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EGLĖ KATILIŪTĖ

**RESEARCH METHODOLOGY OF EDUCATIONAL
POLICY IMPLEMENTATION PROBLEMS
(CONTEXT OF EDUCATION REFORM IN LITHUANIA)**

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KAUNO TECHNOLOGIJOS UNIVERSITETAS

EGLĖ KATILIŪTĖ

**ŠVIETIMO POLITIKOS ĮGYVENDINIMO PROBLEMŲ
TYRIMO METODOLOGIJA
(LIETUVOS ŠVIETIMO REFORMOS ASPEKTAS)**

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Introduction

Substantiation of the research problem. Globalization tendencies, involving the movement of free market and free capital, economical and social changes of modern global heighten new challenges for educational policy. Educational system induces people to permanent education and get prepared to optimally act in changing work activity. Referring to the characteristics of new society presented by different authors, it is possible to note that the essential characteristic of knowledge (Sakaiya, 1991; Drucker, 1993), learning (Fullan, 1993; Fink, Stoll, 1996), information (Mollner, 1990) and intellectual (Lyotard, 1993) society is constant state of learning, contact with knowledge and information. Globalization influences work content and organization forms. The activity of employees becomes more diverse, and the character of the work changes more and more often. The difference between the income of qualified and nonqualified employees increases in most countries of the global. Thus the need for higher education increases rapidly, the phenomenon of mass higher education more and more manifests, and governments have to solve uneasy problems caused by this new phenomenon. The governments of developing countries are forced to develop their systems of education in order to train more qualified employees. However limited economical resources and ideological attitudes of international financial organizations do not let to increase state finance meant for education. Achievements of education are more often compared internationally. This inevitably influences the change of curriculum. Information technologies are wider and wider used at educational institutions. By means of this it is sought to expand accessibility of education, first of all due to distance education, as well as to improve the quality of education, taking advantages of the possibilities given by computerization and the Internet. Due to information technologies global network of education is being created. Global network of information means formation of global culture (Carnoy, 1999; Želvys et al., 2003). Educational systems are not isolated; they have inevitably to react to the changes and challenges that are taking place around. Traditional educational policy and the institutions implementing it cannot empower a human being to actively function in constantly changing global, so changes inevitably take place in educational policy.

The research of policy implementation has deeper traditions in the field of public policy. Derthick (1972), Pressman and Wildavsky (1973), Bardach (1977) analyzed failures of policy; Van Meter and Van Hom (1975), Hood (1976), Gunn (1978), Sabatier ir Mazmanian (1979) created rational hierarchical models („from the top to the bottom“), striving to identify the factors of successful implementation; Lipsky (1971), Wetherley and Lipsky (1977), Elmore (1978, 1979), Hjern et al. (1978) criticized these models, stressing the role of organizational interactions. Other researchers analyzed the implementation as evolution (Majone and Wildavsky, 1978); as learning

(Browne ir Wildavsky, 1984); as continuum of policy and action (Lewis and Flynn, 1978, 1979; Barrett and Fludge, 1981); as the part of policy subsystem (Sabatier, 1986); and as management of public sector (Hughes, 1994). In the research of policy implementation both components are important: curriculum, and implementation means. Curriculum researchers have much deeper traditions than policy implementation. Curriculum principles were analyzed by Bobbitt (1918) and Tyler (1949), curriculum development, considering not only curriculum design theory, but also practical implementation possibilities were analyzed by Taba (1962), different aspect of curriculum development were analyzed Oliva (1982), Beyer and Apple (1988), Pinar et al. (1995), March and Willis (1995), Bellack and Kliebard (1997), Wragg (1997), Kelly (1999), Young (1998), Smith (2000) and other scientists. Sarason (1971), Gross et al. (1971) studied educational policy implementation. The above mentioned authors are considered to be the pioneers of this research field, who analyzed difficulties of educational policy implementation (Fowler, 2000). Most reforms of education fail because the culture of educational organizations is not evaluated (Sarason, 1971; cit Fowler, 2000).

Gross et al. (1971; cit Fowler, 2000), having performed their researches, made the conclusion that critical role in educational policy implementation goes to teachers. Berman and McLaughlin (1976) analyzed successes and failures in educational policy implementation. They drew the conclusion that successful implementation of educational policy is not mechanical process, here the behavior of implementers and application of educational policy to local circumstances determines the success. Kirst and Jung (1980) assumed that short research of educational policy implementation increase the probability of failure, researchers have to analyze the implementation of educational policy of not less than ten-year period. Peterson, Rabe and Wong (1986) confirmed this conclusion by their research. Murphy (1991) related the success of educational policy implementation to well-prepared design of educational policy. The research conclusions of Louis and Miles (1990) encourage paying attention to financial and human resources, time and context when implementing educational policy. Bowe, Ball and Gold (1992), Beckhard and Pritchard (1992), Crawford, Kydd and Parker (1994), Woods and Bagley (1996) also analyzed the problems of educational policy implementation.

The educational policy as the feature of social practice is intensively reformed in most East European countries (in Lithuania as well) contrarily than in the countries, which natural historical-cultural development was not perverted by Soviet system, and it experiences the state of transformation. The most important peculiarities of this transition period are the heritage of pre-Soviet and Soviet period, yet non-firm democratic processes, fundamentally changing system of economics, fast change of other strata of society, changing role of the state and changed priorities of values. The process of transition into

democratic system is considered to be the historical possibility fallen to the countries of this region to overcome its conditional retardation. Due to sparse resources, modernization of historical and other reasons as well as „catching“ in companies, the state plays a very important role. Having evaluated this, it is important systemically to analyze the educational policy implementation in the countries experiencing transformation.

The works of Lithuanian researchers (Jucevičienė, 1994, 1996, 1998, 2001, 2002; Želvys, 1998, 1999, 2001, 2003; Juozaitis, 2000; Adaškevičienė, 2001; Cibulskas, 2001; Gurskienė, 2001; Bagdonas, 2002; Laužackas, 2002a, 2002b; Janiūnaitė, 2004) touch different aspects of educational policy implementation, however they do not present methodologically integrated approach as well as integrated and consistent researches on the educational policy of the country experiencing transformation. The educational policy implementation is an important object of social research in Western countries from the eighth decade of the 19th century, meanwhile in Lithuania the lack of consistent researches of this character is felt.

The author of this dissertation, when writing her master theses, analyzed how global tendencies of education are resounded in the latest documents of Lithuanian educational policy (Katiliūtė, 2000). Exactly the result of that work disclosed the need for the research of educational policy practical implementation, because in the theoretical level the documents of Lithuanian educational policy mostly suit global tendencies of education even though they lack harmony (especially in the level of strategies).

A lot of differences emerge between educational policy and education practice, so the consistency analysis of educational policy, strategy and its realization is important both in global, and Lithuanian context. However the **problem of research methodology** emerges. Meanwhile no complex methodology, which can be applied in solving this problem, was suggested. The problems of policy are contextual and situational: specific historical circumstances and configurations raise and define them. So any decision has to consider this situational context as well as to pay attention to how problems are perceived, interpreted and manipulated by particular participants of the political process. On the supposition that problems are clear and unambiguously defined, the society is imagined as purposefully created machine with functionally defined and thus controlled parts. But people are not cogs in the machine, and contemporary social science does not treat them so that they were only the cogs (Newby, 1993; Parsons, 2001).

Thus the absence of the research methodology of educational policy implementation, involving the level of secondary school, is an important scientific problem. In the dissertation, while solving this scientific problem, the answers to the following **problematic questions of the research** will be looked for:

1. *What socio-educational dimensions and characteristics would enable to reveal educational policy and to investigate its implementation?*
2. *What essential dimensions and characteristics of educational policy determine the differences between educational policy and education practice?*
3. *Is it possible to treat these differences as the problems of educational policy implementation?*
4. *What research strategies, methods and instruments applied in complex would enable the identification of the problems of educational policy implementation?*

While developing the universal methodology of research on educational policy implementation on the criteria level, Lithuania is important and appropriate context for the analysis of such scientific problem on the indicator level, because this country has already been implementing different reforms in educational system for 15 years. As well it is inevitably influenced by outside impacts (globalization, europeanization, etc.). So Lithuania being open to outside impacts attempts to form and implement original educational policy.

Having restored independent state of Lithuania, education was ready to take part in its further creation, as well as had its aim and essential objectives: to change post-Soviet mentality of the society, to develop its underlying democratic values, ideals, new political and economical literacy, maturity of virtuous culture, to be a catalyst of society, its culture change in general. The ideological political, world-view value and legal basis of education has changed. Comparing to an ideological agent of the totalitarian state, centralized managed by strict directions, a school gradually becomes relatively autonomous institution providing social services to a citizen and society (Strategic Guidelines, 2002).

New value attitudes of education, new goals and objectives were formulated in the Conception of Lithuanian Education (1992). The Law of Education of the Republic of Lithuania was validated in 1991, but considering the challenges provoked by the change and the EU directions, its actual edits are constantly made (the last edit was made in 2004). In 2003 the Parliament of the Republic of Lithuania validated the Long-term State Strategy of Education for 2003-2012 for the first time (further – Strategic Attitudes, 2003). The education undertook its obligation to become the basic factor of society development, the foundation of social reforms, even to overtake general development of society conditioning it and due to its importance applied to be recognized as the field of socio-cultural activity supported in priority by the state of Lithuania.

The research aim is to create and substantiate the research methodology of educational policy implementation problems (context of education reform in Lithuania).

The research objectives:

1. To disclose the complexity of educational policy paradigm: the conception of educational policy and its essential characteristics.
2. To substantiate the criteria and indicators of educational policy implementation problems research.
3. To substantiate the research strategy, methods and instruments of educational policy implementation as well as the project of their application.
4. To verify the research methodology of educational policy implementation problems by socio-educational approach in the country in transition, identifying the peculiarities of educational policy implementation problems of education reform in Lithuania.

The research methodology refers to triangulation conception, when descriptive analysis (of scientific literature and documents) and written inquest were coordinated, and qualitative research – qualitative content analysis of critical reflections was applied as additional method.

Theoretical concepts:

- ***Curriculum conception.*** Curriculum is an essential matter in the education process in order to achieve that pupils would become people, individuals or citizens of certain type: curriculum can refer to personal interests of pupils (Dewey, 1969; cit. Todd, 2001) or the state-controlled result can be its basis (Wien and Dudley-Marling, 1998). In both cases, the premise on what it means to learn and to be “educated” is emphasized; the fact, what educators think the learners have to become, determines the goals and objectives of education practice (Todd, 2001).

- ***„Espoused” theory and theory-in-use (Argyris et al., 1985).*** Policy and its documents always are in the level of „espoused” theory (these are such theories, which an individual recognizes, perceives and obligates to follow); meanwhile in practical process of implementation the theory “in-use” manifests (i.e. such theories, about the existence of which we judge by our performed actions; this is intangible cognitive maps, by means of which individuals create their actions). As Argyris et al. (1985) state, in most cases the espoused theory and theory-in-use of a human being do not coincide. In the process of critical self-reflection it is possible to reproduce the proximity of theory and practice, which is necessary for the practice.

- **Conception of policy implementation as evolution (Browne, Wildavsky, 1987).** Policy implementation is rather evolutionary process of „learning“, but not the hierarchical sequence. It is recognized that in the implementation process the implementers not only prosecute the policy directed from the top, but also forms it.

- **Conception of conflict theory (Darendorf, 1996).** Main conflicting groups of society are classes, which differ by economical attribute. Main reason of conflict is the fact that some people have power over the others. Main conflicts emerge between those who have power and those who do not.

The following **methods** are applied in the dissertation research:

- **Analysis of scientific literature**, the purpose of which was to disclose the complexity of educational policy conception paradigm. The analysis of scientific literature was also evoked in substantiating the system of research criteria of educational policy implementation.

- **Content analysis of documents** is applied in analyzing the most important documents of educational policy (Law Acts of the Republic of Lithuania). The analysis of documents is applied in substantiating the indicator system of educational policy implementation.

- **Questionnaire survey** was performed in order to disclose the problems of educational policy implementation. The nonstandard original questionnaire was designed. It was surveyed 1030 respondents of mixed sample – different education stakeholders (192 first-year students, 246 pupils (school-leavers), 180 parents, 255 teachers, 93 school assistant-managers, 64 school managers).

- **Statistical data analysis** of the written inquest was performed applying methods of descriptive statistics and calculating arithmetic mean, standard deviation of results (SD), carrying out factorial (applying the method of principled components, VARIMAX rotation and analyzing factorial weight (L)), cluster and discriminant analyses, calculating correlation coefficients. The data were processed applying the **SPSS 12.0** (*Statistical Package for Social Sciences*) software.

- **Qualitative content analysis** was performed in analyzing critical reflections and answers to the open question of the questionnaire. Content analysis refers to systemic performance of stages (Mayring, 2000): 1) multiplex reading of the text; 2) exclusion of manifest categories and subcategories as well as their substantiation by the arguments extracted from the text; 3) interpretation of categories, involving subcategories.

Scientific novelty and theoretical significance of the dissertation:

►Original models of structurization of educational policy conception were designed. ►Original characteristics of educational policy, criteria and indicators of their implementation were substantiated. ►Theoretical model of educational policy implementation research in reformed system of education was formulated. On the basis of this constructed theoretical solution the research can be repeated in any other country, which implements the education reform and wishes to know the problems of educational policy implementation, but only having adapted the indicators according to the documents of educational policy in a particular country. ►The original complex methodology of the research of educational policy implementation was created. ►By means of empirical methods important scientific facts about the expression of educational policy implementation in the reformed system of education in the country undergoing transformations were accumulated.

Practical significance of the dissertation: ►On the basis of theoretical analysis the created original methodology of the research of educational policy implementation enables practitioners of education, especially those who exercise the management of education system to more objectively to evaluate the emerged situation in the country implementing the reform of education. ►The created methodology of the research of educational policy implementation can be applied in complex as well as the researchers, who analyze educational policy, managers-practicians of higher level of education system and politicians of education can modify it for the research of the educational policy of the other country or the other level of education system (e.g., higher education). ►The research results can help the formers of state's educational policy to better perceive the attitudes of different educational stakeholders prevailing in reality in respect of the educational policy being implemented and to take better decisions, based on the evidence obtained during the research. ►The problematic aspects of educational policy implementation in the Lithuanian education reform were identified. ►The accumulated scientific facts open the possibility to improve the implementation of educational policy as well as the decisions related to it in the country. The applied importance of the dissertation is conditioned by various circle of potential consumers of the research results. This is – heads, assistant-heads, teachers of secondary schools, managers and politicians of different levels of education, parents of pupils, and the society.

Structure and volume of the thesis. The thesis consists of an introduction, three parts, conclusions, literature references and appendices. The volume includes 196 pages, the reference list contains 252 titles.

CONTENT OF THE DISSERTATION

INTRODUCTION

1. THEORETICAL FUNDAMENTALS OF EDUCATIONAL POLICY

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THE DISSERTATION CONTENT

The **introduction** of this thesis substantiates the research problem, defines the research subject, aim and objectives, explains theoretical and methodological approaches to the investigation, surveys the used research methods, discloses theoretical and practical significance and scientific novelty of the research, and presents the list of publications.

1. Theoretical fundamentals of educational policy

1.1. Complexity of the paradigm of educational policy conception

The concept of educational policy contains the notions of *education* and *policy*, so in this subchapter these notions are separately analyzed, highlighting semantic meaning of these notions. Later these notions are compounded into the concept of *educational policy* as well as their characteristics are revealed. *Educational policy can be understood as essential attitudes, values and principles that determine the strategy of educational system development of a particular country, goals set for education as well as purposeful actions. Educational policy is influenced by educational managers of different levels, stakeholders (school communities, employers, politicians, etc.) as well as sociocultural context of the country.* Essential characteristics of educational policy are value background, contextualism as well as purposefulness (see Figure 1).

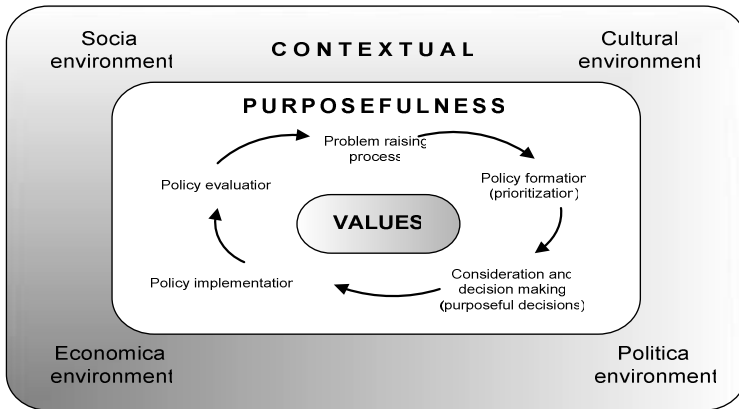


Fig 1. Education policy conception (Katiliūtė, 2004)

Specific features of educational policy that complement key characteristics of educational policy reflect that it is a constituent of social policy, being in prerogative of state sector; it relates to the policy in other fields; it is complex; it is dialectical; it cannot be implemented forthright (its implementation is complex) as well as it has unpredictable outcomes. Action science is invoked in order to explain non-coherence of education policy levels (intended, actual

and in-use) as well as the contexts corresponding them (influence, text production and practice) (see Figure 2).

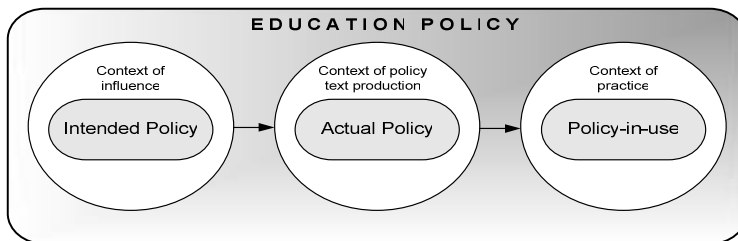


Fig 2. Education policy levels and its making contexts (Katiliūtė, 2003)

1.2. Essential characteristics of educational policy

Considering value background of educational policy as the key characteristic of educational policy in formation, implementation and evaluation of policy, it is necessary to refer to social values. Social values should be embodied in laws, include basic democratic principles and ideals. These values are related to „thin” theory of good (McLaughlin, 1997; Winch, Gingell, 2004), which does not depend on different individual opinions or contradictions, as well as they are compulsory for all members of the society. Having evaluated the characteristic of educational policy – contextuality, its relation to social and economical objectives of the country is inevitable. It is also important to note that most factors determining educational policy exist beyond the borders of educational system. In the context of great unemployment, risk and increasing individualism, characteristic for post-industrial society, in which social differences and inequality constantly increase, educational policy has to seek for set objectives. The third essential characteristic of educational policy – its purposefulness – relates it to strategic planning, realizing which it is important to formulate vision, mission and goals of educational system. By long-term and purposeful strategy it is hard to substantiate educational policy, which does not have clearly expressed vision, mission, philosophy, i.e. it does not know what its mission is, what meaning of its activity is, on what principles it predicates its activity.

1.3. Relationship of educational policy and curriculum

The conception of curriculum is widely analyzed by most researchers (Bobbitt, 1918; Tyler, 1949; Taba, 1962; Beyer, Apple, 1988; Goodson, 1990; Portelli, 1993; Calgren, 1995; Bernstein, 1996; Young, 1998), however this subchapter presents only essential conceptions of curriculum, their coherences to educational policy as well as national curriculum of Lithuania is discussed in brief. The essential issue being emphasized in the conception of curriculum is as follows: teaching, goals, content, methods,

didactic material, as well as the entirety of teaching organization and control is considered as constantly changing and renewing system. The object of educational policy, realizing society interests, its core is renewal of curriculum, considering challenges of modern society, e.g., creation of the curriculum based on life-long learning skills and competences.

1.4. Problemacy in formation and realization of educational policy as social order

Social order in educational policy can be understood as social need determined by social reality, which directly influences curriculum, is related to values and quality of education. Social order should be: formed considering the requirements set by all society groups for education; clearly reflected in strategy of education as well as coherently implemented by means of educational policy. Problemacy of social order formation and implementation can be conditioned by: ♦constantly changing environment requirements for a modern human being, as they induce constant transformation of social order; ♦involvement of not all society groups into formation of social order, as separate stakeholders lack self-discipline and competence; ♦lack of clear mechanism, which would ease presentation of expectations of separate stakeholders for public discussion, and later involvement into strategy of education; ♦important role of teachers in the implementation of social order, as they cannot be treated as neutral implementers.

The first part of the dissertation presents comprehensive analysis of scientific literature, which allowed the study of complexity of educational policy paradigm, definition of the key characteristics of educational policy, which were used as the base for substantiating the research methodology of educational policy.

2. Substantiation of research methodology of educational policy implementation

2.1. Substantiation of criteria of educational policy implementation

In the second part of the dissertation theoretical matrix model, which integrates key characteristics of educational policy, global dimensions of education as well as reflects criteria and indicators of educational policy implementation, was created. In the beginning of the second part of the dissertation the review of global and European dimensions of education was performed. Modern approach to education is expressed in the Education Commission Regulations of UNESCO (Delors, 1996). UNESCO is of the opinion that the aim of education – is not only to improve knowledge and skills, but also to create good relations of individuals, groups and nations. The “vision” of education of the European Union (EU) is formed through the EU documents, related to education, matters of the youth, science, social policy of the EU (European Commission, 2000, 2001). The most important areas of

education development are quality, accessibility, content, openness, and effectiveness of education. Four essential dimensions of education, important for the countries undergoing transformations, were chosen as different sections in the theoretical matrix model. The matrix model, by integrating the particularity of educational policy and global dimensions of education, i.e., in the cells horizontal and vertical intersection, enabled revealing the criteria of educational policy implementation (see Table 1).

Table 1

The System of the Criteria of Educational Policy Implementation

<i>Global dimensions of education</i>	<i>Characteristics of educational policy</i>		
	<i>A. VALUE BACKGROUND</i>	<i>B. SOCIAL CONTEXT</i>	<i>C. PURPOSEFULNESS</i>
1 THE DEVELOPMENT OF THE POSSIBILITIES OF LIFE-LONG LEARNING	A1 Guarantee of accessibility *A: m, mo, t, d, p, s	B1 Guarantee of social conditions *A: m, mo, t, d, p, s	C1 Diversity and openness of education forms *A: m, mo, t, d, p, s
2 THE GUARANTEE OF EQUAL POSSIBILITIES	A2 Social justice *A: m, mo, t, d, p, s	B2 Social and financial conditions of learning *A: m, mo, t, d, p, s	C2 Equal possibilities for the start and learning *A: m, mo, t, d, p, s
3 THE GUARANTEE OF THE QUALITY OF EDUCATION INSTITUTIONS' ACTIVITY	A3 Autonomy/decentralization of institutions *A: m, mo, t, d, p, s	B3 Quality of conditions and results *A: m, mo, t, d, p, s	C3 Quality evaluation / monitoring *A: m, mo, t, d, p, s
4 THE DEVELOPMENT OF THE SKILLS CORRESPONDING THE KNOWLEDGE SOCIETY REQUIREMENTS	A4 Development of social values *A: m, mo, t, d, p, s	B4 Correspondence of education services to society needs *A: m, mo, t, d, p, s	C4 Relationship of education and life practice *A: m, mo, t, d, p, s

* The criterion is disclosed referring to: A: m – the data of pupils' survey, A: mo – the data of teachers' survey, A: t – the data of parents' survey, A: d – the data of headmasters' /heads' survey, A: p – the data of school assistant-heads' survey, A: s – the data of students' survey.

The system of the criteria of educational policy implementation is universal for the research of educational policy of any country (especially of transition period). Referring to the created system of the criteria of educational policy implementation, diagnostic research instrument of the research (questionnaire) was constructed. In the level of indicators purposefully considering the aim of the dissertation the context of Lithuanian secondary school level was reflected after having performed the content analysis of the latest documents of educational policy.

2.2. Substantiation of the research instrument (questionnaire) of educational policy implementation

In order to perform quantitative research non-standardized original questionnaire consisting of 96 items was applied, its questions were grouped into three blocks: 1) instruction, 2) block of diagnostic variables (89 closed-type questions, 1 open-type question), 3) block of demographic questions (6 closed-type questions).

2.3. The geography of the research of educational policy implementation and characteristics of the research sample

The research geography and research sample are defined, substantiating the research sample as undeviating from factual demographic tendencies and resounding the research goals and objectives. The population of the respondents consists of heads, assistant-heads, teachers, pupils (school-leavers) of Lithuanian secondary schools as well as students of university (first-year). School heads, assistant-heads and teachers were chosen because they directly participate in the implementation of educational policy, meanwhile pupils, their parents and students were chosen as main conscious consumers of education services who “feel” the education reform most. The analysis of the opinions of different educational stakeholders is important as the opinions not only influence the behavior of educational stakeholders and other attitudes, but also it influences the ways they process information about the object of the attitude, in this case – the implementation of educational policy (Bohner, Wanke, 2004). Total number of the respondents is 1100 (1030 returned the questionnaires); the feedback of the questionnaires is 93.6 %. The educational stakeholders of 29 basic and secondary schools as well as gymnasiums participated in the research. This is 2 basic schools, 23 secondary schools and 4 gymnasiums. Out of these schools there were 10 rural (or regional) and 19 urban schools. They are Kaunas, Klaipėda, Lazdijai, Kėdainiai, Marijampolė, Vilkaviškis cities’ schools; Josvainiai, Aukštadvaris towns’ schools; Garliava, Linksmakalnis, Čekiškė settlements’ schools; Sitkūnai, Šlienava, Šeštokai, Seirijai, Ilgakiemis villages’ schools. Also in the research participated students from 9 higher education establishments: universities Kaunas, Vilnius and Šiauliai cities as well as Marijampolė College. In total – there were 38 research nests. Considering that secondary schools of all types, universities and the college took part in the research as well as the rural and urban context was represented, it is possible to state that this research can represent and reflect the present situation in Lithuania.

2.4. The analysis of quantitative and qualitative research data: methodology and logics

This dissertation research refers to the attitudes of qualitative and quantitative research compatibility and independence of these researches: 1) qualitative and

quantitative researches are independent, being applied in the order of consistency; 2) the research of phenomenon is begun by the qualitative research; 3) the qualitative and quantitative researches are performed in different samples, which function in surveyed social reality (Morse, 1997, Cormack, 2002; cit. Žydzūnaitė, 2003). Social reality is possible to be revealed through reflections, stories, comments expressed by the people functioning and living in it (in the case of this dissertation research – the population of stakeholders of educational stakeholders). Cormack (2002) assumes that in this case it is important to apply qualitative methods, which disclose people’s conceptions, motives, and expectations. The obtained data of qualitative research can be supplemented in the same social reality, when performing quantitative research as well (Cormack, 2002). Qualitative and quantitative research data obtained from different populations of stakeholders of educational stakeholders enables the realization of these methodological aspects (Polit, Hungler, 1995; cit. Žydzūnaitė, 2003): they strengthen the validity of results as well as the effectiveness of their substantiation and illustration. The validity of chosen statistical methods (*factorial analysis, correlation analysis, and discriminant analysis*) is argued in the research. Used statistical indicators are explained.

In the dissertation the data analysis is performed coherently applying the strategies presented in the logical scheme (model) of the research (see Figure 3).

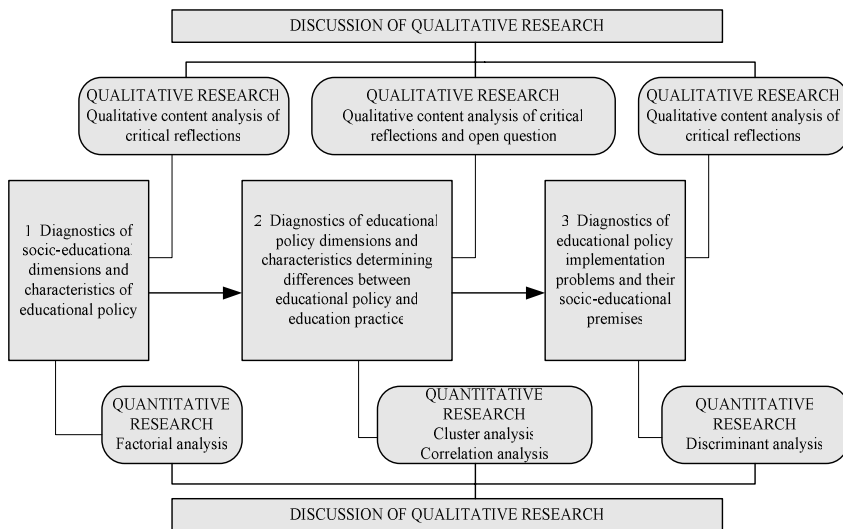


Fig 3. Logic scheme (model) for research data processing (Katiliūtė, 2004)

3. The research results of educational policy implementation problems and discussion

3.1. The results of quantitative research

3.1.1. Variables of educational policy implementation problems: methodological and psychometric validity of constructed scales and indices

The application of factorial analysis method gave the possibility to multiplex the number of primary variables and to design theoretical-diagnostic constructs of the research, which resound scales and subscales, without losing essential information. In processing the questionnaires it was moved from 89 variables to 27 indices (subscales). The results of primary factorial analysis allowed the identification of 27 characteristics of educational policy implementation, which reflect peculiarities of educational policy expression, emerging in four global dimensions of education. Indices (subscales) made on the basis of factorial analysis are not identical to theoretically modeled characteristics of educational policy implementation. It is possible to consider the fact that, referring to the research data, it was hard to identify the characteristics of educational policy implementation identical to the theoretically formulated characteristics as the advantage because in real practice theoretically purified characteristics of educational policy implementation manifest in complex. The indices (scales and subscales) made on the basis of factorial analysis disclosed real criteria of educational policy, in which positive and negative aspects reflected, and this allowed answering the first question of the research: in what socio-educational dimensions and characteristics does educational policy distinguish? Having multiplexed the variables (having performed primary and secondary factorial analysis), original/distinctive structure of educational policy characteristics and criteria, which is basically not controversial to theoretical model of educational policy implementation characteristics, has been unclosed.

3.1.2. The expression and inter-cohesions of educational policy implementation problems (diagnostic variables)

Having applied the method of cluster analysis and its visual result – dendogram, it is possible to identify the groups of features, to which respondents were subject to accept or not. Having summarized the obtained data of all respondent population by means of cluster analysis, it is possible to observe that one cluster integrated more problematic features of educational policy implementation (Mean = 3.50; the scale of evaluation involves the interval from 1 to 5, where high score shows approval). The respondents were subject to approve the expression of these features. The following features reflect negative characteristics of educational policy implementation: chaotic character of secondary school reform, problemiškumas of learning conditions

(environment), unfavorable conditions for adult learning, orientation of educational system to good motivated pupil, non-created conditions for “non-standard” pupil to learn, etc. The features that reflect positive aspects of educational policy implementation integrated in the other cluster (Mean / Vidurkis=3,3): conditions to attain education are created for everyone, the focus in educational process is on general competences and multidimensional knowledge, conditions for adult learning, diversity of school types induces life-long learning, possibilities for problematic children “to join” learning process, etc. The respondents were subject to evaluate the expression of positive aspects of educational policy implementation more reservedly; their expressed position is closer to neutral in comparison with the evaluation of problematic aspects. The characteristics (subscales) that got into the second cluster can be treated as characteristics of educational policy implementation, determining the differences between educational policy and educational practice.

Significant statistical cohesions unfolded between the orientation of educational system to good motivated pupil and even five scales. The orientation of educational system to good motivated pupil is related to non-constructed mechanism to educate problematic children ($r=0.385$, $p<0.01$), teaching of problematic adults, school-graduation and the order of admission to universities ($r=0.368$, $p<0.01$), problems of education financing and reform ($r=0.331$, $p<0.01$), advantages of individualized education ($r=0.233$, $p<0.01$) as well as guaranteed conditions to attain education ($r=0.068$, $p<0.05$). The obtained data allow drawing the premise that that stronger cohesions are between the orientation of educational system to motivated pupil and the scales reflecting problematic aspects of educational system.

3.1.3. Analysis of interest spaces of educational stakeholders

In analyzing the premises of educational policy implementation, similarities (interest overlapping) in the answers of respondent groups (educational stakeholders) are important. Such analysis is carried out by means of cluster analysis. It is sought to clarify how much separate groups of educational stakeholders (according to the status) are similar, evaluating the educational policy implementation. Having performed the similarities’ analysis of the answers of different educational stakeholders (according to the status) of educational policy implementation subscales, it is possible to assume that in this respect the groups of teachers and assistant managers of school are the most similar. The overlapping of their spaces is closest to zero iteration. This means that teachers and assistant heads have the most similar approach to educational policy implementation. The group of heads is another group of specialists, the interest space of which integrates into the analysed field. The overlapping of their spaces is observed in the beginning of the scale of iterations. The first cluster can be called “providers of education services”.

Students and pupils get into separate cluster (block). Similarities of their approach are detected in the second place of the scale of iterations. Parents join them in the fifth step of the scale of iterations. Thus common block of the overlapping of three interest spaces of educational stakeholders is created. It can be called the block of “providers of education services”.

3.1.4. Cohesions of the expression of educational policy implementation problems and social demographic factors

It is sought to identify social demographic (*gender, status, age, education, geographic place of learning/work*) variables, able to explain peculiarities of educational policy implementation. The influence of demographic social factors upon the approach to the premises of educational policy implementation was checked by non-parameter tests of *Mann-Whitney* and *Kruskal Wallis*, having chosen the ($p \leq 0.05$) significance threshold. In this subchapter only two raised hypotheses, which are important in the research of educational policy implementation, will be presented: 1) status of respondents influences the evaluation of the features of educational policy implementation; 2) place of residence of the respondents (city/village) influences the evaluation of educational policy implementation features. *Both raised hypotheses were proved: both status of respondents, and place of learning/work statistically significantly influenced the evaluation of educational policy implementation. The research data allow assuming status of respondents had greater influence upon the evaluation of educational policy implementation.*

3.2. Discussion of quantitative research

In the result of the empirical research, the identified problems of educational policy implementation in Lithuanian education reform are in the discussion compared with the main goals of the development of education named in the Attitudes of State Strategy of Education for 2003-2012 (2003): *the efficient and harmonious system of education, socially correct system of education and quality of education*. Comparing the research results with main goals, it was identified that politicians of education should pay most attention to the guarantee of quality striving in order to change the situation into the desired one till 2012 and the predicted result would be attained.

3.3. Methodology and results of the qualitative research of educational policy

3.3.1. Action science as conceptual idea of qualitative research of educational policy

Action research is invoked in order to solve the research methodology of educational policy. Learning way, which Argyris et al. (1985) calls two-loop learning, expresses essential drive of action science: to teach people-practicians to change their activity model by means of critical reflection and

thus to improve in one's activity. It is important when speaking about the managerial competence development of implementers of educational policy as the reflective analysis of the activity (action science emphasizes it) does not limit in the acquisition of new skills, but it stimulates changes in the level of person's values, attitudes, beliefs. Argyris et al. (1985) distinguishes action theories of two types: espoused and in-use theories. The espoused theory is the theory, which an individual recognizes, perceives and obligates to follow. Meanwhile, the theory-in-use is the theory used by an individual in his/her real practice; it is often in the level of tacit knowledge, i.e. a human being does not give thought and does not perceive that he/she acts referring to automatic learned models, by this keeping his/her *status quo*. In addition, Argyris et al. (1985) stress that in most cases the espoused and in-use theories of a person do not coincide. And this discrepancy can be expressed only by means of public reflection. The reflective insight into theory-in-use is necessary in order to improve further activity and competence of an individual.

In this dissertation research not only the discussed methodological conception of action science, but also the conception of qualitative content analysis is followed (Mayring, 2000; cit. Žydžiūnaitė, 2003): content analysis refers to the systemic performance of the stages – 1) multiple reading of the text; 2) the exclusion of manifest categories and subcategories and their substantiation by the arguments extracted from the text; 3) the interpretation of categories involving subcategories.

The qualitative research was performed in several stages. In the first stage respondents wrote critical reflections. In the second stage, which was performed parallelly in the sense of time, respondents answered the open question of the questionnaire. In the first stage research 35 students (Kaunas University of Technology), who study at the program of education management, took part. They were purposefully chosen as most students worked in the real practice of education, some were executives. The students had to write down their critical reflections by answering the given questions.

3.3.2. Peculiarities of the conception of educational policy

The qualitative research of the conception of educational policy enables revealing the dynamics of the conceptions of educational stakeholders, experiences, expectations and attitudes of educational stakeholders in respect of educational policy. Having performed the qualitative content analysis of critical reflections in answering the question „*How do I understand educational policy? Why?*“, 21 qualitative category was singled out. *In the context of the research the qualitative content analysis of the given question allowed observing that practitioners of education had not formed clear and united conception of educational policy. Distinguished subcategories of the conception of educational policy disclose different aspects. Some categories clearly express what educational policy is (e.g., strategic planning), others*

reflect different peculiarities of educational policy (e.g., participation of stakeholders, values in educational policy, contextuality of educational policy), the third ones express peculiarities of educational policy implementation (e.g., coherences of educational policy with change and reform, implementation of educational policy goals, etc.). Some categories reflect certain problems in educational policy as well (e.g., decisions „from the top“ in educational policy, purposefulness of educational policy as well as the gap of educational policy from reality).

3.3.3. Educational policy and real practice of education

3.3.3.1. The aspects proving discrepancies of educational policy and real practice of education

Discrepancies of educational policy and real practice of education are proved in the result of qualitative content analysis: interferences of educational management; abstention of society; problems of education network; unfit/incapable system of pupil's support; lack of education accessibility; lack of quality in vocational training; problems of competence acknowledgement; problems of provision of educational system; problems conditioned by curriculum; problems of teachers' activity. These problematic aspects can relatively be attributed to different levels of educational system. For example, for the level of secondary education the following problematic aspects are relevant: ineffective system of pupil's support; problems conditioned by curriculum as well as problems of teachers' activity. For vocational training the non-quality of vocational training is a very important notice. It is purposeful for problems of competence acknowledgement to be attributed to the subsystem of adult training. Most problematic aspects, however, show up at the level of all educational system: problems of education management; lack of education accessibility; abstention of society; problems of education network; problems of provision of educational system.

3.3.3.2. Declared and real values as the gap between educational policy and real practice of education

In this stage of the research it was sought to answer the following questions: *what values are declared in the documents of Lithuanian educational policy (in the level of endeavoured policy)? What values are fostered in the real practice of education?* In order to answer the first question qualitative content analysis of the latest documents of educational policy was carried out, and in order to answer the second question qualitative content analysis of the answers to an open question of the questionnaire was performed. Having performed the qualitative content analysis of the answers to the question: *„Name five values, which, according to you, a school foster in reality“*, 83 values were identified (research sample N=1030). As the content analysis was performed referring to the list of theoretically formulated values, three categories were distinguished:

terminal values, instrumental values and “anti-values” emerging in school practice.

3.3.4. Actions of educational stakeholders, capable to diminish contradiction between educational policy and real practice of education

In this research the text was interpreted referring to the following question of the research: „*What actions of active/inactive educational stakeholders could diminish contradiction between educational policy and educational practice?*” Having performed the qualitative content analysis of reflections, 21 qualitative categories were distinguished.

3.4. Discussion of qualitative research

In this discussion the results of qualitative research are compared to scientific literature and/or documents of educational policy and/or main conclusions of the research performed by other researchers. The conception of educational policy is compared to scientific literature, the aspects proving discrepancies of educational policy and real practice of education are compared to the conclusions presented in the study of Lithuanian educational policy carried out by the experts of Economic Cooperation and Development Organization (ECDO) (*Reviews of National Policies for Education in Lithuania*, 2002), as well as to one of the latest documents of educational policy, Strategic Attitudes (2003), reflecting intended educational policy of Lithuania. In the result of the qualitative analysis the identified actions of educational stakeholders capable to diminish contradiction between educational policy and real practice of education are compared to the new professional requirements for teachers identified by the EBPO experts (EBPO, 1998, cit. Rado, 2003) following the attitude that the role of educational practitioners in the implementation of educational policy is one of the basic ones, as the implementers in the implementation process not only perform the policy given from the top, but also form it (Browne, Wildavsky, 1987). The premise is formulated: an educational practitioner, who satisfies the requirements set for him/her, would help to diminish the contradiction between educational policy and real practice of education by his/her successful activity.

General Conclusions

Having disclosed the complexity of educational policy paradigm, it was found out that:

- **from theoretical aspect *educational policy* can be understood as essential attitudes, values and principles determining the strategy of the development of education system in a particular country, the goals set for education, and purposeful actions. Educational policy is influenced by the**

heads of different level education, stakeholders (school communities, employers, politicians, etc.) as well as socio-cultural context of a country.

- The components of the conception of educational policy, which are considered to be essential characteristics of educational policy: *values as the basis of educational policy; purposefulness of educational policy; contextuality of educational policy* involve different levels of educational policy and are oriented to different contexts of educational policy. The characteristic *values as the basis of educational policy* mostly reflects the level of endeavoured educational policy and is oriented to the context of influence, in which discourses of policy are constructed, the conception of education and its social goals are defined, and social order is formed. The characteristic *purposefulness of educational policy* reflects the level of factual policy and is oriented to the context of creation educational policy documents, in which social order takes the shape of official legal laws, strategies, resolutions and other documents of policy. The characteristic *contextuality of educational policy* reflects the level of used policy and is oriented to the context of educational practice, in which the documents of educational policy are interpreted and the “re-creation” of the policy takes place, considering the context.

The research methodology of educational policy implementation is based on the matrix model of educational policy characteristics and global educational dimensions, in which the system of **criteria and indicators** discloses. The essential characteristics of educational policy are on the horizontal of the matrix model. Global educational dimensions identified during the theoretical analysis are on the vertical of the matrix model. This is *the development of life-long learning possibilities; guarantee of equal possibilities; guarantee the quality of educational institutions activity; development of the skills that corresponds the requirements of knowledge society*. The criteria system of educational policy implementation is universal for the research of educational policy in any country (especially of transition period). In the level of indicators the context of Lithuanian secondary school level is reflected purposefully, having performed the content analysis of the latest documents of educational policy. The original methodology of the research of educational policy implementation, referring to the triangulation conception (when descriptive analysis (of scientific literature and documents) and written inquest are coordinated, and the qualitative research, to the conceptual solution of which the action science was evoked, was applied as additional method), allowed the research of problematic and positive aspects of educational policy implementation.

Having performed the research of educational policy implementation, which enabled the identification of the peculiarities of educational policy implementation problems in Lithuanian education reform, it was found out that:

- Criteria of educational policy implementation are not identical to the ones formulated by means of theoretical analysis. However the comparison of the theoretical model and the facts obtained empirically shows the tendency of the approach to the theoretical model (convergence) of educational policy implementation. Theoretically based criteria and indicators in a real research cause the effect of criteria transformation, i.e. these criteria regroup according to the relevance of education reform in a country. Only positive or neutral tendencies prevail in the criteria of educational policy implementation distinguished during the theoretical research (e.g., guarantee of accessibility, development of social values, diversity and openness of education forms, etc.), and in the characteristics of educational policy implementation based on empirical facts – negative tendencies, reflecting practical reality (e.g., impossible requirements for pupils, chaotic character of secondary school reform, problems of learning conditions (environment), etc.).
- Educational stakeholders do not have clear positive or negative attitude towards educational policy implementation, however the research data allowed observing more negative than more positive evaluation.

Among *positively valued* tendencies of educational policy implementation the following positive changes should be stressed:

- *in educational process the focus on general competences, multidimensional knowledge as well as development of basic skills;*
- *educational system forms attitudes of pupils, long-life learning and development is necessary.*

Among *negatively valued* tendencies, the educational stakeholders mostly approved that:

- *in reality it was enough time only for knowledge conveyance and reproduction in the education process;*
- *pupils suffer due to the pressure of parents, teachers and society: you must learn, know, win a contest and be the best;*
- *privat lessons induces inequality as some parents can hire privat teacher for their children, and the others - cannot;*

- *changing system of school graduation and admission to higher education establishments cause some problems for pupils.*

These negative tendencies of educational policy implementation can be considered to be the existing problems of educational policy implementation.

Not paying attention to the solution of such problems as *not created mechanism to educate problematic children; problematic changing order of school graduation and admission to universities as well as problematic adult teaching; problems of education reform (especially financing)*, orientation of education system only to good and motivated pupils will become more distinct.

- In the result of cluster analysis two blocks of education stakeholders' interests disclosed significantly. The first overlapping of interest fields was identified among students, parents and pupils, is called *consumers of education services*. The second overlapping of interest fields – among teachers, assistant managers and managers, is called *providers of education services*. The research data allow stating that the gap between customers of education services and providers of education services, i.e. their approaches and evaluations significantly differ.
- The viewpoint of educational stakeholders to the implementation of educational policy depends on different socio-demographic variables (gender, status, age, education, geographical place of learning/work). The research data allow stating that *status* had the greatest influence (a pupil, student, teacher, etc.), *geographical place of learning/work* – in the second place. The status and geographical place of learning/work of educational stakeholders can be considered the socio-educational premises of educational policy implementation problems, influencing the approach of educational stakeholders to policy implementation.
- Practitioners of education differently from researches in the concept of educational policy reveal:
 - **characteristics of educational policy** (goals, values, contextuality/contextualism and dichotomic structure are characteristic to educational policy);
 - **peculiarities of educational policy influencing successful implementation of educational policy** (cyclic solution of education problems, analysis of educational policy, possibilities conditioned by decentralization, involvement of

stakeholders into educational policy, education reform oriented to results, balance between centralization and decentralization, equal cooperation between levels of education management and rational distribution of financial resources);

- **problematic aspects of educational policy** (autocracy, gap from reality, incompetence and non-functionality of documents).
- According to practitioners of education, the clearest aspects or problems proving the discrepancies of educational policy and real practice of education are as follows:
 - *interferences of education management;*
 - *non-participation of society;*
 - *problems of education network;*
 - *invalid system of support for a pupil;*
 - *lack of education accessibility;*
 - *non-quality of vocational training;*
 - *problems of competence recognition/acknowledgement;*
 - *problematičkumas of education system provision;*
 - *problems conditioned by education content/curriculum;*
 - *problems of teachers' activity.*
- In the documents of educational policy public values based on “thin” theory of the good prevail (e.g., equality, freedom, social recognition, family security, responsibility, honesty), and a school realizes wider scale of values (e.g., real friendship, knowledge, beauty, tidiness), but in the school practice the block of anti-values is also observed (e.g., distrust, aggressiveness, hate, egoism). In order to explain this situation it is possible to draw the premise that in reality the school “does not resist” the influence of social environment, but this requires deeper research.
- The practitioners of education emphasized the following actions, which could diminish the contradiction between educational policy and real practice of education:
 - **contemporary learning** (e.g., creation of formal and informal learning environments, perceiving them as stimulating innovativeness and improvement; efforts to create learning organizations, perceiving them as the environment for contemporary learning, etc.);

- **creation of networks** (e.g., creation of partnership relationship and networks in different levels; formation of the image of educational organization through active relationship with community and society);
- **constant observation and evaluation of the activity** (e.g., constant self-analysis of different educational stakeholders (through reflection, learning from mistakes, self-evaluation), which is understood as the means of activity improvement; organized researches in different levels (class, organization, system), evaluating them as possibilities of activity improvement, etc.);
- **expression of public spirit** (e.g., active provision of suggestions in the levels of organization and system; efforts of different educational stakeholders to actively participate in the activity of communities as well as to cluster into different organizations and associations, understanding that this is the possibility to influence decisions of the government, etc.);
- **innovativeness** (e.g., efforts of education practitioners to initiate the change in different levels (one's personal activity, organization, society); active dissemination of good experience of educational stakeholders, beginning with that in one's activity innovations are purposely implemented, the development of one's competence is observed and evaluated as well as in applying different methods when sharing the experience, etc.);
- **striving for systemic changes** (e.g., striving for schools autonomy, understanding this as the possibility to actively render practical suggestions for valdančioms institutions as well as to implement the changes, etc).

Having empirically diagnosed the research instruments of educational policy implementation problems in the country of transition period in socio-educational approach, it was identified that:

- Theoretical–methodological idea about the possibility to base the research of educational policy implementation on triangulation principle of qualitative and quantitative methods (realizing the latter on the basis of non-standardized survey, qualitative content analysis of critical reflections and statistical methods) allowed

getting particular empirically reliable and theoretically significant results during the research.

- Coordination of quantitative and qualitative researches in the same context of the research allowed guaranteeing internal and external validity: a) to properly reveal the „key“ features of educational policy implementation due to wider volume of the data (internal validity); b) to more objectively summarize the research results (external validity).
- The quantitative research allowed the identification of: *the expression of theoretically based criteria and indicators of educational policy implementation in real practice of education; problems of educational policy implementation and their inter-cohesions; interest spaces of educational stakeholders; socio-educational premises of educational policy problems.*
- Action science was invoked for conceptual solution of qualitative research methodology of educational policy implementation. During the qualitative research the essential objective of the action science – to teach practitioners of education by means of critical reflection to constantly change the model of one’s activity and to improve in one’s activity – was realized. So it is sought not only to depolarize theory and practice of educational policy, but also it contributes to the development of the competence of implementers of educational policy.
- The qualitative research allowed disclosing of: *peculiarities of educational policy conception among practitioners of education; aspects proving the discrepancies of educational policy and real practice of education; as well as actions of educational stakeholders (practicians of education), capable to diminish contradiction between educational policy and real practice of education.*

Results of the research are presented in the following publications:

1. Katiliūtė, E., Jucevičienė, P. (2005). Education policy: the Space of Overlap or Clash in Education Stakeholders’ Attitudes? *Social Sciences, 1 (47)*, 54-61.
2. Katiliūtė, E. (2005). Premises for Development and Implementation of the Educational Strategy in the Knowledge Society. *Learning and development for innovation, networking and cohesion*, 69-84. Baltische Studien zur Erziehungs-und Socialwissenschaft. Peter Lang.

3. Katiliūtė, E. (2004). Congruences and gaps in models of values: distinction between education policy and practice. Education-line (British Education Index – BEI). The European Conference on Educational Research (EERA). Prieiga per internetą: <http://www.leeds.ac.uk/educol/documents/00003743.htm>
4. Katiliūtė, E. (2003). Linking of Higher and Secondary school in the perspective of Education policy. *Social Sciences, 1 (38)*, 7-14.
5. Katiliūtė, E. (2002). Ethics of Social Order for Education as a Controversy in a Pluralistic Democratic Society. *Towards the learning society: educational issues*, 263-274. Baltische Studien zur Erziehungs-und Sozialwissenschaft. Peter Lang.
6. Katiliūtė, E. (2001). The Tendencies of Lithuanian School Change in the Context of World Educational Characteristics of the 21st Century. *Social Sciences, 1 (27)*, 48-58.

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REZIUOMĖ

Temos aktualumo ir mokslinės problemos pagrindimas. Globalizacijos tendencijos, apimančios laisvos rinkos ir laisvo kapitalo judėjimą, ekonominiai ir socialiniai šiuolaikinio pasaulio pokyčiai kelia naujus iššūkius švietimo politikai. Švietimo sistema skatina asmenis nuolat ugdytis ir ruošti optimaliai veikti kintant darbo sąlygoms. Remiantis įvairių autorių pateikiamomis naujosios visuomenės charakteristikomis, galima pažymėti, kad žinių (Sakaiya, 1991; Drucker, 1993), besimokančią (Fullan, 1993; Fink, Stoll, 1996), informacinę (Mollner, 1990) ir intelektualiąją (Lyotard, 1993) visuomenę lydinti esminė charakteristika yra nuolatinis mokymosi būvis, kontaktas su žiniomis ir informacija. Globalizacija daro įtaką darbo turiniui ir organizavimo formoms. Darbuotojų veikla tampa įvairiapusiškesnė, o darbo pobūdis vis dažniau keičiasi. Skirtumas tarp kvalifikuotų ir nekvalifikuotų

darbuotojų pajamų daugelyje pasaulio valstybių didėja. Todėl aukštojo išsilavinimo poreikis sparčiai auga, vis labiau reiškiasi masinio aukštojo mokslo fenomenas, ir vyriausybės tenka spręsti nelengvas šio naujo reiškimo sukeltas problemas. Besivystančių šalių vyriausybės priverstos plėtoti savo švietimo sistemas, kad parengtų daugiau kvalifikuotų darbuotojų. Tačiau riboti ekonominiai ištekliai ir ideologinės tarptautinių finansinių organizacijų nuostatos neleidžia žymiai padidinti švietimui skirtų valstybės lėšų. Švietimo pasiekimai vis dažniau lyginami tarptautiniu mastu. Tai neišvengiamai daro įtaką ugdymo turinio kaitai. Ugdymo įstaigose vis plačiau naudojamos informacinės technologijos. Taip siekiama išplėsti švietimo prieinamumą, visų pirma taikant nuotolinį mokymą, taip pat pagerinti mokymo kokybę, panaudojant kompiuterizacijos ir interneto teikiamas galimybes. Informacinės technologijos padeda kurti globalų švietimo tinklą. Globalus informacijos tinklas reiškia pasaulinės kultūros formavimąsi (Carnoy, 1999; Želvys ir kt., 2003). Švietimo sistemos nėra izoliuotos, jos neišvengiamai turi reaguoti į aplink vykstančius pokyčius ir iššūkius. Tradicinė švietimo politika ir ją vykdančios institucijos nepajėgia įgalinti žmogų aktyviai veikti nuolat kintančiame pasaulyje, todėl nuolat vyksta pokyčiai ir švietimo politikoje.

Politikos įgyvendinimo tyrimai gilesnes tradicijas turi viešosios politikos srityje. Politikos nesėkmes analizavo tokie mokslininkai: Derthick (1972), Pressman ir Wildavsky (1973), Bardach (1977); racionalių hierarchinių („iš viršaus į apačią“) modelių, siekiančių identifikuoti sėkmingo įgyvendinimo veiksnius, kūrė Van Meter ir Van Hom (1975), Hood (1976), Gunn (1978), Sabatier ir Mazmanian (1979); šiuos modelius kritikavo, pabrėždami organizacinių sąveikų vaidmenį, Lipsky (1971), Wetherley ir Lipsky (1977), Elmore (1978, 1979), Hjern ir kt. (1978). Kiti mokslininkai nagrinėjo įgyvendinimą kaip evoliuciją (Majone ir Wildavsky, 1978); kaip mokymąsi (Browne ir Wildavsky, 1984); kaip politikos ir veiksmo kontinuumą (Lewis ir Flynn, 1978, 1979; Barrett ir Fludge, 1981); kaip politikos posistemės dalį (Sabatier, 1986); kaip viešojo sektoriaus vadybą (Hughes, 1994). Tiriant švietimo politikos įgyvendinimą, aktualios dvi dalys: ir curriculum, ir įgyvendinimo priemonės. Curriculum tyrimai turi dar gilesnes tradicijas nei politikos įgyvendinimas. Curriculum principus nagrinėjo Bobbitt (1918) ir Tyler (1949), curriculum vystymą, atsižvelgiant ne tik į curriculum konstravimo teoriją, bet ir į praktines įgyvendinimo galimybes, nagrinėjo Taba (1962), įvairius curriculum vystymo aspektus nagrinėjo Oliva (1982), Beyer ir Apple (1988), Pinar ir kt. (1995), March ir Willis (1995), Bellack ir Kliebard (1997), Wragg (1997), Kelly (1999), Young (1998), Smith (2000) ir kiti mokslininkai. Švietimo politikos įgyvendinimą tyrė Sarason (1971), Gross ir kt. (1971). Minėti autoriai laikomi šios tyrimų srities pradininkais, nes pirmieji tyrė švietimo politikos įgyvendinimo sunkumus (Fowler, 2000). Daugelis švietimo reformų žlunga dėl to, kad neįvertinama švietimo organizacijų kultūra (Sarason, 1971; cit Fowler, 2000).

Gross ir kt. (1971; cit Fowler, 2000), atlikę tyrimus, padarė išvadą, jog lemiamas vaidmuo, įgyvendinant švietimo politiką, tenka mokytojams. Sėkmes ir nesėkmes įgyvendinant švietimo politiką nagrinėjo Berman ir McLaughlin (1976). Jie pateikė išvadą, kad sėkmingas švietimo politikos įgyvendinimas nėra mechaninis procesas, čia sėkmę lemia įgyvendintojų elgsena bei švietimo politikos pritaikymas pagal vietines aplinkybes. Kirst ir Jung (1980) teigė, kad trumpalaikiai švietimo politikos įgyvendinimo tyrimai padidina nesėkmės tikimybę, tyrinėtojai turi analizuoti ne mažesnio nei dešimties metų laikotarpio švietimo politikos įgyvendinimą. Peterson, Rabe ir Wong (1986) savo tyrimais taip pat patvirtino šią išvadą. Murphy (1991) švietimo politikos įgyvendinimo sėkmę siejo su gerai parengtu švietimo politikos dizainu/planu. Louis ir Miles (1990) tyrimų išvados ragina atkreipti dėmesį į finansinius bei žmogiškuosius išteklius, laiką ir kontekstą, įgyvendinant švietimo politiką. Švietimo politikos įgyvendinimo problemas taip pat tyrė Bowe, Ball ir Gold (1992), Beckhard ir Pritchard (1992), Crawford, Kydd ir Parker (1994), Woods ir Bagley (1996).

Priešingai nei kraštuose, kurių natūrali istorinė - kultūrinė raida nebuvo iškreipta sovietinės sistemos, daugelyje Rytų Europos šalių (tarp jų ir Lietuvoje) švietimo politika, kaip socialinės praktikos ruožas, yra intensyviai reformuojama ir patiria virsmo (transformacijos) būseną. Svarbiausios šio pereinamojo laikotarpio ypatybės yra priešsovietinio ir sovietinio laikotarpio paveldas, dar nesutvirtęje demokratiniai procesai, iš pamatų kintanti ekonomikos sistema, sparti kitų visuomenės sluoksnių kaita, kintantis valstybės vaidmuo ir pakitę vertybių prioritetai. Perėjimo į demokratinę sistemą procesas laikomas šio regiono šalims tekusia istorine galimybe savo sąlyginiam atsilikimui įveikti. Dėl negausių išteklių, istorinių ir kitų priežasčių modernizavimo ir „pasivijimo kampanijose“ valstybei tenka itin svarbus vaidmuo. Įvertinus visa tai, aktualu sistemiškai nagrinėti švietimo politikos įgyvendinimą transformaciją patiriančiose šalyse.

Lietuvos tyrinėtojų (Jucevičienė, 1994, 1996, 1998, 2001, 2002; Želvys, 1998, 1999, 2001, 2003; Juozaitis, 2000; Cibulskas, 2001; Bagdonas, 2002; Laužackas, 2002a, 2002b; Adaškevičienė, 2003; Janiūnaitė, 2004; Anužienė, 2004; Gurskienė, 2004) darbai liečia įvairius švietimo politikos įgyvendinimo aspektus, tačiau nepateikia metodologiškai integruoto požiūrio ir integruotų bei nuoseklių transformaciją patiriančios šalies švietimo politikos tyrimų. Švietimo politikos įgyvendinimas yra aktualus socialinių tyrimų objektas Vakarų šalyse nuo aštuntojo 19 a. dešimtmečio, tuo tarpu Lietuvoje stokojama nuoseklių tokio pobūdžio mokslinių tyrimų.

Šios disertacijos autorė, rengdama magistro baigiamąjį darbą, nagrinėjo, kaip pasaulinės švietimo tendencijos atliepiamos naujausiuose Lietuvos švietimo politikos dokumentuose (Katiliūtė, 2000). Būtent to darbo rezultatas ir išryškino švietimo politikos praktinio įgyvendinimo tyrimo

poreikį, nes teoriniame lygmenyje Lietuvos švietimo politikos dokumentai, nors ir stokoja dermės (ypač strategijų lygmenyje), iš dalies atitinka pasaulines švietimo tendencijas.

Tarp švietimo politikos ir švietimo praktikos atsiranda daugybė skirtumų, todėl švietimo politikos, strategijos ir jos realizavimo nuoseklumo nagrinėjimas tiek pasauliniu, tiek Lietuvos mastu yra aktualus. Tačiau iškyła **tyrimo metodologijos problema**. Kol kas nėra pasiūlyta kompleksinės metodologijos, kurią būtų galima taikyti šiai problemai tirti. Politikos problemos yra kontekstinės ir situacinės: jas iškelia ir apibrėžia konkrečios istorinės aplinkybės ir konfigūracijos. Todėl bet koks sprendimas turi atsižvelgti į šį situatyvumą, į tai, kaip problemos suvokiamos, interpretuojamos ir manipuluojamos konkrečių politinio proceso dalyvių. Manant, jog problemos yra aiškios ir vienareikšmiai apibrėžtos, visuomenė išsivaizduojama kaip tikslingai sukurta mašina su funkcijų atžvilgiu apibrėžtomis ir todėl kontroliuojamomis dalimis. Tačiau žmonės nėra mašinos sraigteliai, ir šiuolaikinis socialinis mokslas jų netraktuoja taip, tarsi jie būtų tik sraigteliai (Newby, 1993; Parsons, 2001).

Todėl švietimo politikos įgyvendinimo tyrimo metodologijos, apimančios bendrojo lavinimo mokyklos lygmenį, trūkumas yra aktuali mokslinė problema. Disertacijoje, sprendžiant šią mokslinę problemą, bus ieškoma atsakymų į tokius **probleminius tyrimo klausimus**:

1. *Kokios socioedukacinės dimensijos ir charakteristikos leistų atskleisti švietimo politiką ir tirti jos įgyvendinimą?*
2. *Kokios esminės švietimo politikos dimensijos ir charakteristikos sąlygoja skirtumus tarp švietimo politikos ir švietimo praktikos?*
3. *Ar galima šiuos skirtumus traktuoti kaip švietimo politikos įgyvendinimo problemas?*
4. *Kokie instrumentai ir metodikos, naudojami kompleksiskai, leistų nustatyti švietimo politikos įgyvendinimo problemas?*

Kriterijų lygmenyje kuriant universalią švietimo politikos įgyvendinimo tyrimo metodologiją, indikatorių lygmenyje Lietuva yra aktualus ir tinkamas kontekstas tokios mokslinės problemos nagrinėjimui, nes ši šalis jau beveik penkiolika metų intensyviai vykdo įvairias švietimo sistemos reformas. Taip pat ją neišvengiamai sąlygoja išorės poveikiai (globalizacija, europeizacija ir kt.). Taigi Lietuva, būdama atvira išorės poveikiams, bando suformuoti ir įgyvendinti savitą švietimo politiką.

Atkūrus nepriklausomą Lietuvos valstybę, švietimas jau buvo pasirengęs dalyvauti toliau ją kuriant, numatęs savo paskirtį ir esminius uždavinius: keisti posovietinės visuomenės mentalitetą, ugdyti pagrindines demokratines vertybes, idealus, naują politinį ir ekonominį raštingumą, dorinės

kultūros brandą, būti visuomenės, jos kultūros kaitos katalizatoriumi. Pasikeitė švietimo ideologinė politinė, pasaulėžiūrinė vertybinė ir teisinė bazė. Iš ideologinio totalitarinės valstybės agento, centralizuotai valdomo griežtomis direktyvomis, mokykla palaiapsniui tampa sąlygiškai savarankiška socialines paslaugas piliečiui ir visuomenei teikiančia institucija (Lietuvos švietimo plėtotės strateginės nuostatos. Švietimo gairės. 2003-2012 m. Projektas (toliau – Švietimo gairės, 2002)).

Naujos švietimo vertybinės nuostatos, nauji tikslai ir uždaviniai buvo formuluojami Lietuvos švietimo koncepcijoje (1992). LR Švietimo įstatymas patvirtintas 1991 m., tačiau, atsižvelgiant į kaitos keliamus iššūkius bei ES direktyvas, jis nuolat redaguojamas (paskutinė redakcija atlikta 2004 m.). 2003 m. LR Seimas pirmą kartą patvirtino ilgalaikę Valstybinę švietimo strategiją 2003-2012 m. (toliau – Strateginės nuostatos, 2003). Švietimas išipareigojo tapti pagrindiniu visuomenės raidos veiksniu, socialinių reformų pamatu, netgi lenkti bendrąją visuomenės raidą, ją lemti ir dėl savo svarbos prašėsi būti pripažįstamas prioritetiškai Lietuvos valstybės remiama sociokultūrinės veiklos sritimi.

Šio disertacinio tyrimo **objektas** – švietimo politikos įgyvendinimas, **dalykas** – švietimo politikos tyrimo metodologija.

Tyrimo tikslas – sukurti ir pagrįsti švietimo politikos įgyvendinimo problemų tyrimo metodologiją (Lietuvos švietimo reformos aspektas).

Tyrimo uždaviniai:

1. Atskleisti švietimo politikos paradigmos kompleksiskumą: švietimo politikos sampratą bei jos esmines charakteristikas.
2. Suformuluoti švietimo politikos įgyvendinimo problemų tyrimo kriterijus ir indikatorius.
3. Pagrįsti švietimo politikos įgyvendinimo tyrimo instrumentus, parinkti metodus, ir parengti jų taikymo projektą.
4. Patikrinti švietimo politikos įgyvendinimo problemų tyrimo metodologiją pereinamojo laikotarpio šalyje, nustatant švietimo politikos įgyvendinimo problemų ypatumus Lietuvos švietimo reformoje.

Tyrimo metodologija remiasi trianguliacijos koncepcija, kai derinamos deskriptyvioji (mokslinės literatūros ir dokumentų) analizė bei apklausa raštu, o kaip pagalbinis metodas taikomas kokybinis tyrimas – kritinių refleksijų kokybinė content analizė.

Disertacija remiasi šiomis **konceptualiomis nuostatomis:**

- **Curriculum koncepcija.** Curriculum yra esminis dalykas ugdymo procese, siekiant, kad mokiniai būtų žmonės, asmenybės ir piliečiai: curriculum gali remtis mokinių asmeniniais interesais (Dewey, 1969; cit. Todd, 2001), arba jo pagrindas gali būti valstybės kontroliuojamas rezultatas (Wien ir Dudley-Marling, 1998). Abiem atvejais pabrėžiama prielaida, ką reiškia mokytis ir būti „išugdytam“; iš tikrųjų tai, kuo ugdytojų manymu turi tapti ugdytiniai, dažnai apibrėžia švietimo praktikos tikslus ir siekius (Todd, 2001).

- **„Idėjinė“ (espoused) ir „naudojami“ (theory-in-use) teorijos (Argyris ir kt., 1985).** Politika ir jos dokumentai visada yra „idėjinės“ teorijos (tai tokios teorijos, kurias individas pripažįsta, suvokia ir išipareigoja laikytis), tuo tarpu praktiniame įgyvendinimo procese reiškiasi „naudojami“ teorija (t.y. tokia teorija, kurios egzistavimą rodo mūsų veiksmai; tai neapčiuopiami kognityviniai žemėlapiai, kurių pagalba individai kuria savo veiksmus). Argyris ir kt. (1985) teigimu, daugeliu atvejų žmogaus idėjinė ir naudojamoji teorijos nesutampa. Kritinės savirefleksijos procese galima sukurti teorijos ir praktikos ryšį, kuris reikalingas praktikoje.

- **Politikos įgyvendinimo kaip evoliucijos koncepcija (Browne, Wildavsky, 1987).** Politikos įgyvendinimas yra veikiau evoliucinis „mokymosi“ procesas, o ne hierarchinė seka. Pripažįstama, kad įgyvendinimo procese vykdytojai ne tik vykdo iš viršaus nuleidžiamą politiką, bet ir ją formuoja.

- **Konflikto teorijos koncepcija (Darendorf, 1996).** Pagrindinės konfliktuojančios visuomenės grupės yra klasės, kurios skiriasi pagal ekonominį požymį. Pagrindinė konflikto priežastis yra faktas, kad vieni žmonės turi valdžią kitų atžvilgiu. Pagrindiniai konfliktai kyla tarp tų, kurie turi valdžią, ir tų, kurie jos neturi.

Disertaciniame tyrime taikyti šie tyrimo **metodai**:

- **Mokslinės literatūros analizė** atliekama siekiant atskleisti švietimo politikos sampratos paradigmos kompleksiskumą. Mokslinės literatūros analizė taip pat pasitelkta grindžiant švietimo politikos įgyvendinimo tyrimo kriterijų sistemą.

- **Dokumentų analizė** taikoma analizuojant aktualiausius švietimo politikos dokumentus (LR teisės aktai). Dokumentų analizė panaudota grindžiant švietimo politikos įgyvendinimo indikatorių sistemą.

- **Apklausa raštu** atlikta siekiant atskleisti švietimo politikos įgyvendinimo problemas. Sukurtas nestandartizuotas autorinis klausimynas. Apklausta 1030 mišrios imties respondentų – įvairių švietimo subjektų (192 studentai (pirmakursiai), 246 mokiniai (abiturientai), 180 tėvų, 255 mokytojai, 93 mokyklų vadovų pavaduotojai, 64 mokyklų vadovai).

- Apklauso raštu **statistinė duomenų analizė** atlikta taikant aprašomosios statistikos metodus ir skaičiuojant respondentų nuomonių aritmetinį vidurkį, rezultatų standartinį nuokrypį (SD), atliekant faktorinę (taikant principinių komponentių metodą, VARIMAX rotaciją ir analizuojant faktorinį svorį (L)), klasterinę ir diskriminantinę analizes, skaičiuojant koreliacijos koeficientus. Duomenys apdoroti naudojant **SPSS 12.0** (*Statistical Package for Social Sciences*) programinę paketą.

- **Kokybinė turinio (content) analizė** atlikta nagrinėjant kritines refleksijas ir atsakymus į atvirą klausimyno klausimą. Content analizė remiasi sistemišku žingsnių vykdymu (Mayring, 2000): 1) daugkartiniu teksto skaitymu; 2) manifestinių kategorijų bei subkategorijų išskyrimu ir jų pagrindu iš teksto ekstrahuotais įrodymais; 3) kategorijų, apimančių subkategorijas, interpretavimu.

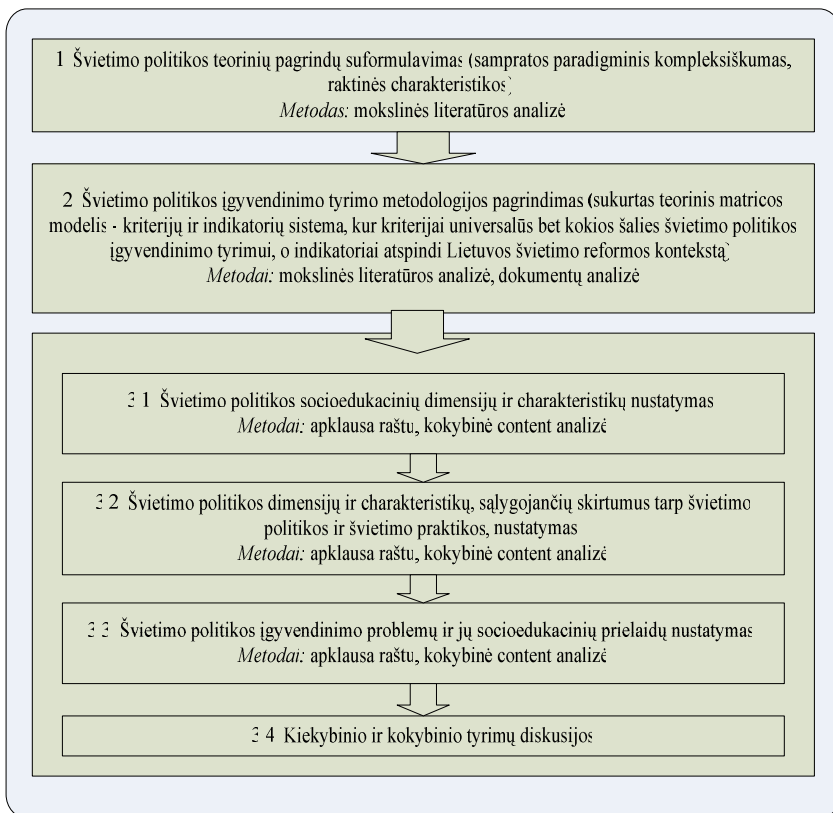
Pirmoje disertacijos dalyje atlikta išsami mokslinės literatūros analizė leido atskleisti švietimo politikos paradigmos kompleksiskumą, apibūdinti raktines švietimo politikos charakteristikas, kurios buvo panaudotos kaip pagrindas grindžiant švietimo politikos tyrimo metodologiją.

Antroje disertacijos dalyje sukurtas teorinis matricinis modelis, kuris integruoja švietimo politikos raktines charakteristikas, pasaulines švietimo dimensijas ir atskleidžia švietimo politikos įgyvendinimo kriterijus ir indikatorius. Disertacijos antros dalies pradžioje atlikta pasaulinių ir europinių švietimo dimensijų apžvalga. Keturios esminės švietimo dimensijos, aktualios transformacijos patiriančioms šalims, pasirinktos kaip skirtingi pjūviai teoriniame matricos modelyje. Matricinis modelis, integruojant švietimo politikos specifiką ir pasaulines švietimo dimensijas, t.y., horizontalės ir vertikalės susikirtimo celėse, leido išryškinti švietimo politikos įgyvendinimo kriterijus. Švietimo politikos įgyvendinimo kriterijų sistema yra universali bet kurios šalies (ypač pereinamojo laikotarpio) švietimo politikos tyrimui. Remiantis sukurta švietimo politikos įgyvendinimo kriterijų sistema, sukonstruotas diagnostinis tyrimo instrumentas (klausimynas). Indikatorių lygmenyje, tikslingai atsižvelgiant į disertacinio darbo tikslą, buvo atspindėtas Lietuvos bendrojo lavinimo mokyklos lygmens kontekstas, atlikus naujausių švietimo politikos dokumentų turinio analizę.

Trečiojoje disertacijos dalyje, remiantis autorine metodologija, atlikta analizė, siekiant nustatyti švietimo politikos įgyvendinimo problemų ypatumus. Nustatyta, kad teoriškai išgrynintos švietimo politikos įgyvendinimo charakteristikos realioje praktikoje reiškiasi kompleksiskai, tačiau empiriškai gauta savita švietimo politikos charakteristikų ir kriterijų struktūra iš esmės nėra kontroversiška teoriniam švietimo politikos įgyvendinimo charakteristikų modeliui. Atlikta kokybinė content analizė leido nustatyti švietimo politikos sampratos ypatumus, švietimo politikos ir realios švietimo praktikos neatitikimą įrodančius aspektus bei švietimo subjektų

veiksmus, galinčius sumažinti prieštaravimą tarp švietimo politikos ir realios švietimo praktikos.

Deskriptyvios analizės ir empirinio tyrimo loginė schema pateikta 1 paveiksle.



1 pav. Disertacinio tyrimo loginė schema

Mokslinis naujumas ir teorinis reikšmingumas. ► Sukurti originalūs švietimo politikos sampratos struktūravimo modeliai. ► Atskleistos originalios švietimo politikos charakteristikos, jų įgyvendinimo kriterijai ir indikatoriai. ► Suformuluotas ir pagrįstas švietimo politikos įgyvendinimo tyrimo teorinis modelis reformuojamoje švietimo sistemoje. Šio sukonstruoto teorinio sprendimo pagrindu atliktas tyrimas, adaptavus indikatorius pagal konkrečios šalies švietimo politikos dokumentus, gali būti pakartotas bet kurioje kitoje švietimo reformą vykdančioje šalyje, norinčioje pažinti švietimo politikos

įgyvendinimo problemiškumą. ►Sukurta originali kompleksinė švietimo politikos įgyvendinimo tyrimo metodologija. ►Taikant empirinius metodus, sukaupti reikšmingi mokslo faktai apie švietimo politikos įgyvendinimo raišką transformaciją patiriančios šalies reformuojamoje švietimo sistemoje.

Praktinis darbo reikšmingumas. ►Teorinės analizės pagrindu sukurta originali švietimo politikos įgyvendinimo tyrimo metodologija leidžia švietimo praktikams, ypač – užsiimantiems švietimo sistemos valdymu, objektyviau įvertinti susidariusią situaciją švietimo reformą vykdančioje šalyje. ►Parengtą švietimo politikos įgyvendinimo tyrimo metodologiją gali naudoti kompleksiskai bei modifikuoti kitos šalies švietimo politikos ar kito švietimo sistemos lygmens (pvz., aukštojo mokslo) tyrimui švietimo politiką tyrinėjantys mokslininkai, aukštesnio švietimo sistemos lygmens vadybininkai praktikai bei švietimo politikai. ►Tyrimo rezultatai gali padėti šalies švietimo politikos formuotojams geriau suvokti realiai vyraujančias įvairių švietimo subjektų nuostatas įgyvendinamos švietimo politikos atžvilgiu ir priimti geresnius, tyrimų metu gautais įrodymais paremtus sprendimus. ►Identifikuoti švietimo politikos įgyvendinimo probleminiai aspektai Lietuvos švietimo reformoje. ►Sukaupti mokslo faktai atveria galimybę tobulinti švietimo politikos įgyvendinimą bei su ja susijusius sprendimus šalyje. Taikomąją disertacinio darbo reikšmę sąlygoja ir įvairus potencialių tyrimo rezultatų vartotojų ratas. Tai – bendrojo lavinimo mokyklos vadovai, pavaduotojai, mokytojai, įvairių lygių švietimo vadybininkai ir politikai, mokinių tėvai, plačioji visuomenė.

Disertacijos struktūra ir apimtis. Darbas susideda iš įvado, trijų dalių, išvadu, literatūros sąrašo ir priedų. Darbo apimtis 196 puslapiai (43 paveikslai, 38 lentelės, 14 priedų), literatūros sąrašė 252 pavadinimai.

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