a routine," Emotional Response (ER) is the affective component, "the amount of stress and anxiety" caused by change, Short-Term Focus (SF) is the affective component, "the extent to which individuals are distracted by short-term discomfort" associated with change, and Cognitive Rigidity (CR) is the cognitive component, "the frequency and ease with which people change their minds."

The PA scale (Schmitz & Schwarzer, 1999) has nine items, rated on four-point scale from "Definitely untrue" to "Definitely true," and it measures the overall level of proactivity.

The Formal Behavioral Characteristics – Temperament Inventory Revised (FCB-TI(R)) (Cyniak-Cieciura et al., 2016) is used to diagnose the basic

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and originally biologically based dimensions of temperament, which, according to the RTT, is an element of personality and concerns the formal, rather than content, aspect of behavior. It consists of 100 items and includes seven content scales: briskness, perseverance, sensory sensitivity, emotional reactivity, endurance, activity, and mobility.[1]

Most of these tools were published in English. The tools were translated using the method recommended by the World Health Organization (2016). The translation and adaptation process consisted of several stages. At the beginning, the authors' consent was obtained to translate and use the GDMS, the CFC, the RtC, and the Proactivity Scales for scientific research. A Polish-language version of the questionnaires was created. When adapting it culturally, attempts were made to maintain the principle of equivalence of the translated questionnaires to the original versions. A bilingual expert was consulted and the translation inadequacies they identified were corrected. An independent translator was asked to translate the Polish version of the questionnaires back into English to verify the accuracy of the translation, to confirm conceptual and cultural equivalence, and to avoid a literal translation. A pilot study was conducted (N = 154), which confirmed the quality of the translated questionnaires. The psychometric properties of the translated tools are comparable to those of the originals; they can be found in the appendix.

## Characteristics of the surveyed sample

The study included 19 participants who took part in a two-week cruise of the GSUS, as well as 20 graduates of the First High School in Bytom, who participated in a week-long cruise in the Baltic Sea. The 19 adolescents (pupils and students; 11 males [57.9%] and eight females [42.1%], aged 15 to 25 years [$M = 17.11$; $SD = 2.38$]) participated in the survey conducted

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[1] The measurement reliability of the GDMS tool is within the range of $\alpha = .77$ to $\alpha = .94$; for the RtC it is $\alpha = .78$ to $\alpha = .88$; for the PA $\alpha = .79$; and for the CFC from $\alpha = .80$ to $\alpha = .86$.

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during the GSUS. The 20 young adults (13 males [65%] and seven females [35%], aged 18 to 34 years [$M = 21.95$; $SD = 4.29$]) participated in the survey during the cruise of the graduates of the First High School in Bytom. All crew members agreed to participate in the study. The sample size is small because of the limited number of crew on the ship, but it includes all crew members. The selection of the sample was purposive: the sample consisted of people who qualified for the cruises.

**Procedure**

The questionnaire study was conducted aboard the sailing ship STS General Zaruski. Consent was obtained from the subjects to participate in the study (parental consent was also obtained if the subjects were minors). The first measurement took place on the first day of the voyage, after embarking and basic training; the second was on the last day of the voyage, just after disembarking. The third measurement was conducted remotely one month after the cruise, using the Qualtrics platform. A response rate of about 50% was obtained for the assessment through the online platform (52.6% for the GSUS and 45% for the Bytom cruise). All participants completing the third measurement through Qualtrics did so promptly.

The data were checked for outliers and extreme observations, deviations from normality, and possible deviations from other assumptions (Tabachnick & Fidell, 2013). Statistical analysis was performed using SPSS 27 software.

Multi-level modeling was carried out, which allows a hierarchical model to be built in such a way that the constant and slope coefficient of the regression line can vary depending on the context. For each parameter treated as random, its variability and its point value are estimated. Adding predictors to a model involves deciding whether its regression parameter is fixed or random (Field, 2013). A two-level model was proposed, with the first level being specific measurements and the second level being the person under study as an individual (measurements

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are nested within individuals). Models were calculated with unstructured covariance (the assumption of zero covariance between constants and slope coefficients was removed). Only statistically significant results are reported. The predictors were temperamental traits as defined by the RTT and time spent at sea.

## Results

This table presents the significant changes and trends observed among different participant groups and variables.

| Participant group/variable | Measurement | Comparison/ Effect | t-Value (df) | p-Value | Effect size (d) | Conclusion |
|---|---|---|---|---|---|---|
| GSUS | 1 vs. 2 | | | | | |
| | IDS | Increase | -2.25 (18) | .037 | -0.52 | Significant increase |
| | CR | Increase | -2.12 (18) | .048 | -0.49 | Significant increase |
| | SF | Decrease (trend) | 1.82 (18) | .086 | 0.42 | Decrease at statistical trend level |
| GSUS | 1 vs. 3 | | | | | |
| | ADS | Decrease | 2.90 (8) | .018 | 0.92 | Significant decrease |
| | SDS | Increase | -2.67 (8) | .026 | -0.84 | Significant increase |
| | CR | Increase | -4.27 (8) | .002 | -1.35 | Significant increase |
| Bytom cruise | 1 vs. 2 | | | | | |
| | ADS | Decrease | 3.03 (19) | .007 | 0.68 | Significant decrease |
| | RtC | Decrease | 2.54 (19) | .020 | 0.57 | Significant decrease |
| | RS | Decrease(trend) | 2.03 (19) | .057 | 0.45 | Decrease at statistical trend level |
| | SF | Decrease (trend) | 1.77 (19) | .093 | 0.40 | Decrease at statistical trend level |
| | PA | Increase (trend) | -1.85 (19) | .080 | -0.41 | Increase at statistical trend level- |
| Gender differentiation | GSUS (Male) | IDS Increase | -2.92 (10) | .015 | -0.88 | Significant increase among males |
| | GSUS (Female) | CR Increase | -3.15 (7) | .016 | -1.11 | Significant increase among females |
| | Bytom Cruise (Male) | ADS Decrease | 3.04 (12) | .010 | 0.84 | Significant decrease among males |
| | Bytom Cruise (Female) | RtC Decrease | 3.36 (6) | .015 | 1.27 | Significant decrease among females |
| | Bytom Cruise (Female) | ER Decrease | 3.23 (6) | .018 | 1.22 | Significant decrease among females |

This table presents the relationships between the studied constructs.

| Dependent construct | Independent construct (predictor) | ANOVA | Variance of constants/slope coefficients | Covariance of constants and slope coefficients | Comments |
|---|---|---|---|---|---|
| Dependent Decision--Making Style (DDS) | Emotional Reactivity | $F(1; 29.78) = 19.85$; $p < .001$ | $Var(u_{0j}) = 17.16$; $p = .006$/ $Var(u_{0j}) = 2.01$; $p = .035$ | $Cov(u_{0j}, u_{1j}) = -4.77$; $p = .033$ | Individuals differed in their input scores; changes over time were not symmetrical and depended on the input level. Individuals with high scores on the DDS scale were less dependent the higher their scores on Emotional Reactivity. |
| Avoidant Decision--Making Style (ADS) | Time | $F(1; 77.45) = 4.15$; $p = .045$ | $Var(u_{0j}) = 31.52$; $p = .003$ | $Cov(u_{0j}, u_{1j}) = -3.66$; $p = .057$ | Individuals varied in terms of their input scores; changes over time most likely depended on the input level. Individuals with high scores on the ADS scale were less avoidant over time and with higher scores on Emotional Reactivity and Activity. |
| | Activity | $F(1; 37.30) = 5.94$; $p = .020$ | | | |
| | Emotional Reactivity | $F(1; 35.23) = 4.25$; $p = .047$ | | | |
| Resistance to Change (RtC) | Activity | $F(1; 36.60) = 10.79$; $p = .002$ | $Var(u_{0j}) = 52.92$; $p = 0.066$ | $Cov(u_{0j}, u_{1j}) = 4.93$; $p = .490$ | Individuals with high scores on the RtC scale became less resistant if they had higher Activity ($b = -1.00$; $t(36.60) = -3.29$; $p = .002$; CI95% [-1.62; -0.38]). |
| Routine Seeking (RS) | Activity | $F(1; 45.68) = 10.36$; $p = .002$ | | | Individuals with high scores on the RS scale became less routine if they had higher Activity ($b = -.34$; $t(45.68) = -3.22$; $p = .002$; CI95% [-.56; -.13]) |
| Emotional Response (ER) to change | Activity | $F(1; 30.90) = 5.56$; $p = .025$ | | | Individuals with higher Activity responded to the change with less stress and emotionality ($b = -.29$; $t(30.90) = -2.36$; $p = .025$; CI95% [-.55; -.04]). |
| Short-Term Focus (SF) | Activity | $F(1; 49.50) = 10.40$; $p = .002$ | $Var(u_{0j}) = 9.44$; $p = .004$ | | Activity caused a shift toward lower SF scores ($b = -.28$; $t(49.50) = -3{,}23$; $p = .002$; CI95% [-.46; -.11]). |
| | Emotional Reactivity | $F(1; 45.93) = 4.82$; $p = .033$ | | | Emotional Reactivity caused a shift towards higher SF scores ($b = .14$; $t(45.93) = -2.20$; $p = .033$; CI95% [.01; .27]). |


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| Dependent construct | Independent construct (predictor) | ANOVA | Variance of constants/slope coefficients | Covariance of constants and slope coefficients | Comments |
|---|---|---|---|---|---|
| Cognitive Rigidity (CR) | Time | $F(1; 73.72) = 9.62$; $p = .003$ | $Var(u_{0j}) = 7.31$; $p = .005$ | | Time resulted in increasing ($b = .69$; $t(73.72) = 3.10$; $p = .003$; CI95% [.25; 1.13]) Cognitive Rigidity. |
| | Emotional Reactivity | $F(1; 41.72) = 10.30$; $p = .003$ | | | Emotional Reactivity resulted in lower ($b = -.19$; $t(41.72) = -3.21$; $p = .003$; CI95% [-.30; -.07]) Cognitive Rigidity. |
| Proactivity | Activity | $F(1; 30.96) = 10.98$; $p = .002$ | | | |
| | Endurance | $F(1; 30.94) = 7.52$; $p = .010$ | | | |
| | Emotional Reactivity | $F(1; 30.94) = 9.59$; $p = .004$ | | | |

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## Discussion

Significant, positive changes in the selected temperament-dependent characteristics were expected due to participation in an open-sea cruise on a traditional sailing ship. It was assumed that these changes from the GSUS cruise would be positive due to educational interactions. The participants of the Bytom cruise were older and more mature and participated in a shorter cruise, so higher input levels and no changes in the traits were expected.

The results for the GSUS participants show an increase in intuitive decision-making and cognitive rigidity and a decrease in short-term focus. The intuitive decision-making style is associated with a higher level of protective factors, which are determinants of mental health with a positive effect on mental health (Bavolar & Bacikova-Sleskova, 2020). After the cruise, the participants trusted their intuition more and were more likely to make decisions based on hunches and feelings, were less likely and less willing to change their minds, and had a higher tolerance for short-term inconvenience associated with change. Measurement one month after the cruise showed a decrease in avoidant decision-making and an increase in spontaneous decision-making and cognitive rigidity compared to the pre-cruise measurement. Avoidant decision-making style is associated with a lower level of protective factors (Bavolar & Bacikova-Sleskova, 2020). The participants tended to be less evasive and even to make decisions more efficiently and quickly and to be less eager to modify them. The results for the participants of the Bytom cruise show a decrease in intuitive decision-making, resistance to change, routine seeking, and short-term focus, as well as an increase in proactivity. After the cruise, the participants relied less on their hunches and feelings, adapted better to change, and were less prone to routines, not distracted by short-term inconveniences of change, and more independent and future-oriented. Greater use of adaptive decision-making strategies correlates significantly with greater psychological well-being (Páez-Gallego et al., 2020). The differences in the results between the GSUS and Bytom cruise participants may have been due to the length of the cruise and the age of the participants.

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The GSUS crew was younger and at an earlier stage of completing the goals of adolescence. The changes were different than expected and involved fewer of the constructs, but can still be seen as positive. Additional qualitative analysis is needed to confirm that intuitive decision-making may be an expression of unconscious competence and cognitive rigidity an expression of consistency in upholding one's decisions.

Using multilevel modeling, it was examined whether temperament moderates change in the listed characteristics over time and, if so, how. The temperament traits that were the most frequent significant predictors of change were Emotional Reactivity (ER) and Activity (A); the single predictor was Toughness (T). ER significantly supports growth in DDS and ADS and SF, and lowers CR and PA. A counteracts ADS, decreases RtC, RS, and ER alternately, lowers SF, and supports growth in PA. Interestingly, T counteracts PA growth.

The opposing effect of ER and a is justified by the negative intercorrelation of the two scales, obtained in validation and standardization studies. It is interesting to note the counteracting effect of PA by T, which positively intercorrelates with a in both validation and normalization studies (Cyniak-Cieciura et al., 2016). It is difficult to explain why Endurance, which is "the ability to respond adequately in situations requiring prolonged and highly stimulating activity, manifested in high resistance to fatigue and distractors" (Cyniak-Cieciura et al., 2016, p. 16), does not support a positive change in Proactivity. The results deviate from the assumptions and do not clearly confirm the hypotheses, despite meeting the assumptions of the educational environment (Wojcikiewicz & Mural, 2010).

## Limitations

There are some possible limitations of the study. The sample sizes are small, the duration of impact was short, the selection of cruise participants was limited, and the traits measured were stable constructs. The small sample size and multiple variables in the models limited the power of the analysis (Cohen, 1992). Offsetting the negative impact is problematic due to several limitations. The first is the limited size of the crew (20 school crew and five professional crew [captain, bosun, and three mates]), which makes it impossible to enlarge the sample. The solution would be to conduct surveys on different GSUS cruises. The changing weather conditions and different experiences of the participants mean that the cruises are not identical, which may affect the crew differently. A second solution could be to conduct a cruise on a larger sailing ship or to compare School Under Sails cruises on different sailing ships. Ships differ in size and crew size, sailing characteristics, personnel, atmosphere on board, interior design (more or less conducive to the school crew socializing), type of rigging (determining the way the crew works), and shape of hull (affecting the ship's behavior in different weather conditions). These variables can affect the crew's experience.

The respondents took part in relatively short cruises. Even short cruises affect constructs that are more susceptible to change, and effects can be seen after just four days (McCulloch, 2002). Cruises of 5–15 days can positively affect measurable constructs (McCulloch et al., 2010). Only cruises lasting at least three weeks can effectively impact traits (Romaniuk, 2015b) other than self-esteem or sense of health (Norris & Weinman, 1996). GSUS cruises typically last three weeks, allowing the crew to integrate, get to know the ship, experience adventures, gain experience in different conditions, and take part in more situations that can have an educational and educational impact. In the case of the GSUS cruise under review, opportunities were fewer due to pandemic-related restrictions, the cruise lasted only two weeks, and the weather conditions were exceptionally mild. Sea education as adventure education needs time to be effective (Neill, 2018; Rickinson et al., 2004).

The participants had the opportunity to sign up for the cruise without any qualification. Previously, applicants participated in a competition, which involved preparing educational materials about an element of the planned cruise itinerary and writing a cover letter. This provided means for selecting the most motivated young people. In the cruise in question, too few people entered the competition due to the pandemic, so the

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crew was supplemented with people recruited freely. The lack of results in such a group can be an argument that sail training is not for everyone, and only those who are positively motivated and committed are likely to benefit from its positive influence. The composition of the group should not be a factor that prevents positive change, as the effects of sail training are reported in all participants, i.e. young and old (Romaniuk & Łukasiewicz--Wieleba, 2020), people with and without disabilities (Romaniuk, 2014), as well as those with other special needs (Caourso & Borsci, 2013).

The selected traits (proactivity, decision-making style, consideration of future consequences, and resistance to change) may be stable constructs, difficult to change in such a brief period (despite the intensity of influence) or resistant to change at all. A possible explanation for the lack of developing proactivity may be the high-input external controllability of adolescents, who are accustomed to being guided into action by parents, teachers, and influencers. A high degree of autonomy over some of the ship's activities should have influenced the growth of proactivity (Wu et al., 2018), but the cruise revealed the need to directly manage the participants on many issues, which may have led to the lack of proactivity development. This is indirectly related to the lack of change in decision-making style. The brief exposure did not allow for previous habits to be shed or create enough situations to stimulate autonomous decision-making; therefore, it did not provide sufficient material for training. The respondents may have been too young or did not yet have time to develop their individual decision-making style. The tool used to measure this should capture any changes in this area and should be chosen correctly (Loo, 2000). The lack of expected changes when considering future consequences may be due to the reasons mentioned above or to the stability of this construct (Petrocelli, 2003; Toepoel, 2010). It was hypothesized that the cruise experience might be significant enough to contribute to changing perceptions of the future, but the impact may have been too short and weak. Developing a balanced perspective of time among young people and showing them the importance of learning from past mistakes and developing appropriate planning for the future is one of the intermediate goals of sail training (Romaniuk, 2020c), as it is linked to many important behaviors, such as health (Piko et al., 2005), motivation (Seijts, 1998), physical activity (Adams & Nettle, 2009), or even leisure choices (Shores & Scott, 2007), and thus translates into continued functioning and quality of life. This justifies measuring this construct and expecting positive changes in it. Resistance to change may have been too entrenched to be reduced. It is possible to overcome it (Coch & French, 1948), especially with the support of others (Lawrence, 1969), and while attempts to do so may generate resistance, resistance itself can be a source of change (Ford et al., 2008). Again, on a cruise of this length, the number of interactions that could be the seeds of change may have been too small (Klonek, 2014).

## Conclusion

Earlier studies that inspired the present analysis gave hope for the desired results, confirming the hypotheses. The results of the exploratory research give reasonable hope for effectively applying the conclusions to practice. Taking into account the existence of different temperament structures (Zawadzki & Strelau, 2003) and the fact that learning outcomes are conditioned by temperament properties (Nosarzewski, 1999), it can be assumed that the development of a dedicated educational program for voyages similar to School Under Sails, which take into account the individual differences of the participants and include a range of techniques adapted to the most popular temperament types, would have a share in increasing the effectiveness of interactions. Considering the fact that temperament determines styles of action (Wieczorkowska-Wierzbińska, 2011), it can be thought that it would be similarly linked to decision-making styles, thus enabling, differentiating, and speeding up any planned development in decision-making style. It is worth starting to modify behavior in adolescent cruise participants by cognitively preparing them with an emphasis on education and indirectly shaping perceptions of the future. Additional analysis "related to learning about the presented time perspectives" (Zimbardo & Boyd, 2015) of cruise participants and their

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correlation with the CFC score can bring new, broader insights to the problem and can facilitate the adjustment of educational interventions to intentionally prepare youth to adaptively cope with change (Palmer, 2004), which can lead to the growth of proactivity.

The research made it possible to check spontaneous changes in the indicated characteristics of cruise participants and allowed us to assess the possibility of shaping them intentionally. It is necessary to prepare a dedicated educational program that includes interactions that shape the desired characteristics and takes advantage of the nature of a sailing ship, the subsequent evaluation of which will make it possible to formulate conclusions about its effectiveness. Sail training is an effective way of influencing young people and should be developed by implementing recommendations based on the conclusions of empirical studies.

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## Appendix

Psychometric properties of the instruments

| Scale | Original | | | Translation / Pilot study | | |
|---|---|---|---|---|---|---|
| | M | SD | α | M | SD | α |
| General Decision-Making Style | | | | | | |
| *Rational* | 3.92–4.16 | 0.33–0.57 | .77–.85 | 3.91 | 0.57 | .71 |
| *Intuitive* | 3.0–3.49 | 0.70–0.78 | .78–.84 | 3.59 | 0.60 | .73 |
| *Dependent* | 3.23–3.45 | 0.63–0.74 | .68–.86 | 3.11 | 0.81 | .83 |
| *Avoidant* | 1.84–2.56 | 0.65–0.97 | .93–.94 | 2.23 | 0.84 | .89 |
| *Spontaneous* | 2.46–2.55 | 0.79–0.90 | .87 | 3.11 | 0.60 | .64 |
| Resistance to Change | 3.19 | 0.63 | .88 | 2.97 | 0.51 | .75 |
| *Routine Seeking* | 2.91 | 0.84 | .82 | 2.40 | 0.71 | .73 |
| *Emotional Reaction* | 3.57 | 0.89 | .78 | 3.07 | 0.93 | .74 |
| *Short-term Focus* | 3.15 | 0.81 | .78 | 2.53 | 0.91 | .79 |
| *Cognitive Rigidity* | 3.22 | 0.86 | .78 | 4.00 | 0.78 | .65 |
| Proactive Attitude | 28.92 | 4.09 | .79 | 28.91 | 3.91 | .83 |
| Consideration of Future Consequences | 41.4–43.8 | 7.02–7.86 | .80–.86 | 42.14 | 6.30 | .76 |
| FCB-TI(R) | | | | | | |
| *Briskness* | | | .73–.79 | 46.14 | 5.70 | .81 |
| *Perseverance* | | | .75 | 40.31 | 6.70 | .83 |
| *Mobility* | | | .78–.83 | 21.55 | 5.76 | .88 |
| *Sensory sensitivity* | | | .76–.79 | 45.03 | 5.44 | .79 |
| *Endurance* | | | .79–.83 | 39.48 | 7.59 | .88 |
| *Emotional reactivity* | | | .85–.88 | 34.51 | 7.80 | .87 |
| *Activity* | | | .83–.86 | 41.56 | 6.89 | .85 |

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# Teachers of Preschool and Early School Education Facing the Challenge of Working With Talented Young Learners – a Study Based on Qualitative and Quantitative Research

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**Abstract**

**Research objective:** The main goal of this article is to portray the challenges that early education and preschool teachers encounter when working with talented young learners in public preschools and kindergartens.

**Problem and research methods**: The author investigates the complexities of working with talented young learners, utilizing quantitative methods such as standardized surveys and interviews with early education and preschool teachers.

**The process of argumentation:** The introduction outlines the topic, followed by a brief description of the challenges in teaching talented learners. The research method is then discussed. Finally, the findings and recommendations for practice are presented.

**Research results:** The findings indicate that early education and preschool teachers face some challenges in teaching talented learners, mostly connected with recognition, diagnosis, and individualized instruction. Many

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teachers feel unprepared, lack sufficient time, and receive little support from colleagues and administrators. They also seldom seek help from specialists.
**Conclusions, innovations, and recommendations:** There is a need for comprehensive political regulation in Poland to enhance the individualization of education for talented young learners. Support for teachers through collaboration with headmasters, parents, and specialists is vital. Teamwork and assistance are essential to effectively meet the needs of these learners.

***Keywords*:** young talented learners, challenges of teaching talented learners, diagnosis, teaching methods, individualization

## Introduction

Talented learners are a unique group that requires a special approach. They learn quickly, retain knowledge well, and apply it properly when needed. They tend to have exceptional memory, vivid imagination, and deep sensitivity. Their cognitive functions are highly efficient. One of their most important skills is the ability to connect facts, generate new ideas, solve difficult tasks, and use a rich vocabulary (Kamińska, 2021). However, some talented learners do not achieve their full potential due to various factors such as emotional difficulties, social inadequacy, excessive nervous tension, and perfectionism (Dyrda, 2007).

In Poland, since 2011, talented learners have been recognized as having Special Educational Needs, and there are laws in place to support their individual learning, according to their current and personal needs. They can receive special pedagogical and psychological assistance, which includes diagnosing their environment, recognizing their abilities, and enabling them to fully participate in public schools. That support can consist of various didactic and special activities that develop their aptitudes, therapeutic classes, consultations, and advice (Ministry of Education Regulation, 2017).

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## The challenges of teaching talented learners

Generally, talented learners are recognized for achieving the highest scores and having outstanding IQ levels (Pfeiffer, 2015). They tend to have more biologically advanced brains and possess greater innate abilities. These abilities can manifest in various spheres of their activities, such as learning foreign languages, including English (Clark, 2002).

Most talented learners are creative and can generate brilliant and original ideas, sometimes even beneficial to others, like their community or classmates. They are open-minded and capable of reflective thinking. Talented learners perceive the world in a non-standard way, differently compared to so called average students. Most of them are individualists and non-conformists, who find it challenging to adhere to standard expectations. In terms of cognitive development, they easily grasp cause-and-effect correlation, which enables them to find excellent solutions to problems (Kerr, 2009).

Teaching talented learners is a challenge for all teachers, especially in early education and preschool, as they need to provide appropriate education for these young and sensitive individuals. This often means extending the curriculum or even creating a personalized program (Goodhew, 2009). At the very least, these students need more challenging tasks, not just a greater quantity of tasks. Teachers should adopt a suitable approach towards talented learners and use active methods such as drama or project-based learning to foster independence and engagement (Todd, 2022). Such learners, particularly in the early stages of their education, need social interaction with peers to become emotionally and socially adjusted and personally fulfilled (Ingram, 2008).

Some talented learners are recognized as twice-exceptional and require additional support from specialists, so supervising teachers have to work with them (Robinson & Campbell, 2010). Another significant area is collaboration with the parents of these learners (Stambaugh & Mofield, 2022). In Poland, teachers are responsible for all these aspects, which makes it a very demanding task. The country lacks a standardized system for identifying gifted students across schools, so teachers must individually

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shape their approaches, select tools, and vary in their knowledge and experience with gifted education. Most rely on observation and discussions with parents to identify talented students.

There are various methods to support the development of talented learners, including acceleration (such as skipping grades or taking higher-level classes) and enrichment (expanding the curriculum with relevant, engaging content). These approaches can be combined, with teachers creating individualized curricula or learning paths. Gifted students may also participate in extracurricular activities, competitions, or special classes. Polish schools are gradually implementing individualization, particularly through differentiating content and pace. Some gifted students may even assist teachers in explaining concepts to peers. Additionally, special art and music schools cater to talented students, and summer camps offer further opportunities. Individualized programs are typically devised by subject teachers, who may consult specialists and colleagues before gaining approval from school authorities (Limont, 2012).

## Research method

In this article, quantitative methods are employed, including a standardized survey with 327 teachers and a supplementary standardized interview with six early education teachers. The author does not compare the two groups of interviewers and interviewees; instead, the perspectives of the narrators are considered supplementary. The main group was studied using quantitative methods, with participants for both types of research selected randomly. Early education and preschool teachers were asked about various demanding aspects of their work with talented learners. The article aims to depict the challenges of teaching talented learners.

The primary research question was: "What challenges do you face when working with a gifted student?" Additional specific questions related to this main question were: 1. How do you recognize talented learners? 2. How do you work with them? 3. What aspects are difficult for you? 4. How do you manage to overcome some demanding tasks/situations

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while teaching talented learners? Non-standardized interviews were used for qualitative research, while a standardized survey was utilized for quantitative research.

## Results and conclusions

**Table 1. Teachers' training for educating talented young learners**

| Training for educating talented young learners | | | | | |
|---|---|---|---|---|---|
| Preschool teachers | | | Early education teachers | | |
| Training | Number | Percentage | Training | Number | Percentage |
| Formal education at universities, high schools, etc. | 138 | 69% | Formal education at universities, high schools, etc. | 51 | 25.5% |
| Additional training: courses and reading resources | 177 | 88.5 % | Additional training: courses and reading resources | 150 | 75% |

The table shows that most preschool teachers, 138 (69%), feel prepared to work with talented learners through formal studies. However, only 51 (25.5%) of early education teachers claim to be similarly prepared. Regarding additional education, which includes various courses and reading, both groups are active. Preschool teachers engage slightly more in this area, with 177 (88.5%) participating in courses and reading about the subject. Early education teachers also show significant involvement, with 150 (75%) taking part in these activities.

**Table 2. Additional factors facilitating work with talented learners**

| Additional factors facilitating work with talented learners | | | | | |
|---|---|---|---|---|---|
| Preschool teachers | | | Early education teachers | | |
| Factor | Number | Percentage | Factor | Number | Percentage |
| Possessing talents and passions | 66 | 33% | Possessing talents and passions | 47 | 23.5% |
| Being open to new methods of teaching | 51 | 25.5% | Being open to new methods of teaching | 79 | 39.5% |

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As shown above, some preschool teachers, 66 (33%) believe that having their own talents and passions, sometimes similar to the hobbies of talented learners, helps them teach these students and steer them to success. Fewer early education teachers share this opinion, with only 47 (23.5%) acknowledging that their talents and passions play an important role in developing the talents of gifted learners. However, a larger proportion of early education teachers, 79 (39.5%) emphasized the significance of being open to new teaching methods. In comparison, 51 (25.5%) of preschool teachers recognize that receptivity to new teaching methods is beneficial.

**Table 3. Methods used for identifying talented learners**

| Methods used for identifying talented learners | | | | | |
|---|---|---|---|---|---|
| Preschool teachers | | | Early Education teachers | | |
| Method | Number | Percentage | Method | Number | Percentage |
| Observation | 200 | 100% | Observation | 177 | 88.5% |
| Diagnostic tools for teachers. esp. tests | – | – | Diagnostic tools for teachers, esp. tests | 84 | 42% |
| Consultation with a Psychology and Pedagogy Clinic | 19 | 9.5% | Consultation with a Psychology and Pedagogy Clinic | 51 | 25.5% |
| Opinion of the parents of the talented child | 50 | 25% | Opinion of the parents of the talented child | 26 | 13% |

According to the table above, all preschool teachers identify talented learners through observation and do not use any tests to detect talents. Fifty of them consult with the parents of talented learners to learn more about them. A significant number consult specialists, such as psychologists or counsellors at the Psychology and Pedagogy Clinic. Early education teachers also rely heavily on observation, with 177 (88.5%) using this method. They seek help from specialists for diagnosis more frequently than preschool teachers, though it is still only 51 teachers (25%). They rarely discuss the matters of talented learners with parents.

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**Table 4. Traits attributed to gifted students by teachers**

| Traits of gifted students according to teachers | | | | | |
|---|---|---|---|---|---|
| Preschool teachers | | | Early Education teachers | | |
| Trait | Number | Percentage | Trait | Number | Percentage |
| Above-average level of mental development | 77 | 38.5 | Above-average level of mental development | 150 | 75% |
| Curiosity about the world | – | – | Curiosity about the world | 105 | 52.5% |
| High motivation to learn | 49 | 24.5 | High motivation to learn | 108 | 54% |
| Independence | – | – | Independence | 86 | 43% |
| Creativity | 77 | 38.5 | Creativity | 36 | 18% |

Many early education teachers, 150 (75%), recognize talented learners as mentally well-developed, highly motivated (108, 54%), and curious about the world (105, 52.2%). Another feature that many of them, 86 (43%) observe is independence. However, fewer respondents, 36 (18%), find these students to be creative learners. Preschool teachers, on the other hand, acknowledge that talented learners are intelligent (77, 38.5%) and highly motivated (49, 24.5%). Contrary to early education teachers, preschool teachers consider creativity as another prominent feature of these students (77, 38.5%).

**Table 5a. Preschool teachers' work with talented learners**

| Examples preschool teachers' work with talented learners | | |
|---|---|---|
| Example of work | Number | Percentage |
| Meetings with interesting experts | 61 | 30.5% |
| Fun activities and exercises based on interests | 58 | 29% |
| Competitions | 72 | 36% |
| Thematic days/weeks | 70 | 35% |
| Well-equipped thematic corners | 73 | 36.5% |
| Encouraging children to be creative | 74 | 37.5 |
| Assigning more difficult tasks | 60 | 30% |
| Encouraging children to showcase their skills | 25 | 12.5 |
| Encouraging the use of sophisticated materials | 44 | 22% |

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Firstly, 74 preschool teachers (37.5%) encourage talented learners to be creative. Many of them, 73 teachers (36.5%), create well-equipped thematic corners in the classroom for these learners. Seventy-two teachers (36%) organize competitions, while 70 teachers (35%) arrange thematic days and weeks. Additionally, 61 preschool teachers (30.5%) invite job experts to meet with the preschoolers. A similar number, 60 teachers (30%), prepare more difficult tasks for these learners to solve, and 58 of them (29%) provide activities and exercises that match the learners' interests. Forty-four preschool teachers (22%) encourage talented learners to use sophisticated materials. Only 25 teachers (12.5%) encourage them to showcase their skills in different ways.

**Table 5b. Early education teachers' work with talented learners**

| Examples of early education teachers' work with talented learners | | |
|---|---|---|
| **Example of work** | **Number** | **Percentage** |
| Oral motivation | 102 | 51% |
| Extracurricular activities | 59 | 29.5% |
| Encouraging participation in competitions | 127 | 63.5% |
| Motivating to learn more | 22 | 11% |
| Preparing individual programs | 7 | 3.5% |
| Encouraging the display of extended knowledge | 44 | 22% |
| Using active methods and projects | 39 | 19.5% |
| Allowing children to choose the topic of educational activities | 35 | 17.5% |
| Adjusting the educational process to special needs | 100 | 100% |

Regarding early education teachers, many of them, 127 (63%), encourage talented learners to participate in thematic competitions. A substantial number, 102 teachers (51%), talk to these learners to boost their motivation. Half of the teachers, 100 (50%), claim to adjust the educational process to meet the special needs of these learners. Some teachers, 59 (29.5%), prepare extracurricular activities, and 44 (22%) encourage these learners to demonstrate their extended knowledge. Not many, 39 teachers (19.5%), use active methods, and 35 (17.5%) allow the students

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to choose topics for educational activities. Twenty-two teachers (11%) encourage these learners to pursue additional learning. Only seven respondents (3.5%) have prepared individual programs.

**Table 6 a. Difficulties in working with talented learners according to preschool teachers**

| Difficulties in working with the talented learners according to preschool teachers | | |
|---|---|---|
| Challenge | Number | Percentage |
| Large class sizes | 75 | 37.5% |
| Lack of financial resources | 47 | 23.5% |
| Insufficient time and space | 57 | 28.5% |
| Developmental asymmetry | 38 | 19% |
| Preparing more difficult tasks | 56 | 28% |

According to many preschool teachers, 75 (37.5%), the most significant obstacle to effectively working with talented learners is the large class sizes. They specify that they do not have enough time and space 57 respondents (28.5%) to help these learners fully develop, nor can they prepare more challenging tasks for them 56 teachers (28%). Some teachers, 47 (23.5%), mentioned a shortage of funds for purchasing additional didactic devices. Thirty-eight teachers (19%) admit that fulfilling the special needs of talented learners is challenging due to developmental asymmetry, which means that the children excel in one area but struggle in another.

**Table 6 b. Difficulties in working with talented learners according to early education teachers**

| Difficulties in working with talented learners according to early education teachers | | |
|---|---|---|
| Challenge | Number | Percentage |
| Reluctant cooperation of a gifted student with a teacher | 63 | 31.5% |
| Lack of interest of the student in a given educational area | 55 | 27.5% |
| Lack or low acceptance of the teacher by the gifted student | 48 | 24% |
| Student-teacher rivalry | 18 | 9% |

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| Difficulties in working with talented learners according to early education teachers | | |
|---|---|---|
| **Challenge** | **Number** | **Percentage** |
| Lack of support from the school management | 1 | 0.5% |
| The need to take care of weaker students | 85 | 42.5% |
| Too many learners in the class | 59 | 29.5% |
| Lack of proper resources and tools | 46 | 23% |

Many early education teachers, 85 (42.5%), claim that they cannot devote enough time and attention to talented learners because they have to care for weaker students in the classroom. Additionally, 59 teachers (29.5%) state that their groups are too large. Many teachers, 63 (31.5%), admit that talented learners are often unwilling to work together with them, and 48 (24%) feel unaccepted by gifted students. Some teachers, 18 (9%), mentioned experiencing rivalry with their talented learners. Furthermore, many teachers, 55 (27.5%), observe a lack of interest among talented learners in specific educational areas, such as mathematics or the Polish language. Only one teacher (1%) reported a lack of support from school management.

**Tabela 7. Prevention of difficulties in working with gifted students according to early education teachers**

| Prevention of difficulties in working with gifted students | | |
|---|---|---|
| **Type of prevention measure** | **Number** | **Percentage** |
| Establishing proper relationships with gifted students | 55 | 27.5% |
| Empathetic approach | 54 | 27% |
| Encouraging talented learners to work in groups | 41 | 20.5% |
| Expanding teachers' knowledge in psychology and pedagogy of creativity | 80 | 40% |
| Utilizing technological innovations | 66 | 33% |
| Creating teacher support teams | 51 | 25.5% |
| Collaborating with high schools and universities | 39 | 19.5% |

The table outlines some solutions to the difficulties of teaching talented learners as suggested by early education teachers. Firstly, 80 teachers (40%) emphasize that educators' knowledge in psychology and pedagogy of creativity should be expanded. Some of them – 66 teachers (33%) – believe that incorporating technological innovations can make the educational process more enjoyable. Fifty-five teachers (27.5%) recognize the importance of maintaining good relationships with talented learners, with 54 respondents (27%) stressing an empathetic approach. They also claim that they need support from a team of teachers (51 respondents, 25.5%) and from higher educational institutions, such as universities.

In conclusion, early education teachers do not feel fully prepared to work with talented learners based on their formal education from universities, academies, and high schools. Preschool teachers, however, claim that they are mostly prepared thanks to their university studies. Both groups attend special courses to properly teach talented learners and most of them frequently read about the subject. Respondents from both groups are not entirely convinced that their own resources, such as talents and passions, are significant when teaching talented learners. Generally, teachers from both groups do not consult their observations of talents with parents and specialists. They are familiar with only a few easily observable features of talented learners, mostly connected to intellectual development, such as fast learning. When describing talented learners, they do not mention character traits such as receptivity and vulnerability.

There is a noticeable difference in how preschool and early education teachers approach working with talented learners. Preschool teachers try to make their learners creative by preparing well-equipped areas that allow children to explore and manipulate exciting equipment. They also organize thematic days or weeks and invite experts to discuss their hobbies and jobs. Early education teachers, on the other hand, encourage talented learners to take part in competitions but do not prepare individual programs themselves. Neither group fully enables these learners to showcase their skills.

Both groups perceive some difficulties in teaching talented learners, but their challenges differ. Preschool teachers emphasize the large group

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sizes, while early education teachers mention the need to prioritize weaker learners. They often do not seek solutions when talented learners are uncooperative and fail to recognize that these students need more interesting and challenging tasks. Talented learners require dedicated teachers who understand their needs. There may be a misunderstanding regarding the rivalry between teachers and talented learners, which implies that the relationship might not be friendly. This issue needs further research as talented learners tend to be unwilling to study and listen when they are bored and their needs are unmet.

To provide a better education for talented learners, teachers are willing to implement improvements. Early education teachers acknowledge a lack of knowledge in the pedagogy and psychology of giftedness and creativity and express a desire to extend this knowledge. Preschool teachers want to use technology to enhance teaching, establish better relationships with these students, and seek support from other teachers.

In the interviews, the respondents first addressed the recognition of talented learners. According to the interviewees, all talented learners have a high ability to quickly and effectively absorb new information (K1, K2, K3, K6), exhibit cognitive curiosity (K1, K2, K6), are eager to take on new and more difficult activities (K1, K2, K3, K4), have a constant desire to expand their knowledge (K1, K2), and show perseverance and ambition (K1, D2, K3, K4). *Talented students easily assimilate new knowledge and skills, ask a lot of questions, are curious about the world, and are active and eager to learn more (K1); These children learn quickly and understand a variety of topics. They, have a rich vocabulary, think logically, and can solve difficult problems and complex tasks (K2) I notice their ease in assimilating content, ambitions, and skills that go beyond the core curriculum (K3).*

When asked how they effectively work with talented learners, respondents highlighted several attitudes conducive to stimulating students' creativity. These include incentives to take risks and independently search for non-standard solutions (K1, K2, K3, K4). The teachers use active methods, which help integrate the group, develop learners' imagination and perception, and enhance their problem-solving skills (K1, K2, K3, K4, K5, K6). They employ varied, additional, and valuable teaching aids that stimulate creative thinking (K1, K2, K3, K5, K6): *I allow learners to take action independently through active methods like dramas and projects (K1)… I use a variety of aids, including multimedia (K2); I encourage children to use modern multimedia, I promote group work using brainstorming, and allow every child the freedom to express themselves (K3); I prepare interesting, supplementary worksheets to spark students' imagination (K5).*

In diagnosing talented students, the teachers primarily rely on observation (K1, K2, K3, K4, K5, K6), which helps them tailor techniques and tools to work effectively with gifted learners and understand their strengths and weaknesses. Recognition of talent is also facilitated by insights from parents (K1, K2, K3, K6), who observe their children daily, as well as by conversations with the students about their predispositions (K1, K2, K6). Three teachers assess students' creative abilities through the analysis of their work (K1, K2, K3). One teacher mentioned involving a school counselor in the diagnostic process, using standardized diagnostic sheets (K4). *Diagnosis is carried out mainly through observation, but also through conversations with children, discussions with parents, and analysis of students' work* (K1).

When working with talented pupils in early childhood education, teachers note the need to stimulate the students' abilities by providing open-ended tasks of varying difficulty, tailored to their intellectual capabilities, to foster their creative predispositions (K2, K3, K4). Teachers also encourage capable students to participate in extracurricular activities and demonstrate to parents the benefits of these activities, such as broadening knowledge and skills and promoting self-determination, which is important for motivating students to take action (K2, K3, K4). There is also a tendency to treat the needs of gifted children individually. Respondents support talented students during both successes and failures, by praising their progress to build internal motivation (K1, K5, K6). *During classes I assign additional work and open-ended tasks, encourage participation in competitions and interest groups, and talk to parents about enrolling students in extracurricular activities outside of school; (K2) I give gifted students more challenging open-ended tasks and presenting opportunities for participating in extracurricular activities (K4); I focus*

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*on meeting the needs of talented students and praising every initiative they take (K5).*

When asked about the difficulties faced by teachers in early school education in working with talented pupils, they most often pointed to the challenges these students have in functioning within peer groups (K2, K5, K6) due to difficulties in socializing with peers, who have differing goals and values. Most talented learners exhibit perfectionism and self-criticism, making it difficult for them to undertake further attempts and challenges after experiencing educational failures (K1, K3). One teacher highlighted the obstacle of insufficient time to devote to talented individuals and communication barriers with their parents (K4). *Talented students are generally very ambitious and it is difficult for them to accept failures (K1); Sometimes they have problems functioning in a peer group because they stand out due to their higher intelligence and skills (K2); I notice difficulties due to not having enough time to work with gifted students, and there are also communication and cooperation challenges with their parents (K4); The biggest problem for talented students is functioning in peer groups. They are often perceived as "nerds" and find it harder to socialize with their peers (K6).*

As for the ways to deal with obstacles when working with talented learners, teachers emphasized the importance of an individual approach. This involves conversations with the learner about their motivation, goals, interests, and failures (K4, K6). They aim to help students see failures as valuable lessons that provide new experiences (K1). One educator sought the assistance of a school psychologist due to a student's emotional problems (K5). Moreover, talking with both the learner and their parents is beneficial (K6). *In the classroom, we celebrate failures because a talented learner's failure does not mean they haven't learned anything (K1). I try to maintain an individual approach towards talented learners (K4); At the moment, I am working with a talented child who can't cope with emotions, so I referred him to a psychologist (K5);. If there are any difficulties, I try to talk to the child individually and, if necessary, with their parents* (K6).

In conclusion, interviews indicate that talented learners quickly absorb and effectively use knowledge. They are interested in learning and the world around them, can learn independently, and remember extensive content. They are also determined to achieve high scores. These observations correlate with survey research results. Most narratives recognize talented learners through observation. Teachers strive to be creative and encourage learners to be self-motivated, independent, active, and imaginative. They are encouraged to find original solutions and cooperate with their peers rather than compete with them. The most significant problem talented learners face is social difficulties. They struggle to assimilate with peers who are average learners and do not understand their ambitions, experiences, and knowledge. Additionally, they often do not show resilience after educational failures, largely due to their perfectionism. The narratives suggest treating talented learners individually.

## Recommendations for future research

More content about how to teach talented learners should be included in academic courses, especially for early education teachers. Early education is more complex than preschool education and requires a deeper understanding of the psychology and pedagogy of giftedness, among other critical areas, to effectively teach talented learners. Teachers should discuss their findings regarding students' talents especially with parents and other specialists to confirm and expand on these observations. They should also be able to provide a comprehensive characterization of talented learners, covering both cognitive and social-emotional areas.

Early education teachers should prepare more additional, challenging exercises and even develop individualized programs for talented learners. Teachers should recognize that their own interests, passions, and natural gifts are important in working with and nurturing talented learners and developing them more. One of the most important matters is that class sizes should be much smaller, which would allow teachers to dedicate more time and attention to talented students.

Moreover, Poland needs teacher assistants specifically for talented learners, who could be termed coaches or special teachers. These assistants would be specially trained to work with talented students, either

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individually or in small groups. Increasing teachers' awareness of the special needs of talented learners and their eagerness to meet these needs is key. Individualization, a modern and useful educational approach, should be fully implemented in our educational system. Otherwise, our education for talented learners will remain insufficient and old-fashioned and we will risk losing the potential contributions of brilliant individuals to our political, social, and economic sectors.

Improvement requires collective effort, involving all stakeholders in the educational process from policymakers, parents, teachers, school and kindergarten principals, to the talented learners themselves. We need more formal, systematic solutions for these students, implemented through policy. Principals should be obliged to form teams of specialists to raise the standards of education for talented learners. Classroom teachers should not bear the sole responsibility for this type of education; they need better conditions and support to nurture both the talented learners and their own professional development. Currently, they are unable to meet the diverse personal needs of talented learners. Collaboration with psychologists should be expanded to improve the social functioning of these students.

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