

UC Berkeley

UC Berkeley Electronic Theses and Dissertations

Title

Educational Recontextualization in Uganda: Seeking Flexibility and Variation in an Era of Transnational Isomorphisms

Permalink

<https://escholarship.org/uc/item/9zt2d9pk>

Author

Lample, Joseph Husayn

Publication Date

2018

Peer reviewed|Thesis/dissertation

Educational Recontextualization in Uganda:
Seeking Flexibility and Variation in an Era of Transnational Isomorphisms

By

Joseph Husayn Lample

A dissertation submitted in partial satisfaction of the

requirements for the degree of

Doctor of Philosophy

in

Education

in the

Graduate Division

of the

University of California, Berkeley

Committee in charge:

Professor Erin Murphy-Graham, Co-Chair

Professor Jabari Mahiri, Co-Chair

Professor Malo Hutson

Fall 2018

Abstract

Educational Recontextualization in Uganda: Seeking Flexibility and Variation in an Era of Transnational Isomorphisms

By

Joseph Husayn Lample

Doctor of Philosophy in Education

University of California, Berkeley

Professor Jabari Mahiri, Co-Chair

Professor Erin Murphy-Graham, Co-Chair

Within the field of comparative and international education (CIE), two important narratives have emerged in analyzing global and local influences on international education. One, advanced by world culture theorists, argues that Western supranational influences on national education systems has led to homogeneity—or isomorphism—in educational structures, policies, and practices around the world. The other, advanced by many in the educational policy borrowing and lending field, prioritizes local efforts to indigenize, or recontextualize, educational policies and practices rather than focus on external influences. In this study, consideration is given to both the global and the local narrative on education in Uganda.

This is achieved over two sections. Part I closely analyzes of the evolution of educational policy in Uganda, tracing prominent transnational isomorphisms—most notably the hegemony of colonial education—across multiple eras. In Part II, two case studies of educational NGOs in Uganda explore alternative approaches to the recontextualization of transferred educational ideas and programs. The case examining Educate! and its Educate! Experience program offers a glimpse into *negotiated* recontextualization, while the case examining the Kimanya-Ngeyo Foundation and its imported Preparation for Social Action program offers a picture of *decentralized* recontextualization. In the end, recommendations are made to the field of CIE regarding the responsible transfer and recontextualization of educational program and practices within an era of transnational isomorphisms.

Table of Contents

Part I: INTRODUCTION & THEORETICAL FRAMEWORK	1
Chapter 1: Research fields, context, and design	1
The African Curriculum Organization, educational transfer, and relevance	1
What is the ACO?	1
Transfer and adaptation in the field of Comparative and International Education	3
<i>Contextual relevancy in educational transfer</i>	4
<i>Educational recontextualization in SSA</i>	7
Main argument	8
Methods	11
<i>Key research concepts and considerations</i>	12
<i>Situating research design in the field of CIE</i>	13
<i>Data collection</i>	15
<i>Coding</i>	16
<i>Researcher positionality & bias</i>	16
Ugandan educational context	17
<i>Educational landscape</i>	18
<i>Education priorities, reforms, and initiatives</i>	20
Remaining chapters	20
Chapter 2: Educational isomorphisms and the history of Uganda’s educational development	23
Introduction	23
<i>Local agency in the proliferation of Western education</i>	24
Colonial education—1900s to 1960	25
<i>The adapted education model—1919 to 1935</i>	27
<i>Literary and higher education—1935 to 1960</i>	31
<i>De la Warr Commission and village schools</i>	32
<i>Coercive colonial isomorphism and the paths untaken</i>	38
Early independence education—1960s to early 1990s	41

<i>Education in Uganda after independence</i>	43
<i>Africanization and education for self-reliance</i>	44
<i>Nyerere and Tanzania</i>	46
<i>Modernization and other foreign pressures</i>	48
<i>Education from Amin to Museveni</i>	53
Educational transfer in Uganda post-EFA	55
<i>EFA and international education agendas</i>	55
<i>Uganda and global educational influences</i>	57
<i>The World Bank and education for development</i>	59
<i>Thoughts on development harmonization</i>	61
<i>Education reforms in era of globalization</i>	64
<i>Learner-centered pedagogies in Uganda</i>	65
<i>A new paradigm?</i>	67
Educational isomorphisms across Ugandan history: final thoughts	69
 Part II: PROSPECTS FOR RESPONSIBLE EDUCATIONAL RECONTEXTUALIZATION	 73
 Why case studies?	 73
Why study NGOs in Uganda?	75
What does recontextualization look like?	77
 Chapter 3: A case study of negotiated recontextualization in Educate!’s Leadership and Entrepreneurship program	 83
 Introduction to Educate!	 83
<i>Negotiated recontextualization</i>	84
<i>Recontextualization and participatory development</i>	86
<i>Case study overview</i>	87
Conceptualizing the Educate! Experience	88
<i>Creation of the Educate! Experience</i>	91
<i>Program description and organizational structure</i>	95
<i>The Purpose of the Educate! Experience</i>	98
<i>Organizational structure</i>	100
<i>Transferred concepts in Educate!’s materials</i>	109
Recontextualization	114

<i>Continuous evolution of the program</i>	115
<i>Mechanisms for incorporating feedback into program revisions</i>	118
<i>Emphasis on practicality</i>	123
<i>Transfer of the model to new contexts</i>	128
Tensions in the Educate! Experience—concluding thoughts	131
Chapter 4: A case study of decentralized recontextualization in the Preparation for Social Action program and the Kimanya-Ngeyo Foundation	137
Introduction to Kimanya-Ngeyo Foundation and Preparation for Social Action	137
<i>Case study overview</i>	138
<i>Decentralized recontextualization</i>	140
Transfer of PSA program	142
<i>FUNDAEC, SAT, and PSA</i>	143
<i>PSA and its structure</i>	147
<i>Capabilities</i>	151
<i>Activities and structure of Kimanya-Ngeyo Foundation</i>	154
<i>South to South educational transfer</i>	162
<i>Kimanya, PSA, and contextual relevancy</i>	163
Decentralized recontextualization of PSA program	166
<i>PSA and its explicit conceptual framework</i>	166
PSA and the ‘To the tutor’ section	169
<i>Salient features of the framework</i>	171
<i>Knowledge fragmentation</i>	173
<i>Decentralized learning</i>	176
<i>Analysis/challenges</i>	185
Chapter 5: Discussion and Conclusion	191
Part I: Transnational isomorphisms and Ugandan education	191
Part II: Prospects for responsible educational recontextualization	194
Resisting isomorphisms through recontextualization—suggestions for the field	196
<i>Comparative International Education</i>	196
<i>Post-colonial SSA and educational reformation – a dream deferred</i>	198
Bibliography	201
Appendix A	209
Appendix B	237

List of Figures and Tables

Figure 1.1 Spectrum of Contextual Relevancy	6
Figure 1.2 The Transversal Axis	14
Figure 2.1 Carrying development models	63
Figure II.1 Types of filtering	79
Figure 3.1 Continuum of Educational Borrowing and Lending	86
Figure 3.2 Growth in schools 2009—2018	97
Figure 3.3 Program Expansion from 2013—2024	97
Figure 3.4 Overview of the E! Experience	104
Table 4.1 PSA Participation	155
Table 4.2 Teacher Training Program	161

Acknowledgements

After working on my doctorate for ten years, there are many people to acknowledge and thank.

First and foremost, I would like to thank my family for their unending support, patience, and encouragement. My deepest love and appreciation goes to my wife, Ioana, without whom I would never have completed this monumental task. I cannot adequately express my gratitude for your tireless support, understanding, and patience. When I began my doctoral studies, we were newlyweds. Now, all these years later, we have been blessed with three wonderful children, Avali'i, Casey, and Masina, whom I must also appreciate for their patience and understanding while their dad spent many nights, and weeks, away working on this dissertation. To my parents, Paul and Marcia, and my sisters, Dr. Emily Lample (you won), and May, I am also extremely grateful for your ceaseless encouragement and offers of support at various stages throughout this process. I am particularly grateful to my parents for the many ways in which they have inspired and supported me throughout my life. A very special thank you to my other parents as well, Bill and Tali, without whose love and support I am very certain this dissertation would not have been possible. I would also like to recognize my grandparents, Patricia Lample, Henry Lample, Casey Walton, and Alice Walton. Although most of you were not able to witness this achievement, I am grateful to each of you for all that you have done for our family and for paving the way for this opportunity.

In Uganda, I have to thank all those at the Kimanya-Ngeyo Foundation and Educate! who selflessly contributed their time as I carried out my research over these many years. Selam, Debbie, Kalenga, Michael, Flavia, Sanem, and others at Kimanya Ngeyo. At Educate!, I extend my deepest gratitude to Angelica Towne for giving me this opportunity and entrusting a stranger to study a project you helped build from the ground up. My thanks also to all those who contributed to my study, including mentors, scholars, youth leaders, program officers, and staff at the head office. A special thank you to Francis, Mary, Collins, and Allan with whom I spent and lot of time as I observed the organization.

Also, I would like to appreciate the Foundation for the Application and Teaching of the Sciences (FUNDAEC), its founders and current staff, for making this study possible. In particular I extend my heartfelt gratitude and appreciation to Ever and Ileana, and to Nilma and Luciano, whose families supported me years ago when I first had the opportunity to learn about the Preparation for Social Action program.

I extend my thanks to all my close friends around the world who have had to endure me talking about my doctoral studies and dissertation for far too long. In particular, my thanks goes to Nooshin and Eden Golshani, and to Bryan, Liam, and Lucy Graham for hosting me for over many summers as I worked on campus when visiting from Uganda. A very special thank you is also owed to Dr. Holly Hanson, whose love for Uganda and whose wealth of knowledge about

the country was instrumental in providing a foundation for my research. In particular, I am grateful for the time we were able to spend studying the history of education in Uganda together.

I would also like to recognize a few individuals at Berkeley whose scholarship, teaching, friendship, and support did not go unnoticed and was integral to my ability to complete this dissertation. Thank you to Professor Zeus Leonardo, Professor Sarah Freedman, Rosa Garcia, and to my former colleagues Becky, Kimberly, Bianca, and Maliheh. And a special thank you to Professor Malo Hutson who consistently made time to meet with me and mentor me over many years despite working outside my field.

I wish also like to appreciate the Andrew and Mary Thompson Rocca Scholarship committee, the Institute of International Studies, and the Graduate School of Education for the generous grants that helped make my dissertation possible.

Finally, to the only individuals whose patience is only rivaled by that of my wife: my sincere and utmost gratitude to Professor Erin Murphy-Graham and Professor Jabari Mahiri for your decade of support and mentorship. I have been extremely fortunate to have such exemplar, accomplished, and thoughtful advisors and dissertation committee co-chairs. I can still remember when I first received your emails, while traveling in Ethiopia, explaining that I had been accepted to the doctoral program in Social and Cultural Studies and that you would be my co-advisors. I am extremely grateful for the time each of you have given me, and the support you have shown both personally and professionally. I look forward to continuing to learn from and work with each of you in the years ahead.

PART I: TRANSNATIONAL ISOMORPHISMS AND UGANDAN EDUCATION

Chapter 1: Research fields, context, and design

The African Curriculum Organization, educational transfer, and relevance

In May 2018, the African Curriculum Organization (ACO) hosted a conference on “Curriculum for Sustainable Learning” in Entebbe, Uganda. In attending the conference, I documented the purpose as threefold: (1) To revive the ACO; (2) to reflect on current trends in curriculum reform sweeping sub-Saharan Africa (SSA); and (3) to consider pathways forward for educational advancement on the continent (May 28, 2018, field notes). The conference included representatives from state curriculum institutions, from national and multi-national Non-Governmental Organizations (NGOs), from schools and private institutions, as well as from UNESCO and the African Union. Participants advanced a call for curriculum development centers (CDCs) from across SSA to work together—as ACO attempted to do decades earlier—to realize quality and *relevant* education in the region. Yet what exactly is “relevant” education?

As if reading from a script, presenters from across the continent made reference to the same talking points. Students needed to acquire “21st century skills,” and countries needed to prioritize the achievement of Agenda 2030¹ and Sustainable Development Goal #4². As Anglophone nations, participants generally referenced a British educational model; they also talked about skills acquisition, preparing students for the labor force, and the need to incorporate new technology into teaching to keep up with changing economies. While these themes were broad enough that experiences in each country might have varied slightly, it was clear that participants generally shared a common language when discussing education in their respective regions. The goal of “harmonizing” educational systems, particularly within regions like East Africa, was frequently raised despite the fact that to harmonize could potentially conflict with creating “relevant” education programs. To the prospective members of the ACO, relevant education was seemingly more about relevance to the times—to industrializing nations, to advances in technology, to globalizing economies—and less about relevance to culture, history, or context.

What is the ACO?

Originally conceived at a regional seminar on “Advanced Training in Systematic Curriculum Development and Evaluation” in Ghana in 1975, the ACO was formally established in 1976 during a conference of education ministers in Lagos, Nigeria (field notes, May 2018; a-co.org). The ACO was launched at a time when newly independent countries in sub-Saharan Africa began asking what education should look like after colonization. Post-independence

¹ <https://sustainabledevelopment.un.org/post2015/transformingourworld>

² <https://sustainabledevelopment.un.org/sdg4>

education was full of promise because it offered a chance to rethink education priorities of the colonial era, to examine what education meant in the African context, and because education was viewed as an important tool for the development of independent nations (Jansen, 1989; Evans, 1994; Datzberger, 2018; Furley & Watson, 1978). Ssekamwa & Lugumba (2001) refer to this phenomenon as a belief in the “magic” of education to generate employment. In fact, the impetus for creating a conference of African curriculum developers extends back even further, as the goal of establishing national curriculum centers across post-colonial Africa was most notably proposed in 1961.

In May 1961, at the dawn of political independence in most African countries delegates of thirty-seven African states and four European states met in Addis Ababa under the auspices of UNESCO and UNECA (United Nations Economic Commission for Africa) to discuss education in Africa. The type of education discussed at this conference was formal schooling, the type which the colonialists had introduced into Africa. This was the first time that such discussions, conducted predominantly by Africans, had taken place at the continental level (Brock-Utne, 2000, pp. 114-115).

Prior to the establishment of national curriculum development centers (NCDCs), most educational systems in newly established states in SSA were utilizing American and European curricula (Brock-Utne, 2000). Thus, the hope for NCDCs, as well as the ACO, was that nations would begin developing educational programs and materials that were *contextually* relevant for Africa (Yoloye, 1986). Participants in Ethiopia resolved that changes must be made to national education systems whose curricular content was no longer viewed as adequate.

That—as the present content of education in Africa is not in line with either existing African conditions, the postulate of political independence, the dominant features of an essentially technological age, or the imperatives of balanced economic development involving rapid industrialization, but is based on a non-African background, allowing no room for the African child’s intelligence, powers of observation and creative imagination to develop freely and help him find his bearings in the world—African educational authorities should revise and reform the content of education in the areas of the curricula, textbooks, and methods, so as to take account of African environment, child development, cultural heritage and the demands of technological progress and economic development, especially industrialization (UNESCO, 1961, p. 23)

Sadly, the dream that NCDCs and the ACO would create an educational renaissance in Africa was short lived. By the early nineties, as external funding and support for the ACO dried up, the organization found itself unable to fulfill its mandate (UNECA, 1993). Even before that,

the struggles inherent in running independent nations led many to lose interest in big questions about indigenization and reshaping educational systems and curricula (Woolman, 2001).

As a consequence of these challenges, questions remain as to the extent to which curricula in SSA has truly changed since independence (Lewin, 1985; Jansen, 1989). What was the nature of the innovations or adaptations that took place? Were they revolutionary or superficial? What were the prominent factors leading to the short lifespan of the ACO, and how did they reflect wider difficulties experienced by NCDCs around SSA? Furthermore, what factors contributed to such a shift in the collective understanding of what it means for education to be “relevant”? Why did such a seemingly stark shift from cultural and contextual relevance in education to relevance to global priorities take place? And what, if any, might be the consequences of such a shift?

Whether a matter of political expediency—bending to the will of powerful donor and lending agencies that promised financial support for specific educational development projects (Klees, Samoff, & Stromquist, 2012; Olsen, Biseth, & Ruiz, 2015; Stromquist, 2002)—or a reflection of attitudes among a Western trained political class which viewed academic training as the highest form of education (Wa Thiong’o, 1986), the period since independence for many SSA nations has been characterized by an embrace and perpetuation of European and Western educational priorities (Jansen, 1989; Brock-Utne, 2000). Few countries found it financially feasible or possessed the political stability to embark on as big a project as developing a unique, contextually, historically, and culturally relevant approach to national education at the time of independence, and even fewer have attempted to do so since (Jansen, 1989; Verger, 2014). As global priorities in education have now taken center stage, the idea of creating uniquely contextualized educational systems and models within much of the world appears even less appealing. In an era of globalization—just as the recent ACO debates illustrated—the most that countries might consider in regard to contextual relevance is how to adapt global education priorities, materials, and programs to reflect (or more likely to succeed within) local realities.

Transfer and adaptation in the field of Comparative and International Education (CIE)

Using labels such as “educational transfer,” “borrowing and lending,” and “adaptation,” researchers in comparative international education (CIE) explore the contentious intersection between globalization, development and education as it takes form in the transnational exchange of educational programs, policies, and methods. Whereas political scientists, sociologists, and social anthropologists first advanced research into ‘policy learning,’ ‘transfer,’ ‘diffusion,’ or ‘reception,’ ‘policy borrowing and lending’ emerged from the field of CIE (Steiner-Khamsi, 2012, p. 6). Over the past decade, the term has undergone a noticeable revival, with researchers in CIE studying different types of educational transfer, notably “voluntary transfer (lesson-drawing, emulation)” and “coercive transfer (harmonisation, imposition)” (ibid, p. 6). Among the questions examined: Is there one emerging global system of schooling, or many (Anderson-Levitt, 2003; Meyer & Rowan, 2006; Schriewer & Martinez in Steiner-Khamsi, 2004)? What are the prominent factors influencing educational borrowing in the developing world (Brock-Utne,

2000; Moulton, Mundy, Walmond, & Williams, 2002)? What does it look like when national and international reforms encounter local realities (Silova & Steiner-Khamsi, 2008)? What does it mean to recontextualize an externally designed program or educational policy (Beech, 2006; Portnoi, 2016; Quist, 2003)? Can nations really be forced to adopt policies that their constituents do not already want (Steiner-Khamsi & Quist, 2000; Vavrus in Steiner-Khamsi, 2004)?

Literature in the field of CIE has also long detailed the historical impact of development and globalization on the field of education (Mundy, 1998; Crossley, 2002; Resnik, 2006; Robertson et al., 2007; Klees, 2010). Resnik (2006) describes three primary explanations for the rapid expansion of educational systems in the period since the Second World War: “convergence theories, stressing the modernization process; neo-Marxist approaches, highlighting neocolonialism and a new type of imperialism; and neoinstitutionalism, focusing on world education culture and states’ need for legitimacy” (p. 173). Each of these perspectives represent distinct assumptions about why and how formal education spread rapidly within the past century. Similarly, conclusions based on these observations tend to fall along three lines of argument.

Historical case studies of single organizations have suggested that the “problems” of educational multilateralism lie within the structure and management of the organizations themselves. In contrast, neo-Marxist accounts have viewed the educational development policies and practices of multilateral organizations primarily as instruments of Western neoimperialism. Finally, accounts by world institutionalists have underscored the role of international organizations in constructing a world culture characterized by homogenous national educational policies linked to “modern” ideals of nation and citizen. Unlike neo-Marxist accounts, this literature has remained silent about the conflicts and contradictions that accompany the global spread of these ideals and practices. (Resnik, 2006, pp. 448-449).

In short, either global educational practices are becoming increasingly similar by coincidence, they are merging intentionally, or the commonalities are superficial and undermined by diverse experiences on the ground. Where one falls within any of these perspectives tends to dictate the type of research that is conducted.

Contextual relevancy in educational transfer

As Crossley (2009) argues in “Rethinking Context in Comparative Education,” “[c]oncern with context penetrates to the heart of comparative education” (p. 1173). But why is context important, and how is it understood within the field? What does it mean for an educational project to be relevant to its beneficiaries? While the relationship between learning and context has broad implications for the field of education (Gruenewald, 2003), in this study I am specifically concerned with the role of context in the international transfer and adaptation—what I refer to as recontextualization—of educational programs.

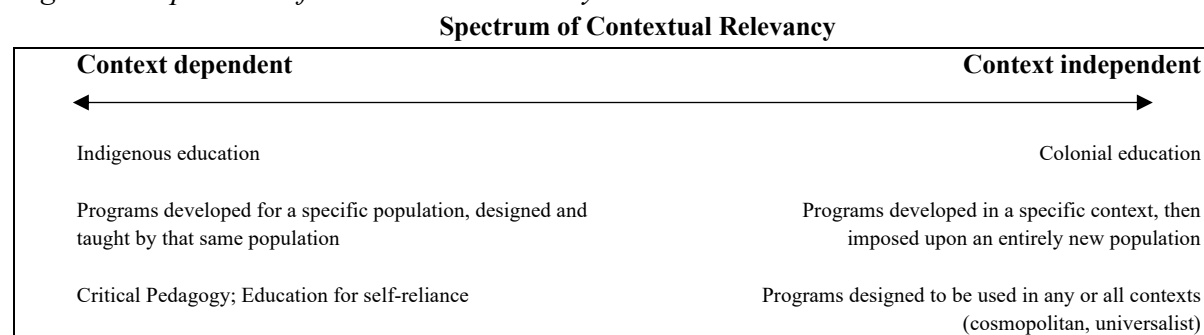
In the mid nineteenth century, Russian scholar K.D. Ushinsky directly undermined the assumptions of many of his contemporaries by arguing, “It is impossible to so isolate education that the life surrounding it on all sides would have no influence upon it” (Ushinsky, 1975, p. 187). Some years later, British historian and educationalist, Michael Sadler—who many view as a pioneering figure in the application of a socio-cultural lens to studies of comparative education—advanced a similar view (Crossley, 2006, 2009; Phillips, 2009). In a speech given in 1979, Sadler stated,

In studying foreign systems of Education we should not forget that the things outside the schools matter even more than the things inside the schools, and govern and interpret the things inside. We cannot wander at pleasure among the educational systems of the world, like a child strolling through a garden, and pick off a flower from one bush and some leaves from another, and then expect that if we stick what we have gathered into the soil at home, we shall have a living plant. (Sadler, 1979, p. 49)

The divergence in thinking about contextual relevancy in education can best be visualized as a spectrum. On one end, we find educational programs and models whose entire identity is determined by the context (e.g. the environment, cultures) where the program evolved. Examples of such projects might include Nyerere’s *Education for Self-Reliance* (1968), Freire’s concept of critical pedagogy, as well as all pre-standardized indigenous models of education. The key characteristic on this end of the spectrum is not that a program’s foundational theories and guiding principles are derived solely from individuals within a specific context, but rather that the program in question was designed such that its approaches, aims, and conceptual framing have been tailored to address a specific population or place.

On the other extreme, by contrast, are those transferred educational projects which, designed in a specific socio-historical space for a particular population, pay little mind to the realities of the new space and population in which they find themselves. In this camp, we would include some forms of colonial education, as well as a myriad of NGO or donor sponsored pre-packaged educational models. Many of these programs, conceived at a particular time and for a particular place, reflect one society’s dominant culture yet are implemented across (or imposed upon) a diverse number of cultural and regional contexts (Sadler, 1979; Jansen, 1989; Metzler, 2009). The context independent policies and programs at this end of the spectrum also include educational initiatives that are often conceived upon purportedly universal principles and beliefs (Unterhalter, 2008). Education itself is viewed as “an independent ‘aspect’ of social reality that [can] be analysed separately from its socio-historical contexts” (Beech, 2006). The motivating logic is that what works or is true in one context, is just as likely to work or be true in another (Cowen & Kazamias, 2009). Figure 1.1 depicts this proposed spectrum.

Figure 1.1 Spectrum of Contextual Relevancy



During the peak of post-colonial movements—at the time when Julius Nyerere unveiled as government policy *Education for Self-Reliance* (1968), and Paulo Freire published *Pedagogy of the Oppressed* (1970)—it was reasonable and even justifiable to propose the creation of educational systems and programs tailored for a well-defined population or place. In today’s increasingly connected world, however, such a narrow approach to educational design no longer appears tenable. Efforts to indigenize curricula and create contextually relevant materials could be seen falling out of favor with international donors as far back as the late 1980s (Brock-Utne, 2000). At the same time, paternalistic approaches to transfer that ignore local realities are equally uncommon today. In its place, a new pattern of borrowing and transfer has emerged that brings together the global and the particular:

(1) a local problem was identified; (2) solutions were sought in foreign educational systems; and (3) a ‘tested’ institution or educational practice (that had worked or was believed to have worked) was adapted to the new context and then implemented. (Beech, 2006, p. 2)

How prevalent has this pattern become? And what has globalization meant for context-dependent educational initiatives? Are comprehensive, context-dependent educational strategies a thing of the past? Today, those who stress the importance of context in educational design and transfer fall under a wide umbrella. Debates about context rarely center on whether or not an educational program can be transplanted from one place to another, but on what kind of adaptation that program must undergo in order to be contextually relevant. Thus, those concerned with the significance of context as a subject of inquiry in comparative education now range from proponents of cosmopolitanism (Unterhalter, 2008) who believe that universal truths are shared across international contexts; to those critical of the new imperialism in education (Tikly, 2004) and its resulting spread of Western hegemonic ideas and practices; to cultural anthropologists who argue that educational efforts will always undergo a process of indigenization or appropriation once introduced to a new context (Anderson Levitt, 2002, 2003; Bartlett & Vavrus, 2017).

In sum, while the tendency to seek potential solutions to local problems from abroad has become more common, the question of how to adapt these strategies to their new context must

always be considered. The theme of context is therefore of paramount concern in educational transfer.

Educational recontextualization in SSA

Since borrowing always implies a decontextualization process in which a model, practice, or discourse is transplanted from its original context and applied to a new one, the process of recontextualization, “indigenization” or local adaptation, will become key for understanding the educational transfer process.

(Steiner-Khamsi & Quist, 2000, p. 275)

The history of education in SSA—from British occupation, to World Bank structural adjustment policies, the Jomtien conference on Education for All (EFA), and more recently globalization and the ubiquity of NGOs in the education sector—is primarily a story of educational transfer and adaptation, of *recontextualization*. In fact, educational recontextualization in SSA undoubtedly predates the colonial era, just as language, cultural, and religious transfer and adaptation also predate the arrival of Europeans (Abdi, 2012; Hanson, 2003; Tikly & Dachi, 2009, p. 105). But given its historical significance for the region today, and, more importantly, given that it is the most well documented example of early exchanges in educational ideas on the continent, colonial education serves as an entry point into a larger discussion about the complexity of educational transfer and adaptation in the African context.

In the age of international agreements EFA and the Millennium and Sustainable Development Goals (MDGs, SDGs), low-income nations—such as the members of the newly revived ACO—face a unique set of pressures to comply with education priorities set by international agencies and donors (Steiner-Khamsi, 2004; Portnoi, 2016). “It is well documented,” argues Verger (2014) in a piece on why policymakers adopt global education policies, “that many countries—especially developing countries—adopt global policies and programs because they are externally imposed on them via aid conditionality or binding international agreements” (p. 16). These foreign pressures can be traced as far back as colonial times (Nyerere, 1968; Bude, 1983; Jansen 1989; Brock-Utne, 2000; Abdi, 2012).

Among the arguments that inspired this dissertation topic is the view advanced by world culture theorists and post-colonial advocates that, beyond the creation of increasingly similar schooling conditions worldwide (Meyer & Ramirez, 2000), the legacy of Western influence on education in Africa is that it has stifled variation and innovation in education thought and practice (Abdi, 2012; Spring, 2006). They warn of structural and policy homogeneity, or *isomorphism*, among global institutions (Meyer et. al., 1997) and in the education sector (Meyer, Ramirez & Soysal, 1992; Meyer & Ramirez, 2000). Meyer et. al. (1997) use the concept of “isomorphism” to understand, for example, why an island society “despite all the possible configurations of local economic forces, power relationships, and forms of traditional culture it might contain, would promptly take on standardized forms and soon appear to be similar to a hundred other nation-states around the world” (p. 152). World systems theorists attribute these

changes to pressures from international donors and agencies such as the World Bank, USAID, etc. (Arnove, 1999; Klees, Samoff, & Stromquist, 2012; Samoff, 1999).

Skeptics of world culture theory (Anderson-Levitt, 2003; Phillips & Stambach, 2008; Steiner-Khamsi & Stolpe, 2006; Verger, 2014), by contrast, maintain that evidence of increasing policy and structural similarities around the world does not suggest that a single, uniform educational model is taking over. Some have argued that, if anything, multiple “isomorphisms” can be identified, each particular to a subset of schooling practices like attitudes on corporal punishment, specific subject-matter pedagogy, or schooling reform strategies. Critics also express concern that macro analyses about isomorphism overlook the agency of those who “borrow” or implement educational policies (Anderson-Levitt, 2003; Steiner-Khamsi & Stolpe, 2006). Authors like Laura Portnoi (2016) further suggest that world culture theorists ignore the multitude of ways in which educational policies and programs are appropriated and recontextualized into new environments. In the introduction to the volume *Local Meanings, Global Schooling* (2003), Anderson-Levitt provides a balanced summary of the concerns raised by both macro and micro level analyses of transnational isomorphism, while also providing her thoughts on what this means for those working to reform education around the world.

In many ways, differences in lived experiences matter more than the common structure. Nevertheless, ultimately, the fact of the common structure matters. It puts a frame around ordinarily thinkable ways of doing schooling. By implication, there are three kinds of reform movements. Some reforms, such as the extension of schooling to all children or the press for efficiency of execution, spread or strengthen the common models. A second kind of reform works within the common models to change the lived experience of students or of teachers, as in Segal-Levit’s example of new kinds of science teaching or other successful efforts at such activities as “active learning” or teacher autonomy. Finally, there are rare reforms that would remove us from the contemporary common model, such as Freire’s vision or Ivan Illich’s proposal to de-school society. The last kind of reform is truly radical and very difficult to bring about, although changes of this magnitude have occurred over the centuries. It behooves reformers to know which kind of reform they are attempting. (p. 19)

Main argument

It is the last line of this paragraph which frames the main argument of my dissertation. Not only should it behoove reformers to “know which kind of reform they are attempting;” in my view, it is equally important for all schooling stakeholders to know the kind of educational project they are engaged in. Teachers, parents, students, education officials, and NGOs implementing educational projects must all pay attention to where their efforts fall within the spectrum of the common structure; or the *dominant ideology* by another name. Tikly (2004), writes about the spread of this dominant ideology as the “global governmentality” of Western

ideas on education—a reference to Foucault’s concept of governmentality which describes the phenomenon by which individuals have so internalized the values of the state (or other dominant ideology) that they end up policing themselves when it comes to maintaining and defending dominant ideas (Foucault 1988). To ignore this global governmentality in international education—one which shapes our understanding of education and teaches us to equate it with schooling, and schooling with preparation for the work force (Spring 2006)—is to stifle opportunities for variation or diversity in educational practice. Furthermore, despite claims that it is challenged or indigenized in some contexts (Anderson-Levitt, 2003; Portnoi, 2016), the transnational influence of this dominant ideology in education in regions like SSA is dangerously ahistorical and rarely critically examined by its principal beneficiaries.

That research on the African educational context requires special attention owing to its complex historical circumstances appears readily accepted among comparative educationalists. On this point, Tikly & Dachi (2009) have argued that when considering the African context, the region’s material position in relation to the North cannot be overlooked. Furthermore, “the discursive basis of global educational agendas, the role of indigenous elites, and the specific form of the postcolonial state” must also be examined (pp. 103-104). All of these factors, they assert, contribute to the predominance of global agendas and elite interests in shaping educational policy—the reproduction of global isomorphisms. Steiner-Khamisi & Stolpe (2006), for their part, believe that neoinstitutionalist arguments about educational convergence would be strengthened by attention to the history of colonization in Africa. “Methodologically speaking, neoinstitutionalist theory does make an interesting case for international convergence, but its claims rest on weak cases. What is absent from their account is the history of colonization, which would explain some of the similarities between First World and Third World countries” (p. 6 Kindle version).

Following the advice of these authors, the central arguments of this dissertation are presented in two parts. Part I examines Uganda’s distinct educational path, from colonial times, through post-independence and now globalization, and addresses how the contemporary educational system of Uganda—a low-income, post-colonial nation in SSA—is the byproduct of years of foreign influence dating to colonization. I argue that the threat of transnational isomorphisms (or dominant discourses on education) in Uganda and much of post-colonial SSA is greater than in other regions of the world because it is here that contested Western educational models—models that are not universally embraced in any context—continue to dominate educational thinking and practice in Uganda. Part I advances the argument that, while “international convergence” may not be visible in all aspects of Ugandan education, the convergence that does exist is emblematic of most low-income, post-colonial societies. The convergence that has taken place is not just about the legacy of colonial education policies, organization, and priorities in the contemporary education system; it also represents a troubling convergence in thought, resulting in the stifling of creativity, variation and ingenuity. The dominant discourse traps the educational imagination inside a neoliberal/capitalist paradigm. “One of the main characteristics of the colonality of power is that it not only included

domination by force, but it was also strongly based on the repressing of indigenous epistemes and the simultaneous positioning of Western knowledge as superior and as the only valuable option to apprehend the world” (Beech & Lista, 2012, p. 378).

Building upon this foundation, Part II of this dissertation focuses on empirical research that I carried out in Uganda between 2013 and 2017, offering multiple illustrations of what educational adaption and recontextualization looks like today. In particular, I look at the challenges related to the transfer and adaptation of educational programs by NGOs (a form of policy transfer). In contemporary Africa, where NGOs have taken on many responsibilities and functions of national governments (Fisher, 1997), examining the complexity of educational transfer and adaptation by such seemingly independent entities is immensely illustrative. For one, as civil society organizations, NGOs have the potential both to protect the state and resist it (Tarlau, 2015). When educational programs are transferred from outside the country, one has to ask whether such programs contribute to the perpetuation of the global dominant discourse, or whether they contribute towards something distinct; something contextually relevant and locally empowering. NGOs face a unique challenge in the fact that they have to account for local voices and contextual relevancy despite also advancing global agendas with foreign funding.

In the end, the aim of this dissertation is to highlight practices and perspectives which might influence new approaches to educational transfer and adaptation, and to challenge an increasing complacency among education practitioners and researchers with the status quo. If the transfer, borrowing, lending and adaptation of educational practices is here to stay—and indeed the inescapable influence of globalization would seem to suggest that it is—then what is needed is a closer examination of the many pitfalls inherent within existing efforts, as well as highlighting possibilities for future practices that are historically sensitive and that promote flexibility, variation, and authentic local participation and representation. In the era of globalization, creating grassroots programs that are entirely context-specific and do not draw from transnational ideas/models seems both unrealistic and impractical. Consequently, an initial question for this research was how are educational policies and practices transferred, or imposed, and later adapted for new contexts? And further, what are the most important contextual considerations that need to remain at the heart of these recontextualization efforts? In other words, how can recontextualized educational efforts resist the pressures of homogenization in order to preserve (and where necessary reestablish) diverse educational practices based on distinct, context-specific world-views and sociocultural perspectives?

At the conclusion of Parts I and II, I argue that the educational stakeholders in Uganda need to employ more principles of critical theory/critical pedagogy, and in so doing, interrogate the systems and models that they have inherited in order to decide whether they are in line with their varied priorities. I further advocate an exploration of new possibilities for educational variation—including an exploration into what was lost to colonialism and postcolonialism—so that the Ugandan educational landscape might encompass a diversity of views and approaches rather than permitting a single system to go largely unchallenged and unquestioned from the time of colonization to the present.

Methods

I moved to Jinja, Uganda in October 2012, and preliminary research for my dissertation began the following year. My first interactions in Uganda were with the Kimanya-Ngeyo Foundation for Science and Education (Kimanya); an organization I had collaborated with previously. Since 2007, Kimanya has implemented a transferred educational program, originally designed in Colombia over many decades, known as the Preparation for Social Action Program (PSA) (see VanderDussen, 2009; Murphy-Graham & Lample, 2012). PSA was one of two transferred educational models that I planned to include in my dissertation research, the other was a project known as Child to Child (C2C). C2C is a health education program originally designed in the UK in 1979, and later introduced to Uganda in 1994 (Stephens, 2007). Finally, a smaller study of the Alternative Basic Education for Karamoja program (ABEK) was intended to round out my research as an example of an indigenous educational model (see Kirumira, 2004).

True to the emergent nature of most qualitative research (Bartlett & Vavrus, 2017), my plans had to be quite flexible in the beginning as I came to better understand my research context. Over the first 18 months I primarily engaged with Kimanya as a participant observer, familiarizing myself with changes to their programs since my previous visits. Efforts were also made during this period to contact representatives of C2C, ABEK, as well as other education researchers at Makerere and Kyambogo universities in Kampala. Given that no contact information for the organizations was readily available online, multiple visits had to be arranged to Kampala and to the Karamoja region in Eastern Uganda for in-person meetings. Eventually it became clear that neither of these programs would be practical as case studies for my research. Due to changes in funding, C2C was no longer operating the same program that I had researched before arriving to Uganda (Pridmore & Stephens, 2000; Stephens, 2007). ABEK, by contrast, was simply too far away. Based in the Moroto District of Eastern Uganda, some 10-12 hours drive from Jinja, it was difficult to stay in communication with the government officials overseeing the program when I was not physically present in the region.

In the midst of these other activities, I also took on a 3-month research assistant position with a professor at UC Berkeley who was collaborating with the World Bank on the Global Partnership for Education (GPE) initiative. Eventually I would report to World Bank representatives directly, with my work taking me to districts spread out over Central, Northern, and Eastern Uganda. As part of this project, I spoke with academics, NGO representatives, and education officials at the local, district, and national levels. I participated in a country level stakeholder meeting organized by the World Bank for education practitioners, NGO and donor representatives as well as government, ministry, and district officials. I visited primary, secondary, and tertiary institutions, speaking with educators, students, and even youth who were cut off from the national schooling system. While none of the findings from that study are included in my dissertation, the experience afforded me a wealth of contextual knowledge that added to my growing understanding of the educational landscape in Uganda. Finally, by September 2014, I had identified the second organization that would form part of my study—Educate!—and I began formally collecting data.

Key research concepts and considerations

The design of my dissertation centers on two case studies, each involving ethnographic research methods. The case studies are supported by a supplemental set of semi-structured interviews with curriculum designers, an education researcher, and representatives from other educational NGOs—each highlighting some aspect of educational transfer and adaptation in Uganda. Flyvbjerg (2001) argued that social science case studies should be selected strategically to yield particular insights (see also “purposeful selection” in Maxwell, 2013). For this reason, I selected organizations and programs for study based on their illustrative yet distinctive approaches to recontextualization. In the case of Kimanya, the PSA program grew out of a Colombian alternative secondary education program and had been transferred for implementation in Uganda, Kenya, and Zambia with support from the Hewlett Foundation (Murphy-Graham & Lample, 2012). It posed a unique opportunity to explore the South to South transfer of an educational program, a transfer that was also facilitated with support from the Global North. In the case of Educate!, their leadership and entrepreneurship program was the culmination of efforts made by a group of American university students, inspired by educational experiences at home, to create a new educational program for youth in Uganda. The process of creating the Educate! program, a program that has continued to evolve for many years, involved collaboration among Ugandans and outsiders and led to a final product that reflects a range of global and local perspectives and insights.

The supplemental interviews represented a convenience sampling (Maxwell, 2013) of (1) representatives from a database of NGOs that I compiled which I believed to fit under the umbrella of “transferred” educational programs in Uganda; and (2) education officials involved in the area of curriculum design. My original intention for the NGO database was to survey a large number of organizations from across the country by having them complete an online questionnaire, and then following up with a smaller subset of respondent organizations for interviews and/or field visits. Due to the poor participation rate with my online survey, I ended up conducting only 5 interviews with individuals either working for or researching organizations matching my criteria within Uganda. In the case of the curriculum designers, I reached out to one individual who was closely involved in the revision of the lower secondary school national curriculum, and through snowballing, was referred to various other curriculum designers familiar with both primary and secondary level revisions.

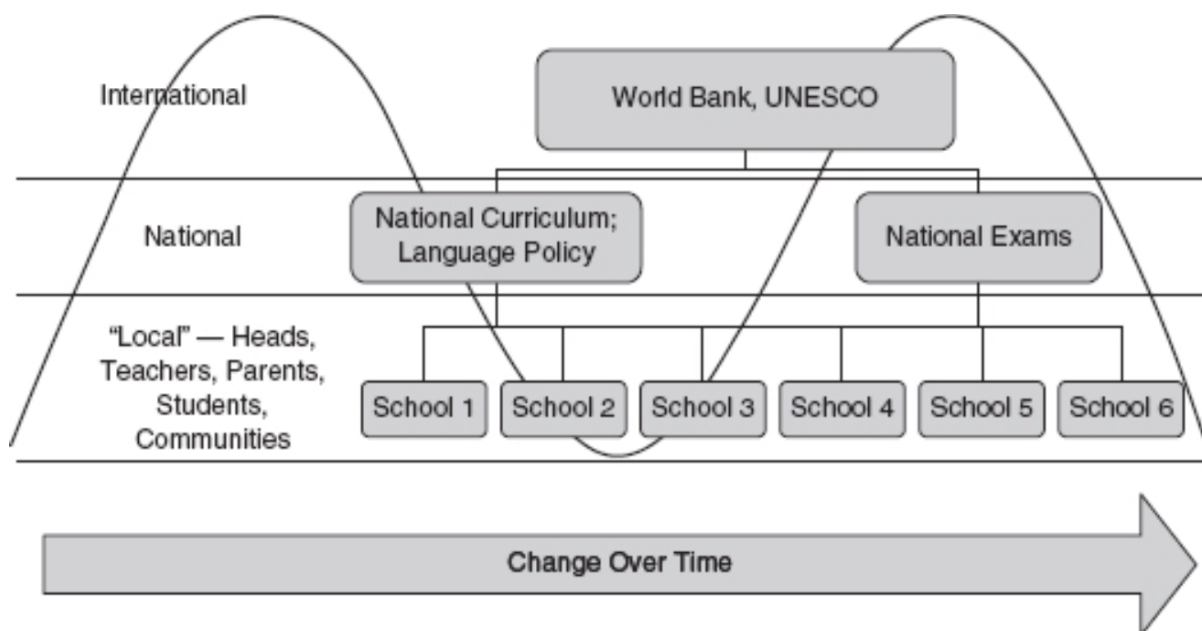
With the exception of the curriculum designers, the questions that guided my interviews and questionnaires attempted to understand how NGOs in Uganda considered the interrelated concepts of recontextualization, insider and outsider knowledge, adaptation, variation, flexibility, contextual relevancy, participation, and agency in their day to day work (See Appendix A). These concepts constituted a deductive set of codes which guided my inquiry into the work of the organizations’ leadership and founders, coordinators and field implementers.

Situating research design in the field of CIE

Given my interest in contributing to the literature on educational transfer and recontextualization, my research design draws from qualitative methods from the comparative international education (CIE) field (Bartlett & Vavrus, 2009). Macro-level analysis of nation-states long served as the “central unity of analysis” for early scholarship in the field, followed for many years by largely quantitative comparative studies, resulting in the marginalization of “historical and cultural considerations in mainstream education research” (Bartlett & Vavrus, 2009, p.3). Yet by the 1970s, ethnographic approaches began to challenge this longstanding positivist paradigm. Anthropological research during this time focused on a range of topics including the ways that schooling reinforces inequalities, the role of schools in mediating structural and acculturation effects on students, and the role of school systems in cultural evolution (Bartlett & Vavrus, 2009). Since then, scholars have largely relied upon prominent research approaches used within the field of education, and within the social sciences more broadly. The challenge of educational comparativists in particular, write Phillips & Schweisfurth (2014), is to identify what is specific about comparison and to evolve methods that best serve that purpose. In their view, the essential questions of research in comparative education are: “What methods and conditions are appropriate to ensure adequate understanding of other cultures from a vantage point outside of those cultures? What does the act of comparison consist in and how might it best be undertaken?” (p. 101).

For Bartlett & Vavrus (2009), effective qualitative research in CIE involves vertical analysis (“comparisons across levels, such as the local, the national, and the international,” p.9) as well as horizontal analysis (“across sites through multisited research” of places that are complex and connected, p. 12). In a more recent work, Bartlett & Vavrus (2017) outline a third characteristic to their comparative case study (CCS) approach: the transversal. The transversal comparison “*historically* situates the processes or relations under consideration” (p. 3, emphasis in original). Figure 1.2, was created by the authors to illustrate transversal axis, and demonstrates how one study “examined the ways in which [learner-centered pedagogy], a specific approach to teaching and learning popularized in the temporal and cultural context of the United States and the UK in the 1970s (Cuban, 1993; Ravitch, 1983)), has been taken up, simplified, and spread globally.” (p.4)

Figure 1.2 The Transversal Axis



(Vavrus & Bartlett 2017, p. 3)

It is in this sociocultural ethnographic tradition that my research is situated. One which utilizes qualitative analysis to examine “how the global and the local mutually shape one another” (ibid., p. 10; see also Anderson-Levitt 2003; Arnone & Alberto Torres, 2007; Tsing, 2005).

While my dissertation research does not match the rigor or complexity that Vavrus & Bartlett’s CCS approach calls for, I have nevertheless employed various characteristics of CCS in my design. My research centers around two case studies (Yin, 2003); one of the PSA program as implemented by Kimanya between 2013 and 2017, and the other of the Educate! Leadership and Entrepreneurship program as implemented by Educate! between 2014 and 2017. Given that my research deals with the implementation of these programs across time and localities, I consider my case studies to be multisited, or horizontal, and sociocultural, examining how “social actors in disparate locations who exert incongruent amounts of influence over the design, implementation, and evaluation” engage in and shape their respective programs (Bartlett & Vavrus, 2017, p. 1). To the extent possible, the focus of my study was not only on how these programs were implemented, experienced, and appropriated (Bartlett & Vavrus, 2017), but also on how they were designed and conceptualized. In this way, interviews with participants in these programs, with field educators, coordinators, founders and international implementers attempted to address both vertical and horizontal elements of comparison. Furthermore, through conducting interviews with national curriculum designers and representatives of NGOs implementing other transferred educational programs and policies, an attempt was made to account for transversal elements of comparison as well; situating the two case studies in the larger sociohistorical context of Ugandan educational reform in the early 21st century.

Data collection

Each case study followed a similar structure to allow for comparability across cases (Maxwell, 2013). Within each organization, semi-focused and open-ended interviews (Yin, 2003) were conducted with (1) current and former staff, (2) current and former participants in the program, and where possible, (3) individuals familiar with the program but not working directly with the organization (including those working with the same program in another context). Questionnaires were also provided to what was meant to be a wider sample of implementing staff, or educators, in an effort to triangulate interview findings. As case studies, the goal of each sample population was to maximize representation of actors in the case. Field observations were conducted by the researcher of organizational meetings, trainings, program study sessions, and various organization sponsored activities or events. Field notes during these observations were either written by hand or typed onto a laptop, with additional observations and reflections recorded after site visits. In both case studies priority was placed on data collection of the implementation process and of individuals directly involved with each program's creation/adaptation. Interviews with participants in each program were less of a priority, viewed instead as a way of corroborating findings from the larger body of interview data. Below, I detail the precise data that was collected for each case, as well as any deviations from this overarching structure.

In the case of Educate!, field observations were conducted between the end of 2014 and early 2017. Regular, weekly or biweekly visits were made primarily during the second half of 2015 through 2016. Less frequent visits were made for larger events during the remaining observation period. A total of 33 individuals were interviewed for this case study (totaling 33.5 hours); 10 with Educate! students, 22 with staff of the organization, and one with a former staff member. Staff members ranged from one of the organization's founders, to national office staff, field coordinators, and field educators.

For Kimanya, a total of 28 interviews (roughly 26 hours) were conducted for this case study. Of those interviews, 21 involved members of Kimanya's staff, while 7 were with current and former students of the program. Of the 21 staff members interviewed, 3 were with founding members of the organization and 3 were with members of its core planning and coordinating group. I conducted these interviews prior to working as Director of the organization. The remaining 15 interviews were conducted by the researchers. I also carried out the student interviews. An additional 2 semi-structured interviews with representatives from PSA implementing organizations in Zambia and Cameroon that are also considered a part of this case study. These interviews were meant to give some sense of the PSA experience outside of Kimanya and Uganda. While field observation was conducted over a period of 5 years, the majority of data was collected during the first 2 years of the study during which time observations were made on a weekly basis. Following my employment with the organization full time, observations of activities within my project at that same frequency, but the nature of my positionality, and thus my observations, had changed (see below). Finally, a total of 20 educators from Kimanya completed and returned questionnaires.

A total of 9 supplemental interviews were conducted totaling 11.25 hours. All of the above data, including interviews, questionnaires, and ethnographic field notes are referenced in my findings sections of the case study chapters.

Coding

Once field work was complete, I employed thematic analysis strategies (Miles & Huberman, 1994) to uncover patterns in my interview transcriptions, questionnaires, field notes, as well as in the reports and educational materials I received from each organization. I initially began with a deductive list of codes (see “Key research concepts and considerations” section above), but through the use of Atlas. Ti a number of inductive codes were created (Miles & Huberman, 1994). Coding led to the identification of common themes and the creation of analytic memos (Saldaña, 2013) which in turn led to the structure and organization of my case study chapters.

Researcher positionality & bias

As discussed in Maxwell 2013, researchers must be careful to account for their positionality and relationships to what they are researching. A unique challenge arose during my study of the Kimanya Ngeyo Foundation. From the time I began observing Kimanya in 2013 until September 2014, I had no affiliation with the organization. I previously volunteered with Kimanya in 2008, however, and had also conducted both an external evaluation of the organization (Lample & Bakirya, 2011) and academic research about it (Murphy-Graham & Lample, 2012, 2014) in the past. Thus when I arrived to Jinja, Uganda in 2012, I was very familiar with the organization both as a researcher and, in some cases, as a former colleague.

From September 2014 until February 2016 I designed and led the implementation of Kimanya’s teacher training program. Finally, from February 2016 I have worked as the Executive Director of the organization. Owing to my change in roles over the course of the study, it was necessary to modify my original research strategy and employ researchers unaffiliated with the organization to complete interviews with staff members after 2016. The revised recruitment protocol for Kimanya staff is quoted below:

In the case of Kimanya Ngeyo, where I, Joseph Lample, am both the field researcher and the Director of the organization under study, I will make an effort to minimize potential coercion or undue influence with staff by hiring research assistants who will conduct any future research with them. For the sake of recruitment, however, I will attend a regularly scheduled staff meeting and present the contents of the PSA staff recruitment script. Once I have presented the contents of the script, which includes sharing the contact information of research assistants, I will no longer approach staff members about the study. As part of the recruitment strategy, it will be the staff members who have to reach out to and inform the research assistants that they would like to be part of the study.

The priority throughout my research of Kimanya was to reduce feelings of vulnerability, coercion, or pressure among the staff after my role changed. It was important to minimize any sense of obligation that the staff felt about participating in my study. It was for these reasons that external evaluators were hired and that staff participation in the study was kept anonymous and voluntary. Furthermore, I communicated in presentations to the staff that the purpose of this study was not to evaluate performance or even the program's impact. Instead it was to learn about how the organization operates, and how those within the organization understand the PSA program. While it is never possible to completely mitigate hidden concerns or feelings of vulnerability, staff were encouraged to be open and not to feel any pressure to do something they did not want to.

Regarding the question of researcher objectivity given my position within one of my case study organizations, I believe that this was not a significant problem owing to my research question. While biases may exist, and there are likely to be blind spots in my research with regard to Kimanya, my research questions were not concerned with impact or even the quality of the work being done. To observe and analyze how a program is implemented for the purpose of identifying any valuable lessons for consideration is in fact quite in line with my roles and responsibilities at Director of the organization. If anything, the question of bias owing to proximity to the research topic is the primary concern, as it is likely that strong familiarity with both my research questions and the work of the organization would mean that strong connections are likely to be found between the two. Nevertheless, I have made every effort to analyze my findings based on the data collected rather than my personal insider views and appreciation for the intentions behind the efforts in the organization.

Finally, I would add that as with any research over an extended period, relationships are almost as likely to develop with research "subjects" at one site as they are to develop with "subjects" in my place of work. The primary difference, of course, is that my personal views are not shared my place of study, unlike my place of work. Nevertheless, relationships developed at research sites always have the potential to shape an investigator's reading of that subject. This is the nature of qualitative and particularly extended ethnographic work. Flyvbjerg (2001) argues, however, that qualitative research (such as case studies) in the social sciences needn't shy away from the elements that set it apart from the natural sciences. It is in this spirit, and with these considerations of researcher positionality and bias clearly in mind, that I have undertaken the research described above.

Ugandan educational context

The nation of Uganda is located at the level of the equator in the Eastern region of SSA, often considered the "heart" of Africa (Ndawula & Ngobi, 2014). It is the smallest of the three countries most often associated with East Africa (EACS, 2010), with a total area of about 241,039 square kilometers, of which about 43,942 square kilometers are covered by freshwater and swamps (Ndawula & Ngobi, 2014). Despite high GDP growth rates, Uganda remains one of the world's poorest countries, with the majority of its population living in poverty. Agriculture is

the prominent sector of economy, employing over 80% of the workforce and involving 66% of the entire population (Ndawula & Ngobi, 2014). The total labor force is estimated at 10.9 million people (Ndawula & Ngobi, 2014), while the unemployment rate was recorded at 9.4% in 2012/13 (UBoS, 2016). English is the official national language of Uganda and is taught in schools, used in courts of law and by most newspapers; although many other Niger-Congo and Nilo-Saharan languages (along with Swahili and Arabic) are spoken throughout the country (Ndawula & Ngobi, 2014).

The total population of Uganda in 2016 was estimated at 41,487,965, with roughly 19.7% of the population believed to live under the national poverty line (World Bank, 2018). The most recent census for Uganda was completed in 2014, at which time it was estimated that 47.9% of the population was between the ages of 0 and 14. If you extend that age range to 19, representing the primary and secondary school going population, that number increases to 59.3%. And if you consider university going population, the total population of Uganda under the age of 30 in the year 2014 was estimated at 75.7% (UBoS, 2016). Interestingly, the fertility rate has actually fallen over the past two decades from 6.9 in 2000 to 5.6 in 2016 (World Bank, 2018). These numbers are particularly important when considering the challenges faced by the country's education sector.

Educational landscape

Since independence in 1962, the education system of Uganda has largely maintained the same structure modeled after the British colonial system (Brock-Utne, 2000; others).

The system consists of pre-primary, primary, secondary, and post-secondary or tertiary education. This follows a 2-7-6-3 approach, that is two years in pre-primary, seven in primary, six in secondary (4 years O-level, 2 years A-level), then three years in university, with the exception of students of medicine who range between five and six years' training. (Ndawula & Ngobi, 2014, p. 402)³

The pre-primary and primary education department is part of the Directorate of Basic Education (DBE) under the Ministry of Education and Sports (MoES). Demand for pre-primary education is still low in Uganda with only about 10% of school-going children having passed through pre-primary schools (Ndawula & Ngobi, 2014). The demand for primary education, by contrast, has radically increased in the past few decades. While Kenya and Tanzania both declared long-term commitment to Universal Primary Education (UPE) during the 1960s, a similar program was not proposed in Uganda until 1989—around the time of the Jomtien Education for All (EFA) conference—and would not be implemented until 1997 (Oketch & Rolleston, 2007). Yet despite its late adoption, Uganda's effort is said to have extended the scope

³ Vocational and technical schools also exist and serve post-primary students.

of UPE in the region by expanding its mandate to encompass free primary education (FPE), leading Tanzania and Kenya to follow suit in the early 2000s (Stasavage, 2005). Although concerns exist about the quality of learning in increasingly overcrowded classrooms due to UPE, it has largely been considered a success due to enrollment increases from 2.8 million in 1997 to 7.6 million in 2004 (Chapman, Burton, & Werner, 2009). The current primary school population is believed to have remained over 7 million today (Ndawula & Ngobi, 2014). Uganda's recent census found that by 2014, 58.4% of the total population above the age of 6 had completed primary school, with total literacy rates at 68% for females and 77% for males.

Schooling in Uganda has long been characterized by a sharp enrollment drop-off between primary and secondary, and an even larger drop-off between secondary and tertiary. Part of the challenge of secondary school completion may have to do with the smaller number of secondary schools in the country. In 1950, Uganda had 50 known secondary schools; 3 of them were run by the colonial government, while 47 were operated by religious organizations. That number did not experience a significant increase until after the 1980s (Ndawula & Ngobi, 2014). In 2014, the total population above the age of 6 that had completed a secondary school degree was 18.5%, with the vast majority of that number having completed the lower "Ordinary-level" degree. For tertiary, the total who have completed a degree was 4.3%. As of 2011, there were 29 universities registered in Uganda, of which five are public.

Also noteworthy about Uganda is its long history of private schools, the earliest of which dates back to 1925. Initially these schools were not given much attention by the government, but were instead typically sponsored by a religious institution of some kind (Ndawula & Ngobi, 2014). More recently they have received increased attention, as all private schools are now required to register with their local government; although full compliance with this policy is far from being achieved. Today, the vast majority of schools in the country are run as private institutions which range from small village schools to large secondary, vocational, and tertiary institutions. Quality in private institutions are also varied. Among the common complaints about secondary schools is that they are very selective about their student populations, and they have been known to unenroll students that are not expected to perform well on examinations in an effort to maintain high examination results (Field notes, May 2015).

One other unique aspect of the education sector in Uganda is the role that donors, international NGOs, NGOs and civil society organizations (CSOs) have long played. While the influence of large donors such as the World Bank has already been touched on above, one cannot overlook the impact that NGOs have on the Ugandan educational landscape. The growing influence of NGOs in providing services that would otherwise be carried out by the government, or at the very least assisting government agencies in improving these services, is as visible in Uganda (Cannon, 2000) as in most other low-income nations (Fisher, 1997).

Education priorities, reforms, and initiatives

Uganda's education system and priorities are shaped by a number of national policy documents and international agreements. At the national level there is the 1995 Constitution, the

1992 Government White Paper, and the 2008 Basic Education Act. At the international level, the Convention on Rights of Children was ratified by the government of Uganda, while the country has also agreed to meet the terms of the 1990 EFA conference, the MDGs as well as the more recent SDGs. (Kusemererwa, 2018, unpublished brief). The Uganda Vision 2040—authorized by Uganda’s president and Cabinet as the nation’s plan for “A Transformed Ugandan Society from a Peasant to a Modern and Prosperous Country within 30 years”—affirms Uganda’s commitment to universal primary and secondary education. “Over the Vision period,” the document states, “the provision of universal primary and secondary education will be considered as a human right and consolidated as basic education” (Uganda, 2007, p. 92).

As part of the Vision 2040 document, which in turn is a summary of the nation’s Comprehensive National Development Planning Framework policy (CNDPF), a number of education reforms were proposed. Among the highlights: (1) secondary schools will be reduced to 4 years; (2) “The entire education system will be changed to emphasize practical skills, aptitude and moral values;” and (3) “The education curriculum, examination and instruction methods will be revised to suit the proposed changes in the education system as well as being responsive to the market demands” (Uganda, 2007, p. 92). Uganda has in fact already begun instituting some of these proposals. In 2007 a new “thematic” primary school curriculum was unveiled (Altinyelken, 2010). And Uganda is currently in the process of scaling out lower secondary school and national examination reforms (Kusemererwa, 2018).

Among other noteworthy developments in the education sector, Uganda has placed an increasing focus on the continuous professional development (CPD) of teachers. Low teacher effectiveness and irregular attendance are among the most commonly cited challenges in the country contributing to underwhelming examination scores (Byamugisha, 2006). Over the years, Uganda has actually promoted many teacher development strategies, inspired by global strategies backed by international donors and organizations, as part of an effort to improve teaching effectiveness. Among the prominent initiatives has been a push for teachers to adopt a learner-centered pedagogy (LCP) (Sikoyo, 2010). Very recently, the MoES, with support from UNICEF, prepared a document entitled “A Teacher Incentive Framework for Uganda” highlighting its strategies for addressing these challenges moving forward.

Remaining chapters

This dissertation is divided into two parts. Part I includes this introductory chapter as well as a discussion of the theoretical foundations upon which my dissertation is based. Part II includes the remaining chapters of the dissertation: my empirical research findings, a discussion about those findings, and concluding remarks and implications from my research.

Chapter details the history of education in Uganda, tracing the themes of educational transfer and adaptation from the period of colonization to the present.

Chapters 3 and 4 present findings from my case studies of the Uganda-based educational organizations known as Educate! and the Kimanya Ngeyo Foundation, respectively. The chapters provide background information about the organizations, as well as the specific

programs that were under investigation: the Educate! Experience program and the Preparation for Social Action (PSA) program, respectively. In addition to analyzing the qualitative data collected in these case studies, each chapter also references the organizations' materials to examine how core content in each program contributes to questions of recontextualization.

Finally, Chapter 5 is the discussion and conclusion of the dissertation. This chapter summarizes the research undertaken, the study's key findings, as well as the resulting recommendations and considerations for implementers, designers, and researchers of educational borrowing, transfer, and adaptation.

Chapter 2: Educational isomorphisms and the history of Uganda's educational development

Introduction

In the previous chapter I stated that the transfer and adaptation of educational and cultural practices in Uganda long predates colonization. The region of the East African lakes was settled over two thousand years ago (Hanson, 2003, p. 9), and over the centuries countless exchanges have taken place between its Bantu, Nilotic, and Nilo-Hamitic inhabitants, each with its own distinctive system of education (Furley & Watson, 1978, p. 4). Nevertheless, colonization, and the arrival of Islam and Christianity to the region, still serve as the most helpful entry points into examining the early exchange and recontextualization of educational ideas in Uganda given that significant scholarship is available about that time period.

From the time the first Muslim traders reached the Buganda Kingdom⁴, the Ganda *kabaka* (king) developed a reputation as receptive to visitors and external knowledge. Not long after welcoming outsiders, kabaka Mutesa converted to Islam and began organizing study classes for himself, his chiefs, and their wives (Hanson, 2010, p. 158). Later, during a visit by the British explorer Henry Morton Stanley, the kabaka is said to have requested that more Europeans come to his kingdom to provide his people new knowledge and skills (Ssekamwa, 1997). Author J.C. Ssekamwa (1997) argues that the kabaka's desire for new knowledge, technology, and literacy, were sparked by a concern to better defend his kingdom from surrounding threats (p. 25). Nevertheless, to seek knowledge, wherever it may be found, is a fundamental tenet of Islam. Regardless of the generating motive, kabaka Mutesa's request was soon heeded. A publication by Morton Stanley in *The Daily Telegraph* from 1875 illustrates the type of call that was extended to those in Europe at the time,

Oh, that some pious practical missionary would come here!... would become the saviour of Africa. Nowhere is there in all the pagan world a more promising field for a mission than in Uganda. Here, gentlemen, is your opportunity. Embrace it. The people on the shores of Nyanza (Lake Victoria) call upon you. (Tiberondwa, 1998, pg. 16)

By 1877, the first members of the Church Missionary Society (CMS), a protestant group, arrived in Uganda, followed soon after by the White Fathers in 1879, a Catholic coalition of missionaries. Viewing the missionaries as a response to his call for new teachers, Kabaka Mutesa appointed a chief, the Ekizigiti, to be in charge of reading; who then promptly organized space for individuals to be taught the Qur'an, the Gospel, and the catechism (Hanson, 2010, p. 159). Kabaka Mutesa is said to have greeted the CMS by informing them that "what he wanted most was to be taught, he and his people, to read and write" (Ranger, 1965, p. 59). Over the ensuing years, the presence of Christian missionaries would far outnumber that of Muslim traders, and

⁴ The Buganda Kingdom was the largest (and most dominant) of multiple territories that would later be annexed by the British to form the Uganda protectorate, precursor to modern day Uganda.

the scope of missionary education expanded beyond Bible studies to include reading, writing, numeracy, agriculture and technical skills (Ssekamwa, 1997, p. 29). It is believed that the highly complex and centralized bureaucracy of the Buganda—the centerpiece of which was the kabaka’s decree that all should learn from the Quranic and Bible classes (Kalibala, 1934)—permitted the church to successfully expand their educational efforts through the support of a network of village chiefs (Evans, 1994; Ranger, 1965).

Noteworthy about the arrival of missionaries, then, was that their presence reflected both foreign and local agency. Although clearly motivated by different reasons than missionaries and the British, locals, in this case the Baganda, viewed the influx of foreign knowledge and literacy as a benefit. In a 2009 article entitled, “Indigenous Adaptation: Uganda’s Village Schools, ca. 1880–1937,” historian Holly Hanson demonstrates the ways in which early Ugandans led much of this early push for foreign education. “Following the indigenous conception that everyone with knowledge has the capacity to share it,” writes Hanson, “early Ugandan Christians who learned to read from missionaries immediately passed their skills on to others” (p. 159). Early missionaries sent various reports to their home countries documenting the extent of these early initiatives. One Catholic priest wrote, “We do nothing except examine ... the postulants teach each other” (Walligo, 1976, p. 103 cited in Hanson, 2010). Yet another elaborated in more detail,

besides this thirst for knowledge and instruction, the Baganda seemed to me to possess not only a peculiar aptitude for teaching, but a singular desire to engage in it. No sooner was a reading sheet mastered than at once the learner became a teacher. It was the same with the Gospels, every fact noted, every truth mastered, was at once repeated to groups of eager inquirers. It was a most touching sight to see little groups scattered about here and there in the church, each of which had in its centre, a native teacher who was himself at other times in the day an eager learner. (Tucker, 1908, p. 111 cited in Hanson, 2010)

In each of these examples, despite the fact that the educational themes and resulting religious conversions served the missionaries’ purposes, the Baganda were visible as (semi-) autonomous⁵ actors in their own right, sharing literacy within their communities just as they might any other newly acquired technology.

Local agency in the proliferation of Western education

While some historians of educational development in Uganda argue that colonial and missionary education *forced* indigenous populations to abandon indigenous educational traditions (Ssekamwa, 1997; Tiberondwa, 1998), such interpretations appear to overlook local agency, making it seem as if early Ugandans simply submitted to foreign intimidation. Instead, the means by which British conceptualizations of education came to dominate the Ugandan

⁵ “Semi-autonomous” in the sense that, while they were not forced to teach the Bible by European missionaries, they were doing so at the request of their kabaka.

context is more complex. Ugandans have played important roles in the borrowing and implementation or adaptation of foreign educational models from colonization to the present. Yet, over that same time, repeated pushes for the educational system in Uganda to coalesce around dominant, foreign policies were not a result of spontaneous homogenization. Over the decades since colonization, the appearance and propagation of educational ‘isomorphisms’ have resulted from a belief in the inherent superiority of Western education models, and from Western authorities’ domination over an inflexible system of education. Local agency rarely translated to resistance to dominant transnational discourses on education, and the circumstances and power imbalances which made that possible are explored below.

In the following chapter, I provide an abbreviated description of what educational recontextualization in Uganda has looked like by examining three key historical periods: the colonial era, the era after Ugandan independence, and the era since the Jomtien Conference on EFA. In exploring these three periods, I demonstrate how foreign pressures and Ugandan agency have directly contributed to the problematic dominance of Western educational models in the country, replacing alternative and indigenous conceptualizations of education in both ironic and distressing ways. Following this, I discuss a few of the epistemological and contemporary debates around education in the African context and how Uganda’s case ties into concerns about the growing hegemony of a Western educational discourse and the persistence of transnational isomorphisms in an era of globalization.

By the end of the chapter, I conclude that the hegemony of Western education persists in Uganda owing to circumstances resulting from its position as a post-colonial, low-income nation. Consequently, indigenous and alternative models of education have all but disappeared from the national education discourse, having been replaced over time by an evolving conceptualization of schooling as a tool for modernization.

Colonial education—1900s to 1960s

For three decades following the arrival of Christian missionaries in 1877, religious education was the only form of schooling available in Uganda. Missionaries determined education policies and implemented their own educational programs, in collaboration with local chiefs, throughout the region (Evans, 1994). While missionary schools would continue to operate in Uganda until the time of its independence in 1962, it was in 1924 that, after the American based Phelps-Stokes Fund published findings from multiple commissions evaluating the educational systems in Africa (Bude, 1983), the British Protectorate of Uganda finally decided to “take a more direct part in the difficult problems of African education in Uganda” (Uganda Protectorate-Annual Report, 1932, cited in Kalibala, 1934). The decision was influenced by multiple factors. First, tensions between newly converted Catholics, Muslims, and Protestants were increasing as religious schools competed for influence in the country (Ssekamwa, 1997). Second, the quality and reach of religious or “village” schools was regularly questioned, with reports highlighting “the neglect of school organisation and inspection” and “the neglect of a balanced education policy ensuring an education for both the broad masses and an elite.” (Bude,

1983, p. 341). Yet another impetus behind the decision of British authorities to introduce secular education was lobbying by Ugandan elites after World War I (Motani, 1979).

Shortly after Britain annexed Uganda as a protectorate between 1894-1896, the government adopted a policy of transplanting “Asians” from the Indian subcontinent to fill vacant clerical positions. Viewing graduates of village schools as poorly educated, the Protectorate “ignored the natives and took ‘the easy way out of employing the Indian’” (Motani, 1979, p. 357). The decision to rely on outsiders to fulfil government roles not only had the effect of creating a racially-structured colonial society⁶, but it resulted in little investment for higher studies within Uganda. As a result, many wealthy Baganda chiefs began exploring opportunities to send their children abroad to complete their higher education. By 1921, the Young Baganda Association (YBA) submitted a “forward-looking memorandum” calling for “a government education department, secularized education and scholarships for Africans to study abroad” (ibid., p. 36). Eventually, such internal pushes—combined with external pressure from the Phelps-Stokes commission, among others—led the Protectorate’s Governorship to act.

In 1925 the Ugandan Protectorate established the first Department of Education, around the same time British colonial authorities issued a White Paper on education entitled “Education Policy in British Tropical Africa” (Ssekamwa, 1997; Steiner-Khamisi & Quist, 2000). The goal of the new Department was not to curtail missionary schools, but to monitor existing educational work, to ensure that the British government’s priorities were being followed, to provide funds where necessary to existing schools, and to build and administer a few new schools. As part of its function, the Education Department also disseminated standard syllabi and prepared examination and certification regulations (Ssekamwa, 1997). By creating a government run Education Department and laying the foundation for a public education system, it would appear that the colonial government was responding to the demands of African elites. Yet in the subsequent decades, the colonial government’s approach to education did not end up aligning with the demands of Baganda elite.

The fundamental debate characterizing colonial education between 1924-1962 was whether it was preferable for Ugandans to participate in Western forms of literary education, either at home or abroad, or whether Ugandans and other Africans under British authority would be better off participating in an adapted form of education emphasizing rural sciences and farming (Bude, 1983; Motani, 1979; Ssekamwa, 1997). While colonial officials and missionary educators occupied many views on this topic over time, Baganda elites consistently argued that their children should have access to the same education as the British. They were, however, more sympathetic to an adapted form of education for the children of rural areas (Ssekamwa, 1997, p. 62). Yet eventually, even villagers would come to view the learning of English to be the primary goal of schooling, more so than the learning of agricultural practices (Ssekamwa, 1997). Ultimately, it was the colonial government—whose paternalistic and self-serving motivations

⁶ Motani (1979) described this racially structured civil society in the following terms: “the small European expatriate element monopolized the apex of the protectorate pyramid, the imported Indians were assigned the lower layers, and the indigenous African majority had been converted into the broad base of this alien pyramid” (p. 357)

remained consistent over decades despite shifts in educational policy from one official to the next—that would dictate the direction Uganda’s early educational system would take.

The adapted education model—1919 to 1935

Prior to the Protectorate’s assumption of control over education in Uganda, responsibility for the financing of missionary schools fell almost entirely to locals and native parliaments (Furley & Watson, 1978). In part, this was because most students of prominent missionary schools were the sons of chiefs and local elite. Yet even poorer village schools were established and sustained through local resourcefulness and “self-help” efforts (Bude, 1983, p. 343). Eventually, this pattern of financial dependence on indigenous contributions would continue even after the Protectorate established its first Education Department.

One of the most remarkable features of mission education in Uganda is the degree in which it is being financed by the fees of the people. These fees, chiefly collected in central and boarding schools, amount to twice that given by the government as grants-in-aid. Grants are also appropriated by the native Parliament(s) and large gifts are given from diocesan funds made up of collections from Natives. In addition to this, practically every out-school is a gift from the native community.” (Furley & Watson, 1978, p. 187)

This transition from no government oversight to partial government funding and curricular control represented a shift in the character of many Ugandan schools. Whereas past financial control of schools brought with it the ability to locally determine curricula and school organization, “[w]ith the increase in state control incurred by state recognition, the centralistic elements in the curricula and the school administration became ever more determinant and the experimental, community-oriented character correspondingly weaker” (Bude, 1983, p. 343). While enthusiasm for missionary schools in the past was typically concerned with literacy and training for civil service and “white collar” jobs, the Protectorate government in the early 1920s was exploring a different path.

The first manner in which the colonial government sought to improve educational opportunities in Uganda, while simultaneously curtailing student radicalization, was through support for vocational and technical education. In 1919, the Committee appointed by the Governor to report on a Native Civil Service wrote to this effect, stating: “We are opposed to any extensive literary education for the general native population, and we consider it should not proceed beyond a standard which will enable a native to learn a trade by which he can earn a living” (quoted in Furley & Watson, 1978, p. 187). By 1920, the Uganda Development Commission urged that the government build technical schools to train Africans in medicine, transport, agriculture, surveys and public works (Furley & Watson, 1978). Makerere College (destined to become part of East Africa’s first university) was established as a technical training institution during this time (Sicherman, 2005). The Director of Colonial Scholars advised that

Ugandans study less politically charged subjects like medicine and engineering over law and general arts. “Studies of the former kind,” he is quoted as saying, “are much less likely to breed frothy political ideas, and native engineers and doctors should exercise a good influence in promoting the development of the Protectorate” (ibid., pp. 361-362). Dwindling support for literary education of Ugandans eventually became official policy in 1922 as newly appointed Governor Geoffrey Archer endorsed the recommendation of a visiting educational envoy that the government should promote education for the masses based on the “customary life of the ordinary peasant” (quoted in Furley & Watson, 1978, p. 188).

As Ugandan elite saw pathways to literary education for their children barred by colonial authorities, they began lobbying for opportunities outside of the country instead. Yet these options were also blocked as colonial authorities were growing increasingly concerned that those who managed to study abroad might become imbued with a “spirit of disaffection or disloyalty” if educated in the wrong country and environment (Motani, 1979, p. 360). The Secretary of State for the Colonies therefore ordered that few Ugandan visas be permitted for study abroad, and that those that were approved should be restricted to Britain (ibid., p. 361). As a compromise, Provincial Officials strongly began favoring the creation of local higher education institutions so as to “enable the natives to receive such Higher Education as will remove their desire from seeking it abroad” (ibid., p. 360). Colonial officials consequently drafted higher education policies that would limit the possibility of disillusionment with the colonial state. The culmination of this approach to education was found in the adapted concept of education.

“Adapted” education was first proposed in colonial education circles by the Phelps-Stokes Fund, a philanthropic society based in New York City. The mission of the Phelps-Stokes Fund was the education of “natives and blacks both in the United States and abroad” (Steiner-Khamsi & Quist 2000, p. 273). An adapted education for Africans, in their view, would emphasize agricultural and manual training—along the lines of the Hampton-Tuskegee approach to industrial education. Such a model was deemed more appropriate than literary education owing to the belief that the latter was irrelevant to the needs of rural Africans (Bude, 1983; Steiner-Khamsi & Quist, 2000).

At the recommendation of the American Baptist Foreign Missionary Society, The Phelps-Stokes Fund financed two commissions in 1920/21 and 1924 to evaluate the educational systems of British Africa (Bude, 1983). The Phelps-Stokes African Education Commission found that colonial schools in Africa relied too heavily on “obsolete education methods from Europe and the United States,” among other shortcomings (ibid., p. 341). After conducting a visit to Uganda, the Commission argued that missionaries had “failed to relate their educational activities to the needs of the people” (quoted in Furley & Watson, p. 189). They noted that while provisions were made for the education of those in Buganda kingdom, those in the northern province were otherwise neglected. The Commission also felt that the schools focused too much on church needs and church matters. They elaborated:

The type of education has been too exclusively literary. In a country with unusually fertile soil they have made practically no provision for agricultural education. This vital responsibility, so fundamental to the welfare of the people, has been left to the chance interest of the missionary in charge, and to the necessity of providing food for the missions. (ibid., p. 189)

In place of literary education, then, the Phelps-Stokes Commission proposed the implementation of a new educational model adapted to the needs of African communities (Bude 1983, p. 341). The proposed “adapted education” model would promote African languages as a medium of instruction, and would emphasize health and hygiene, housing and living conditions, agriculture and handicrafts, organizing leisure time, as well as rural and agricultural science (ibid., p. 342). Its aim would be to diminish “selfish individual competitiveness based on an unrelated bookish system” and instead develop the community “by improving the general standard of living of the population through a community-oriented school system” (ibid., p. 341). It was at this time, in 1925, that the first Department of Education in Uganda was established as part of the colonial government’s effort to advance the recommendations of the Phelps-Stokes Commission.

In its first White Paper on education, the colonial government argued that “education should be adapted to the mentality, aptitudes, occupations and traditions of the various peoples” (Advisory Committee on Native Education in the British Tropical African Dependencies, cited in Steiner-Khamsi & Quist 2000, p. 274). The report, in fact, went even further, arguing that “the aim of education should be to promote the advancement of the community as a whole through the improvement of agriculture” (quoted in Ssekamwa 1997, p. 72). That document, along with another memorandum produced in 1935, formed the framework for an education policy that would remain in effect within most countries until their independence (Bude 1983). Between the 1920s to 30s, authorities throughout East Africa borrowed and adapted the logic and experiences of American Tuskegee movement to create a passive vocational education system that would replace the need for higher education. These efforts advanced the furthest in the region with the establishment of Jeanes teacher training institution in Kenya.

The purpose of the Jeanes institution, founded with support from American donors, was to “train teachers for undertaking extension work in problems of community development in several primary schools” (Bude, 1983, p. 345). In many ways, its goal was also to realize the vision of adapted education advanced by the Phelps-Stokes Commissions. This was no better exemplified than in the decision of James Dougall, secretary of the second Phelps-Stokes Commission, to assume directorship of the institution. Also, in line with Phelps-Stokes recommendations, the Jeanes model drew heavily from the experiences of the Tuskegee and Hampton colleges in the southern United States. At one time Jeanes training institute even considered directly employing graduates from those institutions to train Jeanes teachers. Nevertheless, this plan was abandoned out of concern that black students in those colleges had developed a strong political consciousness and could potentially create troublemakers in the

African colonies (Bude, 1983). Instead, the faculty was made up of European experts who helped teacher trainees prepare for their work in rural villages.

The teachers, many of whom were over thirty years of age, learned to relate traditional learning contents to the African environment and implement them to improve the rural situation. Scenarios dealing with improvements in hygiene or agriculture were rehearsed and performed in the presence of community members. The wealth of traditional tribal stories, proverbs, and music was reactivated and used as a pedagogic instrument. The students were encouraged to collect such elements of African culture and preserve them for future generations. They were introduced to black personalities who had excelled themselves in community development and agriculture. (Bude, 1983, pp. 345-346)

By the mid 1930s, roughly 160 teachers had been trained. A select number of Ugandan teachers had also been accepted by the Jeanes institute, with the expectation that they would return to Uganda and prioritize agricultural education at home. While a similar institute was never established in the context of Uganda, the concept of adaptation took on another form.

Against this background of colonial prioritization of agriculture in schools, the Ugandan Protectorate devised a strategy in 1925 with three priorities: (1) to teach biology in the classroom accompanied by practical agriculture and school gardens at primary level, (2) to train teachers in agricultural skills at government institutions, and (3) and to train government assistants to be employed by the Department of Agriculture (Ssekamwa 1997, p. 72). By 1929, the Director of Education stated, “the aim in the primary stage was to give to all primary education an agricultural bias” (ibid., p. 72). Then, in the following year, the Department of Education introduced a post-primary section of schools known as “central schools.” The purpose of central schools was to provide this agricultural bias, and in so doing, to ensure that a sufficient percentage of the population of school graduates left school with a productive vocation (Furley & Watson, 1978). The Department elaborated:

It should be the aim of educational policy to train the rising generation to become good citizens, and to fit the children during their school life to make the best use of the opportunities which will be offered to them. This can be done by training them as craftsmen and agriculturalists. A policy which tends to give a purely literary training to the mass in order to serve a small minority which may benefit by higher education and qualify for semi-professional careers can, if persisted in, only lead to the creation of a discontented community divorced from its own heredity and environment, with no outlet for its energies but political intrigue and the flouting of authority. (quoted in Furley & Watson, 1978, p. 199).

By 1935, there were 2866 pupils in central schools compared to 2000 in more academic junior secondary schools (Furley & Watson, 1978, p. 193).

Despite its paternalistic policies, created out of the incessant fear of losing control of its subjects—or perhaps even because of these policies—the Protectorate’s vision for central schools was rejected outright by those who could afford to send their children to post-primary “middle schools” which focused on literary education. Furthermore, the intended impact of agricultural education was never truly felt, as the “teachers who were charged with running these Central Schools offering a practical curriculum had themselves gone through a literary kind of course,” and were thus insufficiently prepared and therefore unmotivated to realize such a distinct educational vision (Ssekamwa, 1997, p. 63). Nevertheless, central schools survived for almost a decade owing to support from a sufficient number of influential chiefs that endorsed “back to the land” policies as a means of educating the children of peasants. Returning to the land, after all, meant an increase in profits for those who rented their land, and for a government which taxed agricultural production (Ssekamwa, 1997, p. 73).

By 1938, the main features of central schools were absorbed downward and upward into existing primary and post-primary institutions (Furley & Watson, 1978, p. 200). It was also around this same time in the 1930s that a new Governor, Phillip Mitchell, was appointed to the Ugandan Protectorate. With the departure of his predecessor, Bernard Henry Boudillion, so ended a longstanding policy of resistance to literary education. Boudillion, like many throughout the British Empire, had observed in Asia the potential of education to incite political upheaval, and sought to avoid a similar outcome in Africa by advancing the adaptation concept of education (Ssekamwa, 1997). Yet with the arrival of Philip Mitchell, a new perspective and fresh impetus for policies of higher education appeared in Uganda (Furley & Watson, 1978; Hanson 2010; Motani, 1979; Ssekamwa, 1997).

Literary and higher education—1935 to 1960

The period of the 1920s to mid 1930s represented a low point for Ugandans wishing to provide their children with post-primary education. Yet with the arrival of Governor Philip Mitchell in 1935, new opportunities began to emerge. Unlike his predecessors, Philip Mitchell was not concerned about the negative political implications of an educated Uganda. Under his leadership, literary middle schools were endorsed as alternatives to the adapted central school model (Furley & Watson, 1978). Mitchell prioritized the development of Makerere College as an institution of higher learning (Sicherman, 2005; Ssekamwa, 1997). And perhaps his most impactful decision, in 1936 Mitchell asked the Colonial Office to appoint a special commission, chaired by the Earl De la Warr, the under-secretary for the colonies, to explore possibilities for the expansion of secondary education in Uganda (Furley & Watson, 1978, p. 202).

While Governor Mitchell’s commitment to literary and higher education was influential in making changes in the Ugandan system, historian Nizar A. Motani suggests that the atmosphere upon his arrival was already conducive to reforming the education and civil service sectors. “African denunciation of ‘Phelps-Stokesism,’” he writes, “coupled with the British

acknowledgement of African ability to benefit from higher education coincided with Mitchell's presence in Uganda" (1979, p. 368). It was during his five-year tenure, for example, that the Ugandan Legislative Assembly (made up of all Europeans members and under the direction of the British government) instructed the Protectorate to minimize overseas recruitment for civil service positions, and instead place an emphasis on maximizing local appointments (*ibid.*). Thus, the conditions were created to justify an increase in enrollment at technical and secondary schools. Between 1935 and 1939, secondary school enrollments in Uganda rose from 226 to 1335 (Furley & Watson, 1978, p. 201). The logic behind the Protectorate's new strategy can be found in the Education Department's suggestion in 1935 that African leaders must be trained in higher institutions of learning:

Although the major need of the country may be for an instructed peasantry, their true enlightenment must largely derive from their own African leaders, and they, whether in the Native Administration, in the Church, in the African Civil Service or elsewhere will obviously exert an influence reflecting the quality of the education they have received. Apart from this, reasonable emphasis upon higher education is a symbol of faith in education as a whole. (Furley & Watson, 1978, p. 201).

Calls over more than a decade to permit Ugandans to receive higher education—and thus be granted access to all that British literary education had to offer—were finally answered. Yet at what cost or compromise was this achievement made? Historian Holly Hanson (2010) argues that what Mitchell and the De la Warr commission achieved was the “recreation” of Ugandan education on a British model (p. 166). The result was a system that shifted from more far-reaching and egalitarian—albeit weaker—village schools, to a small number of government-endorsed institutions with limited space for the large majority of Ugandan children. This resulted in further social and class stratification, now as a result of schooling (Sicherman, 2005). Furthermore, the decision to formally model Ugandan education after the British educational system has left an indelible impression that is still visible some eighty years later (Hanson, 2010).

De la Warr Commission and village schools

When Governor Mitchell called for a commission on education in 1936, led by the Earl de la Warr, it represented another turning point in the landscape of educational policy in Uganda. Mitchell and his Director of Education, Harold Jowitt, had already begun a campaign to raise the standards of schooling in Uganda during the previous year. As part of their strategy, the Protectorate began defunding village schools in order to prioritize the development of a select number of more established schools, despite the fact that, up to that time, Uganda had enjoyed arguably the best education system in East Africa (Furley & Watson, 1978). Jowitt defended this position as “selecting the best” schools, even though this meant prioritizing only

218 out of a pool of 5673 (Hanson, 2010, p. 164). Stronger schools meant higher academic and literary standards, all of which were important in realizing Mitchell's vision of establishing Uganda's first university at Makerere (Ssekamwa, 1997). And while a number of large missionary schools with advanced academic programs had been established in various regions of the country, the vast majority of Ugandans attending school at that time attended village schools.

Village schools—also referred to as “bush schools” or “substandard schools”—“served 227,995 learners in Uganda in 1937; they were built, run, and staffed by Ugandans and had developed from the 1870s as Ugandans enthusiastically embraced literacy and new religions” (Hanson, 2010, p. 156). Village schools were run semi-autonomously as they were typically under the direction of local church councils, made up entirely of Ugandans, with land and funding coming from community contributions. Local chiefs promoted education by housing teachers as their guests, and through maintaining boarding schools (which their own children often attended). Also noteworthy about village schools was that they boasted equal attendance from girls and boys, as well as learners of all ages; both policies that align with traditional or indigenous educational practices (Hanson, 2010, p. 160).

In spite of their many achievements, however, village schools were regularly regarded as substandard by Europeans and in particular by the British Protectorate and its education department. They were not organized according to the same curricular standards as missionary schools. Nor did they cover the same extensive content as missionary or government schools, focusing almost exclusively on mother-tongue literacy and religious education (Hanson 2010). Yet rather than adhere to the wishes of many Ugandans, who believed that village schools could be improved, the Protectorate chose to disregard village schools almost entirely, instead prioritizing the development of a select number of missionary schools. It was under these circumstances that the de la Warr Commission was formed; to chart a path forward for post-primary education in Uganda by abandoning lesser educational endeavors and focusing on those with the highest potential to match British standards. Consequently, the findings from the de la Warr commission represent a valuable resource for understanding the cultural and political shift that was taking place in the education sector at this time. “The story of the village schools,” writes Hanson (2010), “and the attitudes toward education of colonial officers, chiefs, missionaries, and African professionals are documented in the notes and verbatim testimony given to the De La Warr Commission on Higher Education in East Africa in 1936 and 1937” (p. 156).

During testimonies from missionaries, Europeans, and Africans, it became clear that two opposing narratives were emerging about the path that education should take within Uganda. On the one hand, Ugandan witnesses—including the rulers of Busoga and Bunyoro kingdoms—recognized that the village school system needed improvement, but felt that it was possible to do so by improving upon what was on the ground. They wanted village schools to teach practical knowledge that had been learned informally in the past (including metalworking, pottery, and weaving), while also following the European curricula administered in missionary schools. They argued, among other things, that school should be free to the poor, that English should be taught

from a young age, that girls should receive equal education to boys, and that schooling should be expanded to all children in Uganda⁷ (Hanson, 2010). To help raise the standards of existing village schools, one witness proposed increasing the number of school inspectors from 5 to 150, “so that they could visit schools once a month instead of once a year, and inspectors could work with the teachers to help them improve” (ibid., p. 164).

In many ways, these proposals were further supported by representatives of missionary schools who had witnessed firsthand both the far-reaching scope of village schools, as well as the loss of educational opportunity that accompanied lack of government investment. The head of the Protestant CMS Society, Reverend Williams, suggested funding education at every level, arguing that half of village school educators are driven by a love of teaching, and only require a tax exemption to sustain their efforts. A Bishop from the Catholic ‘White Fathers’ also pleaded for village schools to receive “more attention, more encouragement, more recognition” (quoted in Hanson, 2010, p. 165). He believed that village schools were caught in the unfair position of neither having the funds to improve, nor being of high enough standard to receive the funds necessary to improve.

Despite receiving arguments in support of expanding the village school model, the commission resolved to continue the path previously initiated by the Protectorate’s education department. At the heart of the commission’s proposal was the recommendation to spend “a very large sum of money” on Makerere so that it could rapidly develop into a Higher College and then eventually a University College of East Africa serving Uganda, Kenya, Tanganyika, and Zanzibar (Sicherman, 2005, p. 19). This meant that missionary secondary schools, as well as newly proposed government secondary schools, would need to be upgraded to the Cambridge School Certificate standard, albeit using a syllabus that made some accommodations for African conditions. Regarding teacher development, the commission advised raising entry qualifications so that those with only a primary education would no longer be admissible—thus further reducing the pool of authorized teachers in the Protectorate (Furley & Watson, 1978, pp 202-4). And finally, the commission’s report also endorsed the plan to defund village schools in favor of focusing resources on developing a select number of stronger schools.

While many may have been disappointed with the decision to remove support for village schools, it is likely that they were still supportive of the commission’s other proposals. Ugandans had already become enamored with European education and its potential to improve one’s social and economic standing. Hanson (2010) states that Ugandans already viewed European knowledge “as the source of their power,” and many witnesses during the de la Warr commission expressed the desire to study the same curriculum as Europeans (p. 163). The phenomenon of correlating European education and economic advancement only intensified from one generation to the next. “Africans who had been adults when Europeans arrived thought of their own cultures as equally valid, and in ways superior” writes Hanson (2010), “but the generations that grew up under British domination accepted the colonizer’s assertion that African societies had been

⁷ In 1937 it was estimated that roughly one-third of a total 750,000 children were currently enrolled in some form of schooling in the Protectorate (Hanson 2010, p. 164).

primitive and Europe was the source of all progress” (p. 162). And while the outbreak of WWII meant that the commission’s recommendations would not have an immediate effect in the Protectorate—owing to funds and human resources being sent from Uganda to support the war effort (Furley & Watson, 1978)—this once prized endorsement of higher literary education would transform into “a single-minded focus on learning what Europeans knew,” with all its long-term consequences (Hanson, 2010, p. 162).

Among the implications for this new era of education was a rather immediate drop in the number of schools across the country; more than 1100 village schools were lost between 1937 and 1939. Those students that persevered in rural areas were forced to enroll within schools of an increasingly religious and denominational character (Hanson, 2010). Meanwhile those fortunate enough to receive a secondary education from elite missionary schools were experiencing an entirely different dynamic. In her book, *Becoming an African University: Makerere 1922-2000*, author Carol Sicherman (2005) writes: “One thing is certain: Western education created an ‘aristocracy of education’” (p. 14). She elaborates,

Atop the education pyramid, the needle of Makerere arose infinitesimally thin. In 1941, there were only twenty candidates for the Cambridge School Certificate in all of Uganda; the ten who passed were the only Ugandans eligible for admission to Makerere (C. Bell, 1985, p. 18). [...] In 1948, eighty-four students (one of them a girl) passed the CSC, as did about 230 five years later and twice that by 1955; ten years later, there were 397 Ugandan first-year students at Makerere (C Bell 1985, 25, 36-37; Prewit 1975, p. 173). Because primary education expanded much faster than secondary and tertiary education, the tip of the needle remained extremely thin. (pp. 14-15)

This sudden effort to concentrate resources on pushing a minority of students through higher levels of schooling was not without consequence. Schooling became among the primary contributors to growing social division in Uganda.

One way in which formal education contributed to increased social stratification was as a result of direct wealth transfer from rural areas to development urban education systems. In 1937, at the time of the de la Warr Commission, the Director of Education proposed using 20 percent of the export tax on cotton (grown by peasant farmers) to fund rural education. That meant that the other 80 percent of tax revenue would be applied towards urban education in areas like Buganda where only a fraction of the Protectorate’s population resided (Hanson, 2010). In the end, even this proposal was deemed too radical as the treasurer objected to losing that much revenue, meaning “the producers of Uganda’s wealth, rural farmers, got much less than 20 percent of the wealth in taxes their labor had created” (ibid., p. 167). Yet the Protectorate government was conscious of the decisions it was making and the impact it would have. It was the belief and intention of the de la Warr Commission that graduates from Makerere University would one day use their education to uplift Uganda. However, inadvertently or not, their

emergence into the higher echelons of society also resulted in them taking over “the homes, the salaries, the privileges, and the attitudes of departing colonials” (ibid., p. 168). They became, according to Hanson (2010), the “*bagudde mu bintu*, the rich people ‘who had fallen into things’ whether they deserved them or not” (p. 168).

Yet even life for the *bagudde mu bintu*, those at the top of Ugandan society, was not without its challenges. Sicherman (2005) highlights some of the pressures experienced by this new elite class using excerpts from an essay submitted for a 1953 Uganda essay competition on the topic “there is no problem more difficult than that which faces an educated man in a primarily uneducated society” (p. 15). She writes of one essay by Bernard Onyango (future Academic Registrar of Makerere),

Analyzing the complex social and personal pain suffered by the aristocrats of education, Onyango starts by pointing out that a parent who sent his son to school was buying ‘an Insurance policy against poverty and the miseries of old age, for his child will look after his material welfare.’ But the son might also surprise his parents by striving to ‘emancipate’ his family ‘from the bonds of their ignorance, suspicion and suicidal conservatism’ – urging them, perhaps, to build latrines. Instead of raising a grateful shovel, older family members might resent the young man’s temerity and regard him as a ‘bully and a prig.’ One thing was guaranteed: they were sure to equate a bachelor’s degree with wealth, regardless of the graduate’s actual salary. Onyango writes of the ‘stream of beggars,’ the ‘merciless influx of money collectors,’ issuing forth from the graduate’s and his wife’s families, all of them interpreting ‘lend’ and ‘give’ [as] ... synonymous’. This was expectable, since a Makerere graduate ‘earning £1000 a year or more may well have a brother earning £60, and is virtually certain to have uncles living at a bare subsistence level as peasant cultivators’ (Goldthorpe, 1965, p. 68). [...] Such were the psychological and social consequences for the ‘frustrated and broken down’ graduate, a modern leader who was too young to be an elder according to tradition. Oppressed by the universal belief in their superiority, these Makerere graduates descended from the Ivory Tower to work among ‘their own’ people. (p. 15)

Such was the struggle of many early graduates of the Protectorate’s emerging higher education system. First, victims of their feelings of alienation from their wider community, then victimized again because they had internalized patronizing and derogatory attitudes about their fellow countrymen as a result of their newly acquired education. The latter sentiment was expressed in a future policy document⁸ which argued that educated people “think of themselves as the masters and the uneducated as their servants” (cited in Hanson, 2010, p. 168). This

⁸ “The Common Man’s Charter,” ratified under Uganda’s second president Obote in 1969

immense gap between “educated” elite and the “uneducated” masses, a direct consequence of the Protectorate’s education policies, has arguably persisted as a lasting characteristic of Ugandan society (Hanson, 2010; Kasozi, 1994).

In the remaining years from the 1940s to 1962 a few notable commissions and committees were organized, although they primarily built off of the legacy of the de la Warr Commission’s recommendations. In 1940, the Thomas Education Committee, whose decisions became law in 1942, proposed three noteworthy changes to the existing system. (1) That education continue to be organized along religious lines; (2) that boards of governors be established at secondary schools, teacher training colleges, and technical schools so as to increase local involvement in school decision making; and (3) that local governments be responsible for financing primary schools in their areas (while secondary schools, by contrast, would be aided by the Protectorate government). These policies remained in effect until 1950. In 1951, the Binns Study Group examined the educational system of the Protectorate and provided a list of recommended changes to improve the quality and quantity of education in the country (Ssekamwa, 1997). It was not until 1952 with the arrival of the de Bunsen Education Committee, however, that a plan for implementing the suggestions of the Binns Group was advanced. Furthermore, in a significant policy shift, the Committee acknowledged its goal of preparing Ugandans (through education) for self-rule (Evans, 1994). Among the significant changes undertaken at the recommendation of the de Bunsen Committee: (1) a new structure of education was adopted which involved six years of primary, two years of junior secondary, four years of Ordinary-level secondary school, two years of Advanced-level secondary school, Makerere University College, as well as reference to teacher training colleges and technical education programs; (2) existing primary and secondary schools were enlarged and more were built to increase enrolment throughout the country; (3) secondary schools were established by the government to run alongside missionary secondary schools; (4) the quality of education was improved through the provision of scholastic materials to schools and through hiring more qualified educators; (5) the number of denominational teacher training colleges was reduced, but the number of teachers admitted within remaining colleges was increased; and finally, as some members of the Committee were Africans, (6) some emphasis was placed on “Africanizing” the curriculum, urging that education should address agricultural themes, good behavior, a sense of community, curiosity, and manual skills (Furley & Watson, 1978; Ssekamwa, 1997).

The resulting impact of these changes, particularly between 1952 to 1962 after the de Bunsen Committee, led to significant gains in student attendance. By 1961, Uganda boasted over 6000 primary schools with close to 550,000 primary students, likely making up for the initial enrollment losses that resulted after defunding village schools in the late 1930s. This represented something close to a 1:2 “place-child ratio,” which meant that for every two children of primary school age there was at least one place available at a primary school in the country (Scanlon, 1964, p. 15). At the junior secondary level there were 261 schools with close to 22,000 Ugandan students (and roughly 3600 Asian students). Here the place-child ratio was 1:14. At the secondary level there were 30 government aided schools with 5050 boys and 1395 girls. The

total number of places available at post-junior secondary level, including senior secondary, trade and vocational schools, was roughly 4500 which corresponded to roughly .9% of the relevant age group (ibid.).

By 1962, at the dawn of independence, what was most noteworthy about the Protectorate's accomplishments was not the impressive enrollment gains after de Bunsen, however, but the legacy of Governor Mitchell and the de la Warr Commission. Uganda's education system was now firmly literary, centralized, and modeled off of Western—particularly British—systems. Secondary schools followed the Cambridge School Certificate standard. During this period, leaving examinations were sent to England for marking (Furley & Watson, 1978). The University of London served as guarantor of Makerere's "international gold standard" in education (Sicherman, 2005). Schooling in Uganda was still largely denominational, although government schools had begun to spring up. In all, those characteristics that had once linked village schools to Uganda's long indigenous educational traditions were largely absent from the character of most schools by the time of independence. "With the increase in state control incurred by state recognition, the centralistic elements in the curricula and the school administration became ever more determinant and the experimental, community-oriented character correspondingly weaker" (Bude, 1983, p. 343). The battle for literary education had been won and the British character of Ugandan schools was now firmly established.

Coercive colonial isomorphism and the paths untaken

Whether it was the "adapted" education policy of Phelps-Stokes, the literary education push of Governor Mitchell, or the decision to close village schools in favor advancing a stronger system of higher education after de la Warr, a theme emerged during the various phases of colonial education from 1920 to 1960: the insistence of Westerners to define what was best and most appropriate for African development. "By failing to [...] integrate Africans into the discussion on and realisation of educational reforms, European-American paternalism, which ultimately regarded Africans as immature people having no understanding of the 'well-meant' plans of their 'protectors', was doomed to failure" (Bude, 1983, p. 349). As the European and first principal of the Jeanse school in Kenya put it, "The fact remains that the African in many cases does not want what we think is best for him" (ibid.). Throughout the colonial period, whether motivated by colonial economic interests or by an altruistic—and inherently paternalistic—vision for the development of Uganda through Western education, the Protectorate governments' efforts failed to give an equal voice or authority to the indigenous population in decision making. "What African critics were demanding was modernization under African control" argues historian Terence Ranger (1965); they wanted "the presentation to Africans of the full range of Western education without preliminary conditions and with freedom to select and make use" (p. 68) as they deemed most fitting. Yet, what they got instead was "white restriction of educational form and content in the interests of the preservation of what whites thought to be valuable in African life" (ibid.).

What lessons can then be gleaned from this foundational period in Ugandan history, given that many of the institutions, policies, and standards from that period survive to the present day? For one, the obsession with literary education (with its emphasis on examinations) and the British character of an emergent national curriculum came about through a combination of foreign and local intercession. Presented with Western technologies and educational policies as introduced by missionaries and the Protectorate education department, Ugandans were given the option to adopt what was viewed as an inferior, insulting, adapted educational model, or to prove that they were equal and could excel using the British system (Hanson, 2010). Testimony from the Tanganyika superintendent of education to the Phelps-Stokes commission demonstrates the complicated position in which many colonial subjects found themselves as the Protectorate toyed with the idea of advancing an adapted education on the continent. “[T]he attempt to preserve old methods may be and will be interpreted by many Africans to be an attempt to withhold the benefits of civilisation and keep them as a subject race” (Ranger, 1965, p. 68). A teacher from a Jeanes school in southern Rhodesia further elaborated, “Why do you teach our children only to use the Native axe and knife, and prevent us from using saws and hammers? Why do you tell us to make wooden spoons? [...] Do you not want us to climb the ladder of civilisation? Is it wrong for our children to want to have chairs and beds and be like the European?” (ibid.).

As articulated previously, the impact of generations being raised under colonial rule was such that many Africans began to look down upon their culture and traditions, instead embracing the possibilities of European education and civilization. Indigenous education was viewed as archaic by the outsiders and thus rather than defend it, explore its merits, or translate it for a new era, most were comfortable simply abandoning it altogether. “One of the main characteristics of the coloniality of power is that it not only included domination by force, but it was also strongly based on the repressing of indigenous epistemes and the simultaneous positioning of Western knowledge as superior and as the only valuable option to apprehend the world” (Beech & Lista, 2012, p. 378). The 1920s to 1962 was consequently a time when indigenous elements of education were largely rooted out of the system. “Indigenous education had taught the full range of skills people needed to prosper and inculcated the capacity to generate knowledge, as well as to incorporate knowledge from far away: the new schools taught only the new knowledge of literacy and religion, in a classroom setting” (Hanson, 2010, p. 162).

This meant that practices and policies which may at one time have been influenced by traditional views were either losing relevance or were no longer viewed as indigenous ideas. Girls’ education lagged behind boys’ education despite many Africans advocating for equal education of girls and boys during colonial rule. Testimony from a Tanzanian to the de la Warr Commission clearly illustrates this perspective: “In our tribal life women are very important; we have women chiefs ruling people; women doctors; women agriculturalists who support their families, and their influence is very strong not only in the homes but outside. I think myself the education of women is just as important if not more than that of men” (Hanson, 2010, p. 161). Despite the fact that it was missionaries and Protectorate officials who originally opposed equal education of boys and girls, it is the Binns Group and de Bunsen Committee that are commonly

recognized for (re)introducing policies to raise enrollment among girls in the 1950s (Hanson 2010). Another impact of the loss of traditional educational values was that practical and literary education became mutually exclusive in the Ugandan education system. Literary education and schooling became valued by Ugandans and Africans alike as means to upward mobility, rather than owing to any perceived relevance in the intellectual content.

School was a place to learn English, to learn Latin, not to learn local crafts. Education became a tool for economic advancement. The articulate African elite wanted Latin to be taught to Africans, not because it had any intrinsic value but, as Serwano Kulubya explained, because not knowing Latin kept their children out of British schools. (Hanson, 2010, p. 163).

Much of the tragedy behind this literary approach to schooling, and the paternalistic adapted system that was perceived to be the only viable alternative to it, is that the two options were treated as dichotomous or mutually exclusive. Some of the positive aspects of the adapted system (local language instruction, emphasis on agriculture and traditional practices) never found their way back into a formal educational system. Many of those same possibilities might have been introduced had Ugandans been permitted to have more authority over shaping the adaptation process to begin with, as they effectively introduced some of these principles into the village school initiative.

What this overview demonstrates is that the logic and organization of colonial education were not without origin. Neither were they based on a universal set of principles or implemented without dispute. Why were schools in the Ugandan Protectorate so closely aligned to British and Western educational models? What had caused this “international convergence?” It was because the colonial government, through its indirect rule of Uganda, had complete authority over the setting up of its schooling system. Before that, it was missionaries who transferred educational models and policies that reflected their religious priorities and educational background. The colonial system of education was very much a transferred (and frequently adapted) system. Even when there was some effort to consider context, as during the Phelps-Stokes Commission visits, the proposed model of schooling was in fact motivated by a vision of Ugandans as subordinate, unworthy of a British education because it would either prepare them for jobs they would never have (Motani, 1979), or it would fill them with ideas of independence (Furley & Watson, 1978; Sicherman, 2005).

When it was eventually accepted that Ugandans were capable of benefiting from the British educational model, or that it was simply necessary for them to govern themselves, Ugandan views and opinions no longer had a place in education planning. They were there to learn, not to teach or reshape the accepted system. As Ugandans fell in line, many began to lose any appreciation for the knowledge systems which had predated the introduction of European and Western education. Ultimately, given that indigenous and oppositional voices were marginalized during the various periods of adaption, it is appropriate to classify colonial

education under Steiner-Khamisi's (2012) "coercive" category of educational transfer. The first educational isomorphism had taken root.

Early independence education—1960s to early 1990s

The period of the late 1950s through the 1960s marked the successful transition of many sub-Saharan African colonial territories to independent countries. With the birth of these nations came an inevitable sense of hope for the possibilities of the future. The end of colonial rule brought the promise of socioeconomic development, opportunity, and prosperity (Metzler, 2009). It is of little wonder then, that among the first priorities after independence was a reformation of the education sector (Brock-Utne, 2000, p. 20). Newly liberated nations and former colonial powers alike strongly believed in the "functional power and efficacy of formal education" (Metzler, 2009, p. 289). "International development and education experts, from across the ideological spectrum and representing multiple disciplinary and theoretical perspectives shared a consensual orthodoxy that held that formal education was an essential (some averred, determining), if not sufficient, ingredient for political, social, and economic development in Africa" (ibid.). The responsibility for nationalizing educational systems had passed into the hands of newly independent governments.

In 1961, as Uganda was still negotiating its independence, delegates from 39 African countries and five European countries, which were still colonial powers, met in Addis Ababa under the auspices of UNESCO and the UN Economic Commission of Africa (UNECA) to discuss the future of education in Africa (Brock-Utne, 1995). At the conference, the delegates resolved that, as "the present content of education in Africa is not in line with either existing African conditions [or] the postulates of political independence, [...] African educational authorities should revise and reform the content of education in the areas of the curricula, textbooks, and methods" (UNESCO, 1961, p. 23). Thus, among the first priorities set by newly independent African states was to transform inherited curricula with an eye on contextual relevancy (Yoloye, 1986). Relevancy, according to participants, was defined as taking into account "African environment, child development, cultural heritage, and the demands of technological progress and economic development" (UNESCO, 1961, p. 23). Yet the aim of relevant curricula would prove much more difficult to achieve in practice. Instead, a number of barriers arose that deterred most nations, including Uganda, from creating an educational system that varied in any significant way from the colonial system present at the time of independence.

First among these barriers, as Jansen (1989) articulates, is the inherent tension and ambiguity between curriculum traditionalists and modernizers in terms of how they defined relevancy. On the one hand, emphasis on "African environment" and "cultural heritage" in new curricula was a call by traditionalists to "Africanize" or "indigenize" elements of schooling materials. Tied to this goal was pessimism about Western curricula, leading some in this camp to adopt socialist education strategies. On the other side were modernists who, while sympathetic to calls for indigenization, felt compelled to retain Western education frameworks, viewing them as the surest blueprint for economic development and industrialization. Under the direction of

modernists, “curriculum dependency” (Lillis, 1985), and “experimentation with exogenous models of curriculum” (Jansen, 1989) characterized the strategies of most African nations after colonialism, with Western influence sustained through the influence of teachers, curriculum specialists/publishers, and donors, among others.

Closely connected to this first barrier of modernizers and traditionalists is Metzler’s (2009) analysis of why postcolonial education systems were set up to fail. According to Metzler, most African states after independence lacked the bureaucratic and financial capacity to enhance the well-being of their citizens. “Because of underdeveloped colonial education systems, postcolonial states inherited a very limited supply of educated, skilled, and experienced bureaucrats” (p. 282). Yet the design and function of the colonial education system, he argues, was a direct consequence of colonial economic policies. In brief, Western Europe in the late nineteenth century was driven by industrial capitalism, yet many European countries were resource poor. Colonial states were set up as a means of extracting natural resources for production abroad. As a result, the priority of colonial governments was to create “mono-economies” that typically identified a single source of revenue expropriation—agriculture in the case of Uganda—and to do so using as few resources as possible. Metzler elaborates:

As a consequence of the distorted nature of the colonial economy, there was little or no development of infrastructures for communication, transportation, and financial services, other than what was needed to facilitate the expropriation of primary product(s). Road and rail systems ran from location of raw materials (e.g., where the mines were) to the coast, with limited development within the country. Moreover, until the late colonial period there was no state support for developing local African entrepreneurs with little or no access to credit and other vital financial services. (p. 283)

In this way, the colonial state inherited by independent governments was fundamentally contradictory. “[T]he state was maximalist in terms of security (developed police and armed force relative to other state apparatuses) and revenue collection, but minimalist in all other areas of state function with a very underdeveloped bureaucracy particularly in areas of human and social services: health care, education, housing, water, sanitation, developing transportation and communication infrastructure...” (p. 281). Thus, when leaders of newly independent African nations set out to channel existing state structures and human resources towards the socio-economic development of their people, they did so at a significant disadvantage owing to the contradiction between what they sought to do and what the systems they inherited were designed to do.

In the following section, each of these themes and barriers are explored in more detail within the context of Uganda’s struggle post-independence.

Education in Uganda after independence

As Uganda negotiated its independence from Britain between 1961-1962, its early leaders shared the region's confidence in the potential of education as a tool for nation building (Furley, & Watson, 1978; Ssekamwa, 1997). During this period of African independence, UNESCO declared education a human right, and the Organization of African Unity resolved that African countries should strive for universal primary education as soon as possible (Furley & Watson, 1978). The 1961 conference of African states was followed by another in 1962 in Tananarive which laid general guidelines for the advance of education in East Africa. Education for self-reliance became the policy of not only Tanzania but all of East Africa only a few years after independence (Furley & Watson, 1978). And yet Uganda, as much as other emerging nations at the time, found its post-independence education plans caught between three competing priorities. Jansen (1989), writing about the continent at large, describes the first two of these priorities as "the desperate struggle to define appropriate content," and the desire for "a severe and sustained critique of the colonial curriculum." Yet both of these, he explains, were "overshadowed and complicated by a different priority in the first phase of independence: educational expansion" (p. 220).

In writing about Uganda in particular, Ssekamwa (1997) offers a similar analysis post-independence, arguing that the desire for educational expansion was related to challenges that newly elected leaders faced upon taking power. The first challenge was a lack of qualified people to fill important positions within the government and other companies. And the sense of urgency over training qualified Ugandans to fill such positions stemmed from the second challenge: the need to develop economic activities to quickly increase production so that government services could be carried out. Finally, Ssekamwa argues that the third challenge facing efforts to revamp the educational landscape was the need to instill confidence in Ugandans of their ability to overcome their problems after years of colonial rule. Ssekamwa describes this last challenge, albeit simplistically, as the need to remove an "inferiority complex from the minds of the students" (p. 169). By this, Ssekamwa is undoubtedly referring to the legacy of colonial education as an instrument for, what Fanon and wa Thiong'o have termed, the colonization of the African mind (Fanon, 1963; wa Thiong'o, 1986). Metzler (2009) has similarly argued that,

Colonialism depended on an ideology of racial and cultural superiority that legitimized the practice of gross discrimination and oppressive regimes, not just to the colonizers (and citizens of the metropole), but also to the colonized. Colonial cultural apparatuses—including schools—were engaged in a dual cultural strategy of glorifying European culture while concomitantly denigrating African culture, values, and worldviews. (p. 284).

Ssekamwa (1997) suggests that government campaigns emphasizing "the creation of an African identity" and "the development of African personality" were therefore created in response to this issue of Ugandans feeling inferior to the West.

Given these competing priorities and challenges at the outset of independence, the struggle set an educational agenda within Uganda which understandably did not follow a linear trajectory. At different times, leaders espoused the merits of building upon an inherited

educational system to hasten modernization (Furley & Watson, 1978), while also encouraging a new direction for education by indigenizing or Africanizing the educational system (Furley & Watson, 1978, Ssekamwa, 1997; Hanson, 2010). Yet in the end, Uganda, along with most other African nations at that time, struggled to create anything divergent from prevailing colonial models. The internal pressure to modernize Uganda proved too great to spend significant time experimenting with education. “[E]xpansion of the already existing educational system[s],” notes Brock-Utne, (2000), “took priority over the creation of new systems in education” (p. 20).

Africanization and education for self-reliance

Before focusing on educational expansion, there was a brief period of enthusiasm for the idea of contextualizing education for the African experience and renouncing inherited colonial education priorities (Ssekamwa, 1997). It is fair to assume that this sentiment grew out of deliberations among former colonies during the conferences in Addis Ababa and Tananarive. During the Addis conference, representatives called for reformed curricula to be relevant to “the African environment, child development, cultural heritage and the demands of scientific and technological progress” (Jansen 1989). Among the proposals made by advocates for an Africanization of curriculum during this period, Jansen (1989) writes:

In the field of medicine, therefore, critics attempt (a) to show the rationality and plausibility of traditional African medicine (Horton, 1971) and (b) to simultaneously question the relevance of Western medicine in Africa (Udoakah, 1987). In the area of science education, alternatives have been proposed that utilize ‘traditional modes of belief about the natural world’ (Ingle and Turner, 1981, p. 362)—such as attitudes towards cause and effect, prediction, experiment, and time—and that capitalize on the child’s environment (physical, cultural) as a source of scientific knowledge and an affirmation of their cultural milieu (Haden, 1973; Kay, 1975; Gay and Cole, 1967). In the field of literature, proposals include using African languages as the medium of instruction; and incorporating oral history, African art and traditional music forms as legitimate school subjects (Mazrui, 1985). (pp. 222-3)

Within Uganda, as part of its effort to create an “African identity” and “African personality,” schools began to teach subjects that, for the first time, prioritized Ugandan geography and history over those of Britain and the United States (Ssekamwa, 1997). Such efforts also necessitated that serious inquiry into Ugandan history, sociology and geography be carried out. Jansen (1989) notes that changes to curricula were quite common throughout the continent, with the most accessible subjects for locally-initiated change being history, social studies, and literature. Yet even still, these changes often amounted only to “exchanging white heroes for black heroes, with little change in the psychological and epistemological assumptions which governed the colonial curriculum (see Lillis, 1985)” (p. 220). Nevertheless, the first

curriculum influenced by these efforts appeared in 1964, alongside other reforms resulting from the government financed Castle Commission report on education in 1963 (Ssekamwa, 1997). Furthermore, the push for Africanization in Uganda was not only about curricular changes, it was also about Africanization of jobs. In particular, high level positions within the civil service, education, the professions, as well as business and commerce which were once the primary domain of Westerners and Asians. “True political or economic independence could only come when the posts were in the hands of Ugandans” (Furley & Watson, 1978, p 391).

The only other prominent effort to re-envision the Ugandan educational system came as part of the radical—albeit short-lived and ultimately unsuccessful—proposals during Milton Obote’s “move to the left” campaign as Uganda’s first president (Furley & Watson, 1978, p. 407). Around 1969-1970, amidst an uneasy atmosphere of strikes at secondary schools around the country, President Obote proposed a radical change in the spirit of education in Uganda, especially at the secondary level. Obote called for schools to instill a dedication for service to the community among school leavers, while also suggested that school curricula were too Eurocentric, with an emphasis on the pursuit of white collar jobs only. Furley & Watson (1978) write of this time:

Above all, there was disapproval of the elitist tendencies secondary school leavers had. An official declared: “It may be a relic of colonialism that the school and college products tend to think about themselves as a privileged class who are not always very sympathetic to the aspirations of the masses of the people who are, in fact, paying for their education.” Schools must be decolonialised, to avoid producing “little black whites.” [...] President Obote frequently referred to the same theme: that educated youth must identify themselves more with national aspirations and the new political culture, they must cease to think of themselves as a privileged class. Opening the annual conference of the Uganda Education Association, he hinted that drastic measures might be necessary: “It is the negation of Uganda’s identity for our schools and institutions of learning to produce citizens who will deny, reject or despise their own origin and culture, their own character and way of life.” The needs of the country must dictate the subject matter taught and determine the nature and content of the curricula. Educators and those they teach must realise it may become necessary for the government to decide what courses should be given and how those who receive them should be deployed.” (pp. 407-408).

The movement that Obote called for went beyond the education sector, and culminated in the creation of a state manifesto known as “The Common Man’s Charter” (Furley & Watson, 1978).⁹ While monumental in its ambition and detail, the entire enterprise did not progress far

⁹ An interesting excerpt on the subject of education reads: “We cannot afford to build two nations within the territorial boundaries of Uganda: one rich, educated, African in appearance but mentally foreign, and the other,

before President Obote was ousted by a military coup by General Idi Amin in 1971.¹⁰ And even when Obote returned to power for a second term in office in 1980, his radical education ambitions did not return.

In the end, Ugandan efforts to indigenize the educational system remained only modest at best.¹¹ Instead, the focus of the government over the first few decades of independence—with full support from a population that since colonial times was increasingly committed to the promise of formal education as a means to opportunity and development (Passi, 1995)—turned to the reorganization of its inherited colonial education system to achieve its aim of rapid modernization (Ssekamwa, 1997). As noted earlier in Metzler's (2009) article, this effort would be fraught with difficulty given that the educational system inherited by the newly independent Uganda was not designed for the purposes that Uganda had in mind. Nevertheless, before looking at the efforts of educational modernizers, it is worth taking a moment to look briefly at the efforts of one country which did achieve some success, at least initially, in creating a unique educational experience for its citizen after independence.

Nyerere and Tanzania

Of all the nations to gain independence from European colonizers during the 1960s, only two are frequently recognized as having departed in any significant way from the educational systems that they inherited. While political will for indigenized educational reform in West Africa is said to have mirrored Nyerere's agenda (Semali, 1999)—with Mali having embarked on the most thorough educational reform movement in that region (Brock-Utne, 2000)—few nations managed to follow up preliminary policy debate with a reform strategy as radical as that of Tanzania under the leadership of its inaugural president, Julius Nyerere. In his widely-cited treatise, *Education for Self-Reliance* (1968), Nyerere advances a critique of colonial education

which constitutes the majority of the population, poor and illiterate.... We are convinced that from the standpoint of our history, not only our education system, inherited from pre-independence days, but also the attitudes to modern commerce and industry and the position of a person in authority, in or outside the Government, are creating a gap between the well-to-do on the one hand and the mass of the people on the other.... Our education system aims at producing citizens whose attitude to the uneducated and to their way of life leads them to think of themselves as the masters and the uneducated as their servants.... In this Charter we lay emphasis first on the people being given massive education in operating and establishing institutions controlled, not by individuals, but by the people collectively. This massive education should aim at re-orientating the attitudes of the people towards co-operation in the management of economic institutions, and away from individual and private enrichment. We therefore direct the Government to give education to the people to acquire new attitudes in the management of our economy where collective exploitation of our resources to the benefit of all will take the place of individual and private enterprise aimed at enriching a few." (quoted in Furley & Watson, 1978, p. 408).

¹⁰ It is worth noting that the coup by Amin was strongly welcomed, if not supported by, a British government which had grown wary of Obote's move to the left (see Mwakikagile, 2012, and <https://www.theguardian.com/news/2003/aug/19/guardianobituaries>)

¹¹ After Obote, the most noteworthy example of "indigenizing" the educational system took place as Uganda began to take full control over its inherited colonial model of education. Hanson (2010) writes: "With the curricular revisions of 1975, Ugandans tried to make education more fully an expression of Ugandan culture and society. A local publishing industry produced a rich variety of texts and supplementary books. The Ministry of Education brought testing and test supervision inside Uganda" (p. 168).

and a call to indigenize education that was unparalleled for its time. It was not until much later in the post-colonial era that discussions about Africanization of national curricula and “the reintroduction of indigenous education in formal schooling” took place in central, eastern and southern Africa (Semali, 1999; p. 311).

At the heart of Nyerere’s vision was his aim for self-reliant rural development through a set of policies known as “ujamaa” or African socialism (Vavrus, 2005, p. 180). Within this framework, the purpose of education, Nyerere argued, “is to transmit from one generation to the next the accumulated wisdom and knowledge of the society, and to prepare the young people for [...] their active participation in its maintenance or development” (1968, p. 383). In Nyerere’s view, a non-indigenous educational system would neither advance local wisdom, knowledge, or beliefs to the next generation, nor lay the foundation for the establishment of a distinct society.

The education provided by the colonial government in the two countries which now form Tanzania had a different purpose. It was not designed to prepare young people for the service of their own country; instead, it was motivated by a desire to inculcate the values of the colonial society and to train individuals for the service of the colonial state. [...] [I]t was a deliberate attempt ... to replace traditional knowledge by the knowledge from a different society. (pp. 383-384)

Nyerere believed that the system he would establish could move beyond the limitations of its predecessors. In his view, the system Tanzania inherited deepened an arbitrary and unnatural division between the life of a child in school and at home. Nyerere writes,

At present our pupils learn to despise even their own parents because they are old-fashioned and ignorant; there is nothing in our existing educational system which suggests to the pupil that he can learn important things about farming from his elders. The result is that he absorbs beliefs about witchcraft before he goes to school, but does not learn the properties of local grasses; he absorbs the taboos from his family but does not learn the methods of making nutritious traditional foods. And from school he acquires knowledge unrelated to agricultural life. He gets the worst of both systems! (p. 392)

The Tanzanian educational system was meant to improve the life of its predominantly rural population through an emphasis on socialist and ‘traditional’ ways of thinking.

Among the priorities of Nyerere’s educational initiative: to expand schools to every village in the country; to reduce nationwide illiteracy; to teach mental and manual work; agriculture; traditional languages, customs, and cultures; national unity; and civic responsibilities (Semali, 1999; Nyerere, 1968). Despite the distinctions between this model and its predecessor, the purpose of this new educational system was not to provide an inferior education, but “to

provide a different education—one realistically designed to fulfill the common purposes of education in the particular society of Tanzania” (Nyerere, 1968, p. 395).

In the end, much like other efforts to radically alter the educational systems within Africa, Nyerere’s efforts were eventually overshadowed by prioritization of economic growth and development. “The major contrast in the context for education policy making in Tanzania during 1967-1990s is the move from emphasizing the formation of a socialist state and public responsibility in education to emphasizing the development of a market economy which blends public and private initiatives” (Buchert, 1997 cited in Brock-Utne, 2000, p. 125). By the 1980s, under pressure from the World Bank and IMF, Tanzania was forced give up its policy of a tradition-rooted socialism called ujamaa and move in a capitalist direction (Brock-Utne, 2000, p. 56).

Modernization and other foreign pressures

As noted earlier, the dawn of independence in Africa brought with it the anticipation of “real political power that in turn would facilitate socioeconomic development, opportunity, and prosperity” (Metzler, 2009, pp. 288-9). And what fueled this optimism was strong faith in the power of education to enable that progress. New governments recognized that the “development and maintenance of ‘modern’ social, economic, and communication infrastructure was dependent on an educated and appropriately skilled bureaucracy” (Metzler, 2009, p. 290). As a result, governments began promising equal access and educational opportunity for all their citizens. “The legitimacy of the new states, therefore, depended heavily on their ability to provide access to schooling for large parts of the African population” (Brock-Utne, 1995, p. 179). From local officials to international development and education experts, each shared in the orthodoxy that formal education was the key ingredient for political, social, and economic development in Africa. Metzler (2009) writes,

This orthodoxy was based on two central assertions: (1) that schooling is an inalienable human right of all human beings; and (2) that an educated citizenry is sine qua non for political, social, and economic development. This consensus was fully endorsed by all the newly independent state regimes which viewed schooling as producing economically productive citizens, who in addition to providing the human capital essential to economic development, would assist a severely underdeveloped state structure by providing an adequately skilled bureaucracy with the expertise necessary to creatively address the gargantuan development project of the postcolonial state. Very importantly, this education orthodoxy was universally shared by the highly politicized citizens of the newly postcolonial nation-states who were convinced that improved access to all levels of education was essential to improving their own, and their progeny’s, living standards (Fagerlind & Saha, 1989). (p. 289)

The notion that the education orthodoxy was shared by government officials and citizens alike is important for appreciating the agency of newly independent nations and their citizenry in pathing their future. Yet it is also important to remember that this obsession with education as the most important instrument of social and economic progress was itself a product of the colonial educational system (Metzler, 2009; Hanson, 2010).¹²

In Uganda, the first elected government largely picked up where colonial officials had left off with education planning. Over the decade prior to independence, Uganda saw an eightfold increase in secondary student enrollment, and a doubling of primary school students. Yet despite record increases, in a country of roughly seven million people, only 7500 were secondary school graduates (Furley & Watson, 1978). For this reason, at the time of independence, Uganda viewed itself in desperate need of skilled manpower to assume the functions of the public and private sectors. Following in the tradition of colonial leaders, among the first acts of the newly established government was to appoint an education commission to review the education system and build upon the recommendations of the de Bunsen Committee of 1952 (Ssekamwa, 1997). This new Commission, known as the Castle Education Commission, would focus on how to produce a larger pool of qualified workers; and the government quickly adopted its recommendations after their publication.

Among the proposals of the Castle Commission were guidelines for restructuring the education system, including: increasing primary from six to seven years; abolishing junior secondary schools, farm schools, rural trade schools, home craft centers and secondary modern schools, instead prioritizing academic secondary schools; setting the Ordinary-level of secondary school at four years and Advanced-level at two years; starting technical colleges and agricultural colleges after O-level; and setting a number of Makerere University degrees and supporting the establishment of new universities (Ssekamwa, 1997, pp 169-170). But at the heart of the Castle Commission's recommendations was yet another significant increase in school enrollment, particularly at the secondary level. The goal was ultimately to increase the number of university graduates. In order to achieve this, many new primary schools were built around the country, new secondary schools were formed, and existing secondary schools were expanded to take on more students. As Ssekamwa (1997) details, "In 1962 there were 28 government grant-aided secondary schools" but by 1970 "there were 73 secondary schools" (p. 170). Furthermore, the enrollment of O-level students in 1962 was 1991 but in 1970 it reached 29,540. To achieve these numbers, many private schools were also formed through individual initiative (*ibid.*).

Yet another significant achievement of the Castle Commission was the government's passage of the 1963 Education Act which led to the takeover of government-aided schools. Whereas the colonial era largely left missionaries to own and run schools independently, the government realized that this system was inefficient and posed barriers to its plans to train a significant number of qualified men and women. In part, the barriers posed by the previous system was that schools could reject students based on their religious background, leaving some

¹² See the above subsection entitled "Coercive colonial isomorphism and the paths untaken" for more details.

to have to travel significant distances to find an accommodating institution (Furley & Watson, 1978; Ssekamwa, 1997). In one small area, multiple schools representing different denominations could even be built in order to accommodate religious differences. Eventually, the government found these mounting religious differences to be a significant barrier to the creation of a unified nation state. One commentator at the time observed that “Protestants, Catholics and Muslims, educated in separate schools, tend to regard one another not as fellow citizens of one nation but as members of different communities each rivaling the other for wealth, power and status” (quoted in Ssekamwa, 1997, p. 175).

For these reasons, and out of concern for economic efficiency and standardizing the treatment of teachers across the country, the government ultimately passed the 1963 Education Act and assumed control of all formerly government-aided institutions. Only private schools were not impacted by the new law. The result was a significant consolidation of authority over the national education system within the central government. Today, many of the features of the Education act are still in place, including the creation of school management committees and Parent Teacher Associations (PTAs); the provision that only the government can assign school inspectors; and the provision that headteachers of any religious denomination can be appointed to any school, regardless of the religious affiliation of its founding body (Furley & Watson, 1978; Ssekamwa, 1997).

How the government was able to achieve these changes, including sizable enrollment increases and the creation of new primary and secondary schools, is the question of relevance to chapter. In short, it was through significant input from international actors: from expatriate teachers, to foreign ‘experts,’ imported teacher training models, foreign designed curricula, imitated examination approaches, and ultimately, donor funding. The combination of these foreign influences led to what Lillis (1985) has termed the “curriculum dependency” of post-colonial African nations. The biggest barrier to indigenizing the educational experience in Uganda, consequently, was the willingness of the government to make compromises in order to accelerate modernization; as the follow examples illustrate.

Foreign Teachers. Despite sizable increases in secondary and tertiary school attendance in the years leading up to independence, Uganda was suffering from a shortage of capable Ugandan teachers for post-primary education. With the decision to open even more primary and secondary schools as part of the modernization effort, the problem of qualified teachers was only exacerbated. In response, right from independence in 1962 the government began recruiting teachers from Britain, USA, Canada, and Australia (Ssekamwa, 1997). By 1964, 94% of secondary teachers in Uganda were expatriates (Furley & Watson, 1978, p. 405). In each instance, the teachers came to Uganda through foreign service programs, such as the Peace Corps or Volunteer Service Overseas (VSO) programs, which meant that they did not receive salaries from the Ugandan government. It also meant that many of the teachers were on short term (typically two year) contracts, and that most were not formerly trained as teachers (Ssekamwa, 1997).

Regardless of qualifications, there is little question that the presence of foreign teachers played a role in shaping the educational experience in Uganda at that time. For one, the constant turnover of foreign teachers also caused frequent interruptions to efforts to the education sector. Furthermore, such teachers were considered important guests of the government and as such were afforded special treatment in comparison to fellow teachers, including being guaranteed the best accommodations. In terms of pedagogy and educational philosophy, Phillips and Ochs (2004) have written, “when foreign teachers work in the classroom outside of the country in which they have trained, it is almost inevitable that foreign pedagogy or classroom techniques will be introduced and adopted in the local context” (p. 8). It was also unlikely that the presence of almost entirely Western teachers after independence would amount to significant changes to what Metzler (2009) viewed as the tendency of Ugandan schools to glorify European culture while simultaneously undermining African culture, value, and worldviews.

Finally, the problem with reliance on foreign educators for almost a decade in Uganda meant that little attention was given to raising up qualified educators locally. When Amin took power in 1971 and expelled expatriate teachers, for example, the country was forced to recruit Ugandan teachers to occupy vacated positions. Yet the combination of these openings, along with the prior rapid expansion of schools, forced the government to hire teachers with little teacher-training, making it impossible to entertain the idea of innovating the existing national curriculum (Brock-Utne, 1995, p. 179).

Foreign curricula and experts. Another way in which indigenizing efforts were stifled during the period after independence in Uganda was due to decisions to import foreign curricula. “While recognizing the need for some localization of the curriculum, modernizers [insisted] on retaining Western scientific frameworks for development” (Jansen 1989, p. 223). Brock-Utne (1995) has written that while African educationists were “busy fulfilling the promise of schooling for the African masses, the curriculum and textbooks, along with teaching methods were in the hands of the educational industry and publishers of the North, mostly the former colonial masters” (p. 179). It seemed as though most independent states in Africa had not yet formed curriculum policies (Lillis, 1985). In Uganda, the first National Curriculum Development Centre was not announced until 1971 and was not opened until 1973 (Furley & Watson, 1978; Evans 1994).

In the absence of a firm curriculum strategy, countries like Uganda were forced to fill the void with western curricula. Eshiwani (1993) describes one instance in which representatives of Uganda, Kenya, and Tanzania gathered for a conference in Dar es Salaam in 1964 to prepare a new mathematics syllabus for O-level students. Following the conference, a group of secondary school teachers from Uganda and Kenya met to complete the first draft of the new curriculum. Eshiwani writes, “In the real sense, this team did not write a new textbook. What they did was adapt the British [School Mathematics Project] and call it the School Mathematics of East Africa (SMEA)” (Eshiwani, 1993 quoted in Brock-Utne, 1995, p. 181). Jansen says that numerous programs in science and mathematics with Western origins, in fact, spread across Africa at this time. Another such example was the “African Mathematics Programme, known popularly as

‘Entebbe Maths’ because of its adoption in Entebbe, Uganda” which was a product of the African Education Programme of the American Education Development Center (Jansen, 1989, p. 221).

Another aspect of foreign influence on national curricula in Africa was the persistence of colonial examination systems. Writes Jansen (1989), “It is an educational truism to state that the most effective way to change the curriculum is to change the examination system (Lewin, 1985). The converse has also proven to be true: the retention of the foreign examination system after independence has had devastating implications for curriculum reform in Africa” (p. 223). While the examination system was eventually nationalized in Uganda with the creation of the Uganda National Examinations Board (UNEB) (Hanson, 2010), a lack of meaningful changes to the leaving examination strategy of Britain meant that the changes may have been in name only. “In Kenya, for example, the replacement of the Cambridge Examinations Syndicate by the East African Examinations Councils (EAEC) was largely a change in name, for the practices and assumptions of the colonial examination were maintained through funding processes, expatriate leadership, and the external training of local personnel (Lillis, 1985).

International donors. A precursor to the decades ahead, the early independence period also marked the beginning of international donors’ influence on educational policy agendas in sub-Saharan Africa. First among those to exert that influence, unsurprisingly, was the World Bank. “Donors of foreign loans or grants often gave money only for their own ideas of development, which might differ from local policy; moreover such loans often had “strings” attached to them, stipulating the purchase of materials or equipment from the donor country, which might not be the most suitable” (Furley & Watson, 1978, pp. 360-1). In his analysis of the evolution of education policy in Uganda, David Evans (1994) suggests that the influence of the World Bank was felt in Uganda most especially by the Castle Commission.

At its inception, the Commission was given the following terms of reference: “To examine in the light of the approved recommendations of the International Bank Survey Mission Report and Uganda’s financial position and future manpower requirements the content and structure of education in Uganda; to consider how it may best be improved and adapted to the needs of this country to submit recommendations accordingly” (quoted in Evans, 1994, p. 3). From the very outset, the Castle Commission was constrained by the requirement to offer proposals for the development of Uganda’s education sector “in light of the approved recommendations” of a previous World Bank report. In the end, Evans argues that the Commission’s recommendations were strongly influenced by two factors: (1) the policy framework previously set by the colonial era de Bunsen Committee; and (2) the beliefs and values of the international donor community. That, and the international membership of the Commission itself, comprising nine Ugandans and eight non-Ugandans (Evans, 1994), leaves little wonder why Uganda’s first post-colonial education Commission offered few radical policy pronouncements for the education sector and instead focused on modernization through educational expansion.

Ultimately, the combined result of these modernizing efforts meant that by 1970, the job shortage which the government faced at independence had largely been resolved. Those openings that still remained were primarily in specialized skill areas (Ssekamwa, p. 185). Yet this achievement wasn't without consequences. The legacy of this era was the establishment of post-independence schools as little more than an extension of the highly academic colonial education system. There were still not enough places for all students that wanted to attend schools, and over time the number of graduates began to outnumber the available positions in the country. The government tried to increase enrollment in vocational institutions as a result, but families were still so committed to academic education that they would rather send their kids to failing private schools than government vocational schools early on (Furley & Watson, 1978). Even students who graduated from government sponsored farm schools came out looking for white collar jobs, viewing an agricultural education as simply an alternative to overcrowded secondary schools.

Education from Amin to Museveni

The period from Amin's coup in 1971 through the election of Uganda's current President, Yoweri Museveni in 1986, are commonly remembered for the resiliency of demonstrated by parents in sustaining the education sector amidst a period of austerity and political instability (Heyneman, 1983; Evans, 1994; Passi, 1995). Responsibility for education, at a time when Uganda experienced multiple regime changes, had largely shifted to communities, parents, and religious leaders. However, as has long been the reputation of Uganda, the "remarkable" commitment of its citizens to keep the hope of education alive meant that schools during this period not only survived but thrived (Evans, 1994). Passi (1995) writes,

From 1975 for ten years Uganda was torn by civil war and suffered economic collapse. Yet primary education expanded faster in this decade than in both the preceding and the following years. This shows the enormous resilience of parents and [People's Organizations] at the grass-roots level who took over government schools and ran them during this period. (p. 220).

Heyneman (1983) supports this analysis, suggesting that "Ugandans do not appear to have lost any of their legendary desire for education" throughout the uncertainty of that period (p. 412). Instead, they continued "to send their children to school on a daily basis under the most difficult circumstances" and "despite the vicissitudes of the political environment" (pp. 412-3).

Yet, despite these achievements, the omission of this period had to do with the fact that, even under the leadership of parents and communities, the form of and approach to education within Uganda still did not deviate in any meaningful way. "Unlike many African countries, Uganda has not made any significant changes in the structure of education since independence" (Evans, 1994). Even after Museveni's government settled into power—and an Education Policy Review and White Paper on education were published in 1989 and 1992 which both

recommended “curricular reforms to impart practical skills which will foster national development and close the gap between schooling and life” (Evans, 1994, p. 15)—still there were few, if any, meaningful changes made to the education system inherited from the colonial period. It is for this reason that the theme of this section, early independence education, is ‘missed opportunity.’ What began as a period filled with hope over the possibilities for an African renaissance, spurred on by an imagined de-colonialized education system, ended with indications that African nations had simply traded in colonial decision makers for multinational donors as decision makers. Evans’s (1994) paper on educational policy in Uganda—subtitled “Continuity Amid Change”—best summarizes this perspective:

Educational policy making in Uganda has always had strong ties to the larger international community of educators, first through the dominance of the colonial power, and later through active participation by Ugandan educators in a variety of international forums where evolving understandings of the nature and function of education in Africa have emerged. A gradual shift in the directness of external influence is apparent in the functioning of successive commissions. At first, the influence was by direct membership, including the chair of commissions until the 1970s. Later, the influence is more muted, coming from technical working staff and from international policy documents and conference proceedings and the socialization of Ugandan educators. Uganda has thus broadened its contacts substantially beyond Great Britain, but has sought to integrate new ideas into the existing structure, rather than attempt radical changes.

External donors have played a significant role in educational policy, particularly as implemented in specific contexts. Donors with the resources for major investments have had substantial influences on important components of the educational system, such as the institutional structure of teacher education. Smaller donors have supported reforms in specific aspects of the curriculum – such as teaching of English or French, new approaches to science, or revised math syllabi. The influence of specific donors waxes and wanes with their own priorities and ability to carry out programs. In the late 60’s and early 1970s USAID was quite influential, helping to restructure all of primary teacher training into four regional colleges; yet after the mid-1970s they have had little influence until just recently. UNESCO’s influence was strong in the 1970s, but has been modest during the 1980s. The World Bank has been gradually expanding its activities and its involvement in policy issues to the point where in the early 1990s it is clearly the most influential of the donors in affecting the direction of educational investments. (p. 21)

In his analysis, Evans draws a direct line between the international influence on education in Uganda witnessed during colonization, and in the decades after. Such influences are observable

in anything from membership on prominent education reform commissions, to the publication of international policy documents, provision of technical support, socialization of Ugandan educators, and creation of curricular materials.

Policy isomorphism during the early independence era of Uganda, then, appears to coalesce around the educational agendas of the colonial period. Continuity, amid change. Writing about African curricula at this time, Lewin (1985) argues, “despite a wave of innovations in developing countries, ‘curricular forms persist and have *recognizable genealogies*’ (p. 120; emphasis added). Yet even amidst the seeming permanence of the structural homogeneity in Uganda’s education system since colonization, early signs of a new isomorphism were visible during the latter half of this time period. As the next section illustrates, Evans’s most prescient statements were about the dogged influence of international donors and agencies.

Educational transfer in Uganda post-EFA

Within the previous sections we observed the impact that coercive educational transfer has had on Uganda throughout the 20th century. First, colonization produced educational models that consistently stifled local voices and indigenous experience. Later, when Ugandans eventually took control of the government, the circumstances they inherited made it difficult to do much else other than expanding on the system they inherited. In this section, we observe how seamlessly decades of colonial influence on education transition into the “new imperialism” of the globalization era. By new imperialism, author Leon Tikly (2004) refers to the “emergence, since the latter half of the last century, of a western discourse around ‘development’ manifested in the rationalities and programmes of the World Bank, and to a lesser extent, of the other multilateral development agencies” (p. 177). Thus, in this final section examining the transfer and adaptation of educational policies throughout Uganda’s history, “development” discourses emerge as the latest isomorphic influence on the educational landscape.

While the previous sections traced policy isomorphism in Ugandan education by recounting key historical moments and tracing policy shifts over time, this final section instead focuses on two of the prominent themes which have dominated the educational landscape in Uganda since the 1990s. The first subsection explores the influence of international donors and agencies on education in the region, tracing, in particular, their roles in setting policy agenda through international agreements like Education For All (EFA). The second subsection addresses how the influence of international policy agendas and prominent epistemological debates have informed the pursuit and implementation of education reforms in Uganda and sub-Saharan Africa at large. Throughout each subsection, “education for development” remains a common thread, as it represents the dominating influence on education in the 21st century.

EFA and international education agendas

In her book *Constructing Education for Development* (2003), author Colette Chabbott opens with an anecdote about the emotional closing of the 1990 World Conference on Education

for All (WCEFA). Just before this, she prefaces the story by placing it in its larger historical context. Chabbott (2003) states that since the Universal Declaration of Human Rights were first asserted in 1945, nation states with radically different histories, cultures, and financial and administrative means have helped transform those rights into fairly standardized national development goals, plans, and frameworks for using education to accelerate socioeconomic development. She therefore views the Education for All (EFA) conference as both a catalyst for and product of this standardization process: “On the last day of the WCEFA, 1500 men and women representing 155 governments, 33 intergovernmental organizations, and 125 nongovernmental organizations rose, some with tears in their eyes, to accept by acclamation the World Declaration on Education for All, a nonbinding statement that asserted every human being has a right to a quality basic education” (p. 1). Uganda was among the signatories of that conference (Sikoyo, 2007).

While in many respects, the conference was typical of any number of such international gatherings in the 1990s, one reason for such emotions might be the symbols of historic change or progress that Chabbott captures in the above statement. Chabbott notes, for example, that 155 countries participated in the EFA conference, a dramatic increase from the 54 or so countries that comprised the world in 1940. At that time, much of the known world was made up of protectorates and colonies that did not have the power to represent their interests at international conferences, nor would they gain independence for at least another 20 years (p. 2). In another sign of progress, hundreds of women participated at the WCEFA, yet in 1940, women in many countries “had no civil rights independent of their families and very few women were appointed as delegates to international conferences” (ibid.). Also noteworthy is that in 1940 few colonial powers felt moved to fund mass public education within African, Asian, or Caribbean colonies; owing in large part to either implicit or explicit acceptance of the genetic superiority of some races over others. In light of these observations, the WCEFA represented a “radical expansion of who qualifies as a full human being and what his or her potential might be; what constitutes a nation-state and what its responsibilities might be with respect to promoting human potential; and what role education might play in mediating this process” (p. 3).

In her analysis of the WCEFA, Chabbott offers different ways of interpreting the significance and purpose of the event. One view, she suggests, is that the conference (and a follow up conference in Dakar some ten years later), are best understood as one of many efforts by less industrialized, low-income nations to stake claim to the funds necessary to realize basic education for all children. Another view, by contrast, suggests that conference in fact represented yet another instance of industrialized countries attempting to dictate development and education priorities to less industrialized nations. Chabbott even offered a third, more optimistic view which suggests that perhaps the conference was simply an example of nation states setting high goals in order to create the means of achieving them. While Chabbott does not offer a definitive interpretation of her own, she instead highlights within her book three important aspects of the global environment that she says made the outcomes of the WCEFA a foregone conclusion.

The first feature of this global environment is the push for an ever-expanding global imperative, one which has expanded since the Second World War to include “cover both more economic and social activities—from agriculture and large-scale infrastructure development to family planning and education—and more subgroups of the population—women, the disabled, minorities” (pp. 4-5). The highlight of the second feature is isomorphism:

... isomorphism is the rule; over time, principles, policies, and practices everywhere tend to adopt the same form and language. As noted earlier, despite great variations in history, social structure, and economic resources from country to country, and within countries from one locality to another, standardized blueprints or models of how to “do” development tend to emerge and prevail. This does not mean that all development activities end up looking exactly the same everywhere. Instead, idiosyncrasies persist from one place to another, at the same time basic ingredients prevail in all settings, with local variations. Over time, the realm of potential development principles, policies, and practices is increasingly scripted, and deviation from that script becomes less likely. This tendency towards isomorphism comes into conflict with Enlightenment ideas about the uniqueness of individuals and, by extension, their collectivities. This conflict creates much of the generative tension in development discourse. (p. 5)

The final feature, according to Chabbott (2003) is what she refers to as the “loose coupling” between the values that nation states espouse and the actions that they actually take. The author believes this could either represent an attempt by dominant national or local groups to undermine development outcomes, or could in fact represent a resistance to isomorphism and “the assertion of local values and practices over world culture, skewed though it may be towards local elites” (p. 5). Of these three features of global development, it is the second aspect that is of most relevance to this dissertation.

Uganda and global educational influences

In Uganda, calls for universal education have a long history within the country, with the first instances dating back to colonization. Hanson (2010), for example, has argued that village schools represent the first attempts in the country to realize that right. The next prominent appearance of calls for universal education came during the 1961 Addis Ababa conference where representatives of emerging African states set a goal of “free compulsory universal primary education” and “universal adult literacy” by 1980 (Evans, 1994). Under President Obote in 1981, Uganda devised a Ten-Year Development Plan and among its goals was to establish universal primary education by the year 2000 (ibid.). Shortly after, under a new president, the proposed deadline for implementing UPE was brought forward to 1989. It was not until 1997, however, with the global support for the policy in full view after Jomtien, that implementation of the policy finally began (Oketch & Rolleston, 2007). Whether or not the WCEFA, along with

increasing support for the policy among international agencies, can be credited for Uganda's ability to finally begin implementing UPE is up for debate. What is clear, however, is that interest in the policy was not imposed from abroad (Steiner-Khamsi, 2004). Nevertheless, the WCEFA marks an escalation in the influence of global agendas and donors on education in Uganda and SSA at large.

In 1993, the Ugandan government initiated plans to reform the primary school sector after the approval of the White Paper the previous year. As Sikoyo (2007) notes, the newly elected government was spurred to action after inheriting "an education system with low and declining quality in all its dimensions, compelling it to embark on an ambitious and rapid process of reconstruction and development" (p. 2). The report included over 200 specific recommendations, however it did not include a budget or suggest priorities for achieving its goals. Instead, aware that it did not have the funds to realize the proposed changes, the government left the priorities and budget entirely to the discretion of international donors (Moulton, 2002). The expectation at the time was that national governments were given discretion to propose the types of changes that were needed in their countries, but it was donors who would come in and determine what parts of that plan would be realized, and how.

In the end, Uganda negotiated three major programs with its donors. The first was a structural adjustment credit agreement with the World Bank and IMF which required that the government adjust financial policies throughout the government including the education sector. The second was a program funded by USAID for technical assistance and nonproject assistance; an arrangement that involved the United States funding the Ugandan government's treasuries directly so long as certain conditions were met. And the third was a loan from the World Bank to the MoES which also involved conditions regarding reforms (Moulton, 2002). Among the conditions for each of these agreements, the Ugandan government had to shift funds budgeted for defense to education; to shift funds budgeted for higher education to primary education; to undertake a review of management and accounting practices in the MoES; to improve teachers' terms and conditions of service; to provide sufficient supply of instructional materials; to build teacher training support systems in ten districts; to improve the balance between boys and girls who enroll in and complete primary school; to increase access to schools through construction of new schools and rehabilitation of existing schools; reform the curriculum and examination system; improve teacher training systems; and develop a local publishing and printing unit (*ibid.*, pp. 55-57). The resulting compromise between the Ugandan government's priorities and the priorities of donors became known as "the reform" (*ibid.*).

After negotiating the details of these agreements, the expectation was that Uganda, through its MoES, would implement the plans with support from donor agencies according to the timeline and terms of the programs. "Reforms were shaped in accordance with a paradigm, or model, of top-down rational, technical planning led by experts seeking permanent solutions to persistent problems," write Moulton & Mundy (2002b, p. 179). "The Ministries of Education were to take the lead in implementation, and funding agencies were to provide support" (*ibid.*). What was not anticipated, however, was that the President of Uganda would unilaterally

announce a plan of his own without support from his ministry or Uganda's donor partners. According to "the reform," the priority of the donor-sponsored primary education projects was improving education quality before focusing on plans to extend universal access. Yet in 1997, determined to keep his campaign promise, President Museveni mandated changes to how government and parents would share the cost of financing primary education, in effect making primary education free for all, resulting in massive increases in primary school enrollment in the years ahead (Moulton, 2002). Sikoyo observed:

UPE dramatically altered the education landscape in Uganda, doubling enrolment in primary schools from a low 2.6 million in 1996 to 5.3 million in 1997. Enrolments continued increasing to 7.6 million in 2004 (MoES, 2005). Net enrolment ratios in primary schools rose from 60 % in 1996 to about 90 % by the end of 2004. (Sikoyo, 2007, pp. 2-3).

Thus, observers noted it was "Political demand rather than rational planning seemingly triggered UPE in Uganda and the policy was consequently implemented without time for detailed planning and in the absence of sufficient data" (Oketch & Rolleston, 2007, p. 143). Staff from USAID tried in vain to intervene with politicians arguing that the original plan was for fees to be eliminated gradually. Even the Permanent Secretary of the MoES made a public announcement endorsing the plans outlined in the government's White Paper, in effect disagreeing with the President's new direction. Yet the President remained firm and the Permanent Secretary was dismissed (*ibid.*).

In the end, the government and the donors worked at cross purposes, still managing to achieve minor advances along their respective areas of priority. Among their biggest impediments, however, was that the funds budgeted for the ten-year primary education reform project were not sufficient to complete both agendas. Jeanne Moulton, who prepared a case study of Uganda's primary education reform in a book alongside reform efforts in four additional SSA nations (Moulton et.al., 2002), argues that the end result of efforts between the 1990s to 2000s was far less than what it could have been had the government and donors worked to achieve the same goals. Yet, this observation raises interesting questions: what right do donors have to dictate an independent nation's education policy and reform strategies? In fact, what conditions led to the dynamic in which international development organizations were directly intervening in the development of education systems in low income nations in SSA? And what factors led those countries to agree to these arrangements?

The World Bank and education for development

Systemic educational reform is an approach to African education reform that was popularized in the 1980s and 90s by the World Bank and USAID. The approach resulted from World Bank policy briefs providing "startling evidence of the widespread crisis and deterioration of African educational systems," which led to the recommendation that a comprehensive

approach to the renewal of African education must focus on “greater quality, equality, and access at the primary level” (Moulton & Mundy, 2002a, p. 2). USAID followed through on systemic reform first, launching or extending twelve basic education programs across Africa. For the World Bank, sector-wide reforms were in many ways an extension of its existing structural adjustment programs in the region (ibid.). Gita Steiner-Khamsi (2012) suggests that, for many years, there were distinct differences between the world’s various aid agencies operating, including the World Bank, DFID, and USAID. Uganda’s past relationships to USAID and the World Bank attest to these differences (see Evans, 1994). Yet today, “[t]hese three large donors, but also others, now inhabit the same system, that is, subscribe to the same international agreements (e.g. EFA, MDG) and adhere to the same standards of aid effectiveness (e.g. Paris Declaration 2005) that regulate the aid relationship between donors and recipients” (p. 7). This is visible in the combined efforts that USAID and the World Bank made to reform the primary education sector in the 1990s and 2000s.

To understand the growing influence of the World Bank and other international donors on education, it is necessary to first appreciate their connection to development. The concept of ‘development’ is at the very heart of World Bank discourse (Tikly, 2004). Yet the ease with which the logic of ‘development’ and ‘underdevelopment’ permeated global discourse and reshaped the identities of peoples and nations around the world following the Second World War is rather alarming. The terms had been transformed from almost a neutral term for indicating growth and improvement in national standards to taking on a host of implicit meanings.

The new binary of developed/underdeveloped provided a mechanism for re-inscribing the old north-south relationship which had until then been largely formed in relation to the colonizer/colonized opposition. Whereas development had in the past been a ‘natural’ phenomenon, in the new hegemonic worldview, development took on a transitive meaning, that is, it became something that could be performed by one actor or region over another actor or region. Further, whereas colonizers and colonized had previously belonged to two different universes, separated by a gulf of biological and cultural difference, the new binary represented a step in the reinvention of the ‘Third World’ as part of a continuity with the West (Escobar, 1995). Furthermore, whereas classical colonialism was premised on the view that although the ‘natives’ could be ‘civilized’ to some degree, they could never achieve equality with the West, in ‘development’ discourse, it became possible for underdeveloped regions and populations to evolve into developed ones. (Tikly, 2004, p. 181)

The result of this shift was that the word ‘underdevelopment’ came to symbolize a ‘lack.’ No longer was it acceptable for a nation to point to historical circumstances to explain their current state. Instead, development logic meant that the underdeveloped were treated “simply as poor without seeking the reasons for their destitution,” and it made “growth and aid (conceived in

technocratic, quantitative terms)” the only possible means to development (Rist, 1997, quoted in Tikly, 2004, p. 183). And so long as newly independent African nations like Uganda viewed themselves as underdeveloped, it meant that they were dependent on the expertise of outsiders.

Karen Mundy (2002) finds that early in its establishment, the work of the Bank focused primarily on lending to developing countries, with most lending for education “rationalized as manpower forecasting” (p. 486). As the years went by however, the Bank took a special interest in providing advice about more financially smart ways for client-nations to utilize the money that they were being loaned. With the onset of the 1980’s, the “Washington consensus” emerged, providing a “normative framework for action for the major multilateral and donor agencies in their dealings with Africa and other parts of the so-called ‘developing’ world” (Tikly 2004, p. 179). The goal of the “consensus” was to encourage low-income countries to adopt policies of trade liberalization and export-led growth, along with an emphasis on cuts in government expenditure and the use of user fees in public services. Many, if not all of these policies were in turn adopted by beneficiary nations, leading to a proliferation of new policies regarding how low-income governments structure their educational systems (p. 179).

One common practice of the Bank, for example, was to conduct multiple transnational research studies for the purpose of identifying which “school factors were stronger determinants of achievement and therefore better ‘investments’ in developing countries” (Jansen 1995, p. 192). Using these results, the Bank would, whether explicitly or implicitly, espouse ‘one-size-fits-all’ educational strategies. As demonstrated by the Washington consensus, these strategies more often than not relied heavily on neoliberal policies such as voucher schemes, the strengthening of private schooling, and increasing the financial investment of local populations towards their own schooling (Klees 2010). The result, argues Tikly (2004), has meant the “spread of western ways of thinking about the art and practice of government,” in addition to “a redefinition in discursive terms of the West’s relationship to the low-income world through the perspective of ‘development’” (p. 180).

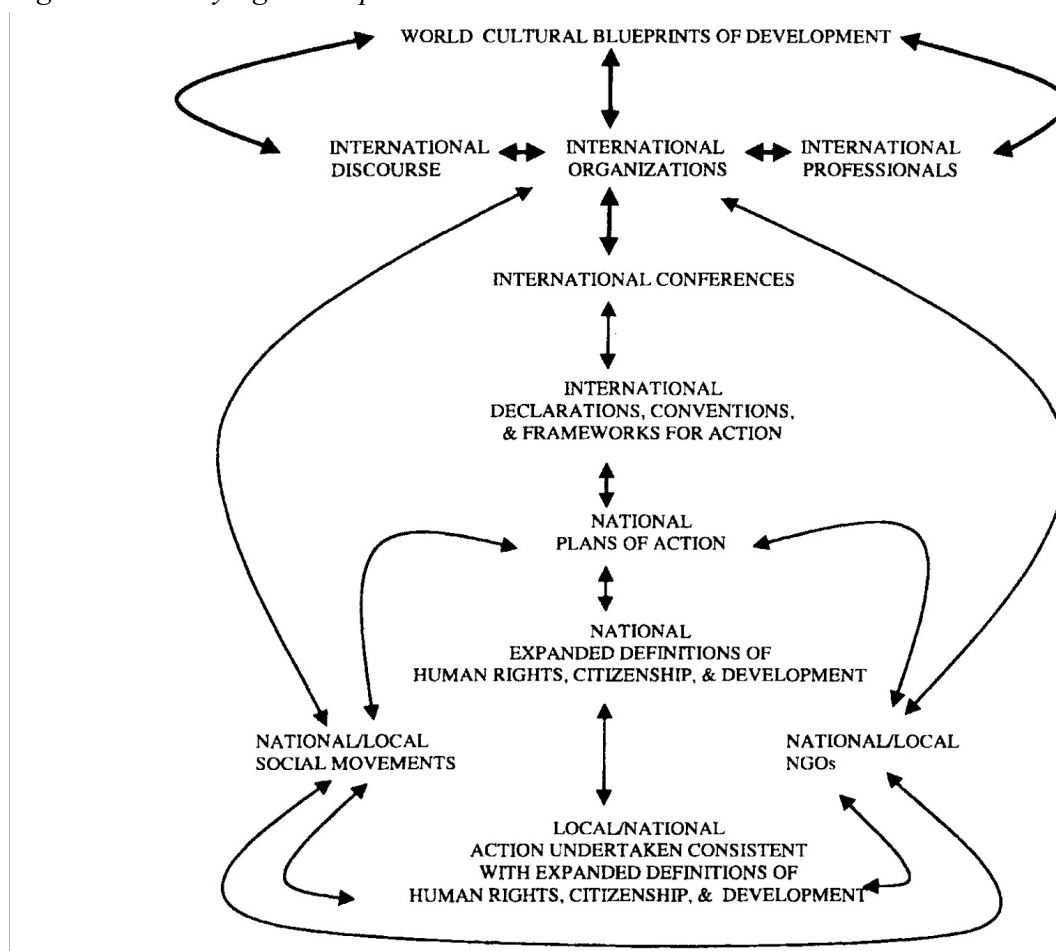
Thoughts on development harmonization

Returning to the theme of global discourse about education and development, and the way in which international agencies have tended to dominate it, Steiner-Khamsi (2004) writes:

As Schriewer (2000) and Mundy and Mundy (2000) have demonstrated, ‘global civil society’ and other international agents acting on behalf of globalization have contributed considerably to constructing an international model of education at a discursive level. In low-income countries, the external pressure to reform in certain ways, and the reference to an international community that exerts such a pressure, are not self-induced as in economically developed countries. On the contrary, the pressure from the international community on low-income countries in the form of international agreements (e.g. Education for All, Millennium Development Goals, Fast Track Initiative, etc.) is real. (p. 5)

Despite acknowledgement of this pressure, however, authors like Steiner-Khamsi remain skeptical about exactly what it means, or rather, how useful it is to focus on. More important than the external policy pressure exerted by these agencies and programs, in her view, is the question of “how these externally induced reforms are locally implemented” (ibid., p. 5). For example, “what does harmonisation do to local policies and practices, and what mechanisms of power are invoked when pressure is exerted to align national structures and policies with a larger educational space?” (Steiner-Khamsi, 2012, p. 12). Along these lines, questions of local adaptation, modification, and resistance are of more importance to understanding educational transfer than focusing only on the level of policy influence (Steiner-Khamsi, 2004).

In concluding this subsection, Chabbott (2003) provides a useful diagram which depicts the complexity of the interplay between many of the key players in the realization of education for development (see Figure 2.1, from Chabbott, 2003, p. 9).

Figure 2.1 Carrying development models

This model, according to Chabbott, “shows a mechanism for carrying models of development from the world societal level through discourse, organizations, professionals, conferences, national frameworks for action, and local governmental and nongovernmental action” (pp. 8-10). While acknowledging that much of the interplay within the model represents a top-down motion, she suggests that many of the interactions are in fact recursive: “professionals reformulate discourse, conferences grow into permanent organizations, and so forth” (p. 10). Furthermore, the bottom of the diagram depicts some of the emerging bottom-up linkages that are being created within policy reformulation; although she argues that these linkages still remain weaker than those that are top-down. Finally, of special note in this model is the role that regional, national, and local NGOs have played in policy transfer and adaption; often serving as proxies for the intended beneficiaries of development or education interventions, while also serving to transmit it.

Up to this point, the first half of this section has highlighted influences on national policy relating to the actors at the upper half of Figure 2.1. But international agreements have also played a large role in shaping school (or local) level reforms as well. “Development discourse itself is a powerful regulator of international educational policies and politics, framing some

issues as ‘problems’ while sidelining others, and specifying ‘solutions’ through a process of naming and classifying certain outcomes as, a priori, more desirable than others” (Taylor, 2009, p. 79). In the following section I briefly explore the transferred policy of “child centered learning” and the impact it has had within Uganda.

Education reforms in era of globalization

In the previous section, authors like Moulton & Mundy (2002a) outlined the emergence of a new paradigm of education reform, one which “calls for top-down and system-wide reform of the education system, based on a technical, comprehensive plan for improving quality, equality, and access at the primary level” (p. 2). Among the most pervasive educational reforms to result from that paradigm and spread throughout SSA was learner-centered pedagogy; also known as child-centered learning (Tabulawa, 2003; Chisholm & Leyendecker, 2009; Sikoyo, 2010). Country profiles for SSA indicate the prevalence of “outmoded” teaching styles, including “Chalk and talk,” which tend to focus on “verbal recall of factual information and definitions” (Chisholm & Leyendecker, 2009, p. 688). The logic behind a top-down push for learner-centered approaches, therefore, was to shift the focus to inquiry-based learning and make lessons more practical. Such a shift would also lessen the significance of examinations in the school system, prioritizing continuous assessment instead (ibid.).

In his paper on international aid agencies and learner-centered pedagogies, Tabulawa (2003) links the emergence of this particular reform in SSA to a push by Western governments and development agencies at the end of the Cold War to link education to the democratization process. Tabulawa cites Harbor (1997) as he states, “Western governments and aid agencies not only seem, in principle at least, to favour democratisation of African political systems, they also see education playing an important part in the process” (p. 22). The reason for this connection, argues Tabulawa, is that learner-centeredness is often viewed interchangeably with ‘participatory’, ‘democratic’, ‘inquiry-based’, and ‘discovery’ methods of teaching/learning (p. 9). Furthermore, Tabulawa subscribes to a world systems analysis of the role that the West plays in shaping global education agendas.

World systems (WS) analysis conceptualizes the world as dominated by a capitalist economic system with origins in the West. Unlike dependency theorists, WS theorists do not believe that those states at the periphery, who are dominated by the ‘core’ industrialized states, are doomed to a position of subordination forever (p. 11). Instead, WS theory argues that core states employ education, or more specifically schooling, as a “dominant Ideological State Apparatus,” Althusser (1984), to disseminate the ideologies that support their interests. “Educational aid, just like all foreign aid, ‘represents a transfer not only of resources and technologies, but of culture and values as well’” (Stokke, 1995, quoted in Tabulawa, 2003, p. 11). Thus, teaching methods like learner-centeredness transmit ways of thinking, or habitus (Bourdieu & Passeron, 1990), from core to periphery states, as well as values like autonomy, open-mindedness, and tolerance for alternative views. Each is transmitted as part of a body of traits deemed essential to building a pluralistic, liberal, democratic capitalist society. “It is for

this reason that I argue that by purporting to promote democracy, learner-centredness invariably promotes the reproduction of capitalism in periphery states” writes Tabulawa, even if learner-centeredness relates to capitalism in only an indirect and non-causal way (2003, p. 12). For Tabulawa, then, the merit of an educational strategy is secondary to the “hidden curriculum” (Giroux, 2001) that it transfers into periphery states.

Learner-centered pedagogies in Uganda

Author Leah Sikoyo (2007; 2010) has conducted research into the transfer and adaptation of learner-centered approaches within Uganda. While she does not examine its adoption under the same WS lens as Tabulawa, Sikoyo attempts to understand why this particular intervention has struggled to take hold in Uganda. In her dissertation, Sikoyo (2007) offers her interpretation as to why learner-centered pedagogy was adopted in Uganda. First, the 1989 Education Policy Review Commission (ERPC) argued that up to that point, Uganda’s previous curriculum was “largely irrelevant and unresponsive to the needs of local communities (Republic of Uganda, 1989; 1992)” (Sikoyo, 2007, p. 4). And second, the previous curriculum “was perceived as primarily focusing on preparing learners for secondary education and not for everyday living” (ibid.). To address these weaknesses and to ensure that the new curriculum was relevant to the needs of families and of the country, the Primary Education Reform Programme (PERP) was launched.

Sikoyo notes that the curriculum reform process was heavily influenced by the progressive pedagogy movement; with its calls for creativity, critical thinking and problem-solving skills (2007). Project designers at the national level wanted education to address themes of social relevance to Uganda, including environmental conservation and health and family life issues (including the HIV/AIDS epidemic). As a consequence, learner-centered pedagogy was identified as a fit for these priorities, in addition to being a fit with donor priorities. Learner-centered practices were viewed as “an effective antidote to teacher-centred didactic practices, associated with teacher dominance and passive learners, rote learning and the stifling of critical and creative thinking (O’Sullivan, 2004; Rowell, 1995)” (Sikoyo, 2010, p. 247). Among the learner-centered strategies to gain prominence in Uganda was the problem-solving approach, a model introduced into the new science curriculum. The primary features of the problem-solving approach include the active participation of students in a pedagogic process where teachers are viewed as facilitators while students take responsibility for their own learning; structuring lessons to involve activity-based instruction like group work and ‘learning by doing’; and connecting knowledge across the different topics and themes of the subjects, and even to other school subjects and everyday life (Sikoyo, 2010, pp. 250-1).

Sikoyo’s research draws from Basil Bernstein’s (2000) theory of pedagogic discourse in order to trace how knowledge about learner-centered pedagogies, once transferred to Ugandan teachers and schools, is produced, distributed, reproduced, and recontextualized (Sikoyo, 2007). She employs this conceptual framework in assessing how teachers respond to learner-centered strategies; how, if at all, they translate it or implement it to fit their circumstances. Sikoyo’s

findings suggest that contextual constraints—such as those posed by schools, the broader educational system, and society—had more of an impact on teachers’ implementation of new approaches than did their interpretations of the national curriculum. These contextual factors were found in large part to undermine adoption of learner-centered pedagogies, and as such Sikoyo was left with a bleak outlook on their potential benefit or relevance to the Ugandan context (2010).

How did teachers interpret the problem-solving approach? Sikoyo found that teachers primarily interpreted the approach as a pedagogy which required increased student participation. Teachers tended to associate learner participation with strategies like group work, role play, practical activities, and questions and answers (2010, p. 254). For this reason, Sikoyo felt confident that teachers generally understood the main pedagogic features of the problem-solving approach. Nevertheless, her research went slightly deeper and probed whether teachers valued this approach as an effective or beneficial strategy for science education. In response, teachers articulated that the approach benefited students by enhancing learners’ conceptual understandings, their retention of knowledge and their ability to apply new knowledge and skills to real life (*ibid.*). In brief, the majority of teachers endorsed the view that this approach, and in particular its emphasis on activity-based instruction, helped motivate students, helped students to better understand content, helped them experience phenomena through different senses, and helped them to develop their social skills (*ibid.*).

Despite their ability to comprehensively articulate the perceived benefits of learner-centered strategies, Sikoyo found that most teachers in fact failed to implement problem-solving approaches in the way they understood it and in the manner prescribed by the national curriculum (2010, pp. 255-256). In most cases, five contextual barriers were found to have impeded teachers. Among them: (1) time constraints, and the pressure put on teachers to complete mandated curricula using inflexible teaching practices; (2) medium of instruction, including large class sizes, restrictive lesson times, and low proficiency in English among learners; (3) school instructional cultures, and a lack of support for teachers in adopting pedagogic innovations, particularly among high performing schools; (4) inadequate instructional resources, and the lack of adequate equipment and materials at schools for conducting practical lessons; and (5) minimal learner involvement in pedagogic processes, and the persistence of teacher-centered tendencies including excessive policing of students, pervasive hierarchical forms of social order, and teachers’ tight control on pedagogic processes (Sikoyo, 2010).

In concluding, Sikoyo maintains that in order for learner-centered strategies to have any success in Uganda, it would require systemic shifts in how education is controlled at the level of curriculum administration, educational administration and governance, and schools and classrooms as well (2010, p. 260). Each of the barriers to implementation of learner-centered strategies tended to be outside of teachers’ control. As such, Sikoyo argues that “contextual factors at the school and education system levels posed more challenges to [teachers’] take-up of the pedagogic innovation than their interpretation of the curriculum” (p. 259). Interestingly, Sikoyo ends her paper calling for greater sensitivity to the contextual circumstances that

surround education in developing countries. She goes so far as to suggest that unexplored cultural factors—such as the “culturally differentiated” roles of teachers and learners, with adults respected as “keepers of knowledge” and the young expected to learn from their elders—may forever inhibit teachers’ abilities to effectively realize problem-solving learning approaches in the Ugandan context (ibid.). For these reasons, Sikoyo suggests that researchers in low-income nations like Uganda would be better suited focusing on strategies to help teachers “enhance pedagogies in large classrooms than adopting learner-centred approaches whose future in our context is bleak” (p. 260).

A new paradigm?

In assessing education in Uganda after the World Conference on Education for All, the problem with each effort to reform the education sector comes down to its approach. Putting aside the question of merit in the policies being advanced, an analysis of each transfer and adaptation approach reveals that, much like the previous eras in Uganda’s history, the period post-EFA has also been shaped by transnational isomorphisms: from the paradigm of primary education reform to the pervasiveness of learner-centered pedagogies. This is not to suggest that government, schools, teachers, or other education stakeholders did not exercise agency in how they recontextualized policies and reforms at local levels. However, it appears clear that the logic of education reform, as well as its priorities, are regularly shaped by external influences (particularly international donor agencies), which in turn circumscribe efforts to reform educational practice.

For example, where are the calls for exploring indigenous alternatives to education after nearly a century of Western dominated approaches to schooling? Why is the priority in SSA on primary education reform and not secondary, or tertiary? Tikly (2004) writes, “as has been argued elsewhere and is gradually being recognized by some of the multi-lateral development agencies themselves, the over-emphasis on primary education at the expense of other levels of education removes the indigenous capacity for research and innovation which is centrally important if countries are to link education to indigenously determined future development priorities (Crossley, 2002; Tikly, 2003b; Tikly, et al., 2003)” (p. 190). The decision to prioritize primary education over other potential interventions is neither inherently obvious nor inherently rational. Instead, this priority was advanced in SSA because it was the will of international donors, despite pushback from scholars who highlight the importance of higher education in achieving national development (Mamdani, 2007). In the end, just as the discourse of ‘development’ and ‘underdevelopment’ forever reshaped the global imagination about what it means for a nation to progress, so has Western intervention in educational policy-making in SSA stifled the collective imagination over the possibilities for alternatives to education for development.

At the end of their book on educational reforms in Sub-Saharan Africa, Moulton & Mundy (2002b) offer important suggestions for how to overhaul the existing top-down paradigm dominating education reform in SSA. Far from rejecting the influence or participation of

Western donors and outsiders in this process, the authors sketch out a new paradigm which they believe resolves much of the disfunction of current reform models. For one, the authors suggest that implementation strategies move away from “attempts to establish a system that is fundamentally new in all aspects and at all levels simultaneously,” or “structurally top-down” (p. 210). Instead, they would like to see strategies that adopt an “incremental bottom-up” approach:

Such strategies would allow for more diversified attempts to reach more limited objectives. They would be less centralized, relying less on design at the outset, and be more organic. They would allow more room for politics and negotiation after the initial framework has been approved. Instead of designing an entire improved system, such an approach might experiment with more organic processes for learning how to grow an improved education system. They might foster more decentralized, participatory, learning-governed policies and programs. Although such an approach might seem less “rational,” from the donor perspective, it would provide more space for African creativity and innovation and for the development of relationships between those with different kinds of expertise—local and grounded, as well as global and idealized. (p. 211)

What stands out about their proposal to find compromise between “a fully planned reform and the uncoordinated donor-driven project” is its emphasis on flexibility and experimentation (p. 211). Rather than assume that donors or even the government can predict all the evolving needs of an intervention over the course of implementation, Moulton & Mundy have emphasized the iterative nature of their approach to reform.

The authors further argue that such an approach, sponsored by a long-term agreement between the government and funding agencies, has the potential to create an entirely new development paradigm.

Our studies suggest that policies and programs that are driven by the will and preferences of schools and communities, regional and district officials, not just central planners, are more likely to take hold. We wondered why donors seemed so fixed on finding a single recipe for educational problems in Sub-Saharan Africa: as we know from educational experiences in the United States, competition among policies, plans, and programs often produces innovations likely to endure. In this context training Ministries of Education so that they have the capacity to manage innovation and change is crucial.

Because they bring the resources, funding agencies, in fact, are in leadership positions. To deny this is to distort the reality of the implementation process. The challenge for funding agencies is to recognize the right time to lead and the right time to relinquish leadership and to develop strategies that support, rather than dominate or quash, local improvements. This is an inherently difficult

task in contexts of macro political instability, insecurity, and lack of trust. The recent push for ever greater accountability and performance in the governments of Western democracies complicates the problem further. Nonetheless it is critical that donors adopt a more iterative and internationally coordinated approach to reform implementation. (p. 211)

In their vision for a new reform paradigm, Moulton & Mundy offer donors a framework for balancing state level planning with local level flexibility. Although unlikely to ever be realized, the authors' vision is inductively constructed from analysis of donor-led reform movements across five separate states in SSA. It acknowledges and even diagnoses the problematic reasons why donor led transfer (particularly imposed/coercive transfer) is ineffective; such as in the case of primary education reform and in the introduction of learner-centered pedagogies in Uganda.

One important factor which this new paradigm may overlook: what happens when an approach to education is so ingrained within existing structures and existing practice that even providing space for flexibility and experimentation won't cause anything new to happen? In Sikoyo's dissertation analysis, for example, teachers in low-income schools—despite possessing more freedom and flexibility in adopting new pedagogies than teachers in better performing schools—were found to be just as unlikely to adopt new approaches (2007). Why, then, should we expect anything different from Ministries of Education or complex educational systems? Alongside a flexible reform strategy must also be the introduction of and experimentation with new ideas, imported or transferred, and/or efforts to reexamine rich histories of indigenous ideas and practices that once flourished pre-colonization. Whether it is one approach, the other, or both, even these efforts will likely require the deskilling of stakeholders and “re-skilling them with epistemological and philosophical beliefs congruent with the new approaches (Tabulawa, 2003)” (Sikoyo, 2010, p. 259).

In Section II of this dissertation, two case studies explore in more detail what it looks like for organizations to flexibly transfer and recontextualize educational ideas and programs. After which, a deeper discussion of the possibilities of a new paradigm is explored in the penultimate discussion chapter.

Educational isomorphisms across Ugandan history: final thoughts

The most important area of domination was the mental universe of the colonized, the control, through culture, of how people perceived themselves and their relationship to the world. Economic and political control can never be complete or effective without mental control. To control a people's culture is to control their tools of self-definition in relationship to others.

(Wa Thiong'o, 1986, p. 16)

This quote, from prominent Kenyan author and Makerere graduate Ngugi Wa Thiong'o, clearly and concisely sets the stakes for contemporary critiques of colonialism, and for critiques

of the preponderance of transnational isomorphisms which have shaped Uganda's educational landscape since independence. In this chapter I have attempted to trace the history of educational transfer and adaptation in Uganda by examining three illustrative stages in the nation's development. In the first section, I explored how colonial authorities and missionary educators dictated the parameters of acceptable and relevant education, rarely adhering to the persistent demands of their Ugandan subjects. In the second section, I characterized the radical proposals for educational reformation during the early-independence period as a missed opportunity, given that Uganda, among other emerging states in the region, chose to expand rather than reinvent its inherited educational system. Finally, in the last section, I describe how "development" discourses emerged as the latest isomorphic influence on the educational landscape of Uganda.

Across each of these eras, we easily observe the constancy of Western influence on the education sector—with colonialism's legacy far from forgotten—and its consequent "domination" of the mental universe, or imagination, of the colonized. Most notably, in the first section, referenced Hanson's (2010) observation that the "generations that grew up under British domination accepted the colonizer's assertion that African societies had been primitive and Europe was the source of all progress" (p. 162). In this way, with each new generation raised under the influence of assumptions about Western superiority, more and more of the country's rich indigenous experiences, knowledge, and practices were lost to time. Hanson's article also challenges us to ask, what would education look like today if indigenous educational priorities and alternatives had not been suppressed? "How does our perception of African education in the present change, if we recognize African initiative in teaching literacy, African science, and the indigenous commitment to girls' education that distinguished Africans speaking to the De La Warr Commission in 1937 from their less enlightened British interlocutors" (2010, p. 170)?

And while Ugandans have never actually been stripped of their autonomy at any stage in the history recounted here, ideas about schooling and education have surely narrowed. At every stage since the first introduction of British and American educational models, how schooling is conceptualized has been dominated by external ideas. Steiner-Khamisi & Stolpe (2006), although skeptical of the belief in a harmonization or convergence of global education policy, suggest that educational systems may be changing.

A central question in globalization studies is whether educational systems are abandoning their distinct cultural conceptions of 'good education' or 'effective schools,' and are gradually converging toward an international model of education. [...] Since the trajectory of that trade tends to be unidirectional—transporting educational reforms from high-income income to low-income countries, and rarely the other way around—educational systems in different parts of the world are increasingly becoming similar. (p. 2)

It is for this reason that Wa Thiongo's quote is so impactful. It is a reminder of the urgency to discover alternative forms of knowledge and alternatives perspectives on education

outside of the Western episteme. For even when Africans have developed oppositional discourses, many have still remained couched within a Western discursive framework, “most usually either liberalism or Marxism” (Tikly, 2004, p. 188).

What the remainder of this dissertation seeks to explore is how alternative approaches to transfer and recontextualization can be promoted and what they look like. After outlining the efforts of two Ugandan NGOs, the Discussion chapter brings together the lessons from those efforts with the lessons from this historical analysis. In it, I propose possibilities to the field of CIE for the responsible transfer and adaption of educational programs and ideas within an era of transnational isomorphisms.

PART II: PROSPECTS FOR RESPONSIBLE EDUCATIONAL RECONTEXTUALIZATION

In Part I of this dissertation I introduced the theme of recontextualization and its relevance to the study of education in the age of globalization. I made the case that examining educational transfer and adaptation is particularly important within low-income countries in SSA, like Uganda, which are characterized by long legacies of foreign educational transfer and imposition (Spring, 2006). In Part II of this study—consisting of four chapters and a conclusion—I analyze empirical data collected between 2014 and 2017 to understand (1) how educational policies and practices are transferred and adapted for new contexts; (2) what are some of the important contextual considerations that must be addressed during recontextualization; and (3) how transferred educational efforts can or should resist homogenization in order to preserve and promote diverse educational practices based on distinct, context-specific world-views and sociocultural perspectives. Before exploring the first case study, however, I briefly address three important questions in this introduction to Part II:

- 1) Why case studies?
- 2) Why study NGOs in Uganda?
- 3) What does recontextualization look like? (i.e. what types of activity and changes am I looking for)?

Why case studies?

In her introduction to the volume *World Year Book of Education 2012: Education Borrowing and Lending in Education*, Steiner-Khamsi (2012) contends that research priorities in comparative education specific to borrowing and lending have changed after three generations of scholarship. The biggest shift, she argues, is from a bilateral frame of comparative reference—where educational policies are viewed as originating from a particular country and from a specific set of circumstances—to an international frame of reference—one in which well-traveled educational policies become “deterritorialized” and take on the new, vague label of “international standards” (ibid, pp. 9, 10). “It is noticeable that policy makers increasingly refer to ‘international standards’, rather than to concrete lessons learned from a particular educational system, when they make their case for policy transfer” (p. 9). And she believes this phenomenon has led to the realization of compelling new strands of research. Of particular interest to this dissertation is the use of case studies as a means to explore agency in policy transfer and to explore policy harmonization and coercive transfer (p. 8).

As noted in my first chapter, the field of comparative education was long dominated by quantitative studies conducting macro-level analyses of nation-states (Bartlett & Vavrus, 2009). Among the reasons that qualitative and sociocultural research methods grew in prominence over the past decades, however, is their emphasis on agency:

For many of us, it is thorough analysis of the local context that matters most in understanding the agency, rationale, and impact, of policy transfer. Rather than viewing policy makers as helpless recipients of global standards, reforms, and trends, this group of authors acknowledges (active) agency as reflected, among other examples, in selective borrowing and local adaptation. (Steiner-Khamsi, 2012, pp. 10-11)

Despite acknowledging the global discourse changes and pressures felt by many low-income nations (Steiner-Khamsi & Stolpe, 2006)—a result of both growing harmonization in thinking about education as well as the growing influence of international donors and organizations (Chabbot, 2003)—comparative education researchers have turned to case study analysis to assist in capturing the complex motivations and multitude of actors involved in educational recontextualization (Steiner-Khamsi & Waldow, 2012).

In particular, case studies are valuable to comparative education because of their ability to “provide access to the inner workings of a case, a system, a country, or an institution” (ibid, p. 10). A case itself is considered a “bounded system with its own ‘causal web’ (Tilly, 1997) that connects the large number of variables in the case system” (p. 12). Steiner-Khamsi (2012) singles out the concept of “policyscape,” first presented by Stephen Carney (2009), as a particularly powerful example of research that examines policy considerations across different “levels, sites, and actors within a country/case,” yet also across multiple countries/cases. The term policyscape was used to denote how the transnational flow of policies “permeates every level, transforms every aspect, and affects each actor, in an educational system” (Steiner-Khamsi, 2012, p. 15). It is based on this example that Steiner-Khamsi believes other case studies can make powerful contributions to the field of comparative education:

Precisely because globalisation is ubiquitous, every case enables us to understand the transnational character of educational policies and practices. Any site, level of analysis, or actor within a given case(s), qualifies for comparison. As a corollary, Carney compares three different countries, three different levels (higher education, general education, non-university-based teacher education), and two different areas of reform (governance and management systems, curriculum reform). By comparing different cases, levels, and areas, he stretches the conventional rules of cross-national comparison. The two key questions in contextual comparison— case selection (what do the selected cases stand for?), and comparability (can they be compared?)— are addressed convincingly. (2012, p. 15)

In the chapters that follow, two case studies of educational adaptation were selected in Uganda because of the unique ways that they illustrate recontextualization (“what do the selected cases stand for?”) in a low-income, post-colonial context. Unlike Carney (2009), my cases do not

offer the opportunity to compare across national contexts. Instead, the comparisons made in Part II of my dissertation are based on the distinct ways in which each organization, as “a bounded system,” has engaged in the recontextualization of educational ideas and programs which originate outside of Uganda. Each case study examines similar actors at different levels (organizational founders, staff, and students) as well as similar program characteristics or motivations (program materials, why the programs were created, and why they are believed to be relevant for Uganda). Furthermore, the chapter following the two case studies summarizes findings from supplemental interviews with three additional organizations that are implementing transferred educational programs, as well as with an education researcher and national curriculum designers, in an effort to compare my case study observations to the wider Ugandan context. All of these findings are then analyzed in light of existing literature in comparative education to provide important considerations for researchers and practitioners of educational transfer and adaptation.

Why study NGOs in Uganda?

As the previous chapters illustrated, Uganda is an important site for research into the recontextualization of transferred educational policies and ideas because of its distinctive educational history. As a low-income and post-colonial society in SSA, Uganda’s educational system has long been shaped by powerful external influences: from colonization, to international development, and now globalization.¹³ During their respective decades of prominence, each of these transnational projects left structural and ideological impressions on the Ugandan educational landscape. From the creation of public schools—organized by age groups from the primary through tertiary levels—to the curricula and subject areas used in that national schooling system, and later to the reforms and restructuring of schools around policies like LCP and EFA; foreign agencies, donors and organizations have long shaped national education discourse and priorities.

And now, for at least the past few decades, international and local NGOs are multiplying in number as they “fill in the social service vacuum left by the state” (Mundy & Murphy 2001, p. 88), particularly in low-income nations in SSA (Cannon, 2000; Robertson, et. al. 2007; Semboja & Therkildsen, 1995). Among the areas in which NGOs have taken root since globalization is the education sector. “This development has been seen as a response to the failure of states (Oyugi, 2004); the failure of New Social Movements (Hirsch, 2003); the increasing reliance on NGOs by UN agencies (Martens, 2001); and global trends that create new spaces for civil action (Edwards, et. al., 1999)” conclude Robertson et. al. (2007, p. 10). In Uganda, Mukasa (2003) carried out a small case study examining the challenges inherent to “Northern” NGOs (NNGOs) operating in low-income nations with foreign leadership.

Among her findings was that the organization in question, a “Southern” NGO (SNGO) sponsored by a NNGO, provided poor capacity building to its local staff due to an overreliance

¹³ For more on development, globalization, and SSA see Robertson et. al. 2007

on foreign staff. She also observed problematic power relations between foreign and local staff, frequent turnover of foreign staff, and consistent undervaluing of local staff knowledge.

Some local staff expressed concern that their long-term experience was not always appreciated and respected with these frequent changeovers. Often, it was local staff who ‘showed expatriate staff the ropes’. Yet in the time since the Rakai programme began, [‘Campaign Against Poverty’] had not been able to bring local staff to senior positions. As a result there was concern raised as to the level of ‘ownership’ of the programme by local staff. Some felt they were not adequately included in the decision-making process despite the length of their service, and felt they were there largely to implement decisions. Local staff found it difficult sometimes to understand their roles and what was expected of them every time new expatriates arrived. (p. 20)

The undervaluing of local staff knowledge was also found to impact the organization’s cultural sensitivity during project implementation. One positive element observed, by contrast, was the fact that local communities were able to learn from the example of foreign staff. In particular, the fact that foreign women were hired in roles that were traditionally reserved for men led many in the local community to change their opinions about the capacity of women.

Similar to Mukasa, I also chose to conduct case studies of educational NGOs in Uganda; albeit the organizations I selected would both be characterized as SNGOs or local NGOs rather than NNGOs or international NGOs. In part, the decision to study Educate! and Kimanya was motivated by curiosity about the role of agency in educational recontextualization, and what exactly that process looked like in practice. Are there valuable lessons to be learned from education practitioners, particularly those who deal in the intersection between global and local ideas within development and education? What considerations must organizations make when adapting educational ideas, practices, and programs in order to ensure that they are contextually relevant?

While contributors to the Anderson-Levitt (2003) and Steiner-Khamsi & Waldow (2012) volumes contend that educational policy and programs are always indigenized or translated by those who carry them out, world systems theorists like Chabbot (2003) argue instead that isomorphism continues to endure as education institutions and policies continually “become and stay the same” within development (p. 13). Barnett & Finnemore (1999) elaborate on this latter observation, arguing that among the “pathologies” of international organizations is the way in which they “flatten diversity because they are supposed to generate universal rules and categories that are, by design, inattentive to contextual and particularistic concerns” (p. 721). The purpose of studying educational NGOs in Uganda, then, is to better understand this tension between agency/indigenization and isomorphism. Is it possible for educational programs to demonstrate innovative approaches to education, while also remaining largely within framework of dominant global educational norms? And if so, does the struggle to contend with

isomorphism, with replicability, have an impact on the possibilities for diversity and variation in educational practices? Finally, in line with Mukasa's (2003) work, how can NGOs implementing transferred educational programs and models, led by a mix of foreign and local staff, meaningfully ensure the contextual relevancy of their projects?

In much of the literature on transfer and adaptation in comparative education, researchers tend to look at reforms and policies borrowed and implemented by governments and their ministries of education (Steiner-Khamsi, 2004). In such cases the lines between what is local and what is foreign or external can be drawn fairly clearly: local actors (governments) "borrow" from external sources and then other local actors (MoES, its departments, and school stakeholders) recontextualize those models in practice. In such examples the local actors appear to be in the driver seat. It is fairly straightforward to imagine how local agency leads to indigenization of global or foreign practices.

But there are also examples of educational transfer led by nonlocal actors, such as in the case of NGOs. Of the two organizations I have chosen, neither Educate! nor Kimanya falls into the category of foreign led per se. Both organizations had foreign founders, but both also began as local NGOs with a specific interest in the Ugandan context. In studying the processes of educational recontextualization within these case studies, then, additional questions must be taken into consideration. What happens when the model itself is created or chosen by external actors and introduced into this new context? Where does agency come into play then? Does the agency of foreign actors impede on the agency of local actors? When educational programs are transferred from outside the country, one also has to ask whether such programs perpetuate the dominant global discourse, or whether they contribute towards something distinct; something contextually relevant and locally empowering. NGOs face a unique challenge in the fact that they have to account for local voices and contextual relevancy despite also advancing global agendas with foreign funding. According to Chabbot (2003), "outsiders, including development professionals, typically find it difficult to discriminate between messages coming from the poor vs. the rich, the downtrodden vs. their oppressors at the grassroots level" (p. 166).

In looking at the case of educational NGOs in Uganda, then, it will be necessary to consider literature from the field of international development in order to better appreciate the politics of "participation" and local representation in transferred or foreign led projects.

What does recontextualization look like?

In much of her literature about educational borrowing and lending, Gita Steiner-Khamsi emphasizes that recontextualization is "key for understanding the educational transfer process" (Steiner-Khamsi & Quist 2000, p 275). Steiner-Khamsi describes case study research of recontextualization as one of three primary approaches aimed at distilling the inner workings of networks and at understanding the "causal web of a bounded system" (2012, p. 13). In a survey of literature on borrowing and lending, she finds that studies emphasizing the "translation" that occurs when "a reform from elsewhere is selectively borrowed, recontextualised, and then implemented, in a new system" make up the bulk of policy borrowing and lending research (ibid,

p. 13). Yet most of these studies attempt to analyze the entire educational system of a single country. Having already examined the broader policy borrowing and lending issues facing Uganda's educational system in the previous section, over the new few chapters I look at two cases of educational recontextualization by NGOs in Uganda to demonstrate why 'indigenization' in these circumstances is not a foregone conclusion, but requires conscious effort and planning.

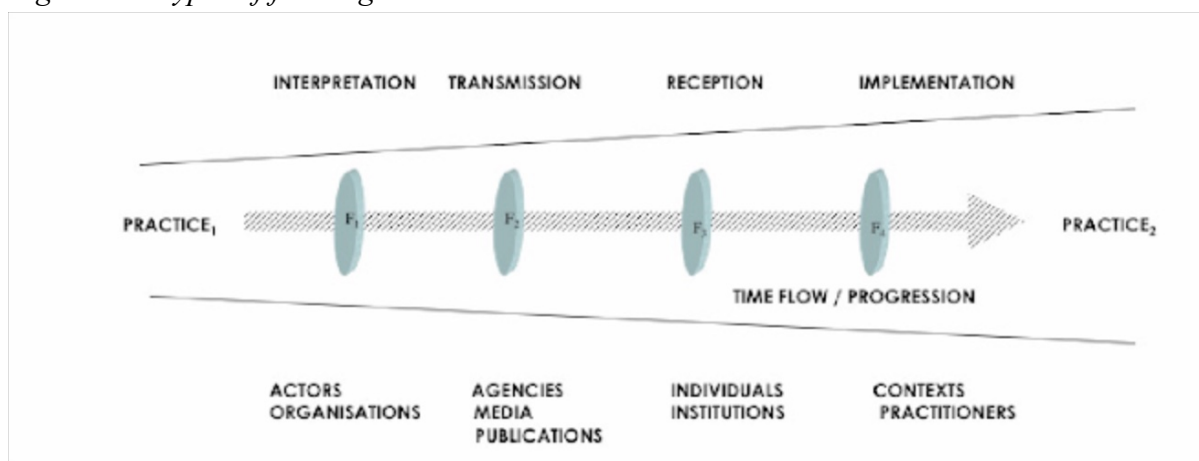
Before looking at the first case study, it is helpful to explore how the term "recontextualization" is used in CIE literature, as well as how its intended meaning within this dissertation. Scholars of educational policy transfer who prioritize recontextualization are primarily concerned with the "local policy context as the analytical unit for examining policy transfer," and consequently place "greater weight on the agency, process, impact, and timing, of policy borrowing" (Steiner-Khamsi and Waldow, 2012, p. 5). According to Rebecca Tarlau (2017), this emphasis sets them apart from others in their field that are more interested in the technocratic reasons for educational policy transfer (the transfer of best practices), the neo-institutionalist reasons (transfer as symptomatic of global isomorphism), and Marxist-interpretations for transfer (transfer as a symptom of a capitalist global economy). Despite their differences, however, I argue later argue that these paradigms—or lenses through which transfer is analyzed—are not mutually exclusive. In the discussion chapter following my two case studies, I explore why a close examination of recontextualization efforts is actually extremely important for understanding the interplay of the 'global' and 'local' within neo-institutionalist interpretations of educational transfer and adaption.

Returning to recontextualization, Tarlau (2017) identifies some of the most prominent conceptual tools utilized by CIE scholars as "externalization" (Schriewer & Martinez, 2004), "cross-national policy attraction" (Phillips, 2004), "indigenization" (Spreen 2004), "policyscapes" (Carney, 2012), and "political production" (Rappleeye, 2012). Recontextualization as "indigenization" is in fact an important theme among anthropologists and social scientists of comparative education. In the introduction to *Local Meanings, Global Schooling* (2003), Anderson-Levitt argues that even when educators accept imported policies and models, those models are inevitably transformed to such an extent that they become something entirely new. Thus, in the eyes of anthropologists, "Global imports get 'creolized' (Hannerz, 1987; Hannerz, 1992) or 'indigenized' (Robbins, 2001)" (p. 16). Yet what does this look like in practice?

Perhaps the most illustrative analysis of how transferred educational policies and ideas are translated to new environments can be found in Phillips and Ochs's (2004) theory of the "four stages of policy borrowing." The four stages include "cross-national attraction," "decision-making," "implementation," and "internalisation/indigenisation" (p. 9). While the paradigm of educational transfer explored by the authors does not directly overlap with this study—they deal primarily with state-led technocratic or "best practice" borrowing/lending scenarios—the fourth stage of Phillips and Ochs's still proves quite helpful in understanding recontextualization. "During the internalisation stage of policy borrowing," write Phillips and Ochs, "borrowed"

policy is adopted to the local context” (p. 15). From here, the authors explain that during the transfer process, a number of actors, organizations, institutions, and networks become involved with the policy or practice, and they inevitably change/modify/adapt it. Each of these actors and modifications can be conceived as a kind of filter. Just as “a man seeing a fish pond looks at it as an angler, as a zoologist, as an aquarist, as an aesthete, or as someone thinking of his supper,” so too do various educational actors see and “filter” a transferred practice upon its arrival to a new context (p. 16). The authors in fact identify four prominent types of filtering, “interpretation,” “transmission,” “reception,” and “implementation” (see Figure 3.2 below). Through each of these filters, a practice is modified in line with the way in which an individual or organization understands an educational phenomenon (perhaps the original intention is misunderstood by those who receive it); the expert knowledge which is brought to bear on it; the political and economic context into which it is introduced; any hidden agendas which it may conceal; the adequacy of the administrative arrangements necessary for its successful implementation; as well as the degrees of enthusiasm or resistance with which the practice is received (to name but a few examples).

Figure II.1 Types of filtering



(Phillips & Ochs, 2004, p. 16)

Again, the most helpful of these four examples for understanding recontextualization is the last one, in this case the “implementation” filter. In describing how this filter works the authors turn to Tanaka’s (2003) work on the “processes of transformation of educational concepts and practices” (Tanaka, cited in Phillips & Ochs, 2004, p. 17). Tanaka begins by making a distinction between “transmitters” of educational policy, who engage in “translational indigenization,” and “receivers,” who he believes engage in “implementational indigenisation” (cited in Phillips & Ochs, 2004, p. 18). In other words, transmitters are involved in moving educational concepts and practices from one culture to another, while receivers put those concepts into operation. Tanaka then describes two contrasting styles of importing used by transmitters: authoritarian importing and liberal importing. A transmitter that imports an

educational policy authoritatively attempts to “arrest receivers’ attempts to undertake implementational indigenisation” of new concepts or practices (ibid.). Prominent exemplars of this approach include state agencies, and the descriptions in the previous chapter of educational policy transmission during the colonial period clearly fit under the label of authoritative importing. Liberal importing, by contrast, involves “translational indigenisation” of educational concepts and practices where receivers are not barred from spearheading that indigenization process, either by choice or due to the transmitters lack of power to stop it (ibid.). Finally, Phillips and Ochs (2004) add to this conceptualization the additional factor of time. “Perceptions will inevitably alter over time, with changing social, political, and economic circumstances” (p. 18). In the previous Figure (3.2), the authors have also attempted to capture how the element of time increases in significance as a process passes through various filters of interpretation.

Having seen how recontextualization and indigenization are understood within the literature of CIE, I will end this section with a few words about how recontextualization is handled in the remainder of this dissertation. In the simplest terms possible, educational recontextualization can be viewed as a stand in for the transfer and adaptation process. It assumes that when transfer happens, there will always be some kind of adaptation process given the inherent, albeit at times restricted, autonomy of local implementors. Also worth noting is that, in this dissertation, I am particularly interested in the complexity of recontextualization efforts that are made by local actors working with two specific NGOs in Uganda. Some individuals working for the NGOs wear “transmitter” hats (e.g. non-Ugandan program designers), while others wear “receiver” hats (e.g. Ugandan staff members). And in the case of those in positions of authority within the organizations, sometimes they wear both (e.g. Ugandan trainers and educators). How then, have these actors engaged in the recontextualization of educational programs and ideas? What factors contribute, for example, in determining whether a program or idea is contextually relevant in the first place? And do the transmitters and receivers see a difference between superficial indigenization and more meaningful contextualization? Or is it possible that indigenization amounts to little more than replacing foreign examples with local ones (Steiner-Khamsi, 2002)?

In answering these questions, I have organized the following case studies along similar lines of inquiry in order to ease their comparison. Drawing inspiration from Carney’s (2012) concept of “policyscape”—“denoting how the transnational flow of hyperliberal policies permeates every level, transforms every aspect, and affects each actor, in an educational system” (Steiner-Khamsi, 2012, p. 15)—I carry out analyses across the following areas within both organizations: (1) the reasons given for the creation of the respective programs; (2) the justification provided for the programs’ relevance to Uganda; (3) the program designs and materials; and (4) the ways in which the programs adapt themselves to the Ugandan context. Furthermore, this comparison is achieved by focusing on interview data and observation data from similar populations: program founders, program administrators, field coordinators, field implementers, and some participants; and the activities observed include meetings, trainings,

study sessions. In each of these spaces, with each of these populations, I was looking to understand what considerations were given to local voices, local relevancy, and to variation.

Chapter 3: The Educate! Experience and negotiated recontextualization

Introduction to Educate!

Educate! is a Ugandan-based organization¹⁴ dedicated to the development of young leaders and entrepreneurs in Africa. The organization implements a multifaceted, skills-based educational model that aims to transform secondary education through the practical training of teachers and empowerment of youth mentors. Educate!’s vision is that youth, guided by such teachers and peer mentors, can be motivated and trained to “start businesses, get jobs and drive development in their communities.”¹⁵ The Educate! model—which I refer to in this dissertation as the “leadership and entrepreneurship program” or the “Educate! Experience”—prioritizes the development of “hard skills” and “soft skills” in secondary school students.

By creating a new educational model that reforms what schools teach and how they teach it, Educate! is empowering teachers and youth mentors to equip students with the skills to drive measurable change. Educate!’s experiential model teaches the “hard skills” of business including planning, budgeting, savings and market research. Educate! complements these skills with the “soft skills” demanded most by both employers and students themselves, such as teamwork, public speaking, networking, critical thinking, self-confidence and creativity.¹⁶

At the end of 2017, Educate!’s program was operating in more than 600 schools in Uganda and Rwanda, reaching more than 25,000 secondary students—which the organization refers to as “scholars”.

The story of why Educate! was founded is well known among people involved with the organization. In my interviews with Educate! staff and scholars, most could recount some version of the events which led the organization’s founder, Eric Glustrom, to create Educate!. One reason the story is so widely remembered could be due to the fact that an abbreviated version of events is included in scholars’ Term One workbooks. In Eric’s words,

I will never forget the moment in June of 2002 when I was sitting in the mud hut of a refugee from the Congo. Benson had only a wooden stool and a few books and pens. He was only 16 years old but lived alone after being separated from his family while escaping to Uganda. His refugee camp was so terrible with violence, disease, and malnutrition. They were so poor and desperate that education was the last thing on my mind. But when I asked Benson what I could do to help, he said, “If you want to help me and my community, then help me to go to school.

¹⁴ Educate! was operating only in Uganda at the time I began my research. More recently they have expanded the scope of their work and are now have offices in Rwanda and Kenya.

¹⁵ <http://www.experienceeducate.org/purposeandvision/>

¹⁶ *ibid.*

Because with an education I can solve the problems here and in my homeland.” From those inspirational words, the organization Educate! was born. Our mission is to develop the next generation of leaders and entrepreneurs in Africa. (Educate!, 2015a, p. 14).

Angelica Towne, considered a third founding member of Educate!, elaborates on this story. Eric “*came to Uganda when he was seventeen and started kind of sponsoring refugees from Congo in Kyangwali [refugee camp].*” Shortly after, while a student at Amherst College, Eric recruited his roommate, Boris Bulayev, to his early efforts. “[T]he second founder came on board, still in their dorm room, and started seeing the effects of the education of students.” Inspired by Benson’s request, Educate! centered its efforts on providing scholarships for refugees in the camp to attend nearby schools. It was not long, however, before Eric and Boris observed the limitations of this approach. They came to the insight, Angelica explains,

... that actually the education [scholarship recipients] were getting was low quality. It wasn’t turning them into leaders and entrepreneurs. And in fact, one student even grew very sick, and passed away from a very preventable disease. And, [the scholarship recipients] didn’t know anything about this disease, they didn’t know the way to avoid it. And it kind of sparked within [Eric and Boris] the reason why education is powerful is also because it can help people change their lives immediately. But was this kind of education doing that? And so, that’s when they came up with the idea ‘ok we need some sort of supportive program.’ We need the program to focus on leadership and entrepreneurship. Leadership because it would solve these problems, such as people dying of diseases that can be avoided. And it would help them with their livelihoods and get out of poverty. And of course, they were up against so much in the refugee settlement. So those were kind of the two skills and the two skill sets that [Educate!] would hone in on.

The decision to shift from awarding scholarships to youth in the Kywangali refugee camp to providing leadership and entrepreneurship training for youth across Uganda was a pivotal turning point in the history of Educate!. What would the process of developing this new program look like? What would its goals be? What ideas and beliefs (both explicit and implicit) would it be built upon? Who would be involved in its creation? The following chapter explores these questions by reviewing how Educate! transferred and recontextualized educational ideas and approaches to create a program that now operates in 875 schools across Uganda and Rwanda.

Negotiated recontextualization

In the introduction, I raised three questions that each case study will address: (1) how are educational practices transferred and adapted for new contexts? (2) what contextual considerations must remain at the heart of these recontextualization efforts? And, (3)

how can recontextualized educational efforts preserve or reestablish educational practices based on diverse, context-specific worldviews and sociocultural perspectives? In attempting to answer these questions, I conducted interviews with one of Educate!’s founders, many of its staff,¹⁷ and a small number of students. Questionnaires were also disseminated to a select number of students.¹⁸ The questions in each of these instruments (see Appendix A) were reflective of a specific set of interrelated themes including recontextualization, insider and outsider knowledge, adaptation, variation, flexibility, contextual relevancy, participation, and agency. Together they served as deductive codes that guided my inquiry, and consequently they are themes which appear throughout my findings below.

As the following sections demonstrate, the Educate! leadership and entrepreneurship model was built from transferred and adapted educational ideas aimed at solving challenges specific to the Ugandan context. Its design and early implementation were led by a group of young Americans, yet the program’s initial pilot was adapted and refined only after the organization hired its first cohort of Ugandan staff. Since then, the program has experienced continuous modifications based on feedback from Ugandan staff and beneficiaries. And more recently, the same program has undergone modifications for implementation in new countries in the region such as Rwanda and Kenya. As a result of this history of balancing contextually specific considerations with foreign educational influences, Educate!’s leadership and entrepreneurship program exemplifies a kind of *negotiated* recontextualiation.

In the opening chapter of *Educational Policy Borrowing: historical perspectives*, David Phillips and Kimberly Ochs (2004) present a “continuum of educational transfer” based on their research in the field of CIE (p. 9). In Figure 3.1, below, Phillips and Ochs have mapped a continuum of educational policy borrowing and lending from voluntary (“introduced through influence”) to coercive (“imposed”), with “negotiated under constraint” as the midway point. Below the continuum, the authors provide examples of each category of educational transfer. In the case of imposed policy transfer, Phillips and Ochs state that it emerges from “totalitarian or authoritarian rule” such as during the extensive period of British colonialism (p. 8). At the other end of the spectrum, in the case of foreign practices that are “introduced through influence,” the authors offer the example of foreign teachers working in the classroom outside of the country where they were trained. In such scenarios, they hypothesize, “it is almost inevitable that foreign pedagogy or classroom techniques will be introduced and adopted in the local context” (ibid.). And in the middle of the spectrum, “negotiated under constraint” is viewed as a balance between imposed and influenced transfer, described by the authors as the type of negotiation that often accompanies bilateral or multilateral agreements between governments and donors.

¹⁷ All staff members of Educate! were interviewed while they still worked at the organization, unless otherwise indicated.

¹⁸ See Chapter 1 section entitled “Data collection” for details

Figure 3.1 Continuum of Educational Borrowing and Lending



Building upon this use of “negotiation” as a back and forth between local implementers and foreign donors—or more specifically between the “transmitters” who engage in translational indigenization and the “receivers” who engage in implementational indigenization as Tanaka (2003) has advanced—I use the term “negotiated recontextualization” to refer to the way in which Educate! founders, staff, and to a lesser extent students have engaged in translating educational ideas with foreign origins to the Ugandan context. In the case of Educate!, which is largely funded through private donors, the organization itself wears multiple hats as insider and outsider, local and foreign, donor and implementer. As a consequence, the organization neither exercises totalitarian control over its programs emblematic of imposed educational transfer, nor does it represent a modest, almost inconsequential form of transfer in which a few outsiders introduce practices and ideas based on their prior training. Instead, Educate! has navigated its recontextualization process by taking conscious steps to introduce foreign concepts and priorities while taking time to adapt them and weigh their impact and relevance in light of consistent feedback from field implementing staff and program designers.

Recontextualization and participatory development

The creation of contextually relevant education would appear to be quite challenging in the age of globalization, particularly in the post-colonial context. The field of comparative education is filled with examples of transferred programs that ignore local realities and fall on the “context-independent” end of the contextual relevancy spectrum (see Chapter 1). How then do individuals originating outside of Uganda create something that is context-specific? Is it possible for outsiders to create something that is entirely context-specific, or is their effort—by consequence of its foreign influence—something new and distinct? In the case of Educate!, my findings suggest that their efforts are neither entirely context specific nor context independent. Instead, the approach that Educate! took to negotiated recontextualization finds its closest parallel in participatory development literature.

The concept of participation grew in importance within educational and development circles because of the perception that prevailing development practices did not afford sufficient opportunity for local agency and variation. As development critics have argued, the very idea of development is premised on the notion that there are places in the world which are “developed” and worthy of imitation, while there are other places that are underdeveloped and which require

foreign intervention in order to develop (Edelman, 1999; Escobar, 1995; Taylor, 2009). Development became a justification for foreign (read Western) aid, led by foreign (read Western) experts, to “un-underdevelop” the Third World (Escobar, 1995, p. 6; Rist, 1997). The binary of developed/underdeveloped, argues Tikly (2004), became the latest means of re-inscribing nations into the old North/South, colonizer/colonized divisions of the past. The result of this mentality was that local experience, knowledge, and agency were often ignored by development projects and development organizations.

The goal of participatory methods in development and education was viewed as a potential remedy to an otherwise untenable situation. Participation arose, in the best circumstances, as a means to increasing the involvement of local actors in planning, implementation and decision-making (Stiglitz, 2002; Rose, 2003). Within education for development, participation was also a means to “enhance local ownership of educational services” (Muwanga, 2000, p. 10). And while the limitations and challenges characteristic of participation efforts in development were explored above, organizations like Educate!—which involved the transfer of educational models from abroad by American founders—have no choice but to prioritize local representation and participation in the creation of their program and recontextualization of its transferred ideas and practices.

In the following sections I have illustrated this process of negotiated recontextualization as it appears throughout Educate!’s history: from its initial beginnings, through its program development, structural and thematic adjustments, and on to its most recent foray into transnational expansion.

Case study overview

This case study is divided into two main sections, within which I have summarized my findings on Educate!’s transfer and adaptation efforts. The first section explores the question: how have educational ideas and practices been transferred by Educate!/? In answering this question, I explore the origins of Educate!’s leadership and entrepreneurship program, present some of the ideas and assumptions it was built upon, as well as describe what its transfer process looked like. The section also provides an overview of the main features of Educate!’s program and its accompanying materials. The second findings section extends this conversation into an examination of the recontextualization and indigenization efforts of Educate! from its inception into the present. Among the unique aspects of Educate!’s recontextualization process touched upon in this chapter are local agency and local participation in the creation and evolution of the curriculum; organization wide representation on the Internal Advisory Board (IAB); “Build, Measure, Learn”—Educate!’s approach to centralized monitoring and evaluation; export of the Educate! model; mentorship; and an emphasis on practicality. The chapter ends with a discussion of a few areas of tension created by the organization’s approach to recontextualization, namely: balancing flexibility and standardization; finding compromise between local and foreign priorities; and consideration of the limits of entrepreneurship and as an educational theme.

My analysis draws upon Educate! documents and materials, field observations, as well as interviews with staff and students, and a small sample of staff-completed questionnaires. In fact, there is an intentional overrepresentation of staff as compared to students in the data collected. This was by design, however, as the issues which most directly address how Educate!’s program operates, how it has evolved, and how it has been adapted are best articulated by its implementors and designers (including planners, researchers, and founders). Furthermore, Educate! students are not the only beneficiaries of the program. Much of the organization’s field staff—including field educators, known as “mentors,” as well as other short-term youth staff—play dual roles in the program as both beneficiaries and implementors.

Finally, it should be noted that, as Educate!’s work is continuously evolving from year to year, my findings can only be considered reflective of the organization’s work and priorities between the period of May 2014 and through May 2017.

Conceptualizing the Educate! Experience¹⁹

Having made the decision to shift from scholarships to a training program for youth, Eric and Boris began exploring how to develop a program to fit their vision. Their first step was to return to Uganda to learn more about the educational landscape, and to determine the feasibility and desirability of their new ideas. Boris and Eric arrived separately in the summer of 2007 and each met with the beneficiaries of the organization’s original scholarship program like Benson in the Kyangwali Refugee Camp. After consulting with the youth at the camp, they went on to meet with secondary school teachers and head teachers in that area, with representatives of national and international organizations like BRAC and Rotary Club, as well as with officials from the MoES. The first idea to emerge from these interactions was the possibility of offering a leadership and entrepreneurship course for select secondary schools. Boris elaborates in a blog post during his 2007 visit to Uganda,

There are many organizations focusing on leadership and entrepreneurship [...] and I am hoping that working with them we can come up with a practical and useful leadership/entrepreneurship curriculum that could supplement what students currently learn. I have heard so many people say that finding a job here is difficult, and I think if one can find a way to empower people to start their own ventures when they cannot find employment elsewhere, it can have very powerful benefits [...]. Working directly with schools would also allow us to sponsor

¹⁹ The following summary of events leading up to the creation of Educate!’s leadership and entrepreneurship program draws from interviews with Angelica Towne, as well as from online journal entries (see <http://www.experienceeducate.org/all-blog/>) made by Eric Glostrum and Boris Bulayev. Although I never met Educate!’s original founders, as they were no longer living in Uganda at the time of my research, the real-time publication of journal entries which they left to posterity are an invaluable resource for understanding the early development of the organization.

additional students there in a more efficient and administratively easy manner.
(Bulayev online blog post, August 5, 2007)

The second idea to emerge was to create Educate! clubs at elite secondary schools which would focus on direct community service. Over the remainder of their visit, Boris and Eric's plans continued to evolve, yet they settled on a common core vision: "to help students develop into leaders and empower them to influence change here in Uganda" (Glostrum blog post, August 5, 2007). By September of 2007, Educate! felt that a new strategic direction had been set, which would involve the development of three new programs: a school development program; Educate! community service clubs; and a leadership institute involving seminars. The following excerpts are taken from a description of these areas written by Boris at that time:

1. School development

To address the rigidity of the UNEB²⁰ curriculum, Educate! hopes to work in close partnership with secondary schools to develop leadership and social entrepreneurship programs that will help students think independently, take initiative, and give back to their communities. [...]

2. Educate! community service clubs

The goal of this program is to change the culture of community service and make it a more lasting presence in the lives of secondary students in Uganda. We will encourage the clubs to develop sustainable projects that are more demanding of their time and energy than of their money. [...]

3. Leadership institute and seminars

To address the gap in leadership, Educate! will be offering leadership, social responsibility, and social entrepreneurship training[s]. (Buyalev, September 6, 2007)

Eric and Boris put these plans aside for a time after returning to the United States. Then in March 2008, Eric returned to Uganda, this time for a period of 6 months. On the eve of his trip, Eric reflected on the task ahead, and gave the first indication of the founders' attitudes about the role of change and flexibility in their program design process.

The reasoning behind the programs is sound—take high potential students with excellent ideas and help them make as large of a positive impact on society as possible. However, determining an effective model for accomplishing this, and then actually implementing the model is going to be, well, an extremely big

²⁰ Ugandan National Examinations Board

challenge. Our plans will surely change, our deadlines may not be met, and after six months the detailed, well thought out image we have developed since August 07 of our new programs will likely be completely different. (Glostrum blog post, March 10, 2008)

Over the next six months, Eric worked to develop the community service clubs and the leadership institute. He was eventually supported on the ground by an initial batch of American and British interns, many of whom were contacts that he had made at college or in his home town. Together the team developed a student selection process, developed relationships with local secondary schools and organizations, and even began drafting a social entrepreneurship curriculum to be introduced into the Ugandan secondary system.

It was through these efforts that Educate! began refining its early justification for the themes that its program would cover. Eric and Boris had originally focused on leadership and entrepreneurship “in order to accomplish [their] mission of educating and empowering the next generation of socially responsible leaders in Africa” (Glostrum blog post, April 9, 2008). During 2008, Educate!’s specific vision for entrepreneurship began taking shape. The founders decided that their program would emphasize “social entrepreneurship” rather than traditional models of entrepreneurship; a distinction that provides a glimpse into how Educate! viewed itself in relation to the larger development enterprise.

Traditional entrepreneurship focuses solely on profit, the bottom line. Much of the developed world has progressed wearing these “profit blinders.” And as a result, the Western world has created a model of development that is unfortunately unsustainable. From the impact on the global environment, to the energy crisis, to the need to exploit other societies to maintain our own level of consumption, the Western model of development is not one which can, nor should, be replicated on a worldwide scale. Social entrepreneurship, on the other hand, is the next evolution of entrepreneurship. Where traditional entrepreneurship has one bottom line, social entrepreneurship has two: profit and impact. Where traditional entrepreneurship leads naturally to the unsustainable exploitation of mankind and the environment, social entrepreneurship is conscious of societal and environmental impact and creates a path of development that leads to a sustainable means of existence.

As Uganda develops, why replicate the unsustainable model on which much of the developed world relies? The infrastructure and institutions of development here are in the process of being created. As Uganda fills in its blank slate of development, instead of replicating the Western model, why not find a new model based on sustainability? We believe social entrepreneurship is a necessary building block of such a model. (Glostrum blog post, April 9, 2008).

In these remarks Eric explains why social entrepreneurship is best suited to the context of Uganda, and how this conceptualization of entrepreneurship challenges the dominant, Western discourse on development. There are a few implicit assumptions made in these statements, some of which I address below.

First is the assumption that profit prioritization is consistent with a Western model of development, while the balance of profit and social impact are a worthwhile challenge to that model. The previous chapter made reference to numerous education researchers in the field of CIE who argue that capitalism has long been a key feature of Western education and by consequence a dominant part of global educational models (Dale, 2000; Tikly, 2004). With that in mind, it seems fair to argue that an emphasis on labor and profit is consistent with Western conceptualizations of education. By contrast, the argument that social entrepreneurship can challenge this dominant discourse is more subjective. How effective a challenge it is, and what its precise intellectual origins are, are both considerations outside the scope of this study. The second assumption in Eric's statement is that entrepreneurship in some iteration, be it traditional or social, is in fact relevant to the Ugandan context. Whether there is evidence to support this assumption is addressed in subsequent sections as I analyze field observations and interviews. Finally, Eric suggests that the "infrastructure and institutions of development" in Uganda are blank slates. While the previous chapter clearly challenges this interpretation given the country's lasting colonial legacy, it nevertheless appears reasonable to suggest that Uganda's institutions are still capable of change.

Also noteworthy about Eric's remarks are his views on the global borrowing and lending of educational models. Eric suggests that the West has dominated perceptions of what development should look like, and that these Western views influence the type of education that a country like Uganda implements. In order to challenge this dominant discourse, Eric suggests that Uganda should import a more promising foreign education model, namely one which emphasizes social entrepreneurship. He believes that Uganda should not remain stuck imitating a problematic approach to development in its schools when a more promising model can be borrowed instead. "Why replicate the unsustainable model" of entrepreneurship? "Why not find a new model" based on the "next evolution" of entrepreneurship: social entrepreneurship? The willingness shown by Educate!'s early founders to borrow and adapt an idea that they felt was more in line with their objectives as program designers becomes an important theme that is further developed in the next stages of the organization's growth.

Creation of the Educate! Experience

With its initial batch of American and British interns in place, and still supported by a small staff of Ugandan youth, Educate! took steps to legalize its status as a Ugandan NGO while also solidifying its program model. Educate! was experimenting with three program components: a social entrepreneurship club, leadership institute, and a two-year course in socially responsible leadership. Initial efforts in these areas were led by Eric, new Educate! staff, as well as a few members of Educate!'s education advisory board, which was made up of experienced Ugandans

including founders of innovative schools and leaders of local NGOs. The courses they offered drew from curricular materials from partner organizations, as well as from the stories of prominent social entrepreneurs like Fabio Rosa of Brazil, and renowned leaders like Nelson Mandela. In order to carry out these activities, Educate! had to identify partner schools. A large batch of schools was selected in Kampala and surrounding areas, with smaller clusters in Hoima in the West, and Mbale in the East. As Educate! prepared to expand its efforts into these areas, the organization began recruiting “mentors” or educators who would implement their programs over a two-year commitment according to the Teach for America model. This initial batch of mentors would be made up of university graduates, and their time would be split between teaching the two-year socially responsible leadership course, facilitating the social entrepreneurship clubs, and providing general support to their group of around 25 students.

Before these plans fully materialized, at the end of Eric’s six-month effort to launch Educate!’s new program in Uganda, the organization hired two full time staff members from the United States to help translate its vision into a comprehensive secondary school program. The first to arrive, in August 2008, was Angelica Towne, the organization’s first Program Director. In our interviews, Angelica shared that developing the Educate! leadership and entrepreneurship program was “specifically what [she] wanted to do.” She had previously implemented leadership programs in Jamaica, Ethiopia and the United States, and she wrote about two of those experiences in her undergraduate thesis on Paolo Freire’s *Pedagogy of the Oppressed*. Angelica was soon joined in Uganda by Emily Lutyens, the organization’s first Country Director. In an introductory post to the organization’s website,²¹ Emily shared that she was drawn to the organization because of its unique approach to education, and the opportunity to initiate programs that would contribute to social change in the country. Together with Eric they formed a nucleus of young American transplants—all in their early to mid-twenties—that, over a period of three months, would oversee the development of Educate!’s first program from its beginnings as a two-page concept note to a pilot that was running in 24 schools.

The first task for the new arrivals was to familiarize themselves with their new context. Angelica and Emily spent their first weeks meeting with school teachers, with likeminded organizations, and with the scholarship recipients in Kyangwali in Western Uganda. Angelica explains that during this time she and other colleagues compiled curricula from different organizations that were implementing leadership or entrepreneurship courses; particularly programs based in Uganda or in Africa. Angelica also brought with her many materials from her past work in Ethiopia, Jamaica and the United States, including materials that she had been exposed to as a youth growing up in New York City. In all, Angelica shared that there were a number of organizations which influenced their initial program design, including Posse, Teach for America, Cornerstone, African Leadership Academy, LEAD, Cross-Roads, and ASHOKA, among others. As one early collaborator revealed to me in an interview, “*We [at Educate!] definitely don’t believe in reinventing the wheel.*”

²¹ <http://www.experienceeducate.org/all-blog/2008/8/31/emily-joins-the-team-in-kampala.html>

The next step in Educate!’s rollout plan was to create a three-month training program for mentors known as “Induction.” The organization’s first ever induction was scheduled for November 2008, and more than 400 people responded to their open call for seven mentor positions. As Angelica describes it, this first induction was a bit unique in that it served the dual purpose of not only preparing mentors for their eventual roles, but it was also a space for testing and revising the content of the Educate! Experience materials as well. Angelica explains,

So we came out here with about two pieces of paper with what the program could be. One piece of paper had some leadership principles from an organization across the road, who had been working in Uganda for about 20 years. Also foreign led, but it was kind of a foreign born Ugandan. [...] [It was] called Cornerstone. It was a Christian based organization and we were not trying to be Christian so that was somewhat helpful. And the other piece of paper was social entrepreneurship and it was a very new idea at the time. [...] This is the marriage of these two ideas of leadership and entrepreneurship. [...] So from those two pieces of paper we hired a team of Ugandan nationals (I think there was one Kenyan who dropped out). And there was the seven of us, me and Emily, and our mission was to build the program in three months and role it out to 24 schools. And we did that.

Regarding the creation of the curriculum and its influences, Angelica further elaborates,

I went through a leadership program in high school called Posse, and I also went through like 90 other NGOs it must have been. [...] It was like 12 just in high school. I went to an inner-city public school, the school closed down. Let’s help the poor kid programs all over the place. I wanted to go to college, so I did everything. I did everything from environmental leadership to like the theatre program. So, I had a lot of books that I had taken and specifically I was in a nine-month program for university prep called Posse. And so, [...] I had written down a lot of their tools and materials and I had kind of started this process of what works and what doesn’t work. And I had done a kind of a pilot program in Ethiopia and Jamaica in college as well, and so some of that was kinda coming into it, which was like delivery of dialogue kind of methodology.

So by the time I came here, I would basically come up with an idea in the morning, usually at night, and then in the morning we would run it out and play it out. ‘Let’s do a game.’ ‘Let’s do this lesson plan.’ ‘Let’s try to do this activity.’ ‘Hey let’s take on this challenge.’ ‘What do you think about this skill set?’ ‘Are these the skills that are kind of underneath leadership that should be focused on?’ So like, one of the things that I didn’t know as much about was entrepreneurship, which I think was actually really great for the development of the program

because it meant that I didn't do the traditional entrepreneurship training things. I think a lot of programs come here and bring negotiation. Like, American principals of negotiation to Uganda (laughs). It's like, they have been negotiating their entire lives. They know exactly how to do those things way better than we do. Like, what are you doing? And so those types of things didn't really get into it. [...]

It was three months of us building the program up to the point of us launching it in the next February. So we would do, basically, a month and a half leadership course. I'd say a couple of weeks on the club, what does it mean to start a business? Stuff like that. And then a long time on just like, what are the systems that we were gonna use to deliver this, keep track of this, register the students, makes sure it's practical, all that.

Angelica's description of this critical stage in the development of the Educate! Experience is noteworthy for two reasons. On the one hand, she introduces a persistent theme in the story of Educate!'s transfer and recontextualization process: that the program was continually in flux, continually evolving, and regularly adapted and negotiated by its various implementors (both those of local and foreign origin). This aspect of the Educate! Experience is explored in more detail in the second part of this chapter, which explores the recontextualization process. The second noteworthy feature highlighted in Angelica's comments are the many programs, tools, and materials she references as inspiration for the creation of the Educate! program. From organizations Angelica was involved in growing up in the United States, to programs she developed for other countries like Ethiopia and Jamaica, and finally to organizations already engaged in social entrepreneurship in Uganda, Educate! was influenced by many foreign and (seemingly) local educational models.

Ashoka was [a big influence]. That's [...] social entrepreneurship. They had a lot of free materials online. They were really at the forefront of pushing that as a field. And pushing content. So a lot of our case studies came from there. And then Cornerstone, despite their pretty narrow focus on the principles of Jesus, also had good ideas about how to engage students, how to connect with them. They really informed the mentorship aspect of [our program]. And then, Posse was a lot of it. And then the teacher training component is almost cut and paste from TFA. Because I managed to get my hands on one of the manuals. They gave it to me.

Once again, Angelica suggests that there were numerous programs, themes, and materials which the organization "imported" during this early stage of program design. Her comments are also very closely in line with what Eric and Boris both described during the periods in which they led the program design process.

In addition to bringing these insights and experiences to bear on the creation of their own educational program, during this early stage of the transfer process Educate! was also involved in efforts to reform the secondary school curriculum. For years in the mid 2000s, up to the time of my study in the mid 2010s, there was talk in Uganda about revising the national secondary curriculum as it had not seen a significant overhaul since the time of independence. An editorial piece cited by Educate! in 2009 in support of this view²² argued: *“Education experts have for decades been contending that our education system, which is characterized by cramming, has greatly undermined the country’s need for practical, free-thinking, resourceful, functional and self-sustaining individuals. Most of the products our education system is churning out are desperate job seekers who have certificates but without the practical skills demanded by the labor market.”* Such opinions, widely accepted inside and outside of the education sector, helped convince Educate! not only of the need to offer a more practical educational experience with its own program, but to assist national curriculum designers in doing the same. In 2011, after slowly building a relationship with Ministry of Education and Sports, Educate! was asked by the government and the United Nations International Labour Organization (ILO) to write the social entrepreneurship section of the emerging national entrepreneurship curriculum.²³ It would be the first time the social entrepreneurship was discussed in the national curriculum. By 2012 the new curriculum was scaled out to all schools and Educate!, alongside a revised examination structure on entrepreneurship which Educate! had assisted the Ugandan National Examination Board (UNEB) in creating.

One final aspect of the initial design phase that was important to the transfer and adaptation process is the extensive work that the organization carried out in reading the Ugandan context by conducting over a hundred interviews with head masters and students around the country. This too will be considered in more detail in the second part of this chapter which focuses on recontextualization. The following subsection describes the eventual form that the Educate! Experience took at the time this study was conducted.

Program description and organizational structure

I began my observation of the Educate! leadership and entrepreneurship program in mid-2014 and completed data collection in May 2017. Over those three years, the form and content of Educate!’s program changed multiple times, alongside noteworthy changes in personnel at the national office. One reason for these changes is the fact that Educate! viewed its program as still in a period of crystallization, evolving each year as the organization expands its reach. As the

²² <https://allafrica.com/stories/200909300266.html>

²³ An article in the local newspaper at that time described the key areas of Educate!’s reform efforts as follows. Educate! summarized them as: (1) A more practical and relevant entrepreneurship curriculum. (2) A business club in schools. (3) A national exam that evaluates what students actually do in the business club, thus forcing the curriculum to be fully practical and transforming the classroom into a business lab. (See: <https://www.experienceeducate.org/all-blog/2013/4/1/national-curriculum-change-in-uganda-mentioned-in-leading-ug.html>)

program experienced initial successes, with its first batch of 400 graduates appearing in late 2010, the question of scaling the Educate! Experience program countrywide began to arise. Between 2012-2013, Educate! formally embraced plans to scale their program, but before doing so made the decision to first revise its program by actively engaging with partner organizations to identify best practices that could inform Educate!’s work:

That’s when the research and process kind of kicked off, because we were then allowed to change the program. We have always been a learning organization and our approach has always been to contact other organizations doing the same thing, because we were so young. It has always been, ‘let me call Irene Mutumba and figure out like how does she manage this. ‘Let me call Cornerstone, let me call, you know?’ And so BRAC, we started doing a partnership with them. We started talking a lot about India. We started talking a lot about what other education social enterprises were out there. What was interesting about it is that they kind of characterize India as the next step in a lot of organizations’ development because so many organizations were going to scale and were operating in an environment where there is less donor funding. And so they were focusing on sustainability. Both of which was absolutely true. So we found like a short list, it must have been 50 organizations, picked 20 of them, and went to India to research, like, what are they doing? How are they doing it? Through this process Boris also started learning a lot about “lean startup,” which is business school concept, and we kicked off kind of the internal learning process here based on that. [...]

But it was a very clear, like, strategic moment where we could shift strategy. And we wanted to do that with best practices in mind. And we also weren’t super certain how we wanted to do it. We were very open to changes within the model at that moment. I mean we put everything on the table. Should we be with out-of-school youth? Should we only focus on business? Should we only focus on leadership? Should we change the whole, like, way we measure our success? I mean everything was a question.

When I began my research into Educate! in 2014, the organization was just completing its first year of efforts to expand and scale the new program. Figures 3.2 and 3.3, taken from Educate!’s website, provide a picture of the organization’s expansion from 2009 to the present. Over the three years of my study, the changes I witnessed were consequently a reflection of Educate!’s emerging direction and model. Interestingly, I have discovered even more minor changes to the program since the completion of my research.

Figure 3.2 Growth in schools 2009—2018

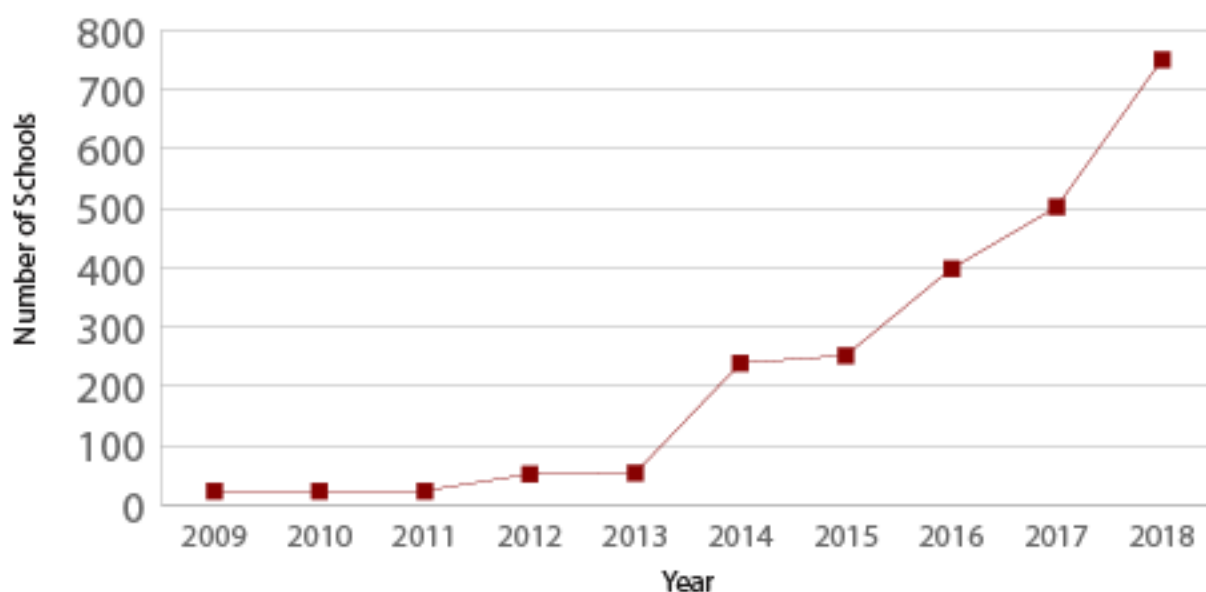
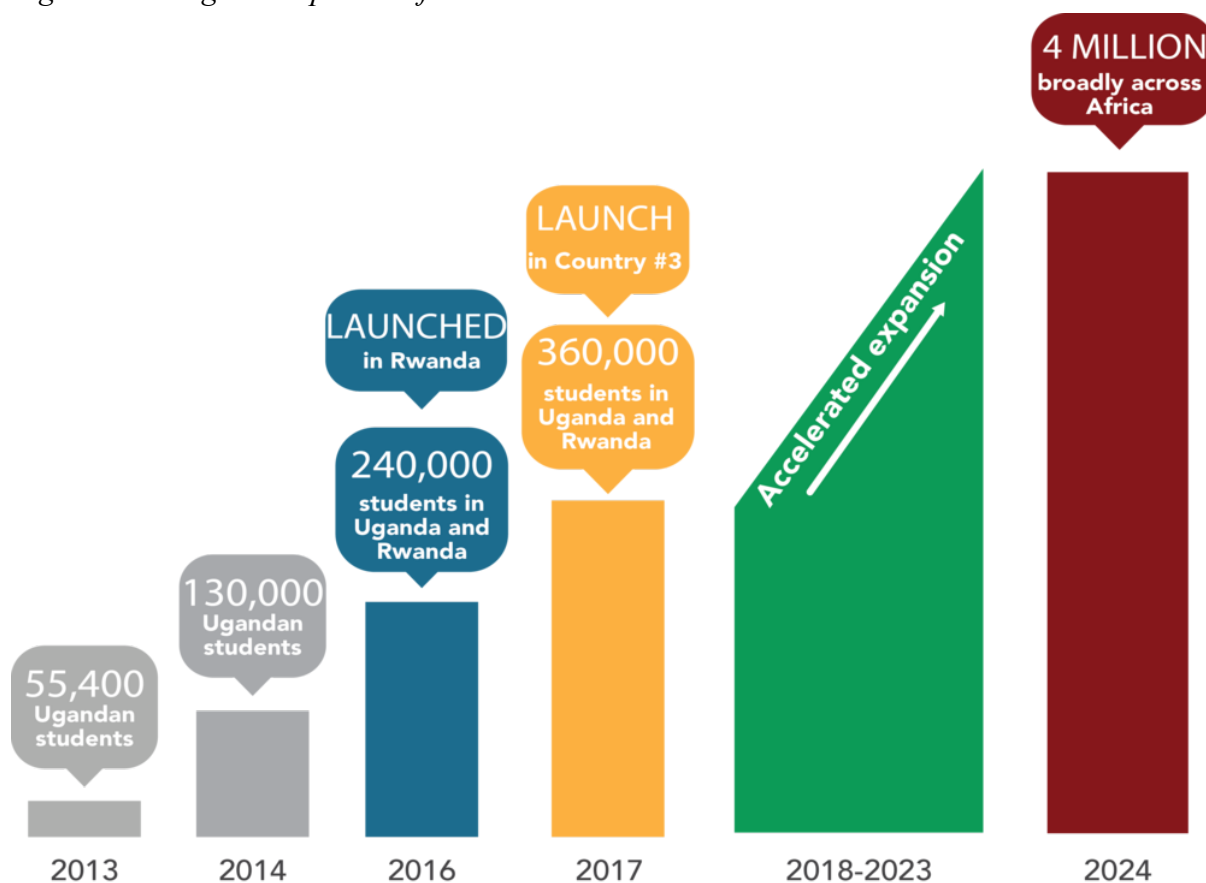


Figure 3.3 Program Expansion from 2013—2024



The Purpose of the Educate! Experience

In my conversations with a diverse number of staff members and students, after instituting the abovementioned programmatic changes, a few consistent themes were raised about the aim of the Educate! Experience. Prominent among them were ‘empowerment’ and ‘self-reliance.’ *“What [...] the program is trying to achieve is empowering the youth with skills that can make them develop long-term sustainable enterprises and become self-reliant, become job creators.”* In the view of the program designers and implementers, youth in particular were targeted because they make up the biggest percentage of the population in Uganda, and thus *“the youth are the solution to the challenges that are affecting Africa.”* Another respondent elaborated:

You see the mission is to develop that young leader and the entrepreneur, not only in Uganda but everywhere else in Africa. So the overall goal is to make sure that [...] a scholar somewhere can actually pick a skill, can go away with a skill and probably, become self-reliant. [...] Or try to bridge that miss-match, like, you are in school you are learning something. You come out of school, you cannot do anything. So how do you bridge that gap? I think that is in nut shell that is like the overall vision of the organisation. [...] Because being in school is one thing, and then coming out is another. [...] It would solve our, not even Africa’s problems, but our everyday problems as long as you can be self-reliant as a human being. I think that’s all you need to survive minus thinking about what can the government do for me, what can so and so do for me. It’s just what can I do for myself and maybe how can I help the others around me.

By equipping youth with resilience and self-reliance, Educate! believes that its program is preparing secondary students with the necessary skills to be able to successfully handle an uncertain future.

The key to this approach is a practical curriculum that focuses on the development of leadership and entrepreneurship skills. During the program’s 25 lessons throughout the year, students are assisted to learn soft and hard skills; from public speaking, project management, problem solving, teamwork, and research on the one hand, to actually planning and carrying out individual and collective income-generating projects on the other. In the words of one mentor, *“So at the end of the day so if someone has gone through the Educate! Experience program, like for two years, that person cannot go back home and sit and maybe doesn’t have a job. At least they are being taught a skill on how to start, how to make different products, so they can set up their small businesses. So it is all about developing people in order to start creating their businesses.”*

Richard Luuba, one of the longest tenured members of the Educate! team, highlights not only the way in which Educate! students are empowered to create their own opportunities, but the fact that the program has influenced them into initiating projects that are of benefit to others

as well. He states that the program creates entrepreneurs, *“those who are looking at creating their own enterprises, getting jobs for others.”* These are individuals who may also enter the workforce, but who are a different kind of employee. They are not *“corrupt people,”* they create and change systems at the workplace, and they *“are very enterprising at the workplace.”*

Graduates of the Educate! Experience, according to Richard, a *“community problem solvers”* that seek to find a balance between individual and collective gain. *“These are the kind of youth who are looking out and caring for the society. They want to do entrepreneurship but they want to do social entrepreneurship. Not just looking at profit, but having the social aspect at the heart of it all.”*

Finally, Angelica, one of the founders and for a long-time the lead content designer of Educate!’s program materials, describes the goal of the Educate! Experience in the following terms:

Our goal is leaders and entrepreneurs and [...] I think it all goes back to that experience with the scholarship students, in just recognizing that there is such an investment in education. Families are sacrificing to send their students to school. We really have to pay attention to that school experience, and what they’re learning, to make sure that it is relevant to their lives and practical for them to use. And if you’re getting an education that can’t bring you out of poverty, what are we investing in? And why are we waiting until you finish University, or you finish getting your PhD? You are trying to run so many people up this education ladder. It should be useful now. It should be practical now. And there are so many students dropping off at different levels, and we know this. And yet, all of secondary is focused on preparation for university. So most students don’t make it. So how are we making an education they can use. And so for me it’s about using education to actually empower people. Because I think it is an ideal that we believe happens, but because of the way universal secondary education has been rolled out in Uganda and many countries, the quality is so low, I don’t think we’re delivering on that promise. The promise is you go to school your whole life is better. You hear stats: “girls change the world when they’re educated.” “Boys revolutionize the world.” “Literacy makes you a giant of success.” I think we need to make that really true and really intentional. [...]

I think it is offering the skills and experiences to do that. And it is also offering a safe space to experiment, and fail, and succeed also. Because I think one of the things we talk about is just, the studies of really successful social entrepreneurs always had a leadership experience, or an important experience of engaging in the communities or at home at around the age of 17. Which to me is a very interesting idea about where you are at in your development as a person and what challenges you have been given and what opportunities have you been given. So in many ways I see us giving that opportunity to have that moment,

means that there is going to be more entrepreneurs more leaders and more people having these educational experiences at the age that they need to have them to be successful.”

And as for why the Educate! Experience is implemented in existing schools rather than as an alternative program at a privately-run institution, Angelica explains:

We want to change the education system. Our tag line is ‘the future of secondary education.’ There is already so much money going into putting your kid into school. We don’t want to be the separate program outside of that system. [...] If this is the value system of everyone in the country because this is formal education, we don’t want to start competing with that. So we really believe in increasing the quality of what exists, which is also why we didn’t start our own school. That was on the table you know. Why don’t we just start our own school and then we can educate all the kids in the way that we want to and they’ll be great. That, we realized, just wouldn’t change enough of a systems-wide approach, and it wouldn’t last long term, it wouldn’t be sustainable. So now we are working with 9000 students. To do that with one school would be massively expensive. And then, I can’t imagine kind of making a program that would stop there. Knowing that it works, knowing that we have the impact data that shows that our program does make a huge difference, I think we have a responsibility to bring that to as many people as possible.

Embedded within each of Angelica’s responses are a combination of views that reflect not only her experiences in Uganda over the five years prior to our interview, but also opinions that reflect the educational literature and schools of thought with which she has been engaged since her undergraduate thesis on Paulo Freire’s *Pedagogy of the Oppressed*. As the voice of the Educate! Experience for many years, Angelica has had to navigate two seemingly conflicting positions as an outsider transferring educational ideas to Uganda, and as the lead designer of a contextually relevant program for Ugandan youth. A later section explores how she, and the organization at large, have navigated this challenge.

In the following two sections, however, I highlight the core elements of the Educate! Experience program as well as the Educate!’s organizational structure as I observed them between 2014 and 2017.

Organizational structure

Since its modest beginnings in 2009, Educate! has grown into a relatively large, multinational organization with offices in Uganda, Rwanda, Kenya and the United States. On its website, Educate! states that it currently has over 170 team members spread over these four sites, and more than 300 additional field educators, or ‘mentors.’ The organization’s 2017 Annual

Report lists the organization's annual budget at a little more than \$3.8M.²⁴ In Uganda alone, the team (excluding mentors) is listed at more than 120 individuals, supporting implementation of the program in over 750 secondary schools around the country. Such a large team means that there are more roles and responsibilities within the organization than it would be useful to describe in this study. Instead, only the roles and teams within the organization that are central to the day to day implementation of the program, and the creation and evolution of the program's materials are included in the descriptions below.

Before that, one brief note about how Educate! operates geographically within Uganda. The organization first divides the country into nationally recognized regions: Eastern Uganda, Northern Uganda, Western Uganda, Central Uganda, and Southern Uganda. From there, each region is divided into a number of community units. A community unit can be a large city or district, each containing a group of staff members assigned to work with schools in that area. Sometimes larger cities/districts can be divided into multiple units. Within a community unit, you typically find one program officer, one youth leader, and a handful of mentors.

Scholar. Educate! scholars are the principal receivers/beneficiaries of the Educate! Experience. Scholars are recruited at every participating secondary school from the Senior 3 and Senior 5 classes. Priority is given to Senior 5 students as they are viewed as more mature and capable of completing the lessons and activities associated with the program. However, when a sufficient number of Senior 5 students cannot be found owing to circumstances which may vary from school to school, the Senior 3 students are then invited to fill in the available spaces. And it is only those secondary school students who are enrolled in the Leadership and Entrepreneurship Course who are considered scholars.

Mentor. An Educate! mentor is both a beneficiary of the Educate!'s program, as well as its chief field transmitter. When the program was first created, mentors were initially university graduates with a special interest in helping youth through the Educate! Experience program. As the organization made plans to scale the program, however, Educate! decided to recruit the graduates of its program—former scholars and now A-level secondary school graduates—to become the mentors. While the organization recognized that this would have an impact on the quality of mentoring, including what they could reasonably expect a mentor that was one year removed from secondary school to accomplish, Educate! felt that this was the only affordable means to grow their program. As part of this shift, the role of the mentor was no longer viewed as a hired position, but rather as a fellowship.

Mentors participate in multiple trainings throughout the year known as “inductions.” They join Educate! on a two-year basis during which time they are not provided a salary, but rather provided with funds to cover their transportation needs, and to support their existing at-home businesses. Every Educate! mentor is expected to sustain his or her own entrepreneurial income-generating project. The primary responsibility of mentors is to implement the Leadership and Entrepreneurship Course in schools, to support and mentor scholars as well as the Educate!

²⁴https://static1.squarespace.com/static/520111afe4b0748af59ffc18/t/5b33ab506d2a73a4df3c355d/1530113083208/Annual_Report_2017

business clubs. In Educate!’s program materials, it is said that the “E! mentor facilitates the LEC lessons and provides academic, business, and personal advice to E! scholars” (Educate!, 2015a LEC book). Furthermore, mentors are described as having a distinct role to that of a teacher. In their first session with Educate! scholars, every mentor shares the following description: “Being a mentor means I believe in your potential and I am here to advise, motivate, and support you on any issues—whether they are school, personal, family, or business-related” (ibid.). Every mentor works with multiple schools within a given community unit, typically making school visits every day of the week.

Youth Leader. A Youth Leader is considered a salaried position within Educate!. Youth leaders primary function is to assist mentors in their support of Educate! scholars and business clubs. When a mentor is sick, a Youth Leader will often fill in for him or her by carrying out a lesson at a given school. Youth Leaders may also visit mentors when they are implementing a lesson in order to observe and support them. Another major function of Youth Leaders is to follow up with scholars by interviewing them about their business and community projects. Outside of these responsibilities, Youth Leaders generally support Program Officers with their various tasks, particularly in the area of coordinating program activities (such as mentor trainings, community unit meetings, etc.) including arranging for venues and food. A typical community unit has one Youth Leader who reports to one Program Officer.

Program Officer (PO). The Program Officer is the member of Educate! team responsible for all the activities within a community unit. A Program Officer’s responsibilities range from identifying prospective schools to join the Educate! program, maintaining relationships with schools that are already implementing the program, running courses to train and support mentors, as well as ensuring that all field reporting is completed within their particular community unit on a regular basis. Program Officers are also responsible for recruiting new mentors and for working and training teachers in the Skills Lab program.

Design and Training team (D&T). Among the departments and teams responsible for the regular maintenance and development of the content of the Educate! Experience is the Design & Training team. While the title and responsibilities of this team slightly changed over my three years of engagement with Educate! (at times they are said to overlap with the “innovations” team), nonetheless one of its primary roles has centered on curriculum design, with the other role being that of the training of staff. The first Design & Training team came into existence during the scaling up of Educate!’s model in 2014. The D&T team works with all of the various program materials produced within the organization: from materials for training scholars, to training mentors, program officers, as well as all other manner of support materials. One of the D&T staff members described the team in the following terms: “*We are the ones who look at the feedback from the field. Actually everyone directs their feedback to us and then we look at, we go back to the drawing board and design whatever our end users will benefit from. So I think the overall role of D&T is majorly to design work for the organization and make sure that the experience based model is reflected in every design—in each of our manuals, each of our guides and curriculum that we design.*” During my three years of observations, the team was

constantly revising and creating new materials. One significant detail about the D&T team is that it is charged with overseeing the Build-Measure-Learn research approach that drives the learning process within the organization.

Others. Among the many other important roles and teams within Educate!’s Uganda office include the Country and Deputy Country Directors, the Programs team, the Monitoring and Evaluation team, the Human Resources department, Finance Department, and an assortment of managers responsibility for things like the scaling of the program, relationships with partner organizations, and implementation of the program. During my time with Educate!, outside of working with the D&T team, I met many individuals involved with the Program team and heard quite a bit about the monitoring, evaluation, and innovation work.

All schools who wish to implement the Educate! Experience must sign an agreement with Educate! and pay a nominal yearly fee.

Program features

In its program materials, the organization describes the Educate! Experience as four programs rolled into one. The four parts of the Educate! Experience include the Leadership & Entrepreneurship Course (LEC), Educate! clubs, Peer mentoring, and Teacher associations. See Figure 3.4 taken from a LEC coursebook (Educate!, 2015a, p. 3).

Figure 3.4 Overview of the E! Experience

OVERVIEW OF THE E! EXPERIENCE

The Educate! Experience program partners with secondary schools to develop young leaders and entrepreneurs. Educate! delivers four programs rolled into 1! There are four key components to what we do:

Program Component	Purpose	Description	Facilitator
Student Business (E!) Club	Organizes the entire school student body to start businesses and projects together during the school term.	Club members form groups of up to 20 students. Each group is responsible for starting and implementing a project. The E! Club tries to recruit as many students as possible.	E! mentor advises members in project creation. E! Associate Teacher patrons the club and talks with school administration on its behalf.
Leadership and Entrepreneurship Course (LEC)	Select the top students who will lead the school and E! club and give them specialized skills and life-long mentoring.	Only 40 selected students become the leaders or “scholars” of Educate! Scholars attend weekly lessons for 1 year and start projects back home. Certificates are given.	E! mentor facilitates the LEC lessons and provides business and personal advice to E! scholars.
Peer Mentorship	Mentor younger students in leadership & entrepreneurship skills.	Peer Mentoring Events are: Community Day (Term 1), Skills Day (Term 2), and Mentoring Week (Term 3)	Each E! scholar mentors 3 ‘O’ Level mentees; they meet in small groups: 2 scholars and 6 mentees per session
Teacher Association & Training	Teachers & Admin become E! Associates to develop their leadership skills and improve the student learning experience.	2-3 Teachers & Administrators per school selected to be E! Associates and support the E! program inside and outside the classroom	The E! Program Officer facilitates 2 workshops per term which offer practical training in experience-based education

Any school that wishes to implement the Educate! Experience must sign an agreement with Educate! and pay a nominal yearly fee. In addition to these four activities, I would also add the Youth Business Experience (YBE), which is the training and support program for Educate!’s field educators known as mentors.

Leadership & Entrepreneurship Course (LEC). The Leadership & Entrepreneurship Course, is, in many ways, the heart of the Educate! Experience. LEC is one to two classes per week (totaling roughly 80 hours) during which Educate! mentors carry out practical lessons with scholars specific to a particular theme. Classes take place after school. Each lesson has elements of group work, of listening to or reading stories and case studies, and of games and practical exercises. As one mentor explains,

We also do LECs, teaching LECs in school: a leadership, entrepreneurship course. So these lessons are to stimulate those guys’ attention and to concentrate. So these lessons are to open their minds on business related issues and leadership issues, you get? They should know that when you do a business sometimes you need to

team up with guys. How do you do it? How do you manage with those guys? Is it that each time you come across a challenge you have to break off from your teammates or is there a way you can handle those issues?” Richard Luuba expands, “So the workbooks have the basic resources that are used in the curriculum in terms of case studies, stories, the take aways that they have to do that are in the curriculum book that the mentor holds. [...] And also the summary notes, the gist, the major key things in each of the lessons, those are contained in the workbook.

LEC lessons are organized around three themes which change during each of the three academic terms. As a member of the Innovations team describes:

We have a set of themes for every term. So, Term One the theme was leadership and you will have lessons in there that are geared towards making these students realize their leadership potential. Term Two we have the major theme is entrepreneurship. So you will have lessons there with enterprise planning, budgeting, saving, you know all that that is geared towards getting the student to think about business. Term Three the major theme is mentoring: how do you pass on whatever you have learnt to someone else? How do you empower someone else?

At times the organization also institutes themes for the entire year. For instance, the integration of gender into every lesson was carried out one particular year.

So we wanted the scholars to start thinking about some of the, maybe the gender issues in their communities and how they can break those barriers to do whatever they want. So in Term One, even if it's a leadership thing, we will still incorporate the gender aspect in there and probably we start asking them a few things that they can think about. If you are probably a girl, or a boy, do you think you can stand for the presidency of the club? [...] You know, just putting those slight gender changes. When it comes to Term Two theme, we still incorporate in gender and we are asking them, like, who is your role model entrepreneur wise? Or when you think about female entrepreneurs, who comes to your mind? Because most times in the class you say who are the entrepreneurs you know three quarters of them will probably mention male entrepreneurs but in the gender, in the gender inclusiveness we are trying to get the students to actually think about other entrepreneurs, the mostly female.

The LEC at each school is made up of 40 scholars and lasts for 4 terms (there are three academic terms in a year). Throughout the year, scholars will carry out various activities and

projects associated with the course, including “back home” income-generating projects, school-wide service projects like “community day,” “skills day,” and “mentoring week.” Each individual scholar is expected to complete a number of activities over the course of the year in order to be considered a “graduate” of the program and receive a certificate of completion. Typically, those who were the most active members of their LEC and who had the most innovative back-home projects receive gold certificates which improves their prospects for being invited to join the Mentorship program in future years.

Educate! clubs. Every school that implements the Educate! Experience is assisted to create an Educate! club. Unlike LEC, there is no limit on the number of students that can join an Educate! club. In fact, the objective of the clubs is to involve as many students as possible. In order to be elected to a leadership role in the club, however, that particular student has to be a LEC scholar. Typically, every club will have a president, vice-president, secretary, and treasurer. The LEC scholars in the club are introduced to its objectives during their lessons; however, it's important to note that the club is student-led and creates its own plans and projects without strict oversight by Educate!. Nevertheless, mentors do attend occasional club meetings in order to support it in achieving its objectives throughout the year.

When talking with staff at Educate! it became clear that clubs fulfill an important role within the organization. In many ways, the Educate! club is the laboratory for the entire Educate! Experience. The Educate! club is what sets the program apart from traditional school learning which leans more theoretical than practical. By providing an outlet for experimenting with the leadership and entrepreneurship themes which the Educate! Experience was designed to teach, Educate! is able to ensure that not only scholars but other students within participating schools gain valuable practical experience related to social entrepreneurship. For scholars, the clubs are a chance to put into practice the leadership skills that they have been studying in LEC. Richard Luuba shares,

We also want them to get out of the class and form the leadership for the students club that they form. So they are able to come up with a constitution for the their club and they are able to have the goals written out very clearly and then send it out to the rest of the students and start recruitment. And start even thinking about the business ideas or any other venture that they want to do it doesn't have to be a business like I said it has to do with what they are passionate about.

Then for other students in the school, participation in the clubs is a chance to learn practical skills alongside the scholars. “*We really intentionally reach out to the other students through the club, and the club may have 200 members,*” shares Angelica. Richard further elaborates, “*The rest of the students have an opportunity to get those other skills through the club that is open to the whole school.*” Among those skills, students learn how to create products, market them for sale, and then learn about profit and loss. Clubs earn real money through the sale of their products, which can either be reinvested in the club for future projects or distributed

amongst its members. One mentor explained, “*We do make products and go through this experience. [...] Sometimes if you save you get a loss, and if you manage it well, you save, you can get a profit.*” The inclusive nature of the Educate! business clubs is by far one of its most celebrated features. It is through the clubs that Educate! scholars complete many of the practical assignments. For example, in term one, scholars must complete a “community day” event, which is typically a community service activity planned and carried out by Educate! club members. Richard explains,

So term one they have to accomplish their leadership passbook, they also have to do a community day which is also just getting more community responsibility for them where they have to organize an event. Again, according to our curriculum, the mentor is there to guide but everything is students led. For example, for the community day they have to choose their theme, their own activities that they are doing and the mentor is just giving them guidance. So they have to organize a community day on their own. So some of the things they have done is doing sensitization campaigns in school, out of school, maybe going into the markets, cleaning up the markets on top of doing the sensitization. Some have gone into hospitals. I remember one case that comes to mind is in Lira where a school went and did sensitization at a hospital and also were able clean up their hospital. And the community was really very surprised and they gave these students medical cover of one year. They told them you present your ID anytime, you will be given free service here. So that speaks to what can happen in terms of simple actions that could change community.

Perhaps the most distinctive aspect of participating in an Educate! club is that in the fourth and final term of the Educate! Experience, clubs compete against one another at the community unit level, with the hope of moving ahead to regional and national competitions. The way that a club wins a competition is by presenting its projects and samples of its products to a panel of judges selected by Educate!. The most innovative or effective a club’s products, the more they are typically rewarded. At the national competition, the top three clubs receive a cash prize that can be invested into the club to support future activities.

Peer mentoring. Peer mentoring takes place on two levels over the course of the Educate! Experience: when mentors guide their scholars, and when scholars mentor each other. One mentor provides a detailed picture of what supporting his scholars looks like.

And then we also have what we call mentoring, peer mentoring, where we go into schools and we start mentoring those guys. Like there are some guys who are in school, they don’t know what to do, for real. They’re just in school because their parents told them go to school and then they are in school. [...] They don’t know how to select courses. But for us, we go to school and start mentoring. They tell

you about their dream courses or their vision, what they want to be and then you try to counsel them. You try to, you know, some guys don't believe in their visions. You try to make sure they do stick on what they do, although they change a little bit. [...] Someone tells you I want to be a doctor. 'Which subjects are you taking on?' 'I'm taking on geography, I'm taking on history.' But he wants to be a doctor the next few years to come. So you look at someone and start to wonder how he's going to make it because he's off the line, you get? He's totally off. So you tell them, 'You know what that course you do, you cannot become a doctor, you get? You need to find something that fits in your course, in your combination that you're doing now in school.'

When it comes to scholars mentoring their peers in school, Educate! anticipates that after being guided by their mentor, scholars will develop the skills and insights necessary to then help their peers. By the end of the year, each scholar should have helped mentor at least three students in the O-level (which typically means mentoring younger students in the case of most A-level scholars).

Teacher associations. The teacher association work is an area that evolved a great deal over the course of my interactions with Educate!. In fact, the Educate! program for teachers that I observed was already different the initial approach that it took during the first few years of the program. At the start, teachers were invited to intensive training sessions as part of the Teachers as Mentors (or TAM) program. Eventually this activity was phased out, and when I began conducting observations, Educate! was relying heavily on their partnership with a newly founded teacher-training focused organization known as STIR Education. Once or twice a term, teachers that volunteered to support the Educate! program, often teachers that taught business or entrepreneurship subjects at the school, were invited to participate in an in-service course co-sponsored by STIR. These meetings typically lasted around a few hours.

Over time, as Educate! began training teachers as mentors again, this time in Rwanda, an internal model for working with associate teachers began to arise. Since that time, Educate! has employed its "skills lab" model of teaching as a tool for helping these teachers to be more practical in their school lessons. Throughout the year teachers participate in multiple skills lab trainings, and are also assisted to learn hard skills, or income generating skills much like their students. Each region of Uganda also hosts a special event for teachers during the year known as a "Global Conference on Education," during which time teachers hear from experienced educators and organizations, participate in skills lab exercises, and have contact with MoES officials.

Youth Business Experience (YBE). As stated earlier, mentors in Educate! are considered both beneficiaries, or receivers, as well as implementers, or transmitters, of the Educate! Experience. As Educate! fellows, mentors participate in a two year long YBE course, led by their Program Officers. Similar to LEC, mentors receive workbooks and participate in lessons during one of their bi-weekly gatherings with their colleagues, Youth Leader, and

Program Officer. Given that mentors are considered Educate! fellows, the YBE program is viewed as the educational component of their fellowship. Because each mentor is expected to have a personal income-generating project that they maintain outside of their involvement with Educate!, YBE is the space where mentors are assisted to improve on those projects. A member of the D&T team shares the following about YBE:

This is the fellowship now that mentors are part of. You see mentors are also youth, actually, because these are graduates from our program. So we feel we want to also grow their businesses, we want them to expand on their projects. But also, as they are empowering others, as they are going to schools and delivering LEC, they also need to be supported in their projects. That's why we started this component now. And it is one of the incentives for them to be in the fellowship because they are not earning money. But they get a lot from this fellowship. [...] Like this year, we had sessions on business planning in Term One. Because in term one normally the theme is start your business. Start or grow your business. Some of them may have started, some of them don't have. So we support them to write a very good business plan, business idea creation, budgeting, how do you raise for resources. Then in Term Two we take them, enrich higher. Talking about marketing, how do you increase your market base, or market network and those things. And then how do you brand your products, because that's part of marketing now. And then in Term Three they look at producer groups, the importance of producer groups, and how you can benefit from producer groups. And we actually give them an assignment to start a producer group.

Of all the Educate! activities that I observed, the YBE and LEC sessions were the two that stood out most as containing visibly imported educational concepts and, at times, supplemental materials.

In the following section, I provide a few observations about the transferred concepts and ideas most prominent in Educate!'s materials. The question of the contextual relevancy of those ideas and concepts are treated in later sections. For now, the goal is simply to identify in what ways the designers of the Educate! Experience attempted to integrate ideas from an array of sources into the program.

Transferred concepts in Educate!'s materials

On a Monday in March 2015, I arrived at a local secondary school in Njeru municipality, just across the bridge from Jinja district. I went to attend a bi-monthly meeting of mentors from the two community units in Jinja District. It just so happens that this meeting was also the one YBE meeting for that month. The agenda for the day was to cover matters related to LEC and business clubs in the morning, then YBE in the afternoon. The meeting was supposed to start at 9am but began close to 9:48am with less than full attendance. Over the course of the morning,

mentors, led by their Program Officers, reviewed how far they had reached in studying LEC lessons with their respective schools, raised any challenges that they had, filed paperwork, discussed upcoming events and lessons, and covered a range of administrative matters. After lunch, at around 2:35pm, the POs introduced the YBE lesson for the day. The events are summarized from my notes below:

Mentors are split into two groups (presumably Jinja Unit 1 and Unit 2) so that they can gather around and watch a video from two separate laptops. “T21 Building Your Business” is the name of the lesson. It seems T21 is the name of the company that produces these lessons. The Program Officers (PO)s are describing, with input from the mentors, what they covered in the previous lesson. It appears that this is the second YBE training of the year. Each mentor set up a T21 account during the January induction training. PO 1: *“Everyone should have their notebook. Welcome to the training session. These sessions will not have flip charts and markers like last year. But please remember to bring your business development book so that we can see how you are doing with your projects at home.”*

The purpose of T21 is to help the mentors develop and complete their business plans. PO 1 notices that some of the business development books are empty. Some did not remember to bring their books (and don’t recall if they were told to do so). PO 1 asks if they have any notebooks for at least taking notes during the lesson. POs are supposed to review and sign business development books. The PO is concerned that mentors are not even looking at them. PO 1: *“This is for your own good. Why should we have to push you to make a business plan?”*

PO 1 reminds mentors to bring YBE materials with them every YBE meeting, and to remember to fill their workbooks so that they can earn their certificate. It is a requirement of YBE along with working on their back-home businesses. Mentors must also have notebooks during the meetings so that they can take notes during the videos. The PO reminds mentors about what was discussed in the previous meeting. For example, mentors must have a money calendar. They are supposed to save and invest. They each have a personal savings goal. *“The reason why people can’t invest is because they cannot track their money well. People go into deficit but don’t know by how much or have a recovery plan”* shares PO 1. When prompted with a question about what else was discussed last lesson, a mentor answers, *“Last time we learned how to manage risks in a business. I learned that there are many risks and they should be handled in different ways.”*

PO 1 asks, “*Which part of a business plan deals with managing risk?*” No one answers. PO 1 calls on a mentor, but the mentor says that he “*knows nothing about it.*” No mentor seems to know the answer to his question. One says “*executive summary*” but does not really know what that is. After some time PO 1 answers the question then reminds mentors about other things that were discussed in the previous meeting. “*The business description is about presenting the business clearly. What do you remember about ‘industry background?’*” PO 1 is surprised when no one can answer and suggests perhaps changing the methodology. He asks the mentors if they completed the assignment of watching video 8 about “industry background” independently. Only one person says no. PO 1 says that they have downloaded video 9, about “market analysis,” and they will watch in on separate laptops now. After the video mentors are supposed to go to an internet café and post comments about the video online.

Before starting the video, PO 1 asks: “*Where is the market? What is it? What is an industry?*” The answer is provided, “a market is where a buyer meets a seller for exchange of goods and services.” PO 1 wants the mentors to reflect on what market and business analysis mean. “*What are market prices? Who are my competitors? What is my projected price? Today you will watch a video about market analysis. You will partner with a different mentor on the platform and try to exchange feedback with each other about how they have done their market analysis. You will watch videos 9, 10, and 11 today.*” The two POs set up laptops and the mentors from each community unit gather around one laptop. The videos are started at the same time on each machine.

The video talks about specifying one’s precise market: local, national, regional, etc. It suggests that they consider the frequency that someone would use their product, and who eventually in the market would use the product. The next video is about learning about one’s customer. The last video, which begins at 3:32 pm, is about creating a marketing plan: motivating people to buy your product. Among the phrases that I catch in the videos are “distribution channels” and “promotion.” At the end of the videos they are advised to make a schedule and work with a partner, and to research more about best marketing practices on the internet. Just after 3:45 p.m., PO 1 says that he can make the videos available to mentors if they provide him with a USB stick. PO 2 asks mentors when they shall all go to the internet café. The lesson ends just before 4 pm. (Fieldnotes, March 23, 2015)

During this YBE lesson, Educate! made use of an e-learning course offered by the UK-based company T21. It is very likely that, just like the teacher associate program which once

relied upon the STIR program model to train its teachers, the YBE course today may no longer use the T21 course with its mentors. What stands out in the lesson is the program's reliance on very technical business terminology. At times it felt as though the terminology may even have distracted from mentors' learning, obfuscating an otherwise practical lesson aimed at supporting mentors to develop their personal businesses. This appeared to be one trade-off in the decision to borrow from an existing course.

The decision to borrow content, and at times even materials or courses, from other organizations and companies was very common during my time observing Educate!. Angelica—the original program designer and current final decisionmaker on programmatic changes—made it clear in her interview that Educate! has never been shy about building from the best practices of other organizations. In my interviews with members of the Design and Training team, the same sentiment was also conveyed. When asked to explain his strategy for researching content for revising curricular materials, including whether he studied school textbooks, a member of the D&T team shared:

No I don't majorly look at teaching textbooks only. I look at business books, because you design something that may be when you teach this to students it will help to bring out this. But when the business people are saying that, 'No no. That cannot work out.' You know? You research then I research from internet, I read about things. I read about economies from different countries, reports that researchers probably make from different countries. I remember I read about a story of Zambia. There was a survey that was carried out on the economy of Zambia. And I noticed that we share challenges with them, because some of the things they discovered is similar to what is happening in Uganda here. Youth, very many young people lacking skills, and trying to sync that with what I am working on. So I basically read on internet, books from internet, but then I also just use online [...]. But I can go on Google and say maybe books on this, and I try to take my time and read. I can read even at night, I do a lot of reading.

Noteworthy about his approach is the fact that the D&T member always tied what he researched back to its relevancy to youth in Uganda. First, he felt that relying on textbooks was not relevant to the needs of students because it did not prepare them for the realities of the business world. This likely explains why Educate! felt comfortable using a course like T21. A course designed for real businesses, Educate! must have reasoned, was surely more relevant to preparing youth business owners than secondary school course materials that was designed for real world businesses. The second aspect of relevancy for the D&T member is ensuring that the content is relatable to the Ugandan context. As a Ugandan, and former secondary school teacher, he was able to use his past experience as a guide in making such decisions.

During my observations of Educate!, I also had a chance to speak with three individuals that worked with or supported the D&T team. Two of those individuals were not Ugandans, and

consequently had to rely on their colleagues and other members of the organization to ensure the contextual relevancy of content that they introduced to the program. One of those individuals, shared the following about her experiences with D&T:

These things are very based on the field visits. So, one of the sessions is about how to design a business card. It was about networks. Oh, and also I use some of the ILO materials, or I read a lot of their materials. International Labor Organization. They have like super cool guides, really hard to get a hold of, but one of them that is open source is the Get Ahead Guide for women entrepreneurs. It is a 200 page manual. It has such cool stuff in it, so I pulled from that. But one thing in that manual was a big focus on networks. And we have heard from POs that mentors are just struggling with mostly finances, and networks can help you a lot in that respect. In getting capital for your business, in like SACCOs, that's a new thing. So this term was very focused on how you build networks, how to make a business card, how to set up a savings group or explore micro-finance options. And the feedback from POs that I think it is the most telling for me anyway is that they like this was much more practical. So in the past the sessions have been more theoretical and they aren't things that a mentor can immediately go implement.

In her comments, Erin nicely presents the process of validating the relevance of borrowed concepts and lessons based on feedback from the field. Once again, the sources of new ideas vary and often depend on the past experience of the individual curriculum designer or the wealth of resources that the organization itself has amassed. But once those ideas are inserted into the program, feedback from the field is immediate, helping the team decide what action is best to take moving forward. And this feedback becomes especially important when the curriculum designers may not be Ugandans themselves.

The appearance of transferred concepts and ideas is not unique to YBE materials. At the conceptual level, themes like social entrepreneurship have been borrowed from external contexts. In terms of transferred ideas and experiences, a study of LEC materials produces numerous references to quotes and abbreviated case studies from individuals outside of Uganda. Early in the Term One LEC book there is a quote from Henry Ford: "Coming together is a beginning. Keeping together is progress. Working together is success." During the courses of the term, a quote is provided from Richie Norton: "The way to be irreplaceable is to become a social innovator. Start projects that motivate you to save the world and simultaneously make you money for your company. Social innovation makes magic happen." Each quote and story are embedded within relevant themes which the texts explore with Educate! scholars, however rarely is any context provided when drawing upon these references. They are meant to support the underlying premise, and not intended to draw significant attention of their own.

LEC materials also feature numerous games, class activities, research or practical activities, and anecdotes which have been adapted from a range of different sources. Many of these examples were either borrowed during Angelica's original program design based on the organizations with which she was familiar, or were borrowed from materials like the ILO entrepreneurship document or through searches of the internet like the D&T members described. Another common feature of the Educate! materials are case studies. They are often used to illustrate the real life successes of individuals.

Albina Ruiz grew up in the rural rainforests of Peru but moved to the city of Lima for university. Many of Peru's cities, not just Lima, are drowning in their own garbage. With 7,000,000 inhabitants (almost one-third of the country's total population), Lima generates 3,500,000 kg of waste each day! It is the poorest families who suffer the most. Wealthy neighbourhoods pay for garbage to be "taken away," but without an organized waste management system, "away" means the front doorstep of poor urban areas like the one Albina moved to for university. [...]

Albina began alone, almost 20 years ago, mobilizing and organizing around a new idea. She thought of a way to use micro-entrepreneurs — most of which were poor trash scavengers— to take charge of collecting, recycling, and selling the community's garbage in a fully organized system. Her role was helping jump-start these small businesses, setting a standard and affordable monthly fee for trash collection services, and coming up with creative and inventive marketing campaigns to attract customers. The cost of the service was about 2,500/- (equivalent to the cost of a sandwich in Peru). Even at this low price it was hard to get community members to trust her service, pay regularly and pay on time. [...] Albina employs (or partners with) more than 150 people and responsibly manages over 3 million resident's waste. (Educate!, 2015b, p. 11).

While this particular case study comes from a woman living outside Uganda, Educate! has made a significant effort since the initial version of the program to include more case studies of Ugandan social entrepreneurs, including former Educate! scholars. By 2015, the case studies I observed included only a handful of individuals outside of Uganda. Those which remained highlighted stories that were still relevant to young people living in Uganda, such as Albina Ruiz's story.

Recontextualization

The previous section offered an overview of how Educate! transferred ideas, activities, and learning approaches in the creation of the Educate! Experience. It also provided details about the background and structure of the organization, as well as the basic components of its program. Having established that educational borrowing has been central to the development of the

organization and to the Educate! Experience program, the remainder of this chapter explores how Educate! has worked to recontextualize its transferred components and ensure the relevancy of its materials and program for its beneficiaries. The specific features of the recontextualization process highlighted in this section include: (1) the continuous evolution of the Educate! Experience; (2) the Internal Advisory Board (IAB) and Build Measure Learn (BML) model as mechanisms for incorporating feedback into program revision; and (3) Educate!’s emphasis on practicality and learner self-reliance. The culmination of these efforts is a negotiated approach to recontextualization that relies on dynamic collaboration between those at the organization’s head office and those implementing the program, or overseeing implementation, in the field. Following these themes, there is a brief discussion of Educate!’s recent efforts to transfer and recontextualize the Educate! Experience within new countries in SSA.

Continuous evolution of the program

An important characteristic of the Educate! Experience since its inception has been its continuous modification and evolution over time. As Angelica described in an earlier section, when the program was first designed in 2008 she drew primarily from her experiences and previous work in designing a curriculum for the first mentor induction. The goal during the induction, however, was to revise the program with the help of Educate!’s initial batch of mentors. James, one of the eight mentors in that first group, talks about what those efforts looked like:

At the time we joined, the program was reflective of the experiences of the people that put it together, Angelica, Eric, Emily, had gone through. They had gone through their own leadership experiences. So I can actually remember—I recognized that there were concepts that were got from Angelica’s development programs that she had gone through. They were programs that—I recognized things that were from [Teach for America], the African Leadership Academy. It was mainly leadership and social entrepreneurship. And we thought it was actually okay to have it that way, but then one thing that we felt needed to be changed was building the connection to the Ugandan students. So let’s say the concept of leading a social change transformation activity—if you bring in the example of, let’s say, students led resistance in China. The students here are not going to connect with it. You have to find a local example. You have to find a local role model. If you talk about social entrepreneurs and you talk about Muhammad Eunice or you talk about the guy behind eye care or if you talk about the lady from South America doing garbage. These are things that the students here can do. They could start something to solve the problem of garbage or to solve the problem of micro-finance. These are things that actually students end up doing. But the big challenge was finding local successful examples that they can relate with. Because every time you bring in an external example, students shut

down. They think these are people under a different education system, under a different set of circumstances and therefore it doesn't work with us. So a big part of what we had to do was to find local examples and that is not an easy thing to do.

An important observation that James made about the need for local examples in the material, the need for contextual relevancy, is that it is not a superficial matter. Literature on curriculum recontextualization often highlights that the most common and simplistic form of indigenizing curricular materials is to replace foreign examples with local ones (Lillis, 1985), without consideration for larger epistemological or psychological questions. What James identifies here, however, is a recognition that an educational material aimed at spurring students to take action, to become entrepreneurs, needs to provide realistic examples that are tangible rather than examples which seem too foreign and unrealistic. In this sense, prioritizing the inclusion of local examples and local stories is not superficial.

James goes on to describe that the next step in the contextualization efforts of the mentors was to look for local individuals whose stories could be included in the books. One of the first case studies, then, was about a young man, Juma, who lived up the road from Educate!'s offices, who was a school dropout yet still managed to run a school for other young dropouts in his community. Another case study looked at Abraham, who used dance to spread a positive message of social change to youth at risk of HIV and drug use. James also shares that the first batch of mentors were also responsible for informing Angelica and her team about the aspects of the program that may or may not be deemed culturally appropriate.

When we first went through the curriculum some sections of it were deemed too radical. We thought we were too radical for the school system. Actually as a teacher who had been teaching for five years I could actually say, 'You know, I believe in this but if you take this to a school and say this is what is going to be in the curriculum they are going to send us out.' Because they think, when you say that students should be able to stand for their rights, it is true they should stand for their rights but what examples do you give them? Because you know the school board, the school administration has vested interests and you wouldn't want a new program that you are piloting to be prevented from being implemented just because it's taking the hard line. Then, and I think at one point we had consulted and because schools are very much based on religious foundations in Uganda, there were examples from the Bible let's say that were in there. But then having examples from the Bible means you are going to alienate Muslim schools or alienate schools that aren't based on a religious foundation. And yet we wanted to deal with schools that cut across the religious divide.

In the end, James viewed the role that the mentors played as extremely important in not only reshaping the curriculum based on the perspective of people who knew the Ugandan context better, but also in advocating for views which Angelica and the original design team had not considered.

But there is already a preset notion that if you bring in a curriculum from Europe and just bring it here everyone is going to be suspicious about it. So I think it was important that a group of eight Ugandans had to go through it and give their own perspective of, ‘No this will work, this will not work.’ Sometimes even tiny things. Sometimes even frustrating things, but these are the realities. It was important to have a team just to go through it. So what the process of change looked like was actually modeling every single part of the curriculum ourselves. So we spent three months living together and waking up in the morning and going through every single session that we thought we were going to be able to implement. And then voting to keep it or not to keep it. Voting to change it or not to change it. So, many things ended up changing. I think in the beginning, much as the focus was on social entrepreneurship and leadership, a big part that was actually introduced was entrepreneurship in itself. Like, does everyone have to be a social entrepreneur? We placed a big value on social entrepreneurship but then realized that not everyone is going to want to take that. And actually, the realities that we faced as students and that the current students were facing was that many people come from a place of hardship and their very first need would probably not be solving a problem in the community but solving my own problem. My own income problem. So we balanced it out and put in a component of just plain business. If you are interested in just doing a plain business, then how do you do it without having to fit within the box of social entrepreneurship.

What this early interaction between the Educate! team and its first mentors demonstrates is the willingness of the organization to adapt its program in order to reflect the interests of its beneficiaries. At various stages in the early design of the program—such as when Educate! interviewed over a hundred head teachers and students before launching the program—the organization took great pains to learn about the interests of its target population. In order to create something that students from across the country could respond to, Educate! willingly and frequently revised elements of its program.

One example of a change that took place in the curriculum had to do with gender. Members of the D&T team noticed that gender related issues were appearing frequently in the feedback that they received, yet there was nothing being done about it program wide. You might go to schools, for example, and observe that all the Educate! club presidents are boys and the vice presidents are girls. Eventually the organization decided to address the theme directly and it introduced more discussions on gender into the program materials. Another example has had to

do with technology. In the interest of ensuring that lessons about starting up a business are as relevant to scholars and mentors as possible, the organization has had to pay careful attention to changes in technology that affect business owners. In a discussion of risks to one's business, for example, there was a need to discuss more about the system of "mobile money" which is a very common payment method in Uganda and an alternative to cash transactions. Yet it comes with its own set of risks that the organization had to bring up in its materials.

For the most part, the types of changes that are introduced to the program are not substantial. There may be changes to what games are included in a lesson based on feedback from the field. Or perhaps a member of the D&T team discovered a new activity or lesson which they feel better communicates something about social entrepreneurship. At times, alterations are also made to the structure and systems within the organization and not necessarily the course materials. Changes to reporting systems or to the mentor inductions, for example. As each change is made, the overall character or aims of the Educate! Experience do not appear to be affected. The purpose of the changes is instead about enhancing the quality, relevance, and effectiveness of the program.

For these reasons, one internal debate that appeared during my time observing Educate! was whether the program would continue being modified forever. When I posed this question to Angelica, she suggested that while changes are still made every year, she wasn't sure whether this would be the case forever. In recent years she believes that the changes which are made are often no longer even about relevancy. At some point, it seems that the organization may be comfortable with having a fixed and standardized curriculum. In many ways the materials of the program are already standardized and scripted. The only change would be that the scripts remain largely the same from year to year. This vision would appear to align with Educate!'s other goals, including its recent efforts to transfer the Educate! Experience model to new countries. While those efforts will surely require a continuation of the recontextualization process, Educate! may be reaching the point that they no longer feel as much emphasis is needed on ensuring contextual relevancy in Uganda after almost 10 years, and after scaling the program within most regions of the country.

Mechanisms for incorporating feedback into program revisions

Having observed the importance that Educate! places on adapting its programs in accordance with feedback from the field, it is important to now look more closely at how the organization has managed to achieve this. In this section, I examine the mechanisms within the organization that foster a culture of learning and responsiveness that characterize Educate!'s negotiated recontextualization process. The reason Educate! has been successful at adapting its program over so many years—despite the accelerated growth of the organization which has gone from working with fewer than 100 schools in 2008 to close to 800 by 2018—is due to the many channels it has created for receiving regular input from beneficiaries and implementers of the program.

Build Measure Learn (BML). The Build Measure Learn system is a tool, based on the “lean startup” approach, which involves business startups creating a minimum viable product, bringing it to customers, and getting feedback. For Educate!, after years of refining its program, the organization is no longer dealing with a minimal viable product. Nevertheless, Educate! uses BML “learn loops” to capture feedback from mentors, scholars, and headteachers and to test assumptions that the organization has about its product. Among the tools used in a learning loop are surveys, observations, and focus group discussions. BML loops are typically conducted each term, meaning up to three times a year, and are overseen (or at least closely followed) by the Monitoring and Evaluation (M&E), D&T, and Innovations teams. While the findings are most directly applicable to the D&T team, during my engagement with Educate! the team was too small to handle BML loops on their own.

When it comes to using BML loops, the goal is less about a general assessment of the program and more about specifically testing ideas. James, a former member of the Educate! team shares,

Build Measure Learn is basically a way to build a system through which you want to test assumptions. Every time you make recommendations, basically you make recommendations based on assumptions. Every time you decide you are going to try out a pilot you are making, you are building a pilot based on assumptions that something will probably work better. So it is way for Educate to give guidance to the design team and to the entire implementing team in terms of what should happen before we bring in an adaptation. [...] You design it and implement it quickly in a space of about 3 to 6 months. You measure quickly, make sure that you have a way to measure the key outcomes that you want to see and at the end of it all reflect and learn what has work and what hasn't worked. You make the decision whether to build [the innovation] in or not build it in. [...] I was happy when Build Measure Learn was built because we would be able to do rapid prototyping and learn the key lessons that are important.

BML results feed directly into the work of the innovations and D&T teams so that they influence Educate! content. And the turn around on what is learned from a loop can be so quick that feedback from a BML in Term One can impact content or activities in Term Three, at times even Term Two.

One of the benefits of using learn loops, is that it helps large organizations continue to adapt their program while working at scale. James shares, *“I think it is a very, very important piece for them to be able to continue adapting. Especially because it operates on a large scale. It is difficult for you to adapt when schools are already comfortable with something. So building the learn loops and using them in any pilot is an important way for you to test out something to see what you want to change. See how it works before you can integrate it into what is implemented. I think that is an important piece and I hope they never drop it.”*

At Educate!, BML loops are not only a tool for receiving feedback from the field, but the decision to conduct a learn loop can also be triggered by feedback from field staff. Hellen, a member of the Innovations team, explains: *“And then for these other smaller BMLs that we do, it’s as I said, the decision comes from the feedback from Program Officers. Like this one of school payment. It was one of the feedback sessions we had with the Program Officers and they were really crying out like, ‘School payments are killing us! We are really, really trying. We go there every day, we make the phone calls, we deliver the invoices, we do everything in our power to get this payment on time, but we are still failing.’”* In response to this feedback, the innovations team began a learning loop to test their assumptions about the potential reasons behind why so few schools paid their fees to Educate! on time. *“We want to understand why they don’t complete on time. Is it that the fees are too high? Is it that the commitment is too low? What is the problem really? Other than us assuming that okay, maybe the money is too high let us just slash it. It is really wrong to make assumptions, especially at scale.”*

In my conversations with members of Educate!’s staff, a number of learn loop examples were provided. A member of the innovations team shared that Educate! is running a loop to learn how the organization can support the government when it rolls out its new O-level curriculum. The loop involves a small pilot study, exploring how a mentor would work with O-level teachers when the majority of Educate!’s experience has been with A-level students. Educate! believes that moving forward, it will need to work with the government more closely if it wants to have a meaningful impact on schools across the country. Another loop example was introducing laminated charts and visual aids for mentors to use during their lessons. This idea was proposed based on the observation that mentors often took too much time writing on the chalk board, and they also wrote with many grammatical mistakes. The purpose of the loop was to determine the cost of such an innovation and whether it had the intended benefit. Additionally, after Educate! decided to switch from university-trained mentors to secondary school graduates (who were former Educate! scholars) at the time of scaling the program, the organization wanted to test its assumptions about the effectiveness of the new mentors. For this reason, they created another learn loop which observed how the new mentors engaged students, to see whether their lessons were indeed interactive, whether they adequately followed the lesson plan, and whether they used personal stories to inspire their students. Finally, not all loops are explicitly curricular or programmatic in nature. One last example was the decision to provide a snack to teachers during their association meetings, including determining how much to budget for each snack.

During my time with Educate!, I asked team members to share with me what the exact BML procedure looks like. Hellen from the innovations team elaborated:

We come up with our question, like what do we want to learn? And when we come up with the questions, we draw up a hypothesis. That, okay, maybe this statement will be true, it may be 100% of schools do this and the other. So we do our hypothesis, we get the learning path. Like where is that information going to feed in. We do the learning path. And then we do our measures, like looking at

our structures. What can we use that we already have to collect this information? So you are asking about the research, the [focus group discussions] and all that. Most times we utilize the field staff especially the Regional Officers to carry out most of this, like probably focus group discussions for us. So the BMLs are a built into the current structure. Like an innovation staff would probably go out to do something, but on the bigger part we, if we have surveys, if we have focus group discussions, if we have interviews, the best structure would be to use whatever is there already. So the regional officers, BMLs have been fed into their job description, so it is something they do on an annual basis. So if I have an interview that maybe I would want, I would just call up the regional officer. But first we need to train them on what we are trying to learn, such that they have the background. So definitely if I tell him that ‘I need you to probably administer these surveys for me,’ he will not wonder where it is coming from. It is part of their role. Those are structures we use to gather information at scale from all the other places.

As Hellen makes clear, the BML process is well known and integrated into the functioning of the organization. It relies upon existing staff who spend much of their time in the field to follow through on the collection of necessary data. And all of it is overseen by the teams working at the head office.

In short, the strength of the BML approach is its focus is on intentional innovation. The organization does not wait for new ideas and best practices to appear naturally. It designs ways to make the program more efficient, and at times more relevant, by testing proposed ideas—ideas originating at the head office and the field—before scaling throughout the organization. The flip side of this approach, it would seem, is that it implies Educate! maintains a lot of top-down control over the experience of its program. Innovation and variation are not encouraged at each school. Educate! staff have suggested, however, that because they operate at scale, and because they rely on recent secondary school graduates rather than university graduates or professionals for implementation of the program, the organization feels more confident that the quality of the program is ensured when mentors and students follow a carefully designed script as opposed to innovating on their own.

The Internal Advisory Board (IAB). The Internal Advisory Board is another integral mechanism that assists the D&T and Programs teams to receive feedback from implementers of the Educate! Experience who spend the majority of their time in the field. The IAB is made up of mentors representing each community unit in Uganda. Initially mentors on the IAB represented an entire region, however this eventually changed to having one representative per unit. Mentors are elected each year to participate on the IAB. Program Officers and Youth Leaders also participate in the IAB reflection space, as well as all members of the organization’s management and office-based teams.

In brief, the IAB convenes once every term at Educate!'s headquarters, typically following the completion of a BML loop. A member of the D&T team shared, *"We got a lot of feedback every time when a monitoring report comes out. When these BML reports comes out, we invite representatives from all staff groups to the office to review these results and to hear from their side how the program is going. So that has been an interesting forum for the designers because we ask them specific questions and to give their proposals."* As explained, during the meetings, participants discuss their experiences from the field, and relay any communications other mentors or their scholars asked them to share with the head office. One mentor explained, *"Basically my work is to report what is happening in the field. Yeah like, I have to research through the mentors what really went wrong. 'Ok, if you are saying this one went wrong, what are you suggesting that we can come up with?'"* Another mentor elaborates by adding that it is the role of the elected representatives not only to communicate what is happening in the schools, at LEC, at clubs, or during mentoring sessions, but these representatives must also take back to their community units what they have learned and what was being discussed at the meeting: *"You represent all that, and then get feedback from the office. Because for them, they don't come to the field, they rarely come to the field. They really want to know what is happening down this way and then help improve."*

As much as the IAB space is an opportunity for staff at Educate!'s headquarters to hear from the field, members of the organization's various teams also take the opportunity to communicate things to the visitors and to ask them questions as well. For one, the D&T regularly presents some of its current plans and efforts to the IAB representatives, including any findings from recent learn loops. At an IAB meeting I attended, it appeared as though representatives worked together to create presentations which answered questions posed by the head office. A sample of questions put to the representatives includes: "Why do some schools take up to Term 3 without having any club projects on the ground?" "What tools/support do you need to have active clubs?" "Has the school admin been active in supporting clubs?" "How do clubs generate income?" "How do they use their income/profits?" Members of a given group take time to confer with one another and reflect on their experiences before presenting their answers to the larger group. In this way, there is a balance between directed and open-ended discussions during the meetings.

Among the goals at each IAB meeting is to present challenges experienced in each community unit, as well as to propose possible solutions. One example of a challenge which was resolved through the IAB system concerned the number of visits to a school business club for which a mentor receives funding. After mentors communicated that they did not have enough opportunities to visit and support school clubs, Educate! made the decision to increase the number of funded visits per term. Another feature of the program that was changed through feedback during IAB meetings related to scholar workbooks. For many years scholars received only an empty folder which outlined the activities that needed to be completed over the course of the program to receive a certificate. This approach meant that scholars were required to use loose papers, fill them out, and keep them in their binders. In practice, mentors shared that many

scholars would forget to bring paper, and consequently, this would cause delay in completing assigned tasks. Furthermore, it meant that scholars were not taking regular notes during LEC. As a result of this feedback, Educate! eventually created workbooks for scholars which provided a combination of space for them to write, space for them to fill out information about their personal projects, as well as provided copies of the case studies and stories which mentors shared during LEC. These workbooks became a very helpful resource to support both mentors and scholars.

It is worth noting too, that not all matters discussed during IAB meetings find a resolution; or at least not a resolution that is welcomed by all parties. One frequently raised topic among mentors, for example, was a desire for the mentor's monthly stipends to be raised. Despite this issue being raised on various occasions, no changes to mentor stipends have been proposed by the organization.

One final observation about the IAB in its present state is that discussions about the program do not appear to address many curricular matters, such as proposing changes to the curriculum to make it more contextually relevant to scholars or mentors. It would appear that, as intimated by Angelica, revision of the program is far less likely to address matters of relevancy than in the past when new and imported ideas were first being introduced and adapted for the Ugandan context. Nevertheless, it still appears clear that as the program continues to evolve, and as new features or content is rolled out, the IAB space is well suited to address any concerns that may arise over the perceived usefulness or relevance of those changes.

Emphasis on practicality

In July 2015, I attended a LEC session in one of the Jinja community units. The mentor was presenting on Lesson 12 from the Term 2 theme of entrepreneurship. The LEC session took place during after class hours at a local senior secondary school.

I arrived at around 5:01pm and found the mentor engaged with scholars in examining the meaning of GEPIC (Greet, Engage, Problem, Inform, Challenge). She is telling the scholars how they can approach giving a pitch (like a sales pitch). Mentor is going to give a sample summary and apologizes that it is not in their workbooks. There are approximately 25 students present. Two more students walk in by 5:05pm.

Vicky invited a student to go up to the front of the class and read the GEPIC speeches that are included in the mentor workbook. Some of the highlights from the speeches: *"Only 25% of students find employment after graduating."* *"Most return home."* *"Many people talk about more job creation."* The reader goes through the speech very quickly but there isn't much conversation about the content, or much time to digest the speech. Students are seated at their desks facing the mentor and the chalkboard. The acronym GEPIC and its meaning are

visible on the board after the mentor revealed the meaning of each letter one by one, as students guessed at the meaning of each letter.

After the GEPIC speech the class begins a game called “Knot or Not.” Another 2 students arrived (5:09 pm). After the game, Vicky asks the scholars ‘Who are the most convincing people?’ (Another student arrives). Students are asked to return to their seats after the game is complete. The mentor continues her previous thought, stating that the scholars need to be convincing with their investors. The mentor asks the scholars to split themselves into groups. Once in the groups, one individual from each group will convince the other members to invest in his or her product. If a member of the group is convinced, then the other group members can give the presenter a piece of paper representing money. They will split into groups of 5. (One student walks out of class as someone came looking for him).

The mentor has now passed out papers to all the groups. She says they should choose a person to pitch first. Everyone should get a turn to pitch. It is a business pitch. As the scholars take turns pitching, the mentor goes around the room asking how many people have pitched so far (5:29 pm). The mentor is now asking individuals to share the pitches that they heard. The examples that are given involve mainly imaginary scenarios. One or two of them sounded like legitimate business ideas while others involved more joking. After presenting, the mentor says, ‘*Hopefully we can now all give the GEPIC pitch,*’ then asks in what other ways can they use the GEPIC pitch.

She says a pitch does not only end at being a business pitch. You can convince your community to do something healthy. You can give a GEPIC speech at school assembly. When you are counseling other students. Or even to overcome a problem you may have been involved in (e.g. giving a GEPIC speech to the police).

Vicky says that next session she will be meeting them in groups. She wants them to separate into groups of 5. She says these groups will be used for peer mentoring. She wants to be able to start mentoring them next week. There are just around 30 people present. The mentor asks where the others are while the students are creating their groups of 5 people.

The conversation now turns to the school business club. The club was able to raise 70,000 UGX and the mentor tells them to give themselves a round of applause. The term goal for the club was 70,000 UGX and they have already

achieved it. The mentor suggests that those who are not here should create their own group.

Again returning to the subject of the club, the mentor says that their plan to sell liquid soap to the school is good but she is also wondering if they have a market to sell to outside of school. The mentor says that they shouldn't do things last minute. Let them confirm with the school that they want it and then get the materials once the order is confirmed. The mentor reminds the students that making liquid soap does not qualify as a project, but is instead a fundraiser and they should come up with a real project as a club. Someone suggests growing in sacks and she said that is some kind of innovation.

All the project ideas that are suggested by the scholars appear to be unoriginal. The mentor suggests that they come up with something new. They should come up with things that are not ordinary. Some have mentioned shoe polish, some candles. The mentor wants them to do something outstanding that has never been done before. (The reason that the mentor is pushing the club to come up with an innovative project is so that they can compete in the regional and national club competitions next year.) Someone suggests toothpaste and the mentor asks if he knows how to make toothpaste. Another suggests bed covers. She suggests a community-based project. They could think about a problem that they want to address. Then she says they can go as far as registering themselves as a Community-Based Organization (CBO).

“Most of us think of business projects and forget about a community enterprise project (profitable community project) or a community project,” shares the mentor. In returning to discuss the liquid soap, the scholars mention that they have had trouble with pricing and branding. The mentor asks if they even remembered to brand their soap. She says that they should get a sticker for branding their soap. She also reminds them to work on making the club more visible in school in order to increase membership.

The mentor closes the session by informing scholars that the first round of club competitions will take place first term next year (as well as the graduation). She thanks them for attending the LEC and says that she will meet them again on Thursday. (Fieldnotes, July 7, 2015)

Scholars of the Educate! Experience are required to complete a number of activities, class discussions, games, and projects over the course of participating in the program. Mentors have their own set of activities as well. As referenced in a previous section, Angelica stated that

Educate! designed its program as a response to an educational system that had become increasingly theoretical and divorced from students' lived experiences. Even the government has acknowledged the overly theoretical nature of its secondary curriculum and is also focusing on practicality as part of its overhaul of the lower secondary curriculum (National Curriculum Development Centre representative, personal communication, June 17, 2015). The above LEC lesson illustrates some of the ways in which Educate! prioritizes practicality and self-reliance within the Educate! Experience program. "*The biggest thing that we do,*" Angelica shares, "*is make sure that information is tied to action.*"

During the lesson, students were required to practice public speaking, particularly the art of persuasive speech making. This is a skill that Educate! encourages its scholars to practice during multiple lessons of the leadership and entrepreneurship course. Yet during this particular lesson, students are intended to relate this skill to the creation of a personal business—one of the primary objectives of the course. As one of the mentors I interviewed shared, the purpose of Educate! is to develop

... young leaders and entrepreneurs in Africa. So they make sure that these people, like the students, the youth, they are being empowered on leadership skills and entrepreneurship skills. So that if they go back home, they can set up back home projects which can support them. So at the end of the day, if someone has gone through the Educate! Experience program, like for two years, that person cannot go back home and sit and maybe doesn't have a job. At least they are being taught a skill on how to start, how to make a different products so they can set up their small businesses. So it is all about developing people in order to start creating their businesses.

In the lesson I attended, the mentor also reflects with scholars about the activities of their club. The fact that the club has reached its income goal for the year indicates that its members have been active. In particular, they appear to have utilized one of the hard skills that Educate! provides to scholars every year, which is how to create and market liquid soap. The mentor is careful to clarify to scholars, however, that what they have achieved thus far is only fundraising, which is half of the club's objective. The primary goal of the Educate! club is to create either an entrepreneurial or, ideally, social entrepreneurial project which allows members of the club to put in practice many of the programs objectives: demonstrating leadership skills in organizing a club and carrying out a project; demonstrating research and analysis skills in assessing a community need as the foundation of a club project; and ultimately demonstrating social entrepreneurship skills in designing and carrying out that project, then distributing the profits among club members. Among the aims of the Educate! Experience is the development of soft skills, or life skills, among club members and scholars. Another mentor elaborates on this point, sharing many of the skills that scholars receive while participating in the program.

Educate! gives out what we call soft skills and practical skills. [...] Basically these include bookkeeping, like how to keep books. Then we have some other practical skills apart from liquid soap, and maybe making a lotion bar with repellent. We have other practical skills within. [...] Then we have other lessons like community enterprise mapping. It's a practical lesson. We have a lesson like public speaking, it's practical—we do it within class. Every scholar is supposed to do public speaking, to do a speech in front of the fellows. Yeah and then we have another lesson, innovation. We innovate, we have what we call innovation matrix. It's still in their workbook. So after doing it then we tell them you go back home and do it. After us doing it in class. So they come back with it. Yeah so community enterprise mapping they also go back in their homes and then they map the community, they come back with that map.

One observation that I made during this and other LEC lessons, is that the aims of the lesson will not always go as planned. First, the attendance of 30 scholars meant that roughly 10 had missed the lesson. Still, this was a decent attendance rate given that Educate! offers its program as a voluntary after school activity. Next, not all of the students appeared to take advantage of the lesson as intended. During the practice speeches, scholars were requested to pitch real products, ideally reflective of businesses that they were running at home, or perhaps hoped to run. Instead, many scholars pitched imaginary items as a joke. Additionally, the conversation about project ideas showed that scholars did not seem to be putting in the intended amount of time to reflect on realistic projects. Instead, during the lesson they simply offered any idea that came to their head. Nevertheless, as a member of the innovations team shared with me during our interview, sometimes the impact of the program is not felt immediately.

Speaking about the experience of a new group of mentors, she shared that when they first joined the mentorship program they were rather troublesome and irresponsible. They even caused a bit of difficulty during their month-long induction training. Yet after some time with the program, and as the mentors began getting jobs, they were better able to articulate the benefits of the skills they had acquired from Educate!:

Every time they call me, they are like 'If I hadn't gotten these skills, I don't know where [I would have gotten them].' Because it just makes a complete person. You have professionalism in there, you have entrepreneurship, you have how to communicate too, how to deal with difficult people. And most of my mentors call me and they are like, 'You know what? I really appreciate the feedback you used to give me because when I speak with my manager right now, I can be able to communicate, you know, all that.' Those are the life skills that someone needs to be able to survive. So I think the content is very, very comprehensive. It makes like an all-around person, not only an entrepreneur but an all-round person.

As this story demonstrates, it is not only scholars who benefit from the Educate! Experience. Mentors and even associate teachers can be viewed as beneficiaries of the program. In the case of teachers, Educate! has been developing a program known as “skills lab” which is intended to develop within teachers the ability to make their classroom lessons more practical, along the lines of Educate!’s LEC lessons. *“Skills lab basically is just a practical teaching pedagogy, where learners are exposed to practical learning taking place in class, actually, and in school,”* shares a member of the D&T team. *“So we are asking these teachers to have a way to teach and to assess learning practically.”* One suggestion that Educate! views as a natural opportunity for teachers of business and entrepreneurship, is for them to connect their lessons to the Educate! program. A member of the D&T team shares,

For example, if a teacher is teaching about business planning—because it is taught in economics and entrepreneurship—teachers teach it theoretically. And there are very many people who became teachers, but they cannot draft a business plan. So if teachers are teaching that, yes, why don’t you use the club? Because the club has projects they are working on. So ask these scholars to go and design a business plan for their projects. And then you are asking them, they go build that business plan. [...] Let them go and build that plan.

In the end, the emphasis on practicality within the Educate! Experience becomes an important means by which scholars, mentors, and teacher associates are able to take ownership of the recontextualization process. As each of these receivers of Educate!’s transferred educational concepts and ideas is aided to connect what they are learning to their individual needs, they are enabled to see that the program remains relevant to their local realities and context.

Transfer of the model to new contexts

“What does that look like, country number two? What are we exporting and not exporting?”
(Angelica)

Among the interesting developments at Educate! during the end of my observation period was an effort to transfer their program model to other countries in the region, namely Rwanda and Kenya, but also to a lesser extent to parts of West Africa. By 2017, Educate! was running a branch of their organization in Rwanda as part of a collaboration with the Ministry of Education and offering a version of the Educate! Experience using teachers rather than mentors as instructors. Initial efforts had also been made to establish a branch of the organization in Kenya. These efforts marked the beginning of a new phase for the organization as once again they had to consider the question of transfer and recontextualization. Whereas the Educate! Experience was developed from scratch and based on a collection of transferred ideas, this new initiative involved the transfer of an entire program from one context to another.

Over the years of implementing the Educate! Experience in Uganda, the organization decided to make its materials available to individuals and organizations around the world that might want to adapt it to new contexts. This decision was likely inspired at least in part by Educate!'s own launch, which relied heavily on accessing materials from other organizations in order to create something of its own. One form of transfer that resulted from this decision was the adoption of Educate! materials by organizations within Uganda, rather than a new country. James, one of the first Educate! mentors, spoke about his own efforts in 2013, after leaving the organization, to adopt its model for a new target population: out of school students.

When we began, we actually took that Educate curriculum and started out with concepts of the Educate curriculum and we quickly realized that we had to change it just within the country. We had very similar goals of building entrepreneurs, helping young people get the skills to start a business or to find a job, which is what I focus on now, and to grow as a people who can make decisions in their lives, which is leadership or life skills. We realized that working with a population that is out of school is very different than working with a population within the school. There are many things that you take as a given with young people within the school. In a school we would assume you bring in a written case study and people would be able to read the case study and engage with it. With people outside the school, half would be able to read it, half would not be able to read it. You actually have to get them to engage with the content without having to depend on the ability to read or to write. [...] In the beginning I think our curriculum was about 70% Educate!. It is now about 30% concepts that we borrowed from Educate!.

As James had prior experience with the program, he was able to do much of the adaptation work on his own. In most other cases, however, Educate! was directly involved in training organizations to use its materials during the transfer process.

"We went from a very 'expat listens to locals and designs things' [approach], to local person puts pen to paper [approach]" Angelica states. She believes such a shift has been very empowering for the localization of their model to new contexts, and vows never to return to the old expat first approach. Having said that, she also recognizes that when it comes to creating a national curriculum, as Educate! has begun to do within Rwanda, such a technical process still requires collaboration between locals and outsiders from Educate!. Still, even in the case of Rwanda, she remains hopeful that with a local design team in place, the process of localizing the program will go more smoothly than it did when Educate! created its first program in Uganda.

Angelica visited Rwanda in February 2015 and participated in a conference on East African Education attended by many. During the conference, Angelica was able to meet with a number of government and education officials and talk about the Educate! Experience. Among the insights that Educate! had gained from working in Uganda, and which she hoped to bring to

bear in moving forward with plans to work in Rwanda, was the vital nature of working closely with the government from the very beginning. Having got their “foot in the door” in Rwanda, she and the team returned to Uganda to begin planning what a government collaboration project might look like. All they knew for sure was that it would be impossible to export their current model, the Educate! Experience, because it was simply too expensive. The infrastructure of the Ugandan model, with such a large network of field staff, was a nonstarter. Eventually the organization decided to propose the possibility of working with teachers in Rwanda directly to implement the Educate! model, an idea that they had been experimenting with unsuccessfully in Uganda for some time. After the government approved their pitch, the team set about concretizing its strategy.

So Rwanda ended up being the absolute best place to do an experiment with it being one-hundred percent government. As much as we would let it be. The idea being we were going to try this teacher model where the teacher really is the implementer, the key driver of the impact. Not the mentor. [...] So we pitched the government on that. I went back to Uganda, had a big planning meeting with a cross section of the organization and some key people who [were involved in the new teacher training program in Uganda, as well as some mentors from the first version of the program]. This great cross section of opinions. We argued over and over again what could be the model, what is it? That’s when we came up with skills lab as an idea. [...] With skills lab, we defined everything we thought was crucial to the success of a teacher creating the same impact as a mentor in schools.

When I asked Angelica to explain more about what skills lab was, she explained that it “*is basically the Leadership and Entrepreneurship Course, the LEC, in Uganda taught by the teachers.*” Because LEC was designed for mentors, they wanted to create a program which would help teachers learn to adopt the pedagogy and framework for education that underlies their program materials. In the end, that led to the creation of the skills lab. And once the skills lab was ready, they brought the idea back to the Rwandan government and it was approved for implementation.

[The government] incorporated it into the national curriculum. They incorporated it into the pedagogical standards or framework that they were using. They allowed us to pilot our program with a hundred teachers, and we have been tweaking the Educate exchange model ever since. That meant tons of us being in the classroom watching them teach it. Over and over and over again. Teachers are not like mentors, so we needed to see what they would do, what they wouldn’t do. Lots of field visits. The internal advisory board structure again so we could build off from the things that we learned about how to do. Good feedback. And then we didn’t design everything, we just tried to make sure we defined and designed the

framework as tight as possible. [...] Because you know that framework couldn't allow for a lot of compromise with different ideas. It needed to be tested as what it was in full to see if it could work. And it does. Which is great. So, quite immediately after the first term of trying it out in Rwanda we were then approached by Kenya to do some reform work and be involved in their reform because it was the same topics. And so where we're at now is trying to sign our MoU with Kenya, hopefully get some pilot schools on ground next year. We are working on the O-level reform in Uganda. And we have our active program in like 104 schools in Rwanda.

As Angelica describes, the key features of its effort to transfer and recontextualize the Educate! model from Uganda to Rwanda (and later to Kenya) included: (a) revising the curriculum to be more accessible and less context specific; (b) creating a framework which needed to be closely followed in the new country, but leaving room for the country to work out some of the details; (c) extensively observing the implementation of the program so that Educate! could offer advice while at the same time remaining faithful to the model; and (d) transferring and introducing helpful mechanisms for learning and receiving feedback as the program is implemented (such as the IAB). In the end Educate! established an office in Rwanda and even transferred a few of its Ugandan staff members to work there full time and assist with the transfer and recontextualization work.

Tensions in the Educate! Experience—concluding thoughts

Among the key themes that arose in this chapter was the question of contextual relevancy. Throughout its efforts to design and adapt its program, both in Uganda and abroad, Educate! intentionally created space for local voices, experiences, and perspectives. During the creation of the Educate! Experience, this involved collaboration between Angelica, Emily, and Eric with the organization's first batch of eight mentors in revising every aspect of the emerging program. As time went on, and as the organization expanded, new mechanisms like the IAB and BML loops were integrated into the organization to ensure that feedback from those in the field was continually integrated into the organization's planning and revision efforts. From my conversations with the D&T team, it appears as though Educate! has not stopped borrowing and adopting ideas from external sources, however the staff, made up of a majority of Ugandans, communicated its confidence that the continued relevance of the Educate! Experience is exemplified by its enthusiastic embrace across hundreds of schools, and its positive endorsements from both mentors and students.

Despite these findings, there were some interesting tensions that arose during my study of the Educate! program. In this concluding section, I briefly explore three topics: balancing flexibility and standardization; finding compromise between local and foreign priorities; and consideration of the limits of entrepreneurship as an educational theme.

Flexibility vs. Standardization. Throughout my conversations about the Educate!’s methodology, a theme that regularly appeared in descriptions from Educate! program designers and mentors was the prescriptive or standardized nature of the curriculum. By design, the organization chooses to script almost all aspects of the Educate! Experience. When speaking with mentors and Program Officers, who train the mentors, each made it clear that it is not the role of a mentor to modify or adapt the program, but to remain faithful to the way it is written. Educate! materials illustrate the extent to which LEC lessons are meant to be scripted. We can look, for example, to the introductory page of Lesson 12, from the term on Entrepreneurship; a lesson which I observed and described above. On the introductory page, prepared for mentors, the following details are provided:

Objectives:

- Scholars will be able to write a persuasive speech to attract investment
- Scholars will be able to identify new ways to mobilize resources

Vocabulary:

Pitching, public speaking

Why this lesson:

To receive support for their enterprises, students will develop public speaking skills to pitch their ideas to different audiences.

Materials:

Ball of string

GEPIC info strips

Visuals: “Advocacy definition,” “GEPIC,” “Mobilizing resources”

Lesson plan flow:

0. Attendance (5 min)
1. Introduction (10 min)
2. Public speaking energizer: KNOT OR NOT? (15 min)
3. Pitching your business idea LECTURE (5 min)
4. Pitching your business idea EACH ONE TEACH ONE (25 min)
5. Resource Mobilization (10 min)
6. Conclusion/Reflection (8 min)
7. Action Step (2 min)

Source: West and East is an adjusted version of the Transformative Action Institute.

Source: Tips on speaking and listening: Skills for Effective Entrepreneurship Development (SEED)

The point to bring home is: Sometimes you just have a few minutes to convince someone your business is worth it. By preparing and giving a powerful pitch you can receive valuable feedback on your business idea.

Do not skip: GEPIC structure

At the beginning of each lesson in the LEC books, a mentor is provided with an overview of the lesson which draws the attention of the mentor to each element of the lesson, including the required materials, and the time allocated to each activity. During their yearly induction trainings, mentors spend a significant portion of their time practicing, or performing the lesson exactly as it is laid out in their workbooks. To an outside observer, it would appear that the scripted nature of each lesson, repeated by mentors every year, all throughout the country, was producing an extremely standardized experience. It appears in fact to stifle flexibility and variation. When asked about whether there was variation in the program model, a member of the innovation team offered the following assessment:

I think the experience is generally consistent because we try to standardize everything from the curriculum because all the mentors teach the same way. We try to make sure everything is standardized. Even the associations, the Program Officer in Mbale is training the same thing like the program officer in Gulu. However, when it comes to different regions they have different dynamics. So sometimes you might try to control how those dynamics probably affect the impact [...] but mostly we try to control it from here by standardizing everything. Whether it is training materials, whether it is the way of teaching, whether it is a follow up procedure.

When prompted further to expand on the logic of a system that standardizes everything rather than adapts to different contexts, the same team member explained,

Well when you look at the curriculum, it's not even quite specific in any way. It will probably not say you need this amount of money to do something, or probably you need to have this kind of attitude. [...] Because it is general. That is the whole idea. Maybe to use a metaphor, it is just to light the bulb. And then whoever has received it will apply it in whatever situation. So if a student in central is learning about advocacy they will be able to apply that to their own situations. What are they advocating for? They could probably be advocating for something that is different from someone in East. So the curriculum is

standardized on general principles. So when it comes to the actual implementation, every region, or every student, or every scholar is getting that and applying it in their own situation.

From this comment it becomes clear that flexibility in the Educate! model comes from what scholars and students decide to do with what they learn. They are given the freedom to contextualize the program as they see fit, especially within their clubs which they largely run on their own. But in terms of getting students to that place, getting them to the position of having freedom to choose and contextualize, the organization believes that it must standardize the experience to ensure the best quality it can throughout the country.

Compromise between local and foreign priorities. As an organization whose materials draw heavily from other existing materials, particularly from sources outside of Uganda, one begins to wonder how the organization ensures that it is not only imposing foreign ideas but is also creating space for local considerations. This balance between the local and foreign is a crucial part of avoiding the coercive or authoritarian models of educational transfer. In my interviews with Angelica, one particular anecdote about leadership stood out as an illustration of Educate!’s willingness to find a balance between local and foreign priorities and ideas.

During the early planning stages of the program, Angelica and Educate! found that while the people they spoke with were very open to and interested in the theme of entrepreneurship, rarely was much attention given to the subject of leadership. So much so, that it might even appear as if leadership was not a relevant need or theme for their program, but possibly something being imposed from the outside. In response to this, Angelica provided the following explanation for why she and Educate! remained committed to the relevancy of leadership as a concept, despite the fact that it rarely came up as a “need” when students and teachers were asked about it:

I kind of think about, it’s like a doctor analogy that I sometimes would use. It’s not perfect, but you know the idea that you ask someone what’s wrong with them, they’re not gonna tell you stage 3 cancer, you know? They’re gonna tell you whatever it is that’s most painful in that moment or whatever is most, I guess expressive. And the other thing is the power of just like suggestion of other people. That, I would call it, “fakeness,” that happens when a teacher is trying to craft knowledge about something and transmit that, also happens when students are talking about their wants, needs, desires, interests. There’s also a kind of fakeness that is inserted in there too. There is a sort of social expectation, there’s the lack of language to say and express new and different things, because all of our mediums are in English. So part of it is also that. And they’re also kids, so there’s limitations to how much they can express their own realities as well.

A lot of the mentoring that happened in our first couple of years uncovered leadership as a constant theme. That people felt disempowered, or they

didn't feel strong enough to do something. [...] All those sort of leadership questions came up, but when you asked someone what the issue was, it was always 'money.' So, it was a belief that I had about leadership borne out of my own experience in NY and in programs like this for quote/unquote "disadvantaged youth." But also in our first surveys of people who weren't necessarily the students themselves, it was flagged as an issue and a problem that would manifest later on. Or it would manifest, and we could see it, but no one was talking about it. For example, students not being able to speak in front of anyone. Students not being able to look you in the eye. Students not feeling able to start something. We couldn't just take what people said, we also had to really pay attention and then ask why a certain phenomenon was happening to other people. And we would get the explanation of that. [...] But again if you ask that teacher what do the students need, they're not going to say leadership. It's just not as known as a concept, as branded as a thing.

Rather than back down from its focus on leadership, Educate! believed that the best approach to ensuring relevancy when importing ideas is not always by asking people for their preferences, but to read the reality and discuss as educators what themes or tools can best resolve the challenges that are being observed. It is noteworthy that within this dynamic, the individuals making the decision about leadership were not only Americans, like Angelica. The decision was made first by the initial group of Ugandan mentors, and later has continued to be supported by a staff almost entirely made up of Ugandans today.

What Educate! appears to be advocating, when it comes to the transfer and recontextualization of imported ideas and educational priorities, is that there is room for debate, for experimentation, and for some degree of reliance on professional expertise. As educators, those who designed the program did not feel the need to bend to the will of beneficiaries in the name of contextual relevancy. At the same time, the organization did not feel it was imposing its views upon an uninterested population. In the end, through testing its commitment to leadership as a foundational theme, and observing the results and the feedback that has been received, Educate! today feels validated in its decision.

The limitations of 'entrepreneurship' as an educational theme. While leadership was a concept that was initially supported more by the organization than its intended beneficiaries, "entrepreneurship" was a theme that was greatly endorsed by prospective students (and by the government and national curriculum). Yet focus on entrepreneurship is not without controversy, particularly within the field of CIE. The pushback against entrepreneurship stems from the belief that it is a concept rooted in Western development paradigms. Tikly (2004) explains a bit about how entrepreneurship came to spread as a tool of development:

It has also been argued that the 1970s saw the emergence of an entirely new way of conceiving the causes of poverty as it affects both men and women with the

elaboration of neo-liberal economic principles and the birth of the Washington consensus. This saw a recasting of the liberal homo economicus as a free economic agent invested with basic rights and civic duties. What emerged was a valorization of entrepreneurialism as the basis for growth along with the notion that these qualities could be actively formed through the actions of individuals themselves rather than on the basis of state intervention. Needless to say, although its universalism was claimed by its exponents, this newly invented model of individualism remained as Eurocentric as its predecessor. (p. 185)

In Tikly's analysis, entrepreneurship emerged just as neo-liberal economic principles gave birth to the Washington consensus, which went on to dominate the development ideology of large international donors like the World Bank. The assumption behind entrepreneurship was that it was the responsibility of the individual to provide for his or her own development, rather than the responsibility of the state. Such a view had its foundations in individualism, which in turn was rooted in Eurocentric views about development.

... for neo-liberalism remains premised on a western, individualistic understanding of human nature. Asking poor people in rural areas in different parts of the low-income world to become more 'entrepreneurial' and to take responsibility on an individual or family basis for paying user fees for basic services such as education and health means going against more traditional, collective forms of social action as they have historically emerged and developed in these areas (Ndoye, 1997). (Tikly, 2004, p. 185-6)

Tikly's argument appears to undermine the value of entrepreneurship as an area of emphasis within educational programs. For Tikly, it is not that there is an inherent problem with individuals choosing to become entrepreneurs; but rather the problem lies within entrepreneurship's implicit embrace of individualism as a philosophy—the idea that each person is responsible for their own development, such as paying for one's own school fees—and the fact that endorsing entrepreneurship as a means to development is to provide support for an inherently Western, capitalistic conception of development.

The purpose in raising Tikly's concerns about entrepreneurship is not to undermine its perceived benefits to Educate! scholars and mentors, but rather to highlight the complexity of transferring educational concepts within an era dominated by narrow conceptualizations of development. In the discussion chapter following the next case study, additional consideration is given to the challenge of handling the transfer and recontextualization of non-neutral or biased educational concepts.

Chapter 4: A case study of decentralized recontextualization in the Preparation for Social Action program and the Kimanya-Ngeyo Foundation

Introduction to Kimanya-Ngeyo Foundation and Preparation for Social Action

The Kimanya-Ngeyo Foundation for Science and Education (Kimanya) is a Ugandan-based organization, established in 2007, with an emphasis on education for community development. Located in Jinja, in the southeastern region of Uganda, Kimanya was founded by a married couple—Dr. Selam Ahderom, of Ethiopia, and Dr. Debbie Singh, of Australia—who desired to introduce the Preparation for Social Action (PSA) program, which had its origins in South America, to Uganda. PSA is an educational program originally developed by the Foundation for the Application and Teaching of the Sciences (FUNDAEC) in Colombia. The PSA program began as an adaptation of the Sistema de Aprendizaje Tutorial (SAT) program, an accredited alternative secondary education program for rural areas that was also created by FUNDAEC (Murphy-Graham & Lample, 2012). FUNDAEC describes PSA as a program that seeks to “enhance the capacity of young men and women who, adopting the designation ‘promoters of community well-being,’ wish to dedicate their time and energy to the progress of the regions where they live” (FUNDAEC, 2004). A detailed account of FUNDAEC, SAT, and PSA are provided in a later section.

Noteworthy about the efforts of Selam and Debbie to transfer the PSA program to Uganda was that they made the decision to create an educational institution for the implementation of PSA before they decided on where it would be established. Selam explains that he and Debbie had been very interested in the SAT program for a number of years prior to founding Kimanya (Murphy-Graham & Lample, 2012). In my interview with Selam he explains,

Originally my idea was that I would be involved in starting an educational program in Ethiopia to work with people in rural Ethiopia. But when I got to learn about the PSA program, or the SAT program before that, then I became convinced that that is really a great program and I got a chance to learn about it when I was serving [at the world headquarters for the Bahá’í Faith in Israel], in more detail. So, when in the end, we came back to Africa with Debbie, my wife, that was always in the back of mind. I was teaching at the university, but I was interested in processes that would [focus on] deeper community engagement and development of capacity at a more systematic level than what I had seen.

When they first arrived in Uganda, Selam was working as an instructor at Makerere University while Debbie worked at a medical clinic in Kampala. Even before the first PSA materials were introduced to Uganda, Kimanya’s founders organized small groups of youth within Kampala to study a sequence of materials meant to strengthen English literacy and promote moral development. While these groups were conceived as precursors to PSA study groups, Selam and Debbie, in consultation with the organization’s early collaborators, made the

decision to shift their base of operations to Jinja. It was believed that in Eastern Uganda, working in less urban environments just as SAT and PSA do in Colombia, the program was more likely to flourish.

Eventually, Kimanya formed a six-person founding body, comprising a mix of Ugandans and non-Ugandans, and registered as a local NGO. At this same time, the organization hired a small staff and, with the help of FUNDAEC representatives, began organizing trainings to prepare local volunteer educators to establish groups within their respective communities that would study PSA materials and implement its corresponding activities. In its “Memorandum and Articles of Association,” Kimanya describes the organization’s underlying aims in the following terms,

The Foundation, inspired by universal principles found in the Baha’i Faith, among which are that each human being is created noble and has immense potential, that education is indispensable for releasing this potential and allowing mankind to benefit therefrom, and that the purpose of human life is to promote advancement of civilization, is thus established to promote processes that enable the generation and application of knowledge as the basis for community development. This is accomplished by bringing together the traditionally separate disciplines of science, technology, education, organization, and rural development through a series of interrelated activities, including investigation and research, development and application of learning methodologies for both formal and informal education, and training at different levels in rural, peri-urban, and urban areas. (Kimanya, 2007).

While Kimanya operates as an independent organization in Uganda, the decision to introduce the PSA program to the country was not, in fact, made in isolation. Instead, FUNDAEC was aware of increasing interest in its SAT program—a program that supported organizations across Colombia and in the surrounding region to implement over multiple decades. In response to this interest, FUNDAEC began to modify its more context-specific SAT program for worldwide adoption. The organization then initiated conversations with individuals and organizations interested in transferring its model to countries in Africa, Asia, and the Pacific. The outcome of these efforts was the creation of the PSA program, and in 2007 FUNDAEC received a grant from the Hewlett Foundation to support the implementation of the program in Uganda, Zambia, and Kenya (Murphy-Graham & Lample, 2012).

Case study overview

As with the previous case study, the focus of my investigation into the Kimanya-Ngeyo Foundation was to answer three questions about its transfer and recontextualization process: (1) how are its educational practices transferred and adapted for a new context? (2) what contextual considerations are at the heart of these recontextualization efforts? And, (3) how, if at

all, do its recontextualized educational efforts preserve or reestablish educational practices based on diverse, context-specific worldviews and sociocultural perspectives? These questions, along with a set of related themes, or deductive codes, formed the basis of the interview and questionnaire questions used with staff and participants of Kimanya (see Appendix A). Those themes included recontextualization, insider and outsider knowledge, adaptation, variation, flexibility, contextual relevancy, participation, and agency. Owing to changes in my positionality in relation to Kimanya—first as outside researcher, then a project head, and eventually the organization’s director—I hired research assistants to conduct most of the data collection for this case study.²⁵ Just as in the first case study, the majority of data comes from interviews conducted with implementers of the program (including the organization’s founders, coordinating staff, and field educators or “tutors”), as well as its beneficiaries (PSA participants). Interestingly, like Educate!’s mentors, PSA tutors were also viewed within the organization as both beneficiaries and implementers of the educational program.

The findings from my investigation are presented over two main sections. The first section details the origins and design of the PSA program by FUNDAEC, examines how the program was transferred to Uganda, as well as how it is currently implemented by Kimanya-Ngeyo. In the following section, the process by which Kimanya has recontextualized the PSA program is explored. In particular, it is argued that the flexibility and open-ended design of the PSA program itself, coupled with its emphasis on learning and its aim of preparing participants to become protagonists of social change, all play an important role in the program’s successful recontextualization. In fact, it is owing to these features of the PSA program that Kimanya placed little to no attention on the adaptation of the program materials or even the creation of new, uniquely indigenous materials, but rather focused on adaptation of the program through ensuring that the experience of its groups responded to the unique needs of its diverse participants. The chapter concludes with some consideration of the challenges specific to Kimanya’s approach to educational transfer.

Within this chapter, three notable features of Kimanya’s efforts to transfer and recontextualize the PSA program to Uganda are examined. The first noteworthy feature is that the introduction of PSA to Uganda represents the transfer of a complete, and richly complex, educational model from one context to another. Unlike the case of Educate!—where educational ideas, strategies, and activities were transferred and contextualized through the process of creating an entirely new program—Kimanya chose to adopt an existing program, comprising a complete set of materials, pedagogical and implementation strategies, as well as a comprehensive theoretical framework that were each already established. The transfer and recontextualization of PSA by Kimanya therefore posed a real risk as a coercive or imposed form of transfer given seemingly fewer opportunities to adapt or indigenize the program. FUNDAEC, the organization that designed PSA, was even involved in the early stages of the transfer process. How Kimanya addressed these challenges is explored in both the transfer and recontextualization sections.

²⁵ See section entitled “Data collection” in Chapter 1 for details

The second noteworthy feature is the fact that Kimanya was attempting to adopt a program from Colombia, another country in the global South, for implementation in Uganda. South to South educational transfer and collaboration is far less prominent in CIE literature than North to South transfer. South to South transfer alters the established dynamics of most borrowing and lending cases, owing to its distinct dynamics of power, as well as to questions of contextual relevance. This theme of South to South collaboration is also explored in more detail within the transfer section.

Finally, the third feature of this case study that stands out is Kimanya's *decentralized* recontextualization process.

Decentralized recontextualization

At the heart of the PSA program and Kimanya's learning strategy is an effort to engage all those involved with the program, from participants to the organization's Director, in a process of regular planning, action, reflection, study, and adaptation. In this way, the experience of the PSA program is intended to change in order to meet the specific needs and circumstances of each group of participants, while the materials of the program largely remain the same. Decentralized recontextualization requires finding a balance between adherence to the material and variation according to context; between independence of the tutor and deep understanding of the intended aims of the material; and between centralized planning and adaptability, and empowering those in the field to learn, reflect, and take varied action.

Although no literature on decentralized recontextualization currently exists, one can rephrase this term by describing it as active and empowered participation at the periphery. By periphery, I am emphasizing that recontextualization should not only be carried out by those at the center of an organization like Kimanya, but it should also be led by those actively involved at the edges of the program: the "receivers" of educational transfer (i.e. students or PSA participants), as well as the "transmitters" who work closely with them (i.e. educators or PSA tutors). Each of these actors plays an important role in the recontextualization process, adapting the program in the field through continual reflection and action, thus decentering the adaptation process. In doing so, transmitters and receivers of the PSA program engage in a form of empowered participation, and therefore the literature which most closely relates to decentralized recontextualization deals with empowerment.

The term "empowerment" has been greatly overused in development and education literature, to the point of being almost devoid of meaning today (Proscio, 2000). Yet despite its "fuzziness" as a concept, the idea of empowerment still resonates (Murphy-Graham, 2012). In her book, *Opening Minds, Improving Lives*, Erin Murphy-Graham examines how studying the SAT program contributes to the empowerment of young women in Honduras. In reviewing existing literature, she describes her use of the term as denoting a process of change, such as "an increase in gender consciousness, self-confidence, and participation in public life (Malhotra, Schuler, and Boender, 2002)" (2012, p. 2). Murphy-Graham then advances her own definition of empowerment, placing emphasis on the concepts of recognition and action:

I propose that empowered individuals come to recognize their inherent worth, the fundamental equality of all human beings, and their ability to contribute to personal and social betterment. They develop the capacity to critically examine their lives and broader society and to take action toward personal and social transformation. (p. 2)

This definition, with its emphasis on the growth of an individual in his or her ability to effect change in the world around them, is further supported by other CIE authors writing about education and development. Nthogo Lekoko & van der Merwe (2006), in their article entitled “Beyond the Rhetoric of Empowerment: Speak the language, live the experience of the rural poor,” describe the term in the following way:

The aim of empowerment is to change the larger social structures and institutions that keep people in positions of powerlessness and poverty. Empowerment activities are meant to help people to initiate, take control of, and lead development (Couto, 1998). Societal empowerment implies that community members enjoy democratic participation in projects of collective interest; this type of empowerment fosters new attitudes toward authority and toward control of one’s life circumstances. (p. 327)

It is with these definitions in mind that I have constructed the concept of decentralized recontextualization as comprising active and *empowered* participation. In the case of PSA’s implementation, the term empowerment refers to enhancing the autonomy, the impact, and the level of participation of every individual involved in the recontextualization process. Yet the way in which receivers and transmitters of PSA are empowered is twofold. On the one hand, they are empowered by nature of their study of the program, as that is the aim of the PSA program. FUNDAEC refers to its interest in education having developed out of an initial concern for the “many chains of activity that define the daily life of the local population” in western Colombia, and gradually evolving into the creation of “educational content and a methodology for building the capacity of people, particularly the young, to become true protagonists of their own development” (FUNDAEC, 2006, p. 1). Empowerment, within the PSA program, is about elevating individuals to become protagonists of their own development. The second way in which those involved in PSA are empowered is a result of the implementing organization, Kimanya, encouraging its tutors and participants to reshape the experience of the program to fit their contextual realities, and equipping them with the tools to do so.

The concept of empowerment and its connection to decentralized recontextualization is further elaborated upon in a proceeding section. Before doing so, however, it is necessary to return to the question of educational transfer and appreciate what the PSA program is, and how Kimanya came to operate it in Uganda.

Transfer of PSA program

In the introduction, we observed that the decision to transfer the PSA program to Uganda was shared by both FUNDAEC and the founders of Kimanya Ngeyo. On the one hand, Selam and Debbie were attracted to the SAT program (as PSA was not yet complete at the time) and interested in “purposefully” borrowing it. At the same time, FUNDAEC was in the process of preparing the SAT program for export, and thus they played an important role in purposefully lending the program. In this way, the transfer of PSA would likely fall somewhere between “negotiated under constraint” and “borrowed purposefully” on the “voluntary” end of Phillips and Ochs’s continuum of educational transfer (2004). The element of negotiation appears in this transfer process in much the same way as it did with the Educate! program. Kimanya—as an autonomous, non-governmental organization made up of Ugandans and non-Ugandans, and implementing a program originating from outside of Uganda—is both a transmitter of the program, deciding what program to introduce to Uganda and translating it to its new context, as well as a receiver of PSA as it actively recontextualized the program with the help of its staff and participants to meet the needs of the communities it worked with. Furthermore, negotiation was also required between the implementing organization and the creators of PSA, as Kimanya only learned how to impart the program through trainings offered by FUNDAEC.

The first of such trainings was offered in 2006, before Kimanya was created, but in the midst of FUNDAEC’s efforts to revise its SAT materials for wider adoption. Not long after Selam and Debbie first learned of SAT, they were both invited, along with about 38 other individuals from countries in Africa, Asia, and the Pacific, to participate in a three-week introductory course offered in Colombia. By the time of the gathering, FUNDAEC had translated and adapted six of its SAT materials for use in what would become the PSA program. Debbie explained in our interview that individuals invited to Colombia were asked to study these six units before arriving, with the intention that the materials would be completed again as a group with the support of FUNDAEC’s staff. Once there, the participants engaged in a combination of activities including the study of the six materials, the completion of accompanying practical components, meeting with SAT tutors and others who had been involved with the program for many years, meeting with SAT students, and generally learning what the program looked like in practice. Selam explains that two things stood out to him about his participation in this space: (1) the richness of the program and its foundational concept of a capability; and (2) the fact that this aspect of the program is widely applicable and not dependent only on the Colombian context to succeed.

I had a chance to go to Colombia and observe some of the SAT groups, talk with some of the SAT tutors. So from all of this there is one thing that struck me and that is how systematically the capabilities were being developed [in students]. [The curriculum] wasn’t approached from the point of view of the subject matter. ‘Oh, it’s good for people to know mathematics.’ Or, ‘it’s good for people to know science,’ or whatever it may be. [...] But rather looking at what does a person

need to be capable of ultimately to be a promoter of community well-being, to be engaged in the community. [...] So it's very possible then, to be able to adapt whatever needs to be adapted because the way that the capability is being built or is being developed has an actual clear framework of how it happens. [...] And so that, I think, is the main reason what convinced me from that very beginning that this program would not be so dependent on its circumstances; on a particular circumstance or a particular set of constraints.

What Selam articulates here is that the wide applicability of the PSA program is closely linked to its approach to its concept of a capability, and to how it develops Promoters of Community Well-being. When the aim of the program is developing capabilities that will enhance an individual's ability to contribute to his or her community, then what shape the study of the program takes, and what it actually achieves, will ultimately vary according to context.

FUNDAEC, SAT, and PSA

To better understand the PSA program and the nature of its transfer from Colombia to Uganda, it is helpful to examine the history of FUNDAEC and the SAT program. The past decade has seen an explosion of literature dealing directly and indirectly with the organization and its programs (see VanderDussen, 2009; Honeyman, 2010; Murphy-Graham, 2008, 2010, 2012; McEwan, et. al., 2014; McEwan, 2015; Murphy-Graham & Lample, 2014; Lample, 2015; Farid-Arbab, 2016; Kwauk & Perlman Robinson, 2016). In much of the published literature, researchers have either focused on the impact of FUNDAEC's programs in their respective localities, or on the unique contributions and insights that FUNDAEC's programs offer to fields such as education for development, CIE, science education, and service learning. Yet what stands out most about FUNDAEC is the consistency of its approach to education and development over more than four decades of activity.

FUNDAEC was created in 1974 by a group of scientists and professionals "who were trying to find a more appropriate role for science, technology, and education in the development of rural areas" (Arbab, Correa, & de Valcarcel, 1988). Disillusioned with prominent thinking about development at that time—much of which offered simplistic formulas for success, equating development with industrialization—the founders of FUNDAEC took up a more challenging path (Arbab, 2000). For FUNDAEC, development was not "a package the 'developed' deliver to the 'underdeveloped' but a process in which entire populations must, in one way or another, participate" (Arbab, 2000, p. 158). While the desire to involve a local population in its development was not unique at this time (see Cooke & Kothari, 2001), FUNDAEC was also not satisfied with "participatory" development fads which invariably divided projects into "us" and "them;" where "they" were asked to participate in "our" plans and models. In order to truly raise individuals to the level of protagonists in their own development, and not just adherents to someone else's plans, FUNDAEC recognized that it had to provide individuals with access to global knowledge through a systematic learning process (Arbab,

Correa, and de Valcácel, 1988, p. 3). In this way, the organization began “seeking strategies for developing, within specific populations, the capacity to generate knowledge and to put that knowledge at the service of their own social and economic development” (FUNDAEC, 2001 cited in Murphy-Graham, 2012, p. 33).

Those “specific populations” with which FUNDAEC would collaborate over decades were agrarian communities in the northern Cauca region of Colombia. And from the outside of its engagement in those communities, FUNDAEC was mindful of how it would avoid the trap of ‘delivering’ development to such a particular population.

The populations with which FUNDAEC would interact would not be perceived according to the visions common in the development literature and among projects of social action. Defining the poor as masses of undernourished people, overwhelmed by problems and needs-housing, employment, sanitation, education, places them in the minds of everyone, either as obstacles to development, or as elements of a political force that can be manipulated in the name of justice, well-being, or progress. It would be much more accurate and constructive for FUNDAEC to consider the participants of its programs as irreplaceable resources in a self-sustaining process of change. The challenge would be to find paths of action that would help the population translate this potential into reality and create possibilities for viable plans of development. (Arbab, Correa, and de Valcácel, 1988, pp. 3-4)

By viewing the population with which it would collaborate as resources for social change, rather than as “obstacles” to development, and through actively embedding itself in the communities of northern Cauca, FUNDAEC set about designing an educational program and process that would develop and channel the inherent potentialities of youth in that region towards “service to the community and to society at large” (Arbab, Correa, and de Valcácel, 1988, p. 4). By investing in the intellectual, spiritual, and social development of these rural youth, FUNDAEC believed it was in fact preparing the very resources that region would need to carry out subsequent programs of research and action; programs that might one day lead to the development of the region (*ibid.*).

In her summary of the early days of FUNDAEC, Erin Murphy-Graham (2012) explains that between 1980 and 1990, FUNDAEC expanded as an organization, wrote numerous educational materials, and increased its collaboration with other institutions and development organizations in the region. Among the most important collaborations at the time was the decision of the Colombian Ministry of Education to approve FUNDAEC’s educational materials, comprising roughly eighty textbooks, as “effective and valid” for secondary education, spanning grades 7-12 (FUNDAEC, 2001 cited in Murphy-Graham, 2012, p. 35). Murphy-Graham is careful to point out that it was never the intention of FUNDAEC to simply create an alternative secondary education program, but instead to pursue social and economic development within

regions of Colombia (ibid.). Nevertheless, approval from the Ministry of Education resulted in the birth of the SAT program, and through the early interest of two organizations—Comunidad por los Niños (Community for the Children) and the Federación de Juntas de Acción Comunal (Federation of Community Action Boards)—SAT began to spread to new departments within the country.

Later, during the 1990s, FUNDAEC partnered with even more organizations across Colombia and into other Latin American countries like Ecuador, Costa Rica, Guatemala, and Honduras, who wished to expand the reach of the SAT program. By the mid 2000s, FUNDAEC was collaborating with over thirty organizations and municipal institutions around Colombia, “offering the SAT program to a student body of over 25,000, having already graduated some 70,000 individuals” (Arbab, 2007, p. 9). And, as Haleh Arbab—one of FUNDAEC’s early members—shared in a talk about the organization and its activities in 2007, the program and its textbooks were undergoing translation into English leading to their adoption “by nongovernmental organizations in Africa and Asia, representing a second phase in the program’s thirty-year evolution” (ibid.).

The story of FUNDAEC and the creation of the SAT program, while briefly summarized here, are worth further investigation.²⁶ What is important to appreciate about the story, however, is that despite eventually expanding the reach of its program across Colombia, then to neighboring countries, and eventually to other continents—FUNDAEC created the SAT program by closely immersing itself in the needs and the reality of a particular region: northern Cauca. In doing so, FUNDAEC created a richly contextualized program; one which sought to develop the capacity of groups of individuals to contribute to the advancement of their communities. Yet, as the process of creating these materials was in part a response to the flaws that FUNDAEC’s founders observed in dominant discourses on development, the SAT materials inherently touched upon more universal (or non-context specific) themes, with the founders drawing inspiration from to the complimentary knowledge systems of science and religion (Arbab, 2000). On the relevance of religion to development, Farzam Arbab, one of the founders of FUNDAEC, has written:

The questions before the development field, concerned as it must be with the prosperity of humankind, relate to the nature of the human being, the underlying purposes of individual and collective life, and the direction of society. Answers to these questions must shed light on the next stage of evolution in the relationships that are essential to existence and progress: between the species and nature, within the family, within the community, and between the individual and the institutions of society. Humanity must become increasingly engaged in a quest for meaning, and such a quest is inherently religious in nature. (Arbab, 2000, p. 178)

²⁶ To learn more about this history, see Arbab, Correa, and de Valcácel (1988), Arbab (2000), and Murphy-Graham (2012). For more details about the SAT program, see Kwauk & Perlman Robinson (2016).

With regard to science, Arbab notes that while the development field has already embraced science as the foundation of its larger project, development practitioners have poorly appreciated the role that science can (or should) play in their efforts.

Having observed a wide range of policies and programmes for many years, I am now convinced that the field of development suffers at various levels from an inadequate understanding of science. First, in the absence of a consistent conceptual framework acceptable to most practitioners, it falls prey to the impositions of competing disciplines— economics, the agricultural sciences, public health and population, anthropology, management, and so on—each of which, while acknowledging a role for other disciplines, insists on fashioning the field according to underlying ideological premises of its own. Second, lacking a clear interpretation of the connections that exist between science and technology, development thinking overemphasizes the latter, and does not pay the necessary attention to the advancement of the scientific culture of peoples. Third, by focusing on certain tools and procedures—for planning, for reporting, for evaluating—it loses sight of the exigencies of systematic and structured learning, an essential characteristic of any approach that claims to be scientific.

By arguing the above I do not wish to suggest that the very complex set of social, cultural, political, and economic interactions necessary to bring about change should be scientific. But neither is it reasonable to assume that social transformation is an engineering problem to be managed by technocrats and moved in directions set by political and economic power. What we have the right to expect is systematic learning about development through which some kind of ascertained knowledge can be gradually accumulated in communities and institutions. (pp. 158)

In the programs and materials that FUNDAEC has produced, the value of considering science and religion in development efforts is that they represent two systems of knowledge widely in use throughout the world, and both offer tools for investigating reality. Thus, while they may not be universal in how they are interpreted, as systems dealing with the study of external phenomena and the inner dimensions of human existence (Kapur, 2000), they are largely universal in their relevance.

Ultimately, it is this interplay between the universal and the contextual elements of FUNDAEC's materials that I argue are behind the success of efforts to transfer and recontextualize the SAT and PSA programs. A description of the features of PSA that aided in its recontextualization in Uganda are examined in a later section. For now, it is helpful to understand the basic elements of the PSA program and the structure and activities of Kimanya Ngeyo, the organization implementing it.

PSA and its structure

While the SAT materials were developed by FUNDAEC decades ago, beginning in the 1980s, the PSA materials have a much shorter history. When FUNDAEC decided in the 2000s to undertake a review of its SAT materials—with the aim of translating them for a broader audience outside the context of Colombia and Latin America—the exercise turned into an opportunity to incorporate thirty years of experience into modifying and reorganizing the content of the materials. As a longtime collaborator with FUNDAEC shared,

There is a vast amount of information across the SAT units. So PSA was able to—I think maybe it was a good opportunity for FUNDAEC to also review all the content and see okay which ones can we reorganize and put together in a different way. Because it was 30 years ago these materials were written, but also 30 years of experience that had been gained since then in its delivery and implementation. So perhaps PSA, maybe it wasn't just about the adaptation of it, but also a review of SAT itself, the reorganization of the content itself, and the capabilities and so on.

One example of this kind of reorganization was the decision to move a lesson on insects from a unit on mathematics to a unit on agriculture. Originally, the lesson was included in the mathematics book as part of a discussion about analyzing insect populations. However, during the review process, the lesson was moved to the agriculture unit instead, as it provided important information for farmers about insect biology and growth.

As with the SAT program, there are four essential components to the PSA program: the textbook, the tutor, the participant, and the community. Complimentary to these four components is the implementing organization (including its staff and coordinators). Taken together, PSA participants study the program's various textbooks in small groups under the support of a single tutor. The focus of the groups is the development of the capacity of participants to contribute to the advancement and well-being of their communities, such as villages or neighborhoods. The implementing organization is responsible for overseeing the training of tutors and the coordination of groups' activities. Within a country like Uganda, the PSA program is studied in groups of around 10 to 15 participants.

Textbooks. The PSA program is made up of 26 textbooks, also known as “units.” At present, there are 18 available units, with an additional being developed. Each PSA unit is part of a “text,” or a group of units (between two to four) which are part of a similar theme. For example, the Units “Properties” and “Systems and Processes” are two parts of the text known as “Primary Elements of Descriptions.” A text typically aims at developing the same capabilities and related concepts within the learner across multiple units, with one building off of the other. In total, there are eleven texts in the PSA program.

PSA textbooks are not organized around traditional subject areas such as Biology, Chemistry, English, Algebra, etc. While such topics are still covered in many of the books, the program is instead organized around concepts and capabilities.

A capability in this context can be thought of as developed capacity to think and act purposefully within a particular sphere of activity. In order to advance in a given capability, one must understand a related set of concepts, learn a number of relevant facts, and acquire a range of skills, abilities, and attitudes, together with the spiritual qualities that underlie these attitudes. Each unit of instruction in the program is organized around the development of one or more capabilities, broadly grouped into four areas: language, mathematics, science, and processes of community life. (FUNDAEC, 2004, p. vii)

In this way, a PSA material may include content that is typically covered in a few different subject areas. A common illustration can be seen in the book “Classification,” which makes use of taxonomy as a means to developing mathematical capabilities in learners.

Using the language of sets, it takes the student through first a detailed examination of the classification of animal species and then, in a much more cursory fashion, an analysis of plant classification. Yet, just as the unit cannot be regarded as one dedicated solely to mathematics, neither can it be considered a course on taxonomy. The substantial amount of taxonomical information is intended to ensure that the capability of classification is developed on a sound foundation of veritable knowledge, and not according to some contrived scheme. (FUNDAEC, 2003, pp. vii-viii)

Each PSA book is action oriented, often involving a number of practical elements like experiments, research activities, and service activities. Students each receive their own textbooks and space is provided for completing exercises within each book. One final feature of PSA textbooks, which is examined more closely later on, is the open-ended nature of the materials. There are no preset answers in any of the PSA books. PSA learners use the same open-ended materials as their tutors.

Tutor. The pedagogy and system of learning employed within the PSA program centers around the tutor. The very name SAT translates in English to “Tutorial Learning System.” Tutors support PSA groups in the study of the program’s various texts, however, their role is different than that of traditional teachers or facilitators.

By tutor, we do not mean “facilitator” as the word has come to be used in educational approaches that borrow the terminology of group therapy. The tutor is a trained teacher who knows more than the student. Yet, the teacher is also a

learner and does not wield arbitrary authority. Tutors guide the students through the textbooks, raise questions and help find answers, clarify obscure matters, encourage reflection on real-life experience and supervise experiments and social action. They do not lecture or dictate, but nor are they mere facilitators of group discussion. (FUNDAEC, 2000, p. 209)

A single tutor is assigned to each PSA group and often plays a direct role in identifying and enrolling participants to study the program. Having one tutor for each group means that tutors assist PSA participants in completing all the books and accompanying activities over the course of the program. PSA tutors are not viewed as experts in any particular area, although they may have their individual strengths, but they are trained by the implementing organization in advance of working with participants to understand the logic and aims of each PSA unit. As they study the program with their participants, tutors are supported by the implementing organization through regular reflection spaces, through visits by coordinators to their groups, and through the provision of specialized materials when necessary for the completion of experiments.

Tutors are typically supported financially by organizations implementing PSA, but they are not commonly viewed as staff. Instead, the role of tutor is viewed as a form of service that one carries out in a community where he or she may live. Because they are not expected to possess or transmit all the knowledge gained through participation in the PSA program, tutors learn alongside their participants, as well as conduct acts of service and carry out research and experiments with them. In most cases tutors also work with their fellow tutors in a given region to complete practical activities as part of their trainings, including maintaining experimental agricultural plots. For these reasons, PSA tutors are viewed as both transmitters and receivers, or implementers and beneficiaries of the program.

Participant. As with the term tutor, the term “participant” is commonly used in the PSA program to denote a difference in how the program views its learners in comparison to traditional students. They are not considered as participants in a program, but as participants in a process of personal and social change. They meet in community-based groups under the guidance of a tutor in order to advance through the study of PSA units. Far from passive recipients of knowledge imparted by teachers or textbooks, participants are viewed as protagonists of their “own spiritual and intellectual growth as well as [contributors] to the transformation of society” (FUNDAEC, 2000, p. 207). Kimanya and the PSA program are “*trying to help the participants to be active in the development of their communities,*” shared Kimanya’s Program Coordinator.

Essential to PSA participants is the concept of a “promoter of community well-being,” which is the designation that each participant assumes. Participants join PSA while already occupying other jobs or roles of service within their community, including as teachers, students, farmers, fishermen, parents, etc. They therefore join the program in order to add to the knowledge and abilities they possess, to acquire a deeper understanding of relevant concepts, and to “enhance certain qualities, attitudes, and skills that will enable them to serve their communities more effectively and thus promote the well-being of their people” (FUNDAEC,

2014, p. 1). To be promoters of community well-being involves integrating “knowledge from various fields relevant to the challenges they must meet in order to act on their social reality” (ibid.).

Community. The relationship between the PSA program and community members is reciprocal (Murphy-Graham, 2012). On the one hand, the community is the site where students must be actively engaged in order to enhance their learning. Understanding and engaging in the “processes of community life” is one of the four core capabilities emphasized within the PSA program. In developing capabilities related to the community, participants regularly carry out acts of service, such as establishing classes for the education of young children, and raising awareness about environmental issues, while also taking action to promote a healthy environment. Kalenga, the Program Coordinator for Kimanya at the time of my study, expands on this further,

If really the tutor is accompanying his participants very well, you’ll find that by the time this group finishes the 18 books, almost everyone in the village will have benefited from this PSA program. For me that’s the beauty of this program, the PSA program. Because it’s not only one person or two or ten people benefiting but it’s the entire village that is benefiting from this program. And that’s why we are saying that now when the PSA program is in the community, this group should be looked at as an institution of the community.

In this way, the community benefits from students as they continually work to contextualize their learning experience.

Yet at the same time, the community also provides numerous benefits to the participants of PSA. For one, community members often support PSA groups through “donating land, providing technical assistance in agriculture” and other areas (Murphy-Graham, 2012, p. 47). Yet just as impactful, the community is a source of learning for PSA participants and groups. Without the community, PSA groups would struggle to situate their learning in the real world. “[T]rue learning and transformation require a strong action-reflection process. Students need to learn in real-life experience what it is like to participate in community development and what it is like to foster a change process in the community” (Roosta, 1999, quoted in FUNDAEC, 2000, p. 221). And so the community serves as a place, not only for investigation and research, but also for learning through experimentation. Throughout these efforts, PSA participants rely on community members as partners in learning, but also as sources of knowledge and experience which is brought into group discussions.

Finally, at times the concept of community in PSA is extended a bit beyond the notion of one’s neighborhood or village. A concept integral to the study of PSA is that of a “microregion.” As one of the PSA units on mathematics, entitled *Classification*, explains:

There is a concept that we often use in our texts and which will be helpful to you in your work in promoting the well-being of others, namely, the concept of a microregion. To understand what a microregion is we must first know that a region is a broad geographical area. For example, we may speak about the region of western Africa, South America, or Southeast Asia, which are large areas made up of many countries. A region can also refer to an area within a country, such as the valley of the Nile in Egypt.

We will use the word microregion to refer to a region that is relatively small, but large enough to contain some towns and villages and maybe a large city. Throughout the microregion the weather is more or less the same, the crops grown are similar, and the activities of the people are closely related. Usually the people share certain common customs. (FUNDAEC, 2003, p. 4)

Following this brief description, FUNDAEC leaves the work of defining the specific parameters of a participant's microregion to the members of the group. Rather than tell the participants what their microregion is, the unit (with the help of the tutor), provides exercises which prompt the participant to define their microregion collectively. "Picture in your mind your own microregion," the textbook suggests, and then "Write down some of the elements of the following sets" (FUNDAEC, 2003, p. 4). Provided as prompts are the suggestions: "The set of crops in your microregion;" "The set of towns in your microregion;" "The set of animals found in your microregion," etc.

By the end of the end of the unit, students are requested to complete a number of in depth analyses and investigations in order to describe and understand the features of their microregion; from aspects of its climate, to the crops commonly grown within it, to the common trades that maintain its economic life. As one of the first units typically studied in the PSA program, *Classification* serves as an introduction to the concept of a microregion, allowing future units to refer back to this concept with regularity as students are supported to continually situate their learning and practice within a well-defined context.

Capabilities

As indicated in the above explanations, the concept of "capability" is an important organizing principle within the PSA program, and fundamental to understanding its approach to education for development. In the following excerpt from a unit entitled *Education*—part of a complimentary text to PSA, typically targeting post-secondary students, known as *A Discourse on Social Action*—FUNDAEC provides a bit of historical context with regard to how the concept of a capability became integral to its approach to education and to the textbooks of PSA.

In brief, the founders of FUNDAEC had been engaged for some time with a group of university students it was training for a career as "generalists in rural development." This was not the same as a degree-program in international development, but was instead training highly sophisticated agents of change from among young villagers, "who could facilitate the integration

of efforts of different government and nongovernmental agencies” in the region where FUNDAEC had begun its research and action in Colombia (FUNDAEC, 2008, p. 37). While their efforts in creating a “generalists” career did not last more than a decade, what FUNDAEC learned in that process became the foundation for the creation of the SAT and PSA programs. In large part, this was due to a recognition of the role that developing capabilities could play in the educational process.

As we accompanied those we were training to become generalists in rural development in their work, we realized how adopting a few carefully devised educational activities could release enormous hidden capacities in the young. We were particularly surprised to witness their ability to share much of what they had learned with the next generation of youth in their villages. The preparation of textbooks, which became such a major part of our occupation in later years, began with our attempts to put in their hands material that would reinforce their educational efforts.

The textbooks we developed in this next stage of our endeavor gradually gave shape to the core of a secondary school program. As it turned out we managed to write texts that taught not only the equivalent of the official program of secondary school, but beyond that, addressed many of the capabilities we could then see in some twenty generalists in rural development who had graduated from our university-level program. It is this secondary program that finally became known as the “Sistema de Aprendizaje Tutorial”, received much recognition from the Colombian government and many NGOs working in the country, was taken to Honduras and the Amazon region of Brazil, and now begins to be propagated in selected countries of Africa, Asia and Latin America under the designation “Preparation for Social Action”.

A concept that has proven to be crucial throughout the evolution of our endeavor is capability. By the term capability we mean “developed capacity to think and act in a particular sphere of activity and according to an explicit purpose”. We use the word to refer not to individual skills but rather to complex spheres of thought and action each requiring a number of related skills and abilities. Furthermore, for us a capability is not something a student either has or does not have. It is something that one develops progressively as one acquires a set of interrelated skills, assimilates relevant information, advances in the understanding of the relevant concepts, and develops certain attitudes, habits and spiritual qualities. Thus, we can speak of the capability of our secondary students to raise awareness among their friends and family members of the urgency of solving certain environmental problems; they will need this same capability in its more advanced form, say, to participate as members of an NGO in the design and

execution of a far more complex campaign of environmental education in a region. (FUNDAEC, 2008, pp. 51-52)

Owing to its prominent role in the PSA program, it is helpful to consider a few examples to more clearly understand its intent. The first example relates to the PSA book, *Environmental Issues*, the first of two units in the text *Promoting a Healthy Environment*. As the book explains in its introductory chapter, the purpose of the unit is to assist participants to engage in service to their communities through the understanding of certain concepts, the acquisition of relevant information, and the development of useful skills and attitudes (all parts of how FUNDAEC defined a capability in the previous subsection):

Of the eleven texts that seek to enhance your capabilities as promoters of community well-being, four are focused specifically on processes of community life and your participation in them. Of course, in all of the material you study with us, you are encouraged to approach such participation in a spirit of service, a theme that underlies every one of our programs. But the purpose of these four particular texts is to familiarize you with a number of concepts, expose you to a body of information, and help you develop skills and attitudes that will enable you to engage effectively in certain processes in service to your communities.

Looking to the example of *Environmental Issues*, then, if one's goal is to help young people develop the capability of raising awareness about environmental challenges in their community, the material designed for that purpose would need to: help foster public speaking and even research skills, would need to provide relevant information about urgent problems facing the local environment (and even equip students with the tools to seek out that information themselves), would need to help students understand relevant concepts like pollution and how waste can be managed, would need to help students develop useful attitudes and habits like curiosity and perseverance, and would need to help students appreciate the quality of humility to ensure that their community efforts do not come across as patronizing or overly critical.

Another illustration of what it means to develop a capability is provided by Selam. Although not a capability specifically developed within PSA's textbooks, Selam commonly points to the example of a carpenter when explaining the complexity of developing a capability in comparison to developing a skill.

Where people actually focus is on the skills of a carpenter. [...] Information, concepts maybe are not given as much prominence often. Whereas for other fields of study or other professions the knowledge, or the information and the concepts are given far more prominence than those skills.

Yet despite the tendency to overemphasize skills when it comes to the profession of carpentry, Selam points out that all the elements of developing a capability are also present in the act of becoming a strong carpenter: information, concepts, attitudes and even spiritual qualities.

A carpenter needs a lot of information: different types of woods, the grains of the wood, how they grow, ages of trees, hard wood, soft wood. So much information about the various tools. Which tool works with which wood, different types of chairs that people use in the community, different types of furniture that is useful, then shapes. So tremendous amount of information that a carpenter needs to know. But obviously it's just an element of that capability of being a carpenter. Then concepts, also, and actually this is very interesting because some of them really are from the PSA program. A lot of concepts about mathematics are needed in carpentry for example. Concepts of how to make a square, how to make a circle, from a geometrical point of view. How to construct two lines to be exactly parallel. What does it mean for something to be flush, or something to be in a particular geometrical shape, location, so on. So a lot of mathematical concepts, a lot of also concepts of business, and how manage a small enterprise, and accounting. A number of many, many different areas of concepts that a person needs to know. [...] This idea of a capability includes attitudes. These include say, for example, for a carpenter is to be careful. How careful or how much attention do you give to details, how careful you are in measurement, how careful you are in cutting. [...] Deeper than that is even the spiritual qualities like patience and attraction to beauty and so on that really swell from deep in the person that motivates them to behave in a particular way.

Through each of these illustrations, it becomes clear that a capability is not something that one has or doesn't have. Instead, it is something that is developed through an educational effort that consciously addresses the many elements that make up a capability. In this way, a capability, as FUNDAEC employs it, "does not refer to individual skills but rather to complex spheres of thought and action each requiring a number of related skills and abilities" (FUNDAEC, 2008, p. 52). It is through the development of capabilities, I later argue, that individuals are empowered to become protagonists of their individual growth and of their community's development; which in turn implies becoming protagonists in the recontextualization of their educational experience.

Activities and structure of Kimanya-Ngeyo Foundation

As an implementer of the PSA program, the Kimanya-Ngeyo Foundation for Science and Education works with all the core features of the PSA program described above (the textbook, the tutor, the participant, and the community). And while the use of the PSA materials—alongside study of other materials produced by FUNDAEC—underlies all of its endeavors, the

organization has come to see itself as more than just an implementing organization. Instead, Kimanya characterizes itself as a development organization, in much the same vein as FUNDAEC, which makes use of PSA and accompanying FUNDAEC materials as tools in its effort to raise protagonists of development, or “promoters of community well-being.” As such, the organization currently outlines its activities along four lines of action: implementing PSA in communities; teacher training and development; agricultural research; and working with promoters of community well-being and ‘graduates.’

PSA in communities. The study of PSA within communities follows the format described above. A single tutor accompanies a group of 10-15 participants through the study of the program’s 18 units. PSA groups in Uganda typically meet between two to five times a week, for six to fifteen hours per week. At this pace, it typically takes PSA groups a minimum of two years to complete all 18 materials. It is common in Kimanya’s experience that the number of participants within a group will reduce quite a bit over that time, and many groups often stop studying before they complete the program. In 2017, Kimanya was supporting more than 540 participants, across 32 groups, in 32 communities, spread over the districts of Buikwe, Jinja, and Kamuli in Central and Eastern Uganda (Table 4.1).

Table 4.1 PSA Participation

Male participants	Female participants	Number of groups	Tutors	Total number of communities	Coordinators
242	300	32	31	32	3

Each district where Kimanya operates the program is referred to as a unit (e.g. Jinja Unit, Kamuli Unit, Buikwe Unit). Each unit is assigned a single coordinator whose responsibility it is to accompany all the tutors and groups within that unit. Coordinators visit group study sessions and activities as much as possible, in addition to leading tutor reflection spaces. A unit is then broken down into sectors which are made up of a cluster of neighboring communities that host PSA groups. At times in the organization’s past these sectors have had sector coordinators—typically experienced tutors from within the sector who are assigned the task of supporting the other tutors in the sector when the coordinator is not present. Tutors meet on a daily basis within their units to study the PSA materials in anticipation of their lessons, to conduct practices together, and to reflect on their activities. On occasion, tutors also meet at the unit and national level for trainings and seminars. At least a few times a year Kimanya organizes a national training for tutors at its training center in Jinja District.

PSA groups largely meet independent from one another, according to a schedule agreed upon by its members. PSA groups are encouraged to keep a reasonable pace, where possible, and groups that meet less frequently are often helped to organize intensive periods of study such as during school holidays for students. PSA participants come from a wide range of backgrounds, including students, former students who did not complete their secondary education, young

mothers, farmers, members of community groups, etc. From time to time during the year, PSA groups in a given unit come together in gatherings known as “student encounters,” providing participants from different communities the opportunity to meet and share experiences with one another. A selection of participants from PSA groups are also invited on occasion to meet in national spaces for seminars and other sorts of reflections. PSA groups typically start projects or even small enterprises as a team, otherwise at a minimum they complete service activities, research investigations, and agricultural practices together. As with the pace of study, the activities and priorities of each PSA group is decided upon by its members in consultation with their tutor (who participates in the project, as well as offers advice on the feasibility of such plans, among other things).

As with each line of action, there is a team of individuals who take responsibility for planning and reflecting on this area. The team is led by a Program Coordinator, who for much of the organization’s history was Masaidio Kalenga. It was only in the past year that someone new took on the role. Aside from the Program Coordinator, the team is made up of the three unit coordinators.

Promoters and graduates. While Kimanya makes every effort to support participants to complete the study of all available PSA textbooks, the priority of the program is not on completion but rather on what results through the study of the materials. For this reason, while the term “graduate” is often attributed to those who have studied all 18 currently available materials, Kimanya attempts to treat all those who were once involved in the study of the PSA program as “Promoters of Community Wellbeing.” Consequently, a line of action that the organization recently initiated relates to an organized effort to meet with and continue supporting PSA Promoters. In its 2018 annual plan, Kimanya has outlined its aims for a particular line of action:

For the past few years Kimanya has attempted to understand how best we can learn from and support our Promoters. In recent consultations [with other international PSA implementing organizations] at the Bahá’í World Centre, we came to realize that one way we can support our Promoters is through developing more practical knowledge about the areas in which former PSA participants are engaged. What we have observed is that as an organization, our experiential knowledge does not go far beyond the content of the materials and as a result, we often leave it to participants to figure out how best to apply what they are learning to develop their communities. Yet even in cases where PSA Promoters have advanced far in their efforts, we have not given much effort to understanding what they have learned. For example, if current promoters are involved in early child education and establishing nursery schools, what do we as an organization know about their efforts or even more broadly about this area of activity? What support can we provide to our Promoters to assist them in working in this area such that their efforts stand apart from the countless other efforts being made within their

micro-region? How do we assist our former participants to establish service activities and income generating activities that are both consistent with the conceptual framework of PSA, but which advance in ways that go beyond what is covered in the content of the program's materials?

Kimanya has already begun generating insights into these questions through our work with primary school teachers and in the area of agriculture. While we will continue to systematize our learning within those areas, we have assigned one of our core team members to better coordinate our efforts with PSA Promoters. In order to do this the core team member will work with a small group of individuals, initially two, with whom he will investigate more into the prominent projects and service activities of our former participants. This will involve, among other things, collecting data regarding Promoters who are currently visible in the communities; understanding how the capabilities they developed are influencing the activities they are currently engaged in; and how these activities are contributing to individual and collective transformation.

Ultimately, we hope to identify two areas of activity (in addition to agriculture and teacher training) which we will learn more about as an organization in order to better accompany our Promoters. At the moment we believe these areas may relate to early child education and managing small businesses/income generating projects. Once our visits with Promoters have finished, however, and the most common thematic areas have been determined, we shall organize meetings with the promoters from each unit in order to create spaces for regular reflection, study, and action around the theme of their choosing. At the moment we have discussed assigning a sort of "tutor" to work with these promoters, however given the early stage of these plans we have not yet committed to a definite system for accompaniment.

Whatever the ultimate design of our strategy, we expect that the core team member, his team, and others in the organization will need to advance in our understanding and experience within the newly identified thematic areas so that we can be better informed as we work with those already engaged in these same areas. While we hope that the organization can be of assistance to Promoters in their various areas of endeavor—assisting them to be increasingly more systematic in their approaches to community development—we anticipate the learning process within these groups will be led as much by the participants (if not more) than by the "tutors." We hope by creating these spaces and inviting all those within a unit to participate in the reflections (be they former or even current participants), all those involved—including the organization—will learn more about the agreed upon areas. As with all our efforts we intend to rely significantly on the PSA and DSA materials to guide our discussions and activities. (Kimanya-Ngeyo internal document, 2018, pp. 3-4).

As the report indicates, this is still a new area within the organization but it one which the organization hopes will formalize in structure over time. In the meantime, a small team led by the Program coordinator for PSA groups has taken responsibility for learning about this line of action.

Agricultural research. The theme of agriculture has always held an important place within the Kimanya-Ngeyo organization because of its prominent role within the PSA program. As a program developed for individuals residing in rural and peri-urban communities, agriculture is one element of the program that has offered the most possibilities for study and experimentation about a theme of significant contextual relevance. PSA participants and groups not only learn about concepts like the acquisition and application of technology through the study of agriculture, but they also conduct investigations within their communities to learn about existing and traditional practices, imported and local technologies. PSA groups and individuals also turn to agriculture as a means to establishing income-generating projects as well.

Given its importance to the program, Kimanya has long had a team of individuals who specialize in this particular area with the goal of learning how to successfully implement the program's approaches to agricultural production in the Ugandan context, particularly the strategy of diversified high efficiency plots (a form of polyculture). For this reason, the area of agriculture has long been one of the areas where recontextualization has been closely considered given the complexities of both understanding and adapting a system of agricultural production that was developed abroad.

For many years it was the Director of the organization that lead reflection and planning efforts for this line of action with the help of a small team of individuals. In the past year, however, there has been significant development in this line of action owing to the settlement of the resource person for agriculture and PSA within Uganda. This individual, Sanem Kavrul, now serves as the Director of Agricultural Research at Kimanya, and she oversees the activities of a team of agricultural researchers and research assistants. One of Kimanya's Program Coordinators also participates in this line of action. In a recent document outlining its plans for 2018, the agricultural team has described its vision in the following terms:

The agricultural efforts of Kimanya-Ngeyo are taking on a new look as we no longer view ourselves as a PSA implementing organization, but as a development organization concerned with the generation, application, and diffusion of knowledge. It is unfortunate that agriculture—which is the main activity that the majority of the population in Uganda is engaged in—has not been given adequate attention. This is particularly visible among youth in Uganda. Despite making up one of the largest percentages of the national population, and even being the largest population that Kimanya works with in the country, youth tend to regard agriculture as an activity reserved for the unlearned. In order to assist this population, and others, to better appreciate the role that agriculture plays in advancing the well-being of communities, Kimanya-Ngeyo will continue

to learn about agriculture at the national and sector level while involving promoters and community members in this process.

Some areas of learning have been identified that the agricultural research team and tutors will be investigating this year. This includes production on small farms, production on urban gardens, mid to large-scale production, animal husbandry, seed bank, soil fertility management, and establishing a reference library on agricultural production at the training centre in Wairaka. At the sector level, tutors and promoters will mainly focus on production on small farms.

It is evident that families have lost their land to investors and the majority of people are left with less than an acre of land on which they are impelled to grow food to cater for the nutritional and other needs for their families. People need to make appropriate technological choices to be able to utilize the small pieces of land in their possession so that they can meet the needs of their families. This same challenge was faced by farmers in Colombia and Fundaec embarked on a research to try to address it. Kimanya Ngeyo will draw on the experiences of Fundaec and will closely work with farmers and promoters in the community to establish a diversified high efficiency plot on 500 m² and generate knowledge on how this plot can answer the nutritional needs of a typical family of 5 to 6 people.

Urbanization is becoming an undeniable reality in most cities of the country and most urban families have no land where to grow food. Kimanya Ngeyo is interested to learn about how a family residing in an urban setting can still grow vegetables to minimize spending money on crops that they can grow in their backyards, containers or sacks.

There are those families who still have large portion of land and can afford to get labour from the community. Kimanya Ngeyo is going to learn how this system can be managed. The organization understands that we cannot deny the truth that people need income beyond getting food from their gardens. This system will still adhere to the principles of a diversified high efficiency plot so that we do not deviate from our framework.

Incorporating animals in the system of agriculture we are learning about is a new area that Kimanya Ngeyo is going to generate more knowledge on this year. The aim is that a diversified high efficiency plot should be able to sustain itself. Animals will be able to provide manure for the plot and answer some nutritional and income needs of the family.

Seeds companies are ensuring that farmers keep going back to them but not all farmers have the means to purchase these certified seeds. It is a need that Kimanya has identified to establish a seed bank at the training centre and eventually in each sector so that farmers cannot stop growing crops because of lack of seeds. The other aim of establishing a seed bank is to preserve our local seeds because there is a threat of losing our indigenous seeds to genetically

modified ones. It is understood that indigenous seeds are more resistant to pests and diseases and losing them will be an unfortunate story to narrate to the future generations. Clear guidelines on the use of the seed bank will be set so that each individual contributing to the seed bank can benefit from it.

The knowledge Kimanya Ngeyo has generated over the past years in the area of agriculture needs to be documented but also there is need to create a reference library where we can draw on the knowledge that has been generated by the large scientific community in the area of agriculture. This library will be set up at the training center and people will be encouraged to borrow books or literatures to further their knowledge in the area of agriculture.

All these efforts as described above will be learned together with members of the communities at national and sector levels. Some promoters of community well-being will be identified with whom to carry out this process of learning so that agriculture can be appreciated by all and not regarded as a waste of time or punishment. (Kimanya-Ngeyo internal document, 2018, pp. 7-8)

Kimanya views the theme of agriculture as cross-cutting with all its other lines of action, and as such the functioning and complexity of the team is expected to increase over time.

Teacher training and development. In 2014, Kimanya embarked on a unique line of action when it began a teacher training and development program in Buikwe District. Whereas its past activities largely revolved around implementation of the PSA program according to the model originally imported from Colombia, the teacher training initiative was the first attempt of the organization to make use of FUNDAEC's materials (namely the PSA and DSA materials) for a slightly different objective than raising promoters of community well-being.

Over the six years of Kimanya's operation prior to this new project, many teachers—from preschool through secondary—had participated in the program either as participants or tutors. As a result, the organization had grown aware of its potential as a tool for helping teachers reflect on the nature of education, on their role as teachers, and on unique ways of teaching and learning. Kimanya had also engaged members of the Ministry of Education and Sports in multiple conversations about its program and materials. During one such meeting, representatives from the ministry made the suggestion that Kimanya explore opportunities for training teachers using the PSA program. As a first step, Kimanya's director recommended that a brief internal study be carried out to understand what past teachers learned through their participation in PSA. Following this a donor proposal was made and the pilot training began in 2015.

Since the pilot year, the teacher training program expanded to over 70 schools by 2017, and trained close to three hundred teachers, head teachers and deputy head teachers (See Table 4.2). In the past year the program expanded into Jinja, its second district.

Table 4.2 Teacher Training Program

	2014 – 2017 (Three years combined)
Teachers who completed 1-year training	233
Teachers who completed only one or two terms of trainings	24
Head Teachers/Deputies who completed 1-year training	18
Head Teachers/Deputies who only one or two terms of training	6
TOTAL Teachers/Head Teachers/Deputies trained	281
Schools involved in PSA teacher trainings	74
Teachers who attended post-training reflection spaces	55
Teachers involved in post-training working group	15

Unlike the traditional mode of studying the PSA program in communities, the teacher training program is currently one year in length, during which time teachers study only 6 of the 18 PSA materials. The pace of study is also more accelerated, which involves some compromises in terms of how participants carry out the practical activities associated with each book. Every effort is made to see that all elements of the materials are completed, however some things are completed during the intensive trainings, held three times a year, while other activities are completed by teachers over the course of the term.

The study of the PSA program in Buikwe was divided into three areas, each a division of Njeru Municipality. Within each division, around 30-40 teachers gathered for about 12-days of intensive study, during each school holiday in January, April/May, and August/September. During each training the participants studied two PSA units, as well as a few lessons from one of DSA's three units (*Basic Concepts, Education, and Science*). During each term, teachers would meet once a week in smaller groups, based on the location of their schools, in order to reflect on their efforts to put into practice what they learned from the program as well as to complete any outstanding lessons from the PSA materials. It was rare that any PSA material was completed during the 12-day intensive study period. At least once per term, PSA tutors also endeavored to visit teachers at their schools to observe their lessons and consult about teachers' ongoing efforts to put in practice the changes that they personally proposed after each intensive training.

While the structure and requirements of the PSA teacher training program designed by Kimanya are quite different from those of the PSA program as it is studied in the communities (e.g. the sequence that the materials are studied in, the inclusion of DSA units, the duration of the program), the organization still views the aims of the two programs as quite similar. Namely, teachers are also trained with the goal of raising promoters of community well-being, however throughout the teacher training program tutors tailor the focus of discussion and reflection on

what teachers can learn from the pedagogy, conceptual framework, and capability approach of the PSA materials. In this way, the focus for teachers is also about critically examining the implicit (and explicit) strategies and approaches to education inherent within the PSA and DSA materials.

Finally, returning to a broad overview of Kimanya-Ngeyo as an organization, it is currently made up of some 50 individuals, including tutors, who represent the largest percentage of that number. In terms of organizational structure (see Appendix B), Kimanya is led by a founding body as well as a Board of Directors. However, the day to day operations of the organization are overseen by its Executive Director. The Director, in turn, is supported by a consultative body known as the Core Group which is currently made up of the organization's three Program Coordinators, the Executive Director, and the Agricultural Research Director. It is at the level of the core group that organization-wide reflection and planning is made. However, as outlined above, much of the planning, action, and reflection within the organization is carried out within the teams that are involved with each respective line of action.

Having reviewed the purpose, history, and aims of PSA, as well as its use by Kimanya, an initial picture of what exactly was "transferred" to Uganda through the borrowing of the PSA program by Kimanya has been made clear. In the two remaining subsections before a discussion of the recontextualization process, I look at the unique phenomenon of transferring an educational program from one country in the global South to another; and end with an examination FUNDAEC's effort to make its conceptual framework explicit within its materials, and how that impacts transferability and adaptability of the PSA program. In both sections the underlying theme addressed is how contextual relevance is considered in light of these features of the transfer process.

South to South educational transfer

In the field of educational transfer, most documented examples of borrowing and lending—and even authoritarian examples of imposing educational systems through colonization—have tended to involve the global North; either through North to North transfer, or North to South. Far less attention has been given to the transfer of educational models and programs across the global South, such as in this case of the transfer of PSA from Colombia to Uganda. While the terms global South and North are highly contentious, along with developed and underdeveloped (Escobar, 1995), literature about the field of South to South collaboration is still informative in regards to the history of educational exchange among low income nations.

Author Michelle Morais de Sá e Silva (2009) writes that, while more such transfers are more fashionable today, their origins go back at least as far as the Cold War. "During that period in history, Paulo Freire himself assisted a number of countries in Africa, China attempted to lead an autonomous Third World bloc (Steiner-Khamsi, 2006), and a battalion of Cuban teachers was sent to the newly independent socialist countries in Portuguese-speaking Africa" (p. 39). Defining the phrase South-South cooperation as "any cooperative initiative between two or more developing countries," Morais de Sá e Silva describes three distinct phases in the evolution of

South to South educational cooperation over its brief history (p. 39). The first phase covers the period of 1949 to 1979, overlapping with much of the Cold War. As such, much of the transferring and collaboration during this time was led by socialist countries as part of a push for newly labeled “developing” countries to promote self-reliance and political strengthening. The next phase, between 1980 to 1998, was characterized by the growing influence of structural adjustment policies and increasing debt on low-income nations (p. 40). During this period many of the institutions created for supporting South-South collaboration were still in operation, however their chief proponents were no longer governments in the South or critics of the global North. Instead these years were marked by the demobilization of many Southern advocates, as pressures from international agencies pushed Southern states to align with Northern models of development. Finally, in phase three, from 1999 to the present, South-South transfer was once again revamped and now defined by the push for “best practice” transfer. Now, not only were the governments of low-income nations interested in collaboration, but international agencies, such as the World Bank and other large donors, had become interested (p. 40).

Given that this history of South-South collaboration is largely characterized by the effort of marginalized nations to seek alternatives to the power imbalance that inevitably characterizes exchanges between the global North and South, it is surprising to find that Morais de Sá e Silva does believe new South to South alignments are horizontal. In her view, in any exchange, there is always a “teacher” and a “student.” “When knowledge is power” (Haas, 1991), the traditional teacher-student relationship occurs, one country expected to teach its policy model and the other country to properly learn the lesson” (2009, p. 54). Furthermore, the involvement of influential global donors can also complicate the nature and intent of educational transfer among nations in the global South, as Tarlau (2015; 2017) has explored in the case of Brazil and its import of the Colombian Escuela Nueva program. In light of these, and other concerns, Morais de Sá e Silva believes that in order for South to South transfer and collaboration to be fruitful, “time, efforts, and resources should be allocated to make sure that transferred policies, programs, and projects are, as much as possible, tailor-made for the ‘recipient’ country” (p. 55).

Kimanya, PSA, and contextual relevancy

It is within the third phase of South-South collaboration that the PSA program was introduced to Uganda, perhaps unsurprisingly, with support from a large international donor based in the United States. While it would be inaccurate to suggest that the transfer of the PA program from Colombia to Uganda was “tailor-made” for the recipient country and organization, it would also be inaccurate to suggest that the transfer of the PSA program was somehow coercive. In an effort to gauge the perceived contextual relevance of PSA as a program borrowed by Kimanya for application in Uganda, my research assistants asked individuals within the organization to describe whether they felt the program was relevant to its new environment, and if so, why? Among their responses was the observation that Colombia and Uganda are characterized by similar educational realities, particularly in rural areas which is the focal point

of the PSA materials; and the fact that the program prioritizes the theme of agriculture, which is perceived as particularly relevant to rural communities in Uganda as well.

Kalenga, among the earliest members of Kimanya, and also one of the few to have visited Colombia, offers his account of why the program was and still is relevant. In particular, the story of what led the founders of FUNDAEC to start their organization and educational program—the fact that university students could not meaningfully understand what science is, or how their education relates to their lives outside of school—resonated most with him, and seemed accurate of Uganda’s reality as well:

One of the reasons why they thought that this program—if it has been successful in Latin American countries, why would it not be successful in lets say Uganda, you see? Because when they share with you the challenges that young people were going through in Colombia, someone completes his studies in University but he’s confused. I always share this with even the PSA students. Like, how many years do we spend in school? You start nursery school, you take three years. Then you add seven years for primary, those are ten years. Then after that you have six more years then after that maybe three years, University. But after going through all these levels, the student is still confused, doesn’t know what to do. And I was telling some of the friends who want to join the program, I’m like, “See [...] we are put in a box, you know, we are in a box from nursery to university. Then after that you are now released from this cage. They are telling you now to go and fly on your own.” The reality outside is totally different from the reality in this box. That’s why you find so many youth are confused, they don’t know what to do.

But now look at the approach of the PSA program. you not only read, study the books but you are also, time to time, interacting with the community, with the community members, with the farmers, with business people in the community, with the community leaders. So you are really in touch with the outside world. You are part of this world. So even before you finish the program, again if the quality of the deliverer of the program was really good, before you even finish the program you know what to do, which way to take to contribute to the well-being of your community. Which is a bit different from our traditional schools where you are locked up in a classroom from nursery to university. Now when you’re out, you find it difficult know to fly, you know this bird which was just in the cage, it was not trained to understand the world outside. It can’t fly and that’s why we have so many young people, so many youth yes, they have all this theoretical knowledge what they learned their schools. But they are confused, they don’t know what to do. Which is really different from the approach that the PSA program is trying to take.

In another example, a current tutor of Kimanya's teacher training program describes her early interactions with the program, and why she feels that it is relevant to Uganda because it addresses many of the shortcomings of the existing educational system.

I think the problems that are facing the people around the world are not very different even if we come from different countries the reality could be the same in many countries, even us our education system in Uganda is theoretical most of the times it does not allow the students to think and not practice what they learn so you study primary and go through secondary and at some point even after Senior 6 a student may not know really what to do with their lives or with their education.

But when I joined PSA, that's when I started saying, "If this is the way I was taught in school maybe I would love sciences and mathematics." Because the tutors who helped us learn these concepts take time to sit with you, to say "Ok, what is the problem?" [...] You really get to know something slowly and the explanation is wide. They use many options to help you understand. But in school that time is not there. A teacher comes and they want to finish up. And then, its good in the way that here you learn as you practice, but in schools you learn to do exams. That is the difference. You study and go do exams, because at the end of the day, that is it.

Finally, in her experience with the program, Flavia, a Program Coordinator and former Unit Coordinator, spoke about the particular relevance of agriculture as a main focus of the PSA materials:

The situation in Uganda is not very different from what's in Colombia. So when I look at PSA the materials really, there are units about agriculture like *Planting Crops* and then [*Diversified High-Efficiency Plots*]. And when I look at the situation of Uganda, agriculture is the backbone of the country. So the technology which is in those books really fits in Uganda as a country. If it's done properly, it can help us to further understand the field of agriculture and also try to see the outcomes of our endeavors in line with that. Because everyone needs to eat, everyone at least has to get to know what agriculture is. Even when they don't have big plots of land, they get to think of the back-yard gardening, or city gardens.

And then we also see many people who are involved in business. And when I look at the materials, the *Addition and Subtraction*, which further enhances somebody's capacity to be able to deal with—when I look at the principles of accounting, if somebody has been dealing in business and they really want to further get to understand how they can manage it. Thinking about the kind

of capital, losses, and profits, and be able to balance their books. I think it helps in that situation.

And then since the program it also helps somebody to think about service in a better way. What can I do to contribute to the wellbeing of my community? So you get to understand and also try to exercise the qualities that are needed when you're rendering service wherever you are. So this kind of understanding makes you to further get into the communities and try to see how we can work together with the people in the communities.

Decentralized recontextualization of PSA program

Having explored the features of the PSA program that were transferred from Colombia to Uganda, the process by which they were transferred, and some elements of why Kimanya felt it would relevant within a new context, the remainder of this chapter examines the process by which PSA participants and staff at Kimanya have recontextualized the educational experience over the past decade. In particular, two features of these recontextualizing efforts are reviewed below: PSA's explicit conceptual framework; and Kimanya's decentralized approach to learning.

PSA and its explicit conceptual framework

While there are many components of the PSA program that have assisted Kimanya in its effort to recontextualize the educational experience within Uganda—and a few are discussed below—the single feature of PSA that I argue has been most integral to these efforts is FUNDAEC's commitment to making the conceptual framework of its program explicit. That school curricula and pedagogy are not socially, politically, or value-neutral is today a widely accepted premise among education researchers (Giroux, 2001, Tabulawa, 2003). Yet it is also common that school curricula generally leave their internal logic, aims, and beliefs—their theoretical or conceptual framework—implicit, hidden from those who would implement or study such content. But by leaving the underlying logic and belief system of a curriculum hidden either has both the effect of enabling technicist treatment of education as a value-neutral project where best practices can be exchanged free from unintended consequences, and also the effect of leaving unchecked the hidden impact that undoubtedly results when dominant worldviews are globalized (Tabulawa, 2003; Tikly, 2004). In short, FUNDAEC has adopted within its curricular and supplemental materials an effort to make explicit its conceptual framework, and the impact, I believe, has aided in ability of Kimanya to recontextualize the program without the need to change the materials themselves.

Within the package of materials transferred to Kimanya from FUNDAEC, there are three categories of materials. First, the (currently) 18 units of the PSA program. Second, the (currently) three units of the DSA program. And third, a few supplemental documents describing aspects of FUNDAEC's history and its conceptual framework. Most prominent in this latter category are two documents entitled, "FUNDAEC: Its Principles and Activities," from 1988, and "Promoters of Community Well-being," from 2014. Members of Kimanya, from the Executive

Director, to the Program Coordinators, Unit coordinators and tutors, as well as members of the various teams from each line of action, all regularly study and reflect on these materials. To a lesser extent, PSA participants also engage with some of the non-PSA materials. Within each of these documents, FUNDAEC has endeavored to communicate and model its conceptual framework, its beliefs about the aims and purpose of education, and its accompanying tutorial pedagogy. Noteworthy about the inclusion of these elements and the effort to make them explicit, is that it was not accidental. In a passage from the document “Promoters of Community Well-being,” FUNDAEC provides an introduction to some of the salient features of its conceptual framework:

Before we examine the salient features of the framework in question, two ideas of pivotal importance need to be considered. Like many other areas of human endeavor, education for development, the field to which our endeavors belong, operates in two complementary dimensions: the universal and the particular. Any project carried out in a specific region benefits from and contributes to learning being accumulated in other regions in both dimensions. Ignoring this principle reduces the effectiveness of the work to be done by the promoter. Two extremes, then, have to be avoided: on the one hand, the mere transfer of ideas and methods without careful consideration of specific cultures and historical developments, and on the other hand, over-emphasis on the particularities of a given culture, denying the existence of that which is human or the worldwide processes that are connecting peoples everywhere. Every agency engaged in PSA is focused on the particular path of development of the region it serves.

Yet, the capabilities the participants need to develop are of a universal character. Each agency learns how to enhance these capabilities in its students using the FUNDAEC texts, sometimes adding relevant supplementary material. The work of the promoter, however, will take various forms according to the realities of a region as well as the particular situation of the individual promoter. A common understanding of the elements of the underlying conceptual framework and the way they appear in different settings is crucial for the learning process set in motion by agencies implementing PSA in various parts of the world. The second idea to be mentioned here has to do with the nature of the conceptual framework under consideration. As we have often said, when we speak of a framework, we are not thinking of a rigid set of rules, certain fixed idea, or a series of predetermined steps that have to be followed. The activity of our network of agencies has to shed light on important questions. These questions cannot be treated in isolation from the physical, social and spiritual reality out of which they have emerged. A conceptual framework incorporates relevant concepts that make it possible to interact with different aspects of this reality.

Some of these concepts are related to themes closely associated with our endeavor, others describe the methodology we adopt to carry out our work, still others have to do with assumptions and convictions that underlie the activity being undertaken. An explicit conceptual framework gives structure to action and research. It makes it possible to be consistent and systematic, avoiding frenetic activity in pursuit of one or another fad that gains prominence in some academic field. By being explicit about one's own convictions, one can examine the hidden assumptions underlying the theory and practice of the disciplines with which one comes into contact. We realize, of course, that the conceptual framework within which we carry out our work is an evolving one. Our understanding of the concepts that give it shape become richer and richer as we learn through systematic and sustained action, and new elements are discovered and added, which further enrich the framework. But at any given time we are able to maintain consistency and clarity by working within an explicit framework. The relation between the evolving conceptual framework and the understanding we gain through experience is dialectic in nature. (FUNDAEC, 2014, pp. 1-2)

This excerpt was taken from the introduction to a 15-page document that goes on to discuss the core elements of its conceptual framework. Among the themes discussed are “development,” “education,” “generation and application of knowledge,” “culture,” “the promoter’s value system,” “community,” “capabilities of the promoter,” and “appropriate methodology.” Without going into those themes—a summary of the entire document is beyond the scope of this section—what stands out in the above statement is the theme of the universal and the particular.

As FUNDAEC explains, development organizations, and particular organizations implementing the PSA program, must be mindful of reading the reality of its particular context and charting a path to development that is responsive to cultural and historical factors. Yet at the same time, FUNDAEC believes that the capabilities that can assist these organizations in raising collaborators in the development process are of a universal character and needn’t be reinvented by each organization. In this way, what FUNDAEC believes it is transferring when organizations borrowing its educational materials is not a recipe for education for development, but rather a broad framework that can assist organizations to learn from its experiences and employ tools that have been effective in a similar context. In the end, the key to FUNDAEC’s approach to educational transfer is that implementing organizations (and other beneficiaries who engage with the PSA program and this document) must be conscious of the beliefs and assumptions which underlay its program in order to effectively make use of them. The question of how FUNDAEC accomplishes this within its other texts, and what elements of its program and framework that it makes explicit are discussed in the remainder of this subsection.

PSA and the 'To the tutor' section

One of the first entry points for students and tutors of the PSA program into FUNDAEC's conceptual framework can be found in the introduction to most of the program's units. In a section entitled, "To the Tutor," the aims of the unit are introduced and placed within the broader context of the aim of the entire program. FUNDAEC often uses this space to connect the present unit to other units within a given text, whether they come before or after it. The introduction also breaks down the specific methods and strategies that the materials uses in developing a particular capability or set of capabilities within participants. An example of one such section is provided below from the unit Properties, which is commonly the first unit studied by all PSA groups.

To the Tutor

Primary Elements of Descriptions is one of eleven texts in FUNDAEC's educational program "Preparation for Social Action (PSA)". Every text is made up of two or more units of study, which seek to enhance the capacity of young men and women who, adopting the designation "promoters of community well-being", wish to dedicate their time and energy to the progress of the regions where they live. It should be noted that these eleven texts also form part of the first of three levels of study in a program that goes by the name "Sistema de Aprendizaje Tutorial (SAT)", implemented in a growing number of countries where it has been recognized by the government as a fully accredited—formal yet flexible—option for secondary education. As currently envisioned, some of the texts studied at the second and third levels in the context of SAT may eventually be added to the PSA program.

The present text has a special place within the program. In the early 1970s, when FUNDAEC initiated what has become an ongoing process of action and research directed toward the educational needs of young people, it observed a lack of facility on the part of many students entering university with words and concepts needed to describe the world around them. Their education had not developed in them much more than a rudimentary command of such words. While students could, for example, recognize various shapes and speak vaguely about the size and position of objects, they had not reflected on the meanings the words associated with these ideas convey.

The unit "Properties" was created in part to address this shortcoming. It is the first of two units in Primary Elements of Descriptions, and along with the next unit, "Systems and Processes", it seeks to help young people advance in the capabilities that will enable them to describe the world they experience with increasing clarity. A capability in this context can be thought of as developed capacity to think and act purposefully within a particular sphere of activity. In order to advance in a given capability, one must understand a related set of

concepts, learn a number of relevant facts, and acquire a range of skills, abilities, and attitudes, together with the spiritual qualities that underlie these attitudes. Each unit of instruction in the program is organized around the development of one or more capabilities, broadly grouped into four areas: language, mathematics, science, and processes of community life.

The first few lessons of the unit acquaint participants with a number of concepts and words used in making descriptions at a most basic level: shape, size, and position. The difference between objective and subjective descriptions is then briefly examined, followed by a review of the general properties of matter in its solid, liquid, and gaseous phases. Some of the properties of specific substances, such as melting and boiling point, color, density, and hardness, are examined next. The concept of property is used to enter into a discussion of the qualities of human beings; of these, the essential qualities of truthfulness, justice, and love are treated in detail. In a similar vein, participants are asked in the final lesson to think about the characteristics of the kind of communities that, as future agents of change, they will be called upon to build. The sections entitled “Extension” and “Reflections” in each lesson are designed with two aims in mind. The former generally introduces additional elements of knowledge relevant to the discussion of specific concepts and words in the lessons, while the latter provides participants with the opportunity to see the broader implications of concepts and to discern the shades of meaning inherent in their associated words.

Many ideas employed in describing the world necessarily come from various branches of knowledge, and so the lessons touch on a number of subject matters. It should be remembered, however, that the unit is primarily concerned with developing capabilities in the area of language. The words and concepts emphasized in the lessons are intended to help the student think about the nature of language. The lesson dedicated to shape, to take one example, should not be treated like an exercise in geometry; its purpose is to encourage participants to reflect on the concept of shape and its role in expression.

What should be clear to the tutor is that the capabilities used in describing reality are not developed through knowledge of physical existence alone. Reality has a social and spiritual dimension as well; the unit therefore is not content to undertake an exploration of physical properties only. By introducing higher entities—the human being and human communities—it is able to extend the discussion into the social and spiritual realms, and students are compelled from the outset of their exploration of language to think about different facets of existence and the means for describing it. It is hoped that, in this way, they will begin to form habits of the mind that avoid the tendency towards fragmentation which invariably gives rise to unnecessary contradictions and imaginary dichotomies in life.

The tutor will want to bear in mind that, at this early stage in their studies, the descriptions the participants make will be far from precise and the words they choose often inadequate. This should not be a source of concern. “Properties” is but the first in a series that will consider the nature of descriptions at increasingly higher levels of sophistication, culminating in units that will explore the relationship between language, thought, and consciousness. Throughout, the tutor should focus on the gradual fostering of a process in which ideas and concepts are expressed with greater precision as knowledge grows and abilities develop. (FUNDAEC, 2004, pp. vii-viii)

While this section is clearly directed at the tutor, providing a kind of orientation to the unit, tutors and participants of PSA use the same materials, suggesting participants have as much access to this content as tutors. In practice, however, a tutor may choose not to review this section with his or her PSA group until after completing the unit, as the information contained therein is often best understood by experiencing it first, rather than simply reading it.

Salient features of the framework

While most of the salient features of FUNDAEC’s conceptual framework are intentionally summarized within the Promoter document, many of those features also appear across other materials. The DSA units, in particular, function as a higher level course which provide a sort of meta-analysis of the underlying concepts fundamental to the PSA program. In various lessons, for example, FUNDAEC provides descriptions of the historical circumstances leading up to the creation of a specific material, or discusses elements of some of the larger epistemological debates that the organization has grappled with in creating its materials.

In Unit 1 of DSA, entitled *Basic Concepts*, FUNDAEC introduces its approach to learning, frames the motivation behind its efforts to engage in development and their systematic nature, and introduces the theme of a “twofold purpose,” which forms the basis of its views about the purpose or aim of education. Regarding its approach to learning, FUNDAEC outlines a cyclical process involving concurrent efforts to act, reflect on action, research, and study (FUNDAEC, 2006, p. 4). As to the motivation behind its development efforts and their systematic nature, FUNDAEC writes:

So many people in the world today cherish the ideals of a good society—peaceful, just, and conducive to prosperity for all. The majority, however, never succeed in translating their high ideals into action in a meaningful way. They dream of a better world yet go about the business of life as would any conformist, simply trying their best to avoid harming others. Those of us determined to dedicate our energies to the transformation of society must realize that sporadic action, no matter what its immediate effects, will not bring about enduring change. Social

action must be systematic and sustained; it must achieve a degree of consistency that profound thinking and careful analysis alone can bring. (ibid., p. 7).

For FUNDAEC, achieving its vision is development it attainable to the extent that individuals strive for coherence between their beliefs and their actions, and take systematic steps to shape the world in line with those beliefs. The term twofold purpose in turn refers to what FUNDAEC believes are the twin obligations of developing one's vast potentialities, talents, and characteristics, alongside efforts to transform the wider society and promote the welfare of the entire human race (ibid., p. 17).

Within the second unit of DSA, *Education*, FUNDAEC exposes students to even more of the core themes and features of its conceptual framework. Given the subject under consideration, it is of little surprise too that the unit on education gives particular attention to analyzing the logic and pedagogy of its PSA materials.²⁷ Among the topics discussed, FUNDAEC makes explicit the aim of education that is implicit within its texts; has a lesson on "capabilities" as the organizing principle of its curriculum; and covers core epistemological questions that shape its programs such as understanding concepts vs assimilation of information, the fragmentation of knowledge, and the "enhancement of understanding." On what it believes to be the aim of education implicit within the PSA program, FUNDAEC writes:

If we were to articulate the purpose of education implicit in our textbooks, we would say that the aim of the educational programs we have developed over the years has always been to assist our students in their spiritual and intellectual growth as individuals and in the development of their capacity to contribute to the transformation of society. This is a simple statement with numerous implications. Assisting students in their intellectual and spiritual development, for example, is not achieved in programs that are only concerned with measurable outcomes, be they virtues or mental skills to work with information. Nor is capacity to contribute to the transformation of society developed in classroom discussions of interpersonal and social issues during which the students' values are clarified, usually by looking at them through a liberal lens. There is much more to education than any narrow approach may suggest. (FUNDAEC, 2008, p. 3)

The idea of a twofold purpose is clearly visible within this definition. Now, given that many of the other features of PSA discussed in *Education* have been explored in earlier sections, only one additional epistemological question is discussed below.

²⁷ It is for this reason that the DSA materials have been of particular benefit to teachers during Kimanya's teacher training activities.

Knowledge fragmentation

In the fourth chapter of *Education FUNDAEC* introduces its concern for the question of integration in creating curricular content. According to FUNDAEC, knowledge is often fragmented within curricular materials, as emphasis is placed on the mastery of subject areas like Biology, Chemistry, English Literature, Engineering, History, Algebra, etc. Typically, fragmentation is viewed as a natural division of knowledge into areas of specialization; areas that, in turn, align closely with divisions in the labor force into areas of professional expertise. Whatever the motivation, the fragmentation of knowledge exemplified in these divisions has created otherwise avoidable difficulties in students' ability to connect and view patterns in what they learn. FUNDAEC further describes this dynamic:

The creation of FUNDAEC was the result of the deliberations of a group of friends, all professors at the Universidad del Valle in Colombia in the early 1970s. Our conversations about alternative pedagogies began with the observation that those entering the university had received a great deal of information during their high school years but had little understanding of even the most fundamental concepts, particularly of science. To begin a discussion on the nature of science, for example, two of us presented our students in a course of physics with a detailed description of how to make the "best" Colombian coffee and asked them if we were teaching them science. To our surprise most of them considered the application of a recipe to be an excellent example of the scientific method. Our endeavor to remedy the situation by improving the content of the courses we were teaching at the University gradually led us to discussions on the challenges of curricular design. What did a curriculum that fostered understanding and not the mere assimilation of information and the mastering of procedures actually look like? Our first consultations on the subject revolved around a vague notion of integration.

Every week our students at the university went from class to class each on a separate subject matter, a habit they had learned well during their high school days. It was quite apparent that they could hardly connect what they learned in one class to that which they studied in another. Whatever knowledge was being accumulated seemed to be sitting in compartments in the minds of the students according to the subject matters into which their curriculum had been divided. Integration, then, had to overcome this problem of fragmentation and at the same time shift emphasis from the assimilation of information to the understanding of concepts. (FUNDAEC, 2008, p. 29)

From this observation, FUNDAEC was moved to experiment with a new educational approach altogether; one which broke down barriers between subject matter. Its first efforts in this endeavor came during its efforts to create a university program for "generalists in rural

development.” The early founders of the organization were also university professors, and experimented with the creation of a material that brought together knowledge from various disciplines towards a single goal: improving the well-being of individuals within a specific region. In this way, the materials would also provide a means to bridging the gap between theory and practice. The result was a material, centering on the crop soya, which engaged students in a conversation about scientific and social themes relevant to the context in which they lived:

Soya was a common crop in the region and a unit dedicated to it proved highly effective. The material we wrote guided the students to organize their own plots to cultivate the crop and to enter into conversation with the farmers to make explicit the community’s knowledge and experience in this area. The purpose of these conversations was to generate knowledge on how to transform the process of agricultural production in the small farms of the region. The material also included lessons that taught students a considerable amount of biology and chemistry. Because of the high protein content of soybeans, the lessons touched on a number of nutritional issues and helped students to participate in some of the research we were beginning on small enterprises that processed agricultural products. In developing the unit, we were acutely aware of the need for the students to become actively involved in the teaching-learning experience. Yet we were also aware of the shortcomings of methods that in the name of discovery shy away from the systematic study of the accumulated knowledge of humanity. While helping our students to learn about the process of soybean production, for example, we were willing to dedicate many hours in the classroom to study the structure of cells, the atomic model of matter and the nature of chemical interactions which would help the student learn more about the growth of the plant they were cultivating.

The unit “Soya” was only taught to a relatively small number of students and was soon set aside as our concept of integration became more sophisticated. But this admittedly too brief a description of one of our early texts demonstrates some of the ideas that shaped our approach to curricular development: our desire to break the rigid walls that had been built around disciplines and fields, our hope to use service to the community as an axis of integration, and our intention to go beyond the dichotomy between theory and practice. Education, it seemed to us, had to overcome the dichotomy between theoretical and practical knowledge rather than perpetuating it. Most current educational systems tend to teach practical and manual skills to some and book-learning to others. The capacity to participate in planning and decision making is developed in a few, while the majority are trained to carry out orders. What we wanted to achieve was to maintain the interest of the students simultaneously in concrete and abstract activities. And, to the degree that we succeeded in integrating theoretical and

practical knowledge, we saw prejudices and false scales of prestige gradually disappear and be replaced by a purposeful attitude towards learning and change. (FUNDAEC, 2008, pp. 37-8)

The unit on soya was a first step, and eventually these early efforts at curriculum design and this early emphasis on integration led to the creation of SAT/PSA materials; materials which are organized around the development of capabilities.

But the effects of knowledge fragmentation were not only affecting students' ability to connect what they learned across subject matter. As later chapters of *Education* explore, FUNDAEC argues that fragmentation has perpetuated a number of widely popularized dichotomies: science vs religion, theory vs practice. The impact of FUNDAEC's new materials, however, has enabled organizations like Kimanya to address these challenges. In reflecting on the contrast between how PSA handles theory and practice compared to traditional schools in Uganda, Flavia, a program coordinator, shares:

When I look at PSA—where we have a number of investigations, research, and also practices—to me it helps the participant to really get to appreciate that whatever I study I also have to get to see the applicability of that concept or an idea. So they go out and exercise what they study, which is not the case in schools. So getting to understand that theory goes hand in hand with practice makes someone to really evaluate themselves and see, 'I have been studying for this long, how has this knowledge helped me?' 'What can I do with this knowledge?' And then, 'how is it going to benefit my community?' Our schools did not train us to think that way. So the only thing we had were the 'practicals' and then you're just doing it for the sake of passing exams.

What this study of FUNDAEC's conceptual framework, and the history that led to it, provides PSA implementing organizations and other beneficiaries is the ability to understand the logic behind its programs. It permits the individual engaging with the materials to decide whether they agree or disagree with the assumptions made within the materials, and it ultimately empowers individuals to exercise some degree of agency in how they want to use the program knowing its implicit intentions and beliefs about the world. In the case of individuals who embrace its conceptual framework, an awareness of the salient features of FUNDAEC's framework help participants and tutors to extrapolate from the lessons within the materials to employ a similar framework—of action, reflection on action, study and research, for example; or being systematic in one's actions; or committing to the twofold purpose—towards goals of their own choosing. And when, for example, a teacher from Kimanya's trainings embraces this framework, it enables him or her to endeavor to employ the logic of a capabilities approach to teaching within their own classrooms.

Decentralized learning

As staff at Kimanya study PSA, DSA, and accompanying materials, they internalize and even operationalize FUNDAEC's conceptual framework. One of the ways this is most visible is in the organization's approach to learning. As the PSA and DSA materials have articulated, the transformation of society, as well as individual growth, requires systematic and sustained action through a process of action, reflection on action, study and research. Yet the PSA and DSA materials also place this responsibility on every participant, not simply the implementing organization. The result of is an approach to learning where decisions about how to recontextualize the program to respond to the needs of local communities and participants are not only made by the heads of Kimanya, but by its tutors and participants as well. Michael, a Program Coordinator at Kimanya, shares his observation of this practice:

So, how this happens is that at the level of the group, the tutors are observing certain things and also interacting with the communities. And by the time they come to the space of the tutors' reflection meeting, they bring all these different learnings. And sometimes, or most times, the coordinator is present in this space. And that learning is generated at that level and all observations shall have been made. And by the time they come, the tutors come to the unit level, from the different sectors, they come up with all these different ideas and recommendations, and all the things they are observing. So, when the coordinator listens to them and writes a number of these things and takes note, by the time it comes to the national level, you will see that, there is the involvement of the community through that process of home visits that the tutors conduct, sometimes with the accompaniment of coordinators. And sometimes, though they are not regular these days, the community meetings also help in giving out some of the insights, the things they are observing during the implementation of the program. So then you will see that the involvement from the community to the tutors, the coordination, and maybe up to the national level. And from the national level now, you can see the national picture of what is really happening with the PSA process and that now informs the national level with the areas that need more learning on to strengthen the process.

In this way, the backbone of Kimanya's decentralized learning process is the tutor, because the tutor is engaged and multiple levels of reflection and action. On the one hand, a tutor meets with his or her participants to the PSA materials, and the tutor participates in the projects and activities of that group, during which he or she has opportunities to meet with other community members where the group is operating. Yet at the same time, a tutor also meets with fellow tutors to reflect on a daily basis about the progress and initiatives of their PSA group. And this space, in turn, is attended by unit coordinators who also engage in reflection and decision-

making at that level, before sharing their observations with other unit coordinators, Program coordinators, and the core group at the national level.

While reflections and decisions based on feedback from the field are certainly made at the national level, Kimanya does not attempt to manufacture or enforce a centralized agenda, where coordinators would fill the role of custodians keeping tutors and PSA groups in line. Instead, the aim at the center of the organization is to consistently reflect on the level of understanding within the organization about the conceptual framework of the program. To this end, the deliberations of the core group and coordinators generally focus on questions of trainings—on how to enhance tutors' understanding of the program so that they can guide their participants to take advantage of what the program has to offer. At the end of the day, as a story from Kalenga suggests, the goal is for Kimanya to help participants become protagonists of their own development; not for Kimanya to dictate what that development should look like.

We always talk about capacity building—that we would love to see these young people going through this program to take ownership of their own progress, the progress of their communities. Yesterday we were studying with the tutors in Wairaka, *Planting Crops*, that was Lesson 1, “Primary Production.” And the first paragraph in that lesson was talking about young people who are participating in this program to participate in the development, selection and use of technology. So I asked the tutors why they think it is important for members of a certain community to participate in the development, selection and the use of technology. So they shared their views and then I was like, ok, “Can we think about our communities? Are there some people from out who have introduced, who have come up with technologies and said that ok, this is what you have to use?” “What were the challenges?” “What were the outcomes?” So everyone was like wow. Then they started talking about the different programs and technologies that have come from outside and also the negative impacts that these have had on the communities. And I was like, ok, now if we help our students to think in this way. That its not that we should always just accept whatever is brought from outside, but how much contribution—have we also participated in the generation, in the development of this technology that they’re asking us to use? So I think, when we look at the PSA, this is the role, this is the vision. Kimanya or PSA program is trying to help the participants to be active participants in the development of their communities.

While the discussion regarding the importing or selection of technology in the lesson was discussed in relation to agricultural technologies, there is an obvious parallel between this idea and the introduction of the PSA program itself. In some ways, the PSA materials are a type of imported educational technology, and as such, Kimanya believes that it is the responsibility of

the recipients to reflect on what they believe is the purpose, the intention of that technology, then to decide on whether or how they would like to use it.

In many ways, the decentralized learning process begins with PSA textbooks. Not only do they provide the conceptual framework which shapes how staff and participants act and reflect on their actions, but the materials also necessitate a degree of autonomy due to how they are structured. For example, a noteworthy characteristic of the PSA and DSA materials is that they have no teacher's guide; no list of predetermined answers. Instead, tutors, just like participants, come to their own answers about a particular topic through the study of the program with others. For FUNDAEC, the struggle to understand something and to relate it to other aspects of one's life and one's goal for their education is more important than memorizing a set of facts. More often than not, the textbooks provide clear answers to questions that are black and white within the paragraphs that precede various exercises. At times, however, the intention of the question is to provoke conversation and reflection, and the final conclusions will depend on the group itself. In order to illustrate this approach, Figure 4.1 provides an excerpt from the unit *Properties*, the objectives of which were described in the previously cited "To the Tutor" section.

2 Size

In the previous lesson we talked about the shape of things. In this lesson we will consider another concept which helps us to distinguish objects from one another. With the clay you used last time, make a few spheres and compare them. They are all made of the same material, and all have the same shape. What is the difference between them?

Think about the meaning of the words *large* and *small*. When you examined the spheres you might have said that one is large and the other small. Compare, then, the large sphere with a soccer ball. Do you still consider the sphere you made large? Now it is the soccer ball that is large, is it not? But the soccer ball is very small compared to the Earth. So what does it mean when we say that an object is large or small? Absolutely nothing. It only makes sense to say that an object is larger than or smaller than another object.

Think about different objects and compare their sizes. What is the largest object you know? What is the smallest?

We often hear that something is extremely large or very, very small. For example, we all agree that an elephant is a large animal and that a mouse is small. Since talking about the size of things without comparison is meaningless, why do we do it so frequently? It is because we are in fact making unconscious comparisons between objects. When we say an elephant is large, we are comparing it with all the other animals we know. A mouse is small compared to dogs and cats, animals we generally see around us.



Let us now think about the concept of size in different dimensions. To the left are a line and a square. Which one is larger? Does the question make sense? What words do we use to describe the size of things in one dimension? Can the words *long* and *short* also indicate the size of things in two and three dimensions? How are the words *length*, *area*, and *volume* related to the concept of dimension?

We understand that when we use the word *large* or *small*, *long* or *short*, we are comparing the size of one object with the size of another. However, there are different ways of making comparisons and some are more precise than others. Let us suppose, for example, that we want to describe the size of a house. Here are three possible ways of doing this:

- a. The house is large, like the older ones in the capital city.
- b. The house is as large as Ricardo's house.
- c. The house is 30 meters wide, 50 meters long, and 10 meters high.

Are the three descriptions of the size of the house equally precise? Which one is the most precise? Which one is the least precise? Try to describe the size of some familiar objects in three different ways—for example, a tree, a dog, a field—making each description more precise than the one before it.

Now then, what happens when an object you want to describe is very small or extremely large? For instance, how would we describe the size of a bacteria? One way would be to explain, say, that 10,000 of them placed in a line would measure one centimeter. And how could we describe the size of the sun? We could say that the radius of the sun is approximately 100 times the radius of the Earth. Describe in this way the size of some very large and some very small objects.

Extension

1. Answer the following questions:
 - a. Which is larger, a line or a cube? Does this question make sense? _____

 - b. Can we describe the size of an object without comparing it with another object? _____

 - c. Does it make sense to say that something is large? _____

 - d. What concept do we use to compare the size of one-dimensional objects? _____

 - e. What concept do we use to compare the size of two-dimensional objects? _____

 - f. What concept do we use to compare the size of three-dimensional objects? _____

2. Answer the following questions:
 - a. Can a triangle have two sides of the same length? _____
 - b. Can a triangle have three sides of the same length? _____
 - c. Is it possible to have a right triangle with two sides of the same length? _____
 - d. With three sides of the same length? _____

3. Consider the following descriptions:
 - a. My dog is as large as your dog.
 - b. My dog is 50 centimeters tall and 80 centimeters long.
 - c. My dog is the size of a typical farm dog.

Which statement is the most precise? _____

Which is the least precise? _____

4. Now consider the following:
 - a. This orange is 8 centimeters in diameter.
 - b. This is a very big orange.
 - c. This orange is as big as the ones that grow on the tree in our yard.

Which statement is the most precise? _____

Which is the least precise? _____

Reflections on the Concepts of Size and Shape

1. Decide whether the following statements are true or false:
 - a. If we know the volume of an object we can know its shape. T ☐ F ☐
 - b. If we know the shape of an object we can know its volume. T ☐ F ☐
 - c. It is correct to speak of the volume of a square. T ☐ F ☐
 - d. It is correct to speak of the area of a sphere. T ☐ F ☐
 - e. If you have two objects of different volume, the object with less volume always fits into the one with greater volume. T ☐ F ☐
 - f. Two objects of the same shape are always of equal size. T ☐ F ☐
 - g. Two objects of the same size are always the same shape. T ☐ F ☐

2. In our daily lives we often use words that refer to the physical world to describe non-physical reality. When we do this, we say that we are using the word figuratively. For example, when we say that someone is in high spirits, we are using the word *high* figuratively in order to explain that the person is happy. Mark the sentences below that use words related to size in a figurative way.

___ She is a very good woman; she has a big heart.

___ He was quite a large man, weighing about 150 kilos.

___ He was riding a very big horse.

___ My love is as deep as the ocean.

___ Your farm is smaller than mine.

___ These are the best sweets in the whole wide world!

___ He is very short-sighted.

___ She continuously sets high goals for herself.

___ She always welcomes new ideas; she is not narrow-minded.

3. Here is the story of two people confused about the concept of length:

Two people were found staring at the flag pole in front of a school building. Another person walking by asks, "What seems to be the problem?"

"We are wondering", say the two, "how to measure the height of this flag pole." The newcomer quickly unscrews the pole from its moorings, lays it on the ground, whips out a measuring tape, measures it, and says, "It is exactly 20 feet long." He then walks away whistling.

The other two look at the pole lying on the ground and, after a long pause, one of them scratches his head and says, "He thought he was so smart. He measured the length, but we really wanted to know the height!"

4. Discuss the following statement in your group: "Generosity is a quality of the heart and does not depend on the size of one's pocket."

The lesson in this example depicts the various components of the typical PSA unit: an initial reading which develops reading comprehension and introduces participants to a new theme under consideration; followed by a series of probing questions which either direct the reader's attention to the concepts and ideas presented in the text, or which challenge participants to consider the broader implications of the concepts and ideas just presented. Given that this is one of the first PSA books to which participants are exposed, the "Extensions," and "Reflections" sections offer somewhat simpler questions than an individual may face in higher level units.

What immediately stands out about the structure of PSA lessons is that they require collective study. While it is possible to read them independently, without input for other participants, the open-ended questions do not achieve the same effect. Next, the format of the materials also necessitates the presence of a tutor. Without someone who has been trained more extensively in the logic and intention of the materials, it is easy for participants to lose sight of a lesson's intended goal given the open nature of each lesson. Another element that stands out is the flexibility of the program. Aside from a clear desire to expose participants to certain universal insights from humanity's collective understanding about science, mathematics, language, etc., the other objective of the materials appears to be directing participants' attention to connecting what they learn with their personal lives. Sanem Kavrul, the Director of agricultural research at Kimanya, and a longtime collaborator with the PSA program in other capacities, elaborates on this point:

I think the materials of PSA are designed in a way to serve a dual purpose or have a dual objective. One is that it chronicles the experience FUNDAEC has gained for some time in different areas in delivering content that has found useful for the realities of rural areas. So there is, for example, the basics of science, the basics of mathematics, and basics of agriculture. The science itself, the solid science itself that is universal, that is not really—it's very clear cut so it's not a grey area that is open to interpretation. It's just science.

But then there is this other area, or other approach, or other components, which is the documentation of new experiences. New realities. And in the second area I think there is a lot of flexibility. So a group of PSA students with the assistance of their tutors can learn about their own reality. It basically, the materials given them tools to read their own reality and understand their reality and implement activities that are according to that reality and then document it. So there sections in some units for example that are called "Research" or "Practice and experimentation" or "Investigation," that ask a group to document a certain area in their region.

So for example in the unit Classification, in the last lesson, asks the students to understand their microregion, once that have built certain capacities to see what does it mean to classify, what does it mean to read, what is a mean to

group things, organize things in your mind. Which are the basics that a tutor would not be—it doesn't give the tutor flexibility for the tutor to just kind of play around it. But once those basic capacities have been developed then in the last lesson the group begins to take charge of its own learning about the microregion, and goes on to investigation. And then the results of that investigation then assist the group to, in further units let's say of *Planting Crops* or *Environmental Issues* or *To Describe the World*, to begin now to generate its own experience in different areas. And it can choose a path, an area of service as group or as individual students, and then to document it. And in that way they're actually, I think the materials enable that global learning to take place.

Because the whole idea is the generation, application, diffusion of knowledge. So these areas where they're really experimenting and learning about their region, contributing, allow them to generate knowledge which then in different spaces of reflection among different organizations and at the continental level but also in the in the context of the country, in the context of reflections among tutors and reflections among coordinators and groups, allow for this body of knowledge to emerge about the local context.

In her comments, Sanem paints a picture of how the study of the PSA materials, guided by a competent tutor, enables participants to generate knowledge about their communities based on their own experiences going through materials of increasing complexity. In this way, it is clear that to become a protagonist of development—to become a promoter of community well-being—individuals must strive to balance the more structured aspects of the program with the openness, or apparent freedom, that comes with the investigations and projects that must accompany study of the material.

In the end, the decentralized learning process within Kimanya is shaped by the framework of the PSA program. The organization, through the PSA materials, attempts to push the process of action, reflection, and study to individuals. At that level, the PSA program becomes a tool to assist participants to take ownership of the recontextualization of the content and objectives of the program. Through their study of PSA materials, groups generate knowledge about their communities, use that knowledge to effect change in their communities, and ideally share what they learn among each other and with members of their communities not engaged in the program. The nature of that knowledge will vary depending on the topics under discussion, but given the themes covered in the PSA materials, it is likely the knowledge will address, at least to some extent, areas such as the education of young children, environmental issues, health and disease, nutrition, and agricultural production.

Meanwhile, at the level of the organization, the process of recontextualizing the PSA program is focused on enhancing tutors' and other staff members' understanding of the conceptual framework of PSA. To the extent that the organization appreciates the complexities and nuances of this framework, Kimanya believes that it is able to help participants of the

program benefit from its content and address societal challenges that both individual groups and the organization identify.

Analysis/challenges

Over this chapter I have examined (1) how and why the PSA program was transferred to Uganda; (2) what contextual considerations were considered in the recontextualization efforts of Kimanya; and (3) what features of the PSA program and Kimanya allowed for questions of local context and local knowledge to remain at the center of efforts to adapt the program within Uganda. While my analysis suggests that there is much that can be learned from the example of PSA's transfer, my research of Kimanya's experience also uncovered a few noteworthy challenges. In wrapping up this chapter, I will explore one specific theme which had a significant impact on the ability of Kimanya to successfully adapt and recontextualize the PSA program to the Ugandan context: the complexity and distinctiveness of the PSA framework.

As this case study has shown, the success of the PSA program depends largely upon the extent to which staff at the organization—from the Director, to the coordinators and tutors—understand and can act in line with the conceptual framework of the PSA program. From the very early days, Kimanya experienced challenges in introducing such a new and complex program to the Ugandan context. Selam shares about this briefly, stating:

The material never presented a significant challenge in our engagement in our community [...] But it didn't mean that we didn't have challenges ourselves, to make sure that everybody understands the process that we are engaged in. That a tutor, for example, is not equivalent of a teacher now with this curriculum or with this process that we are engaged in. But really, [the tutor is] someone who is learning with his friends there to learn to advance their understanding together; so a process of learning together. And so this is something that actually took quite a while and really it is a very active learning for Kimanya—building the capacity of the tutors to be able to engage in that process.

Kalenga also shares about the struggle of the organization to help prepare tutors for the many expectations that the program has for them:

The other challenge is really to do with the quality of the delivery of the program. We've had that challenge and I think we still have that challenge. Because if you look at the PSA books, the knowledge in these books—oh! So perfect, really. Now the question is, is this person who is helping these students to go through this program, how is he ready? Does he understand these materials himself or herself? So that's another challenge that we are still facing. And I was chatting with [someone] a few weeks ago, months ago that, you see, we are looking for tutors but we are failing to get tutors from even our own graduates.

(laughing) So which means that there is still that question of the quality, you know, of the delivery of the program. So it is still a challenge and as an organization we are trying to see how we can overcome that challenge. How can we help our tutors who are helping the students?

As detailed earlier, one of the features of the PSA materials that enable them to so easily adapt to a new context is their open-ended nature. They are designed to help groups ask questions among one another, and within their community. But if the tutor, for whatever reason, is struggling to communicate the intention of a given unit, then Kimanya cannot expect the program to achieve its intended aim.

One interesting example from Kalenga which actually demonstrates this struggle, but also the means by which the organization has attempted to address it, has to do with the study of the lesson on microregions from the unit *Classification*. As Sanem described earlier, the purpose of that unit is the help participants acquire the capability to classify and organize knowledge about the world. Students reflect on, for example, what it means to classify, what it means to read one's environment, to group things, and to organize things in your mind. In the process of doing so, the first 11 lessons of the unit draw from real examples used in the taxonomy of plants and animals. In studying such a lesson, which can take up to a month, it is easy for a tutor and his or her participants to become distracted by the technical terminology of taxonomy, and confuse these lessons as the mere transmitting of interesting information. If that happens, the PSA group, as a result, may not fully appreciate the task they are given in the final chapter of the book, which requires them to carry out an investigation into the plants and animals within their microregion. Such was the case with the example from Kalenga's story of visiting a PSA group that completed the study of *Classification*. And yet, his example also illustrates the potential of Kimanya to overcome such challenges through the support of coordinators in helping tutors and participants appreciate the aim of a given material or the aim of the PSA program:

We met with the tutors in Wairaka and I was just trying to understand how each one is doing in the process of group formation. So they shared what they are going through and so on. Then in the afternoon I said, "No. Just talking to them about how things are moving is not enough." So in the afternoon I went with one of them who has actually started a group. So I just told him that ok today let me accompany you, let me give you a ride to your place and so he was excited because he was not expecting this.

So we went with him at his place because the group meets at his home. And so we had 12 participants who came and they had just finished the unit of *Classification*. This was my first visit to this group and they had finished the unit of *Classification*. Then we asked them to if we could go back again and look at that lesson, the lesson 12 which is really the core of that book. So when I looked at their books, eh! Like when they asked them to give the names of crops that they

grow for food in their communities I looked at most of the books of the students they had like 2 crops. They had mentioned 2 crops, 3 crops. And then the animals raised for food I saw like maybe 2. Someone mentioned a cow, a chicken.

Then when I asked them now to think about all the crops it was so interesting. They could not believe that they have all these crops in their community. They did not believe that they have all these animals in their community. And they were like “Wow! We do not have enough space in the book! What should we do?” I said that’s funny, ok, since you’ve seen the challenge then next time you buy an exercise book because you see you have a lot. They were all happy and then we’re like, now imagine if those who are not here, because there are 18 in the group, so 6 of them were not around. We’re like, now imagine those who are not around because you might think that well I can read this this book at home. But imagine how much knowledge has been generated in this group just for the few hours we’ve been together. So you see, you can’t say that, “No. Let me go home and study these books, you know, on my own.” There is a lot that we learn when we are together, and they were all excited, they were all happy.

So yesterday, Wilberforce is the tutor of this group, was like “Ah! All the students are so excited, you know, and they want to carry out a research. They want to go to the division. They want to go and ask, you know, the leaders about their microregion. They want to understand more about their microregion. They want to get a map of their microregion. They want to understand how many people live in this division.” I was like “Wow! That’s great. Now what can you do as a tutor?” Because now he was asking me for a letter; that Kimanya should write a letter requesting for their local leaders to accept the participants to go and talk to them. I was like, “Wow, Wilberforce. How do you see that? If it’s Kimanya that writes a letter, what impressions are you giving to the local leaders, even to the students?” So they will think that this group belongs to the organization, belongs to Kimanya. Then he was like, “Wow. I did not think about that.” (laughing) And I’m like, “What about asking these students to draft a letter themselves and they sign it, all of them, all the 18 students? Let them sign and they should say that we are members of this community, we are learning this, we are studying this program and it’s for the benefit of the community. We would like to come and visit, ask you a few questions about our community,” and then let all of them let them sign on this letter.

So he went back and I think yesterday, because I did not go to visit again, but he told me that’s what he was going to share with them and he was so excited. And he said “Yeah, that is true. Because if it’s Kimanya to write the letter they will think that the group is for Kimanya. They will not take it as, you know, a group for the community.” Yeah, so I’m learning a lot with accompanying tutors.

The strength of this example, as mentioned before, is that it both illustrates a systemic problem experienced across the organization, but it also demonstrates that sometimes the way to overcome these challenges are not that complicated.

Flavia, another program coordinator and former unit coordinator, elaborates on this struggle to continually advance in one's understanding of PSA as a model.

The initial stage is really hard to understand what PSA is. You can take it for granted like some other course; something where you can go study then graduate. But as time goes on, you really get to appreciate the purpose of education. All this knowledge I have, what am I going to use for? So individuals, like tutors, coordinators, really getting to further their understanding of the purpose of the program in the spaces provided: the trainings, the preparations. It makes them to try to deliver the program in a more effective way.

Like every time I study a book I don't want to [just] study it, I want to learn something that I missed out the other time when I looked at it. So every time I look at the PSA material I really want to see what is now new. How can I further my understanding in line with that particular concept, or even a lesson, so as I advance as a tutor it also makes my work very easy? When I am accompanying my PSA group of course I will be able to think about the quality. Because I know I started when I was just looking at the materials for the sake of studying it, but now I can be able to really know to its applicability. So spaces, consultations, also the relationship that we have with the people we are working with, the people we are serving with. Coordinator, tutor, participants, and the community, also makes us to try to grow stronger every other year that passes by.

From comments such as these it appears the one way in which Kimanya has endeavored to address this challenge of quality is by utilizing the study and reflection spaces to enhance understanding of the PSA materials. Furthermore, Kalenga expressed his belief that accompaniment of tutors by coordinators is also integral to assisting them to improve the quality of their study. One additional approach that the organization has begun exploring is being more selective about the capacity of the individuals who are invited to become tutors. It would seem that, despite Kimanya's belief in the ability of the materials to significantly impact participants, the extent of that impact varies greatly depending on the quality of tutor (and the commitment level of participants).

The lesson from this case, it would seem, is that no matter the perceived effectiveness and relevance of an educational framework, the quality of the program also depends on the ability of the organization to adequately, and appropriately realize that potential. While many features of the PSA program, not least of which is its conceptual framework, have made it conducive to recontextualization, the process of adapting and evolving the program within a new

environment takes time. One sign of promise for Kimanya, has been recent efforts to adapt the content of the program to train in-service teachers. Part of the effectiveness of that approach, which began only a few years ago, has been learning from the challenges faced by the PSA program in communities. Among the lessons learned: the importance of experienced tutors; the need to tailor the learning experience to the needs of the participants; the value of working with a population that can commit to regular study for an extended period; and the benefits of continuous institutional development. From my interviews with members of the organization, it would appear Kimanya is in the process of translating these same insights into improving the effectiveness of its other PSA groups as well.

Chapter 5: Discussion and Conclusion

In the Introduction, I wrote that the aim of this dissertation was to highlight promising practices and perspectives which would challenge existing assumptions about educational transfer and adaptation. Three central questions were then proposed to steer my analysis: (1) how are educational policies and practices transferred, or imposed, and later adapted for new contexts?; (2) what are the most important contextual considerations that need to remain at the heart of these recontextualization efforts?; and (3) how can recontextualized educational efforts resist the pressures of homogenization in order to preserve (and where necessary reestablish) diverse educational practices based on distinct, context-specific world-views and sociocultural perspectives? In subsequent chapters, I endeavored to answer these questions, first by introducing the homogenizes pressures facing international education (Chapter 1), then by placing Uganda's educational system in historical context (Chapter 2), and eventually through examining the "negotiated" and "decentralized" recontextualization efforts of two Ugandan based educational NGOs. In this final chapter, I review the lessons that each of these chapters have for the field of CIE, and conclude by looking more closely at the third question, which brings together the concerns and insights expressed in Parts I and II of my dissertation.

Part I: Transnational isomorphisms and Ugandan education

The international borrowing, lending, transfer and adaptation of educational programs and practices have become fixtures of the modern development and globalization era (Steiner-Khamsi, 2004, 2012; Stromquist & Monkman, 2014). To argue that increasing international influence on local policymaking should be resisted or slowed would appear both naïve and futile. However, an acceptance of the permanence of globalization—and even its potential to effect constructive changes in education and meaningful exchanges of knowledge and experience—does not preclude justifiable criticism of its more problematic features; namely, the rise and seemingly implacable pervasiveness of transnational isomorphisms in global educational policy and practice. As this dissertation has dealt specifically with Uganda, however, I speak primarily of this pervasiveness on educational policy and practice in the context of post-colonial, low-income nations in SSA.

In Chapter 1, I expressed support for comparative education literature which recognizes increasing similarities in schooling conditions worldwide (Dale, 2000; Meyer & Ramirez, 2000; Spring, 2006). Joel Spring (2006) describes these similarities as reflective of European and American schooling priorities:

Global trends support school organizations based on an Euroamerican educational ladder with students progressing in age-graded classes from elementary to secondary schools. With the globalization of school organization, schools around the world have age-graded classes studying a set curriculum in a variety of subjects ranging from reading to science. Progress between age-graded classes

requires student mastery of the subjects in the previous grade with mastery being demonstrated by grades or an examination. Of course, there are variations in this bureaucratic pattern with some national school systems dividing students into vocational and academic tracks, and with differences in the separation of the age-graded classes between elementary and secondary school. (p. 6)

So pervasive has this phenomenon become that recognition of harmonization within international schooling structures and national education policies is even acknowledged among those who remain skeptical of its origins and significance (Anderson-Levitt, 2003; Steiner-Khamsi 2004, 2012; Silova & Steiner-Khamsi, 2008; Portnoi 2016).

Roger Dale (2000) identifies two prominent schools of thought among proponents of the existence, and significance, of structural and policy homogeneity, or *isomorphism*, within international education systems. The first approach he refers to as “Common World Educational Culture” (CWEC), was developed by John Meyer and other world institutionalists. Proponents of CWEC “argue that the development of national educational systems and curricular categories is to be explained by universal models of education, state, and society, rather than by distinctive national factors” (p. 428). In this view, features of national educational systems worldwide have been formed, along with other aspects of the state, “at a supranational level by a dominant world (or Western) ideology” rather than the result of autonomous decision making within each state (p. 429). By contrast, the other approach to interpreting global isomorphism is referred to as “Globally Structured Agenda for Education” (GSAE), and draws from literature on international political economy. Proponents of GSAE see “the changing nature of the world capitalist economy as the driving force of globalization,” and seek “to establish its effects on educational systems, even as they are also locally mediated” (p. 428). In short, GSAE proponents see capitalism as the driving force behind shifts in education and other international policy agendas, with the search for profit motivating transnational agencies and institutions to push for policy change at the supranational level.

Each of these interpretations hold some merit. Other scholars, for example, have also advanced the view that global capitalism or industrialization has been a driving force in educational policy decisions (Tikly, 2004; Spring, 2006)—most notably Metzler (2009) in his analysis of the factors driving colonial education priorities in SSA. Yet there are important commonalities between these perspectives worth considering. Both approaches point to the importance of supranational forces on educational systems, and both believe that national education policies can be affected, even coercively by external forces (Dale, 2000, p. 435). Skeptics of world culture theory like anthropologist Kathryn Anderson-Levitt (2003), view this perspective to be incomplete. First, Anderson-Levitt argues that it is more accurate to suggest that multiple isomorphic tendencies, appearing as competing reform movements, have spread around the world at different times; including movements advocating decentralization movements, teacher autonomy, and student-centered instruction (p. 9). Such a view is supported by other CIE researchers as well (Spring 2006). Second, in the introduction to the book, *Local*

Meanings, Global Schooling: Anthropology and World Culture Theory, Anderson-Levitt proposes a marriage of world culture theory and belief in local variability based on the idea that both perspectives are limited without the other:

If we take seriously both local variability and world culture theory, we recognize that each perspective on its own misses something crucial. It follows that we cannot simply shift the focus from the transnational to the local as we please. We must view schooling from both perspectives simultaneously, as Stambach argues in this volume.

A complete theory of schooling and of school reform would begin by acknowledging that there is a common set of models of modern schooling—or a common set of cultural debates about schooling. Contemporary mass schooling is an institution with (not completely homogenous) roots in Europe. It spread to the rest of the world, as world culture theorists argue, as part of the enterprise of constructing modern-looking nation-states in the transnational system. At a very general level, schooling manifests a set of common forms [...]. Although there seem to be some competing transnational models, such as Freire's, very few really qualify as competition at this level of the general form.

At the same time, as many of the case studies in this volume show, administrators, teachers, and students create within the roughly common structure very different lived experiences (Anderson-Levitt 2002a). This happens in part because there are different actors at different levels with different agendas. In addition, there are inevitably gaps between model and practice. The enacted curriculum in any school in the world can contrast sharply to the official curriculum. Teachers or even entire nations play with the common classroom repertoire, to “indigenize” the structure or tone of classroom life in ways that make it either a caricature of schooling (Fuller 1991; Watson-Gegeo and Gegeo 1992) or a better place for local children (Erickson and Mohatt 1982; Flinn 1992). (p. 18)

According to this view, the fact that common features appear across educational systems in many parts of the world is not the main story. While such transnational isomorphisms may exist, more important is the realization that educational experience on the ground is varied as a result of indigenizing influences from local actors and, at times, national policy.

As a result of this literature, I argued in Chapter 1 that educational systems, particularly in low-income nations, were experiencing the influence of these transnational isomorphisms. In particular, this impact has been felt among nations in SSA from the period of colonization to the present. Looking to Uganda, Chapter 3 makes the case that the colonial period of the country's history has had a pronounced influence on its educational organization and structure, as well as a disproportionate effect on the evolution of its education policy and planning (Furley & Watson,

1978; Evans, 1994; Ssekamwa, 1997; Metzler, 2009; Hanson, 2010). Beginning with the introduction of missionary schools, all the way through the independence period and to contemporary Uganda, educational policy and priorities have consistently been shaped by external, European and American influences. While it is arguable that the schooling system inherited from Uganda's colonial period has been reshaped or "indigenized" at certain periods in history, it is more commonly accepted that the country has not experienced significant changes to its education structure since colonization or independence (Evans 1994). The educational renaissance that was once promised at the onset of independence in SSA never materialized, and the global forces of international donor agencies and policy agreements bear much of this blame.

Part II: Prospects for responsible educational recontextualization

As another skeptic of the significance of harmonizing trends in CIE, author Gita Steiner-Khamsi has regularly brought attention in her literature to the question of indigenization, or recontextualization. In an article with Hubert Quist on educational borrowing in British Ghana, the authors write "Since borrowing always implies a decontextualization process in which a model, practice, or discourse is transplanted from its original context and applied to a new one, the process of recontextualization, 'indigenization' or local adaptation, will become key for understanding the educational transfer process" (Steiner-Khamsi & Quist, 2000, p. 275). In agreement with this sentiment, that recontextualization is of central importance to questions of international borrowing and lending, the two case studies in Part II of my dissertation examined how two organizations in Uganda considered questions of contextual relevancy in their efforts to adapt transferred educational ideas and programs.

In Chapter 3, I found that Educate! posed an interesting case study both in terms of its approach to recontextualization, as well as its approach to educational transfer. The founders of Educate! did not arrive to Uganda with a predesigned program, but rather a collection of ideas and materials based on projects in other countries. The first stage of their recontextualization efforts involved familiarizing themselves with the Ugandan context. Among other things, the founding members visited schools, spoke with established organizations, and met with government officials. When the time came to train their first batch of mentors, the Educate! team had put together a curriculum which they felt reflected a compromise between the best from other programs—including those that Angelica had been involved in or designed for other countries—and their understanding of local needs and interests. It was during the first induction training in 2008, however, that Educate! truly began its process of negotiated recontextualization.

During this first training, the group of Ugandan mentors had a chance to go through every activity and every exercise, debating what they felt was most appropriate or inappropriate for Ugandan secondary students. It was through this back and forth, between Ugandans and the Educate! staff, about imported educational ideas that led to the first Educate! Experience materials and model. From there, Educate! went about expanding the reach of each program, scaling at a rapid pace between 2013 and 2018. Throughout this process, the team remained open

to input from its beneficiaries, including staff, schools, and participants. Ultimately, the strength of Educate!'s recontextualization model lay in the mechanisms it adopted for regularly gathering feedback from those in the field: the Internal Advisory Board, and the Build Measure Learn approach to rapid testing of program innovations. And while there appears to have been little adaptation to the program content in terms of contextual relevancy in more recent years, the organization still has the benefit of testing any curricular changes it makes through the use of its feedback mechanisms.

In the case of Kimanya-Ngeyo and the Preparation for Social Action (PSA) program, what stands out from its recontextualization efforts is the fact that a complete two-year program, made up of 18-26 materials, was imported in its entirety from Colombia. Such transfers bear a unique risk in terms of their potential to be authoritarian or coercive, given their inherent complexity and the assumption that they contain a rigid scheme and rules that need to be followed. Of course there is nothing stopping an organization like Kimanya from ignoring the intentions of the curriculum and utilizing the curriculum for its own purposes. As Anderson-Levitt points out, "The enacted curriculum in any school in the world can contrast sharply to the official curriculum." Yet to do so would ultimately divorce the intent of the material from the intended practice, something which Hannafin et. al. (1997) observe to be epidemic in many educational settings:

Evidence of mismatched instructional goals versus methods are widespread. It is not unusual, for example, for schools to proclaim an emphasis on critical thinking or problem solving, but focus largely on mastery of declarative knowledge. Universities often espouse virtues such as "discovering science as a scientist", but teach and test for rote learning. Trainers proclaim "lean and mean" systems that differentiate nice-to-know from need-to-know knowledge and skills, but routinely include non-essential information or fail to provide sufficient support to promote effective performance. (pp. 101-102)

For an organization like Kimanya that was attracted to the PSA program in large part because of the richness of its theoretical and conceptual framework, it would therefore make little sense to import the program while ignoring its original intent.

Thus, the process of recontextualizing the PSA program in Uganda was, in large part, a reflection of the framework which was originally developed by the lending organization, FUNDAEC. In fact, in addition to transferring the materials of the PSA program—which on their own also include elements of FUNDAEC's conceptual framework for education for development—FUNDAEC also provided Kimanya with a host of supplemental materials. And within these supplemental materials, the organization was able to learn about how the programs were originally developing in Colombia and what their explicit aims are.

The story of Kimanya's decentralized recontextualization efforts was consequently characterized by continuous effort within the organization to study, reflect on, and experiment

with the inherited conceptual framework. It is my view that this approach to recontextualization—in which all stakeholders (from participant, to tutor, to coordinator, and program head) attempt to understand the conceptual framework of a transferred program and find ways to contextualize its aims to their individual needs—has profound potential. As Bednar et. al. (1995, quoted in Hannafin et. al., 1997), states, “... effective instructional design is possible only if the developer has reflexive awareness of the theoretical basis underlying the design” (p. 102). And in the case of Kimanya and PSA, I would argue this is true not only for developers, but also implementers and recipients of educational programs. Through the ability of every individual to engage directly with the conceptual framework of the program, along with the inherent adaptability of the materials, Kimanya was able to create a decentralized recontextualization process, in which PSA groups were not dependent on the implementing organization to determine how they would benefit from or apply what they learned from the program; but rather the groups relied upon Kimanya to assist them to enhance their understanding of how the program worked best.

Resisting isomorphisms through recontextualization—suggestions for the field

What lessons can be gleaned from the efforts of these two organizations? In the remaining two sections, I offer a summary of what the Parts I and II can offer to the field of CIE, and to organizations and states operating within post-colonial SSA. Particular attention is given to the question: how can recontextualized educational efforts resist the pressures of homogenization in order to preserve (and where necessary reestablish) diverse educational practices based on distinct, context-specific world-views and sociocultural perspectives?

Comparative International Education

One way in which recontextualization can resist the pressures of homogenization, or in the context of Uganda, resist the hegemonic influence of Western conceptualizations of education and schooling—both effects of colonial legacies and contemporary international pressures on education policies and agendas—would be through empowering every individual stakeholder to be actively engaged in the recontextualization process. Put in the language of PSA’s conceptual framework: assist every individual to become a protagonist of his or her own development. There are a few things to unpack from this suggestion.

First, becoming a protagonist of one’s own development is not equivalent to the notion of “active participation” that dominates much of contemporary development literature (Cooke & Kothari 2001; Hickey & Mohan 2004; Kendall 2007). “Participation,” in that conceptualization is always limited because ‘to participate’ more often than not means ‘to participate in someone else’s plan.’ Farzam Arbab, one of the founders of FUNDAEC, elaborates on this perspective:

What was the role of the villagers themselves in interdisciplinary, multi-institutional development intervention? The analyses we found in the literature on participation, though thought provoking, were not entirely satisfactory. No matter

how hard we tried, we could not escape an uneasy feeling that by adopting any of the prevalent approaches, we would be asking a people to participate in our plans and follow our models. That we would do everything possible to give them a voice in the endeavour, especially at the level of implementation, would do little to change this underlying message, which, we had no doubt, would be picked up by the people themselves.

What was curious about these deliberations on the theme of participation was that the more one thought in terms of “we” and “they,” the farther away seemed the people one wished to serve. The pendulum seemed to swing from extreme to extreme, from the paternalism of the previous decades to the glorification of cultural autonomy and self-determination. Why were so many development organizations taking on with such tenacity the role of an outsider? Are human beings doomed to be outsiders to every group except a single one, a subculture narrowly defined by nationality, ethnicity, social class, religion, and occupation? (Arbab, 2000, p. 153)

For FUNDAEC, true engagement of every individual in a development process meant more than participating in the organization’s plans. This conviction was consistent with another of FUNDAEC’s core beliefs; that “development is not a package the ‘developed’ deliver to the ‘underdeveloped’ but a process in which entire populations must, in one way or another, participate” (Arbab, 2000, p. 158).

Returning to the question of educational transfer and recontextualization, the belief that development is achieved through the participation of entire populations, and through them leading these processes, can be understood in the context of education to mean that individuals are enabled to have more control over what happens in their education, and how their education connects to their personal objectives. Yet this begs the question, how is this achieved? While Arbab (2000) offers a glimpse into how FUNDAEC answers this question—through scientific learning illumined by moral and spiritual principles (p. 158)—in the context of this study I would advance two possibilities as a means to empowering individuals to have more control over the recontextualization of their educational experiences: (1) critical pedagogy; and (2) making the theoretical framework and intention of educational curricula explicit.

It is worth noting that I do not view these two areas as separate steps, but rather as complimentary tools that may assist in our intended aim. So, why make curricula explicit? One reason is suggested by Hannafin et. al. (2003):

[D]esign must be based in a defensible theoretical framework. The framework must be public; that is, it can be both articulated clearly and differentiated from other perspectives. Multiple frameworks are available from which designs can be rooted; they must, however, establish connections among key foundations,

identify the assumptions consistent with the corresponding foundations, and lead to methods consonant with them. (p. 103)

According to this logic, when the framework of an educational program is public, it not only implies that the designers have thought carefully about the intention behind their programs, and how those programs related to the approaches taken; but it also suggests that by making the theoretical frame accessible, and by placing it in contrast to other frameworks, the student who learns from such a curriculum will be enabled to carefully interrogate it to determine whether it is consistent with his or her beliefs and personal objectives as well. Thus, within the deliberative space of such a classroom, students and educators would have the ability to better shape (or recontextualize) the materials to their needs.

With regard to critical pedagogy, the value of this educational approach is its emphasis on aiding individual students to critically examine the world around them. As a starting point, both Freire (1970) and Giroux (2001) point out that educational curricula are not neutral. Giroux goes one step further by introducing the concept of the “hidden curriculum, which he defines as “those unstated norms, values, and beliefs embedded in and transmitted to students through the underlying rules that structure the routines and social relationships in school and classroom life” (2001, p. 47). Thus, without going into much detail about the complex theoretical framework and functioning of critical pedagogy, one can envision the way in which this approach to learning has the potential to empower students to carefully examine all that they are exposed to.

Post-colonial SSA and educational reformation—a dream deferred

What happens to a dream deferred?

Does it dry up
like a raisin in the sun?
Or fester like a sore—
And then run?
Does it stink like rotten meat?
Or crust and sugar over—
like a syrupy sweet?

Maybe it just sags
like a heavy load.

Or does it explode?

(Langston Hughes²⁸)

²⁸ <https://www.poetryfoundation.org/poems/46548/harlem>

In the previous section I highlighted the need for educational programs to adapt to the needs and interests of their students. In other words, they should be flexible, yet purposeful. In this final section, I want to conclude by making a plea for more variation in education.

During my analysis of the evolution of educational policy and practices in Uganda's history, since the arrival of the first missionaries, there was one particular moment which, in my mind, stood out above all else. It was the period post-independence. When I look back at Uganda's educational history, I cannot help but be reminded of the poem "A Dream Deferred" by Langston Hughes. In this instance, the dream deferred is the dream of an educational renaissance within postcolonial SSA. In the years leading up to independence, there was a sense of possibility in the air, and a belief that for the first time newly freed nations would have a chance to create a more authentic and indigenous educational experience (Yoloye, 1986). The conversation at the conference in Addis, which was one of many leading to the creation of national curriculum development centers across SSA, placed a large emphasis on the question of indigenizing national curricula (UNESCO, 1961). And yet? The dream of was deferred. Indefinitely.

My hope is that in this era of transnational isomorphisms, and the hegemony of western conceptualizations of education throughout SSA, that individuals, schools, educational organizations, and nation-states will each place an emphasis on uncovering diverse ways of learning, and on recovering lost and marginalized systems of knowledge and practice.

Resistance to Eurocentricism, and hence development, can only come from non-Western concepts and categories. The non-Western cultures and civilisations have to reconstruct themselves, almost brick by brick, in accordance with their own world views and according to their own norms and values. This means that the non-West has to create a whole new body of knowledge, rediscover its lost and suppressed intellectual heritage, and shape a host of new disciplines. (Sardar, 1999, in Tikly, 2004, p. 57)

In following this advice, there is hope that nations in SSA and other low-income countries may one day balance the flow of educational knowledge programs to be more multilateral than unilateral.

Bibliography

- Abdi, A. A. (Ed.). (2012). *Decolonizing philosophies of education*. Rotterdam: Sense Publishers.
- Althusser, L. (1984). Ideology and ideological state apparatus. In: *Essays on ideology*. London: Verso.
- Anderson-Levitt, K. (Ed.). (2003). *Local meanings, global schooling: Anthropology and world culture theory*. New York: Palgrave Macmillan.
- Arbab, F., Correa, G., & de Valcarcel, F. (1988) *FUNDAEC: Its principles and activities*. Retrieved 12 March 2010 from www.fundaec.org/en/institution/celater_doc.htm.
- Arbab, F. (2000). Promoting a discourse on science, religion, and development. In: S. Harper (Ed.), *The lab, the temple, and the market: Reflections at the intersection of science, religion, and development* (149–237). Bloomfield, CT: Kumarian Press.
- Arbab, H. (2007). Generation of knowledge and the advancement of civilization. Presentation delivered at the Annual Conference of the Association for Bahá'í Studies North America. Ontario, Canada.
- Bartlett, L. & Vavrus. (2017). *Rethinking case study research: A comparative approach*. London: Book Now Ltd.
- Barnett, M. N., & Finnemore, M. (1999). The politics, power, and pathologies of international organizations. *International organization*, 53(4), 699-732.
- Beech, J. (2006). The theme of educational transfer in comparative education: A view over time. *Research in Comparative and International Education*, 1(1), 2-13.
- Bourdieu, P., & Passeron, J.-C. (1990). *Reproduction in education, society and culture*. London: Sage Publications, Inc.
- Brock-Utne, B. (2000). *Whose education for all?: The recolonization of the African mind*. New York: Falmer Press.
- Bude, U. (1983). The adaptation concept in British colonial education. *Comparative Education*, 19(3), 341-355.
- Carney, S. (2009). Negotiating policy in an age of globalization: Exploring educational “policyscapes” in Denmark, Nepal, and China. *Comparative Education Review*, 53(1):63–88.
- Carney, Stephen. 2012. Imagining globalisation: educational policyscapes. In: *World Yearbook of Education 2012: Policy Borrowing and Lending in Education*. New York: Routledge Taylor & Francis Group.
- Chisholm, L., & Leyendecker, R. (2009). Curriculum reform in sub-Saharan Africa: when local meets global. In *International Handbook of Comparative Education*. (pp. 685-702). Dordrecht: Springer.
- Cooke, B. & Kothari, U. (2001). *Participation: the new tyranny?* London, UK: Zed Books.
- Cowen and A. M. Kazamias (Eds.). *International handbook of comparative education*. New York: Springer.

- Crossley, M. (2002). Comparative and international education: Contemporary challenges, reconceptualization and new directions for the field. *Current Issues in Comparative Education*, 4(2), 81-86.
- Crossley, M. (2009). Rethinking context in comparative education. *International Handbook of Comparative Education*, 22(8), 1173-1187.
- Edelman, M. (1999). *Peasants against globalization: Rural social movements in Costa Rica*. Palo Alto, CA: Stanford University Press.
- Edwards, M., Hulme, D. and Wallace, T. (1999) NGOs in a global future: marrying local delivery to worldwide leverage. *Public Administration and Development*, 19(2): 117-36
- Educate!. (2015a). 2015 Leadership and entrepreneurship course. Kampala: Educate!.
- Educate!, 2015b. 2015 Leadership and entrepreneurship course workbook [draft]. Kampala: Educate!
- Dale, Roger. 2000. Globalization and education: demonstrating a 'common world educational culture' or locating a 'globally structured educational agenda'? *Educational Theory*, 50 (4): 427-58.
- Datzberger, S. (2018). Why education is not helping the poor: findings from Uganda. *World Development*, 110, 124-139.
- Escobar, A. (1995). *Encountering development: The making and unmaking of the Third World*. Princeton, NJ: Princeton University Press.
- Evans, R. V. (1994). The evolution of education policy in Uganda: Continuity and change. Denmark: A Paper Presented at a Conference, Developing Uganda.
- Farid-Arbab, S. (2016). *Moral empowerment: in quest of a pedagogy*. Wilmette: Bahá'í Publishing.
- Freire, P. 1970/1992. *Pedagogy of the oppressed*. New York: The Continuum Publishing Company.
- FUNDAEC. (2000). *Educational Concepts* [material in development]. Cali, Colombia: Foundation for the Advancement and Teaching of the Sciences (FUNDAEC).
- FUNDAEC (2001). Evaluation summary and institutional history. Unpublished grant proposal. Cali, Colombia: FUNDAEC.
- FUNDAEC. (2003). *Classification: Basic arithmetic*. Cali, Colombia: FUNDAEC.
- FUNDAEC. (2004). *Properties: Primary elements of description*. Cali, Colombia: FUNDAEC.
- FUNDAEC. (2006). *Preparation for social action: Education for development*. Cali, Colombia: FUNDAEC. [Internal document]
- FUNDAEC (2008). *Education: A discourse on social action*. Cali, Colombia: FUNDAEC.
- FUNDAEC. (2014). *Promoters of community well-being*. Cali, Colombia: FUNDAEC.
- Furley, O. W., & Watson, T. (1978). *A history of education in East Africa*. Lagos: Nok Publishers Intl.
- Giroux, H. A. (2001). *Theory and resistance in education: Towards a pedagogy for the opposition*. Westport, CT: Greenwood Publishing Group.

- Gruenewald, D. A. (2003). The best of both worlds: A critical pedagogy of place. *Educational Researcher*, 32(4), 3-12.
- Hannafin, M. J., Hannafin, K. M., Land, S. M., & Oliver, K. (1997). Grounded practice and the design of constructivist learning environments. *Educational Technology Research and Development*, 45(3), 101-117.
- Hannerz, U. (1987). The world in creolisation. *Africa*, 57(4), 546-559.
- Hannerz, U. (1992). *Cultural complexity: Studies in the social organization of meaning*. Columbia University Press.
- Hanson, H. E. (2003). *Landed obligation: The practice of power in Buganda*. Heinemann.
- Hanson, H. E. (2010). Indigenous adaptation: Uganda's village schools, ca. 1880–1937. *Comparative Education Review*, 54(2), 155-174.
- Hickey, S., & Mohan, G. (2004). *Participation—from tyranny to transformation?: Exploring new approaches to participation in development*. Zed books.
- Hirsch, J. (2003) The state's new clothes: NGOs and the internationalization of states, *Rethinking Marxism* 15(2): 237-262
- Honeyman, C. (2010). Social responsibility and community development: Lessons from the Sistema de Aprendizaje Tutorial in Honduras. *International Journal of Educational Development*, 30, 599-613.
- Jansen, J. (1989). Curriculum reconstruction in post-colonial Africa: A review of the literature. *International Journal of Educational Development*, 9(3), 219-231.
- Kalibala, E. B. (1934). *Education for the Villages in Uganda*. East Africa.
- Kapur, P. (2000). The principle of fundamental oneness. In S. Harper (Ed.), *The lab, the temple, and the market: Reflections at the intersection of science, religion, and development* (149–237). Bloomfield, CT: Kumarian Press.
- Kendall, N. (2007). Parental and community participation in improving educational quality in Africa: Current practices and future possibilities. *International Review of Education*, 53, 701-708.
- Klees, S. J. (2010). Aid, development, and education. *Current Issues in Comparative Education*, 13(1), 7-28.
- Klees, S., Samoff, J., & Stromquist, N. P. (Eds.). (2012). *The World Bank and education: Critiques and alternatives*. Rotterdam: Sense Publishers.
- Kimanya. (2007). Memorandum and articles of association.
- Kimanya-Ngeyo. (2018). Annual Plan. [internal document].
- Kwauk, C. and J. Perlman Robinson. (2016). *Sistema de Aprendizaje Tutorial: Redefining rural secondary school in Latin America*. Washington, DC: Brookings Institution.
<https://www.brookings.edu/wp-content/uploads/2016/07/FINAL-SAT-Case-Study.pdf>
- Lample, E. (2015). *Watering the tree of science: science education, local knowledge, and agency in Zambia's PSA Program* (Doctoral dissertation).
- Lewin, K. (1985). Quality in question: A new agenda for curriculum reform in developing countries. *Comparative Education*, 21(2), 117-133.

- Lillis, K. M. (1985) Processes of secondary curriculum innovation in Kenya. *Comparative Education Review*, 29 (1), 80-96.
- Mamdani, M. (2007). *Scholars in the marketplace*. Kampala, Uganda: Fountain Publishers.
- Martens, K. (2001) Non-governmental organisations as corporatist mediator? an Analysis of NGOs in the UNESCO system. *Global Society*, 15(4): 387-404.
- McEwan, P., Murphy-Graham, E., Torres Iribarra, D., Aguilar, C., Rapalo Castellanos, R., (2014). Improving middle school quality in poor countries: Evidence from the Honduran Sistema de Aprendizaje Tutorial. *Educational Evaluation and Policy Analysis*, Forthcoming.
- Metzler, J. (2009). The developing states and education: Africa. In: *International Handbook of Comparative Education* (pp. 277-294). Dordrecht: Springer.
- Meyer, J. W., & Ramirez, F. O. (2000). The world institutionalization of education. In: Jurgen Schriewer (Ed.), *Discourse formation in comparative education* (pp. 111-132). Frankfurt: Peter Lang.
- Meyer, H.D., & Rowan, B. (Eds.). (2006). *The new institutionalism in education*. Albany, NY: State University of New York Press.
- Motani, N. A. (1979). Makerere College 1922-1940: A study in colonial rule and educational retardation. *African Affairs*, 78(312), 357-369.
- Moulton, J., Mundy, K., Welmond, M., & Williams, J. (Eds.). (2002). *Education reforms in Sub-Saharan Africa: Paradigm lost?* Westport, CT: Greenwood Press.
- Mukasa S (2003). Are expatriate staff necessary in international development NGOs? A case study of an international NGO in Uganda. Publication of the Centre for Civil Society at London School of Economics. (pp. 11–13).
- Mundy, K. (1998). Multiculturalism and world (dis)order. *Comparative Education Review*, 42(4), 448-478.
- Mundy, K. (2002). Retrospect and prospect: education in a reforming World Bank. *International Journal of Educational Development*, 22. 483-508.
- Mundy, K., & Murphy, L. (2001). Transnational advocacy, global civil society? Emerging evidence from the field of education. *Comparative Education Review*, 45(1), 85-126.
- Murphy-Graham, E. (2008). Opening the black box: Women's empowerment and innovative secondary education in Honduras. *Gender and Education*, 20(1), 31-50.
- Murphy-Graham, E. (2010). And when she comes home? Education and women's empowerment in intimate relationships. *International Journal of Educational Development* 30(3), 320-331.
- Murphy-Graham, E., 2012. *Opening minds, improving lives: Education and women's empowerment in Honduras*. Vanderbilt University Press, Nashville, TN.
- Murphy-Graham, E., Lample, J., 2012. Epilogue: SAT in Africa. In: Murphy-Graham, E. (Ed.), *Opening Minds, Improving lives: Education and women's empowerment in Honduras*. Vanderbilt University Press, Nashville, TN.

- Muwanga, N. (2000). *The politics of primary education in Uganda: Parent participation and national reforms*. (Graduate Thesis). Toronto, Quebec, Canada: University of Toronto.
- National Curriculum Development Centre representative, personal communication, June 17, 2015
- Ndoye, M. (1997) Globalization, endogenous development and education in Africa, *Prospects*, 27, 79–84.
- Nthogo Lekoko & van der Merwe (2006) Beyond the rhetoric of empowerment: Speak the language, live the experience of the rural poor. *International Review of Education*, 52.3-4, p. 323-332.
- Nyerere, J. (1968). (issued in March 1967). Education for self-reliance. In: *Ujamaa. Essays on Socialism* (pp. 44-76). Dar es Salaam: Oxford University Press.
- Olson, J., Biseth, H., & Ruiz, G. (2015). *Educational Internationalisation*. Rotterdam: Sense Publishers.
- Oyugi, W.O. (2004) The role of NGOs in fostering development and good governance at the local level in Africa with a focus on Kenya. *Africa Development*, XXIX(4): 19-55
- Phillips, D. (2004). Toward a theory of policy attraction in education. *The global politics of educational borrowing and lending* (pp. 54-67). Taylor and Francis, Ltd.
- Phillips, D. (2009). In R. Cowen and A. M. Kazamias (Eds.), *International Handbook of Comparative Education* (pp. 1061–1077). New York: Springer.
- Phillips, D., & Ochs, K. (2004). *Educational policy borrowing: historical perspectives*. Oxford: Symposium Books.
- Phillips, K. D., & Stambach, A. (2008). Cultivating choice: The invisible hands of educational opportunity in Tanzania. In: M. Forsey, S. Davis, and G. Walford, (eds.). *The globalization of school choice?* Oxford. Symposium Books.
- Phillips, D., & Schweisfurth, M. (2014). *Comparative and international education: An introduction to theory, method, and practice*. A&C Black.
- Portnoi, L. M. (2016). *Policy borrowing and reform in education: Globalized processes and local contexts*. New York: Palgrave Macmillan.
- Proscio, T. (2000). *In other words: A plea for plain speaking in foundations*. New York: Edna McConnell Clark Foundation.
- Quist, H. (2003). Transferred and adapted models of secondary education in Ghana: What implications for national development? *International Review of Education*, 49(5), 411-431.
- Ranger, T. (1965). African attempts to control education in East and Central Africa 1900-1939. *Past & Present*, (32), 57-85.
- Rapplee, J. (2012). Reimagining attraction and ‘borrowing’ in education: Introducing a political production model. In *World Yearbook of Education 2012* (pp. 141-167). Routledge.
- Resnik, J. (2006). International organizations, the “education-economic growth” black box, and the development of world education culture. *Comparative Education Review*, 50(2), 173-195.

- Rist, G. (1997). *The history of development: from western origins to global faith*. London: Zed Books.
- Robbins, J. (2001). God is nothing but talk: Modernity, language, and prayer in a Papua New Guinea society. *American Anthropologist*, 103(4), 901-912.
- Robertson, S., & Robertson, S. L. (2007). *Globalisation, education and development: Ideas, actors and dynamics* (Vol. 2). London: DfID. Published by the Centre for Globalisation, Education and Societies, University of Bristol, Bristol BS8 1JA, UK at: <http://www.bris.ac.uk/education/people/academicStaff/edslr/publications/10slr/>
- Roosta, M. (1999). *Adult learning and community development: A case study of the FUNDAEC's university center for rural well-being in Risaralda, Colombia*. Northern Illinois University.
- Rose, P. (2003). Community participation in school policy and practice in Malawi: balancing local knowledge, national policies and international agency priorities. *Compare*, 33(1), 47-64.
- Sadler, M. (1979a) How far can we learn anything of practical value from the study of foreign systems of education? Address given at the Guildford Educational Conference on Saturday 20 October 1900, in J. Higginson (Ed.) *Selections from Michael Sadler: studies in world citizenship*. Liverpool: DeJall & Meyorre.
- Schriewer, J. (2000). World system and interrelationship networks. In: *Educational knowledge: Changing relationships between the state, civil society, and the educational community* (pp. 305-343).
- Schriewer, J., & Martinez, C. (2004). Constructions of internationality in education. *The global politics of educational borrowing and lending* (pp. 29-53). New York: Teachers College Press.
- Semboja, J., & Therkildsen, O. (1995). *Service provision under stress in East Africa*. London: Villiers Publications, Ltd.
- Sikoyo, L.N. (2007). *Primary teachers' recontextualization of a curriculum innovation in Uganda*. (Unpublished PhD thesis). University of Cape Town.
- Sikoyo, L. (2010). Contextual challenges of implementing learner-centred pedagogy: the case of the problem-solving approach in Uganda. *Cambridge Journal of Education*, 40(3), 247-263.
- Silova, I., & Steiner-Khamisi, G. (Eds.). (2008). *How NGOs React: Globalization and education reform in the Caucasus, Central Asia, and Mongolia*. Bloomfield, CT: Kumarian Press.
- Spreen, C. A. (2004). Appropriating borrowed policies: Outcomes-based education in South Africa. In: *The global politics of educational borrowing and lending* (pp. 101-113). New York: Teachers College Press.
- Spring, J. (2006). *Pedagogies of globalization: The rise of the educational security state*. Mahwah, NJ: Lawrence Erlbaum Associates, Inc.
- Ssekamwa, J. C. (1997). *History and development of education in Uganda*. Fountain Pub Limited.

- Ssekamwa, J. C., & Lugumba, S. M. E. (2001). *A history of education in East Africa*. Fountain Pub Limited.
- Steiner-Khamsi, G. (2002). Re-framing educational borrowing as a policy strategy. In M. Caruso & H.E. Tenorth (Eds.), *Internationalisierung-internationalisation* (pp. 57-89). Frankfurt/Main, Germany: Lang.
- Steiner-Khamsi, G. (Ed.). (2004). *The global politics of educational borrowing and lending*. New York: Teachers College Press.
- Steiner-Khamsi, G. (2006). The development turn in comparative education. *European Education*, 38(3), 19-47.
- Steiner-Khamsi, G. (2012). Understanding policy borrowing and lending: Building comparative policy studies. In G. Steiner-Khamsi, F. Waldow (Eds.), *Policy borrowing and lending. World Yearbook of Education 2012* (pp. 3-17). London & New York: Routledge.
- Steiner-Khamsi, G., & Quist, H. O. (2000). The politics of educational borrowing: Reopening the case of Achimota in British Ghana. *Comparative Education Review*, 44(3), 272-299.
- Steiner-Khamsi, G., & Waldow, F. (2012). Policy borrowing and lending. *World Yearbook of Education 2012*. London & New York: Routledge.
- Stiglitz, J. (2002). Participation and development: Perspectives from the comprehensive development paradigm. *Review of Development Economics*, 6(2), 163-182.
- Stromquist, N. P. (1998). NGOs in a new paradigm of civil society. *Current Issues in Comparative Education*, 1(1), 1-5.
- Stromquist, N. P. (2002). *Education in a globalized world: The connectivity of economic power, technology, and knowledge*. Oxford: Rowman & Littlefield.
- Stromquist, N. P., & Monkman, K. (Eds.). (2014). *Globalization and education: Integration and contestation across cultures*. Lanham, MD: R&L Education.
- Tabulawa, R. (2003). International aid agencies, learner-centred pedagogy and political democratisation: A critique. *Comparative education*, 39(1), 7-26.
- Tarlau, R. (2015). *Occupying land, occupying schools: Transforming education in the Brazilian countryside* (Doctoral Dissertation).
- Tarlau, R. (2017). State theory, grassroots agency, and global policy transfer: The life and death of Colombia's Escuela Nueva in Brazil (1997–2012). *Comparative Education Review*, 61(4), 675-700.
- Taylor, A. (2009). Questioning participation: Exploring discourses and practices of community participation in education reform in Tanzania. In Vavrus, F., & Bartlett, L. (Eds.). *Critical Approaches to Comparative Education: Vertical Case Studies from Africa, Europe, the Middle East, and the Americas* (pp. 75-92). New York: Palgrave Macmillan.
- Tikly, L. (2004). Education and the new imperialism. *Comparative Education*, 40(2), 173-195.
- Tikly, L., & Dachi, H. (2009). The new regionalism of African education: Limits and possibilities. *South-South Cooperation in Education and Development*. New York: Teachers' College Press and HSRC.

- Tilly, C. (1997) Means and ends of comparison in macrosociology. *Comparative Social Research*, 16: 43-53.
- Tucker, Alfred R. 1908. *Eighteen years in Uganda and East Africa*, vol. 1. London: Edward Arnold.
- Uganda, R. o. (1989). *Education for National Integration and Development*. Report of the Education Policy Review Commission. Kampala: Uganda Government.
- Uganda, R. o. (1992). *Government white paper on the report of the Education Policy Review Commission titled education for national integration and development*. Kampala: Government of Uganda.
- UNECA (United Nations Education Commission for Africa). (1993). *Curriculum development and evaluation for socio-economic development in Africa: The experience of the African Curriculum Organization*. Addis Ababa.
- UNESCO. (1961). Conference of African States on the development of education in Africa. Addis Ababa, 15-25 May, 1961. Final Report. Paris.
- Unterhalter, E. (2008). Cosmopolitanism, global social justice and gender equality in education. *Compare*, 38(5), 539-553.
- Ushinsky, K. (1975). On national character of public education. In: A.I. Piskunov (Ed.) *K. D. Ushinsky: selected works*. Moscow: Progress Publishers.
- VanderDussen, E., 2009. *A spirit of service: conceptualizing service learning through the Preparation for Social Action (PSA) Program in Uganda*. (Unpublished MA Thesis). Ontario Institute for Studies in Education, University of Toronto. Retrieved from: https://tspace.library.utoronto.ca/bitstream/1807/18111/1/vanderdussen_elena_200911_MA_thesis.pdf (10.07.12).
- Verger, A. (2014). Why do policy-makers adopt global education policies? Toward a research framework on the varying role of ideas in education reform. *Current Issues in Comparative Education*, 16(2), 14-29.
- Vavrus, F. (2004). The referential web: Externalization beyond education in Tanzania. In: G. Steiner-Khamsi, (Ed.), *The global politics of educational borrowing and lending* (pp. 141-153). New York: Teachers College Press.
- Wa, T. O. Ngugi (1986) *Decolonising the mind: The politics of language in African literature*. Nairobi: Heinemann Kenya.
- Woolman, D. C. (2001). Educational reconstruction and post-colonial curriculum development: A comparative study of four African countries. *International Education Journal*, 2(5), 27-46.
- Yoloye, E. A. (1986). The relevance of educational content to national needs in Africa. *International Review of Education*, 32(2), 149-172.

Appendix A

Questions for PSA/Educate! Educators

IMPORTANT NOTE: Respondents should not include any information that identifies other individuals, or has the potential to identify other individuals

Introductory questions and background

- 1) Tell me a bit about yourself.
 - a. Where are you from?
 - b. How did you hear about this program?
 - c. Why did you decide to join this program?
- 2) Tell me about this program.
 - a. What do you think this program was designed to do?
 - b. Who do you think this program was designed for?
 - c. What do you believe is the goal of this program?
 - d. Is it successful?
 - e. Do you believe this program is different than other programs in Uganda? If so, how?
- 3) Tell me about your work at this organization.
 - a. What do you do?
 - b. What are your main responsibilities?
 - c. [Ask about specific elements of the program that I have learned about; i.e. with E! ask about teacher associates, business clubs, etc.; with PSA ask about graduate groups, practice gardens, etc.]
- 4) What do you do outside of your work with this organization (or as an extension of your work)?
 - a. [For E! ask about personal businesses]

General program questions

- 5) Do you believe that this program has changed over the years? If so, how?
- 6) Do you believe that the program is still changing? If so, how?
 - a. What factors bring about these changes?
- 7) How much freedom do you believe that you have to adapt how you teach to fit the needs of your participants/scholars?
 - a. Would you use the same advice or approaches in one place as you or another educator would in a different community?
 - b. Are things done differently in different places?
 - c. Are you permitted to be flexible in your teaching or do you need to follow a specific approach?
- 8) Do you believe that this program is relevant to the lives of the participants/scholars who you work with? If so, how? Why?
 - a. Which parts of the program or which lessons do you feel are particularly relevant?
 - b. Do you believe it is relevant to educators and others involved in the program?
- 9) Do you believe participants/scholars in this program are encouraged to work with or learn from people in their wider communities?

- a. If so, why do you believe that is the case?
- 10) What do you like most about this program?
 - a. Are there things that you would change?
- 11) Do you ever give feedback to your organization about changes you would like to see?
 - a. Do you feel that your organization has used your ideas?
 - b. Do you feel that they implement ideas from others as well?
- 12) Tell me about the curriculum used in your program.
 - a. What is it like?
 - b. What are the various parts of the curriculum?
 - i. What do you think is the intent behind each part?
- 13) Do you think that this program would be successful/beneficial in other countries?
 - a. If so, would anything have to be changed for it to thrive there?
 - i. What? Why?
 - b. If this program is already being used in other countries, what sort of differences do you believe there are between how it is used in those countries versus Uganda?
- 14) Do you feel that there is much variation in how this program works across Uganda?
 - a. Is the program different or generally the same in each region?
 - i. How so?
 - ii. If yes, why do you think there are differences?
 - iii. If no, do you think there should be differences?
- 15) How would you describe a strong educator in your program?
 - a. What would he or she be like?
 - b. What would he or she do?
 - c. What about other people in your program (Youth Leader, Program Officer, Unit Coordinator, etc.)?
- 16) Do you believe that this program prepares participants/scholars for the future?
 - a. If so, how?
- 17) What benefit do you feel that teachers get from involvement in this program?
 - a. What about students?
- 18) Do you believe that ideas or knowledge from the local community is included or reflected in this program?
 - a. Where?
 - b. In what ways?
 - c. Do you feel that the program seeks to learn from the community?
 - i. How?
 - ii. Why?

Questions for coordinators (optional)

- 19) Does your organization collaborate with other organizations in Uganda?
 - a. If so, how? Specific examples?
- 20) Does your organization work with the government?
 - a. If so, how?

Communities and schools

- 21) Tell me a bit about your students.
 - a. Do they all live in the same community? Are they from the same areas?

- 22) Do you believe students use what they learn in your program in their home lives or in their communities?
 - a. Could you provide examples?
 - b. Which lessons do you believe are commonly used?
- 23) Have your participants/scholars ever worked on an activity or project that required them to do work with their family or people in their community?
 - a. If so, tell me more about it.
 - b. Did they enjoy it? Why or why not?
 - c. Do you find such projects useful? Why or why not?
 - d. Are there many projects or activities like this?

Educational design and pedagogy

- 24) What do you feel is the purpose of school?
 - a. Of education?
 - b. Is it important? If so, why?
- 25) What role do you think your students play in their education?
 - a. What role should they play?
 - b. What role should the community play?
 - c. Families?
 - d. The government?
- 26) Do you feel that schools and education, as they are currently organized, prepare people in your area to address their lives and needs?
 - a. If not, what can be done about it?

Closing question

- 27) What do you anticipate that your students will do in the future after studying your program?
 - a. What about you? What do you hope to do in the future?

Former Student Interviews

IMPORTANT NOTE: Respondents should not include any information that identifies other individuals, or has the potential to identify other individuals

Introductory questions and background

- 1) Tell me a bit about yourself.
 - a. Where are you from?
 - b. What do you do currently?
 - i. Professionally or otherwise.
 - c. When did you join this program?
 - d. How did you hear about the program?
 - e. Why did you decide to join the program?
 - f. Do you have other friends or family who have been involved in this program?
- 2) Tell me about this program.
 - a. What do you think this program was designed to do?

- b. Who do you think this program was designed for?
 - c. What do you believe is the goal of this program?
 - d. Is it successful?
 - e. Do you believe this program is different than other programs in Uganda? If so, how?
- 3) Tell me what you did as a participant in this program.
 - a. What did you do?
 - b. [Ask about specific elements of the program that I have learned about]
- 4) Did you initiate any projects or activities while studying this program? Or as a result of participating in the program?
 - a. How did the projects/activities begin?
 - b. Who was involved in them?
 - c. [For E! ask about personal businesses]
- 5) Are you still in touch with the program or with people involved in the program?
 - a. If so, in what ways?
 - b. What have you heard about the program recently?
 - i. How is it doing?

General program questions

- 6) Since the time when you began studying this program, do you believe that it has changed?
 - a. If so, how?
 - b. If not, why do you think that it hasn't changed?
- 7) Do you believe that the program is still changing?
 - a. What factors do you think have brought about these changes?
- 8) While studying this program, or since, did you ever met anyone from another community/area involved in this program?
 - a. Do you believe that what they did in those areas is different to what you did where you studied?
- 9) Do you believe that this program helped prepare you for what you are doing now?
 - a. In what ways did this program help you?
- 10) Do you believe that this program was relevant to your life and what you do now, or hope to do in the future?
 - a. What did you learn that you believe was relevant?
- 11) Do you believe that what you learned from this program has helped you or helped your community?
 - a. If so, what? And how?
- 12) As a participant in this program, did you work with or learn things from people in your community?
 - a. Please provide examples.
 - b. Which activities led you to work with people in your community?
- 13) What did like most about the program?
 - a. Are there things that you would have changed about it?
- 14) Did you ever give feedback to the organization about changes you wanted them to make?
 - a. Do you feel that the organization used your ideas? (Provide examples)
 - b. Do you believe that they implemented ideas from other students? (Provide examples)
- 15) Tell me about the curriculum used in your program.

- a. What was it like?
 - b. What were some of the different aspects of the program? [If necessary, name different aspects of the program]
 - i. What do you think the program wanted you to learn or to experience from each of those areas?
 - c. What part of the program did you enjoy most? Why?
- 16) Do you think that this program would be successful/beneficial in other countries? Why?
- a. If so, would anything have to be changed for it to be successful there?
 - i. What? Why?
 - b. If this program is already being used in other countries, what sort of differences do you believe there are between how it is used in those countries versus Uganda?
- 17) Do you know if there is much variation in how this program works across Uganda?
- a. Have you heard from other students whether the program was different or generally the same in each region?
 - i. How so?
 - ii. If yes, why do you think there are differences?
 - iii. If no, do you think there should be differences?
- 18) How would you describe a strong educator in your program?
- a. What would he or she be like?
 - b. What would he or she do?
 - c. What about other people in your program (student, Youth Leader, Program Officer, Unit Coordinator, etc.)?
- 19) Do you believe that this program prepares participants/scholars for the future?
- a. If so, how?
- 20) What benefit do you feel that students get from involvement in this program?
- a. What about educators?
- 21) Do you believe that ideas or knowledge from the local community was included or reflected in this program?
- a. Where?
 - b. In what ways?
 - c. Do you feel that the program seeks to learn from the community?
 - i. How?
 - ii. Why?

Communities and schools

- 22) Tell me a bit about your former classmates in the program.
- a. Did you all live in the same community? Were you from the same regions?
- 23) Did you use what you learned in this program in your home life or in your community?
- a. Provide examples.
 - b. Are you still using what you learned? How?
 - c. What about other people you know in the program?
 - d. Which specific lessons do you believe were useful?
- 24) Did you ever carry out an activity or project that required you to do work with your family or people in your community?
- a. If so, tell me more about those activities
 - b. Did you enjoy it? Why or why not?
 - c. Were there many projects or activities like that?

Educational design and pedagogy

- 25) What do you feel is the purpose of school?
- Of education?
 - Is it important? If so, why?
- 26) What role do you think students play in their education?
- What role should they play?
 - What role should the community play?
 - Families?
 - The government?
- 27) Do you feel that schools and education, as they are currently organized, prepare people in your area to address their lives and needs?
- If not, what can be done about it?

Closing question

- 28) What do you hope to do in the future now that you've finished this program?
- What about your friends who finished the program?

Program leaders

IMPORTANT NOTE: Respondents should not include any information that identifies other individuals, or has the potential to identify other individuals

Introductory questions and background

- 28) Tell me a bit about yourself.
- Where are you from?
 - How did you hear about this program?
 - Why did you decide to join this program?
- 29) Tell me about this program.
- What do you think this program was designed to do?
 - Who do you think this program was designed for?
 - What do you believe is the goal of this program?
 - Is it successful?
 - Do you believe this program is different than other programs in Uganda? If so, how?
- 30) Tell me about your work at this organization.
- What do you do?
 - What are your main responsibilities?
 - [Ask about specific elements of the program that I have learned about; i.e. with E! ask about teacher associates, business clubs, etc.; with PSA ask about graduate groups, practice gardens, etc.]
- 31) What do you do outside of your work with this organization (or as an extension of your work)?
- [For E! ask about personal businesses]

Organizational questions

- 1) Tell me more about your program.
- Who initiated this program?

- b. Who decided to implement it in Uganda? Why?
 - c. What led your organization to feel that this program would be useful?
 - d. What things (organizations, philosophies, etc.) have influenced the design of this program and your approach to implementing it?
- 2) Take me through the lifespan of a participant in your program, from the moment someone joins until the moment he/she completes it.
 - a. How long does the program run?
 - b. What are the various activities that happen during that period?
 - c. [Ask about specific activities that I have observed]
- 3) Are there other activities that your organization carries out? Tell me about those.
- 4) Tell me about the structure of your organization.
 - a. What are the various roles that people have within the organization?
- 5) Tell me about the curriculum used in your program.
 - a. What is it like?
 - b. What are the various parts of the curriculum?
 - i. What do you think is the intent behind each part?
- 6) What sort of trainings are offered to those who implement your program?

General program questions

- 7) Do you believe that this program has changed over the years? If so, how?
- 8) Do you believe that the program is still changing? If so, how?
 - a. What factors bring about these changes?
- 9) How much freedom do you believe that educators have to adapt how they teach to fit the needs of their participants/scholars?
 - a. Would they use the same advice or approaches in one place as another educator would in a different community?
 - b. Are things done differently in different places?
 - c. Are they permitted to be flexible in their teaching or do they need to follow a specific approach?
- 10) Do you believe that this program is relevant to the lives of the participants/scholars who you work with? If so, how? Why?
 - a. Which parts of the program or which lessons do you feel are particularly relevant?
 - b. Do you believe it is relevant to the educators and others involved in the program?
- 11) Do you believe participants/scholars in this program are encouraged to work with or learn from people in their wider communities?
 - a. If so, why do you believe that is the case?
- 12) What do you like most about this program?
 - a. Are there things that you would change?
- 13) Do you ever give feedback to your organization about changes you would like to see?
 - a. Do you feel that your organization has used your ideas?
 - b. Do you feel that they implement ideas from others as well?
- 14) Do you think that this program would be successful/beneficial in other countries?
 - a. If so, would anything have to be changed for it to thrive there?
 - i. What? Why?
 - b. If this program is already being used in other countries, what sort of changes do you believe there are between how it is used in those countries versus Uganda?
- 15) Do you feel that there is much variation in how this program works across Uganda?
 - a. Is the program different or generally the same in each region?

- i. How so?
 - ii. If yes, why do you think there are difference?
 - iii. If no, do you think there should be differences?
- 16) How would you describe a strong educator in your program?
 - a. What would he or she be like?
 - b. What would he or she do?
 - c. What about other people in your program (Youth Leader, Program Officer, Unit Coordinator, etc.)?
- 17) Do you believe that this program prepares participants/scholars for the future?
 - a. If so, how?
- 18) What benefit do you feel that teachers get from involvement in this program?
 - a. What about educators?
- 19) Do you believe that ideas or knowledge from the local community is included or reflected in this program?
 - a. Where?
 - b. In what ways?
 - c. Do you feel that the program seeks to learn from the community?
 - i. How?
 - ii. Why?
- 20) Does your organization collaborate with other organizations in Uganda?
 - a. If so, how? Specific examples?
- 21) Does your organization work with the government?
 - a. If so, how?

Communities and schools

- 22) Tell me a bit about your students.
 - a. Do they all live in the same community? Are they from the same areas?
- 23) Do you believe students use what they learn in your program in their home lives or in their communities?
 - a. Could you provide examples?
 - b. Which lessons do you believe are commonly used?
- 24) Have your participants/scholars ever worked on an activity or project that required them to do work with their family or people in their community?
 - a. If so, tell me more about it.
 - b. Did they enjoy it? Why or why not?
 - c. Do you find such projects useful? Why or why not?
 - d. Are there many projects or activities like this?

Educational design and pedagogy

- 25) What do you feel is the purpose of school?
 - a. Of education?
 - b. Is it important? If so, why?
- 26) What role do you think your students play in their education?
 - a. What role should they play?
 - b. What role should the community play?
 - c. Families?
 - d. The government?

- 27) Do you feel that schools and education, as they are currently organized, prepare people in your area to address their lives and needs?
- If not, what can be done about it?

Closing question

- 28) What do you anticipate that your students will do in the future after studying your program?
- What about you? What do you hope to do in the future?

Student Interviews

IMPORTANT NOTE: Respondents should not include any information that identifies other individuals, or has the potential to identify other individuals

Introductory questions and background

- Tell me a bit about yourself.
 - Where are you from?
 - When did you join this program?
 - How did you hear about this program?
 - Why did you decide to join this program?
 - Do you have other friends or family involved in this program?
- Tell me about this program.
 - What do you think this program was designed to do?
 - Who do you think this program was designed for?
 - What do you believe is the goal of this program?
 - Is it successful?
 - Do you believe this program is different than other programs in Uganda? If so, how?
- Tell me what you do as a participant in this program.
 - What do you do?
 - [Ask about specific elements of the program that I have learned about]
- Have you initiated any projects or activities as a result of studying this program?
 - How did the projects/activities begin?
 - Who is involved in them
 - [For E! ask about personal businesses]

General program questions

- Since you began studying this program, do you believe that it has changed?
 - If so, how?
 - If not, why do you think that it hasn't changed?
- Do you believe that the program is still changing?
 - What factors do you think bring about these changes?
- Have you ever met people from other communities/areas involved in this program?
 - Do you believe that what they are doing in those areas is different to what you are doing?

- 8) Do you believe that this program is relevant to your life and what you hope to do in the future?
 - a. What are you learning that you believe is relevant?
- 9) Do you believe that what you are learning will help you or your community?
 - a. If so, how?
- 10) As a participant in this program, have you worked with or learned things from people in your community?
 - a. Please provide examples.
 - b. Which activities led you to work with people in your community?
- 11) What do like most about this program?
 - a. Are there things that you would change about it?
- 12) Do you ever give feedback to the organization about changes you would like to see them make?
 - a. Do you feel that the organization has used your ideas? (Provide examples)
 - b. Do you feel that they implement ideas from other students as well? (Provide examples)
- 13) Tell me about the curriculum used in your program.
 - a. What is it like?
 - b. What are some of the different aspects of the program? [If necessary, name different aspects of the program]
 - i. What do you think the program wants you to learn or to experience from each of those areas?
 - c. What part of the program do you enjoy most? Why?
- 14) Do you think that this program would be successful/beneficial in other countries? Why?
 - a. If so, would anything have to be changed for it to be successful there?
 - i. What? Why?
 - b. If this program is already being used in other countries, what sort of differences do you believe there are between how it is used in those countries versus Uganda?
- 15) Do you know if there is much variation in how this program works across Uganda?
 - a. Have you heard from other students whether the program is different or generally the same in each region?
 - i. How so?
 - ii. If yes, why do you think there are differences?
 - iii. If no, do you think there should be differences?
- 16) How would you describe a strong educator in your program?
 - a. What would he or she be like?
 - b. What would he or she do?
 - c. What about other people in your program (student, Youth Leader, Program Officer, Unit Coordinator, etc.)?
- 17) Do you believe that this program prepares participants/scholars for the future?
 - a. If so, how?
- 18) What benefit do you feel that students get from involvement in this program?
 - a. What about educators?
- 19) Do you believe that ideas or knowledge from the local community is included or reflected in this program?
 - a. Where?
 - b. In what ways?
 - c. Do you feel that the program seeks to learn from the community?

- i. How?
- ii. Why?

Communities and schools

- 20) Tell me a bit about your fellow students.
- a. Do you all live in the same community? Are you from the same regions?
- 21) Do you use what you learn in this program in your home life or in your community?
- a. Provide examples.
 - b. What about other people you know in the program?
 - c. Which specific lessons do you believe have been useful?
- 22) Have you ever carried out on an activity or project that required you to do work with your family or people in your community?
- a. If so, tell me more about those activities
 - b. Did you enjoy it? Why or why not?
 - c. Are there many projects or activities like that?

Educational design and pedagogy

- 23) What do you feel is the purpose of school?
- a. Of education?
 - b. Is it important? If so, why?
- 24) What role do you think students play in their education?
- a. What role should they play?
 - b. What role should the community play?
 - c. Families?
 - d. The government?
- 25) Do you feel that schools and education, as they are currently organized, prepare people in your area to address their lives and needs?
- a. If not, what can be done about it?

Closing question

- 26) What do you hope to do in the future after studying this program?
- a. What about your friends in the program?

Organization Survey interviews

IMPORTANT NOTE: Respondents should not include any information that identifies other individuals, or has the potential to identify other individuals.

Introductory questions and background

- 32) Tell me a bit about yourself.
- a. Where are you from?
 - b. How did you hear about this program?
 - c. Why did you decide to join this program?
- 33) Tell me about this program.
- a. What do you think this program was designed to do?
 - b. Who do you think this program was designed for?

- c. What do you believe is the goal of this program?
 - d. Is it successful?
 - e. Do you believe this program is different than other programs in Uganda? If so, how?
- 34) In what regions of Uganda does your program operate? Are the same activities done in every region?
- 35) Tell me about your work at this organization.
- a. What do you do?
 - b. What are your main responsibilities?

Organizational questions

- 29) Tell me more about your program.
- a. Who initiated this program?
 - b. Who decided to implement it in Uganda? Why?
 - c. What led your organization to feel that this program would be useful?
 - d. What things (organizations, philosophies, etc.) have influenced the design of this program and your approach to implementing it?
- 30) Does this program exist in other countries?
- a. If so, what is your organization's relationship to the program elsewhere?
 - b. Is your organization part of a network of organizations implementing the same program? If so, please tell me a bit about that relationship.
- 31) Take me briefly through the lifespan of a participant in your program, from the moment someone joins until the moment he/she completes it.
- a. How long does the program run?
 - b. What are the various activities that happen during that period?
- 32) Are there other activities that your organization carries out? Tell me about those.
- 33) Tell me about the structure of your organization.
- a. What are the various roles that people have within the organization?
- 34) Tell me about the curriculum used in your program.
- a. What is it like?
 - b. Who designed the curriculum?
 - c. Is it evolving at all or is it a fixed curriculum?
 - d. What are the various parts of the curriculum?
 - i. What do you think is the intent behind each part?
- 35) What sort of trainings are offered to those who implement your program?

General program questions

- 36) Do you believe that this program has changed over the years? If so, how?
- 37) Do you believe that the program is still changing? If so, how?
- a. What factors bring about these changes?
- 38) Has your program undergone any changes or adaptations in order to make it relevant in Uganda?
- a. If your program was originally designed in another country, do you believe that it is important that it be adapted to be relevant to fit the context in Uganda? If so, what kinds of changes would have to be made?
 - i. What does it mean for a program to be relevant to the context in Uganda?
 - ii. Is relevancy important? Why or why not?

- b. If your program was originally designed in Uganda, was it inspired by any ideas or programs from outside of the country?
 - i. Was it important to your organization that your program be relevant to the lives of Ugandans?
 - ii. If so, how did your organization attempt to ensure that the program was relevant?
 - iii. Is relevancy important? Why or why not?
- 39) How much freedom do you believe that educators have to adapt how they teach to fit the needs of their participants?
 - a. Would they use the same advice or approaches in one place as another educator would in a different community?
 - b. Are things done differently in different places?
 - c. Are they permitted to be flexible in their teaching or do they need to follow a specific approach?
- 40) Do you believe that this program is relevant to the lives of the participants who you work with? If so, how? Why?
 - a. Which parts of the program or which lessons do you feel are particularly relevant?
 - b. Do you believe it is relevant to the educators and others involved in the program?
- 41) Do you believe participants in this program are encouraged to work with or learn from people in their wider communities?
 - a. If so, why do you believe that is the case?
- 42) What do you like most about this program?
 - a. Are there things that you would change?
- 43) Do you ever give feedback to your organization about changes you would like to see?
 - a. Do you feel that your organization has used your ideas?
 - b. Do you feel that they implement ideas from others as well?
- 44) Do you think that this program would be successful/beneficial in other countries?
 - a. If so, would anything have to be changed for it to thrive there?
 - i. What? Why?
 - b. If this program is already being used in other countries, what sort of changes do you believe there are between how it is used in those countries versus Uganda?
- 45) Do you feel that there is much variation in how this program works across Uganda?
 - a. Is the program different or generally the same in each region?
 - i. How so?
 - ii. If yes, why do you think there are difference?
 - iii. If no, do you think there should be differences?
- 46) How would you describe a strong educator in your program?
 - a. What would he or she be like?
 - b. What would he or she do?
- 47) Do you believe that this program prepares participants for the future?
 - a. If so, how?
- 48) What benefit do you feel that teachers get from involvement in this program?
 - a. What about educators?
- 49) Do you believe that ideas or knowledge from the local community is included or reflected in this program?
 - a. Where?
 - b. In what ways?
 - c. Do you feel that the program seeks to learn from the community?

Educational Recontextualization in Uganda

- i. How?
 - ii. Why?
- 50) Does your organization collaborate with other organizations in Uganda?
- a. If so, how? Specific examples?
- 51) Does your organization work with the government?
- a. If so, how?

Communities and schools

- 52) Tell me a bit about your students.
- a. Do they all live in the same community? Are they from the same areas?
- 53) Do you believe students use what they learn in your program in their home lives or in their communities?
- a. Could you provide examples?
 - b. Which lessons do you believe are commonly used?
- 54) Have your participants/scholars ever worked on an activity or project that required them to do work with their family or people in their community?
- a. If so, tell me more about it.
 - b. Did they enjoy it? Why or why not?
 - c. Do you find such projects useful? Why or why not?
 - d. Are there many projects or activities like this?

Educational design and pedagogy

- 55) What do you feel is the purpose of school?
- a. Of education?
 - b. Is it important? If so, why?
- 56) What role do you think your students play in their education?
- a. What role should they play?
 - b. What role should the community play?
 - c. Families?
 - d. The government?
- 57) Do you feel that schools and education, as they are currently organized, prepare people in your area to address their lives and needs?
- a. If not, what can be done about it?

Closing question

- 58) What do you anticipate that your students will do in the future after studying your program?
- a. What about you? What do you hope to do in the future?

DATE _____

INSTRUCTIONS (Educator version)

This questionnaire contains personal questions. Read each question and respond as well as you can. You may skip any question you do not wish to answer. All of the information provided will be kept as confidentially as possible. IMPORTANT NOTE: Please **do not**

include any information that identifies other individuals, or has the potential to identify other individuals.

PART I

1. Please provide the number of years you have spent with your organization.
2. What is the name of your organization?
3. How did you hear about this program?
4. Why did you decide to join this program?
5. What do you believe is the purpose of this program?

PART II

INSTRUCTIONS

In the following section, some questions will include boxes with multiple response options. Please read the questions carefully and mark an “X” next to an answer that best represents your response to a question. For example:

(a) If you really enjoy eating Matooke, in the following question you would select:

	Completely Disagree	Disagree	Agree	Completely Agree
I enjoy eating Matooke	☐	☐	☐	☒

(b) If, on the other hand, you like Matooke, but it isn't your favorite food, in the following question you would select:

	Completely Disagree	Disagree	Agree	Completely Agree
I enjoy eating Matooke	☐	☐	☒	☐

(c) Finally, if you do not at all enjoy eating Matooke, and you somewhat dislike eating rice, in the following questions you would select:

	Completely Disagree	Disagree	Agree	Completely Agree
I enjoy eating Matooke	☒	☐	☐	☐
I enjoy eating rice	☐	☒	☐	☐

6. Tell me about your experience with this program...

	Strongly Disagree	Disagree	Agree	Strongly Agree
This program teaches valuable information.	☐	☐	☐	☐
This program teaches practical knowledge and skills which are useful to scholars/participants both inside and outside of school.	☐	☐	☐	☐
What this program teaches <u>DOES NOT</u> change how scholars/participants think about the world.	☐	☐	☐	☐
What this program teaches has changed how scholars/participants think about their communities.	☐	☐	☐	☐
Inviting members of the community or members of a scholar/participant's family to participate in our activities is an important part of this program.	☐	☐	☐	☐
Including knowledge and experiences from local people is important to this program.	☐	☐	☐	☐
To complete this program, it is important for scholars/participants to learn from people in their community, family, or others who are not studying with us.	☐	☐	☐	☐
The topics and materials in this program are <u>NOT</u> relevant to the lives of people in Uganda.	☐	☐	☐	☐
What scholars/participants learn in this program is <u>ONLY</u> relevant to people living in Uganda, and would <u>NOT</u> be useful in other countries.	☐	☐	☐	☐
What scholars/participants learn in this program, in their community, is <u>EXACTLY</u> the same as what other people learn in other communities.	☐	☐	☐	☐
There is <u>NO DIFFERENCE</u> between what someone learns from this program in one community as compared to any other town, village, or country.	☐	☐	☐	☐
If this program was introduced to another country, <u>NOTHING</u> would	☐	☐	☐	☐

[illegible]

suggestions they have about it, and about the organization that runs it.				
My suggestions and opinions influence the activities and projects we carry out in this program.	☐	☐	☐	☐
My suggestions and opinions are used by the organization to improve this program.	☐	☐	☐	☐
This program has changed since I began working with it.	☐	☐	☐	☐
Participants/Scholars in our group/class regularly share their views and opinions during our study of the program.	☐	☐	☐	☐
The tutor/mentor decides <u>everything</u> that we do during our time in this program.	☐	☐	☐	☐
Tutors/mentors are <u>NOT</u> permitted to organize additional activities or plans because they must follow only what is in the program's materials.	☐	☐	☐	☐
I <u>DO NOT</u> believe that the topics and materials of this program will help scholars/participants in the future.	☐	☐	☐	☐
What scholars/participants study in this program has assisted them to help their families and communities.	☐	☐	☐	☐
Scholars/participants learn skills or ideas which they put into practice on a weekly basis.	☐	☐	☐	☐
What I learned in this program has helped me to start or maintain an income generating activity.	☐	☐	☐	☐
This program has been very helpful in improving my life.	☐	☐	☐	☐
This program has been very helpful in improving the lives of my family or people in my community.	☐	☐	☐	☐
This program is different from any form of education I have experienced.	☐	☐	☐	☐
This program has given scholars/participants opportunities they would have gotten in traditional primary or secondary school.	☐	☐	☐	☐
9. A) If you believe that this program has changed since you began working with the organization, in what ways has it changed?				

B) What do you think has caused these changes?

10. Tell me about some projects or activities this program helped you to start.

DATE _____

INSTRUCTIONS (Student version)

This questionnaire contains personal questions. Read each question and respond as well as you can. You may skip any question you do not wish to answer. You can ask for help if you don't understand something or if you are not sure how to respond. All of the information provided will be kept as confidentially as possible. **IMPORTANT NOTE:** Please **do not** include any information that identifies other individuals, or has the potential to identify other individuals.

PART I

11. Where do you live? (If you live at a boarding school, where is your family's home?)
12. What is your gender? _____
13. What is your date of birth? _____
14. Do your parents support you financially? If so, what do they do?

15. If you support yourself and your family, what is your occupation?																											
16. Are you currently studying? If so, what level? (e.g. Senior 1, Senior 5, university, etc.) If you are not currently studying, skip questions 7 & 8.																											
17. Select the option that best describes where you study. (Select all answers that apply.) ☐ Government School ☐ Private School ☐ Boarding School ☐ Day School ☐ PSA group ☐ Other _____ Specify _____																											
18. If you are not currently studying, please share the last level of schooling that you completed (e.g. Primary 6, Senior 1, university, etc.)																											
19. Does your family home have any of the following appliances? (MARK ALL THAT APPLY) <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center; width: 10%;"><u>Yes</u></th> <th style="text-align: center; width: 10%;"><u>No</u></th> <th></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">☐</td> <td style="text-align: center;">☐</td> <td>Mosquito Net</td> </tr> <tr> <td style="text-align: center;">☐</td> <td style="text-align: center;">☐</td> <td>Radio</td> </tr> <tr> <td style="text-align: center;">☐</td> <td style="text-align: center;">☐</td> <td>Electricity</td> </tr> <tr> <td style="text-align: center;">☐</td> <td style="text-align: center;">☐</td> <td>Television</td> </tr> <tr> <td style="text-align: center;">☐</td> <td style="text-align: center;">☐</td> <td>Clay stove for charcoal stove</td> </tr> <tr> <td style="text-align: center;">☐</td> <td style="text-align: center;">☐</td> <td>Running water</td> </tr> <tr> <td style="text-align: center;">☐</td> <td style="text-align: center;">☐</td> <td>Bicycle</td> </tr> <tr> <td style="text-align: center;">☐</td> <td style="text-align: center;">☐</td> <td>Motorcycle</td> </tr> </tbody> </table>	<u>Yes</u>	<u>No</u>		☐	☐	Mosquito Net	☐	☐	Radio	☐	☐	Electricity	☐	☐	Television	☐	☐	Clay stove for charcoal stove	☐	☐	Running water	☐	☐	Bicycle	☐	☐	Motorcycle
<u>Yes</u>	<u>No</u>																										
☐	☐	Mosquito Net																									
☐	☐	Radio																									
☐	☐	Electricity																									
☐	☐	Television																									
☐	☐	Clay stove for charcoal stove																									
☐	☐	Running water																									
☐	☐	Bicycle																									
☐	☐	Motorcycle																									

☐	☐	Tin Roof
☐	☐	Gas Stove
☐	☐	A garden
☐	☐	A surrounding fence
☐	☐	A car
☐	☐	

20. When did you join the PSA/Educate! Entrepreneurship program?

21. How did you hear about this program?

22. Why did you decide to join this program?

23. What do you believe is the purpose of this program?

PART II

INSTRUCTIONS

In the following section, some questions will include boxes with multiple response options. Please read the questions carefully and mark an “X” next to an answer that best represents your response to a question. For example:

(b) If you really enjoy eating Matooke, in the following question you would select:

	Completely Disagree	Disagree	Agree	Completely Agree
I enjoy eating Matooke	☐	☐	☐	☒

(c) If, on the other hand, you like Matooke, but it isn't your favorite food, in the following question you would select:

	Completely Disagree	Disagree	Agree	Completely Agree
I enjoy eating Matooke	☐	☐	☒	☐

(d) Finally, if you do not at all enjoy eating Matooke, and you somewhat dislike eating rice, in the following questions you would select:

	Completely Disagree	Disagree	Agree	Completely Agree
I enjoy eating Matooke	☒	☐	☐	☐
I enjoy eating rice	☐	☒	☐	☐

24. Tell me about your experience in this program...

	Strongly Disagree	Disagree	Agree	Strongly Agree
This program teaches valuable information.	☐	☐	☐	☐

This program teaches practical knowledge and skills which have been useful to me both inside and outside of school.	☐	☐	☐	☐
What this program teaches <u>HAS</u> <u>NOT</u> changed how I think about the world.	☐	☐	☐	☐
What this program teaches has changed how I think about my community.	☐	☐	☐	☐
Inviting members of my community or members of my family to participate in our activities is an important part of this program.	☐	☐	☐	☐
Including knowledge and experiences from local people is important to this program.	☐	☐	☐	☐
To complete this program, it is important for students to learn from people in their community, family, or others who are not studying with us.	☐	☐	☐	☐
The topics and materials in this program are <u>NOT</u> relevant to the lives of people in Uganda.	☐	☐	☐	☐
What we learn in this program is <u>ONLY</u> relevant to people living in Uganda, and would <u>NOT</u> be useful in other countries.	☐	☐	☐	☐
What we learn in this program, in my community, is <u>EXACTLY</u> the same as what other people learn in other communities.	☐	☐	☐	☐
There is <u>NO DIFFERENCE</u> between what someone learns from this program here, as what they would learn in any other town, village, or country.	☐	☐	☐	☐
If this program was introduced to another country, <u>NOTHING</u> would have to be changed to make it relevant to people there.	☐	☐	☐	☐
If this program was to be used in another country, only <u>A FEW</u> things would have to be changed to make it relevant to people there.	☐	☐	☐	☐
If this program was to be used in another country, <u>MANY</u> things	☐	☐	☐	☐

would have to be changed to make it relevant to people there.				
--	--	--	--	--

25. If you believe that this program has helped you learn skills which are relevant to your life, or has helped your family or community, please share some examples of the things that you learned.

26. Please share some of the books, lessons, or activities which you liked from this program, and what they helped to teach you.

27. Tell me about your experience with this program...

	Strongly Disagree	Disagree	Agree	Strongly Agree
Participants in this program are given a chance to share their opinions about it, and about the organization that runs it.	☐	☐	☐	☐
My suggestions and opinions influence the activities and projects we carry out in this program.	☐	☐	☐	☐

My suggestions and opinions are used by the organization to improve this program.	☐	☐	☐	☐
This program has changed since I began studying.	☐	☐	☐	☐
Participants/Scholars in our group/class regularly share their views and opinions during our study of the program.	☐	☐	☐	☐
The tutor/mentor decides <u>everything</u> that we do during our time in this program.	☐	☐	☐	☐
Tutors/mentors are <u>NOT</u> permitted to organize additional activities or plans because they must follow only what is in the program's materials.	☐	☐	☐	☐
I <u>DO NOT</u> believe that the topics and materials of this program will help me in the future.	☐	☐	☐	☐
What we study in this program has assisted me to help my family and community.	☐	☐	☐	☐
I have learned skills or ideas which I put into practice on a weekly basis.	☐	☐	☐	☐
What I learned in this program has helped me to start or maintain an income generating activity.	☐	☐	☐	☐
This program was very helpful to improving my life.	☐	☐	☐	☐
This program was very helpful in improving the lives of my family or people in my community.	☐	☐	☐	☐
This program is different from any other form of education I have experienced.	☐	☐	☐	☐
This program has given me opportunities I would have gotten in traditional primary or secondary school.	☐	☐	☐	☐
28. A) If you believe that this program has changed since you began studying, in what ways has it changed? _____ _____				

C) What do you think has caused these changes?
29. Tell me about some projects or activities this program helped you to start.
30. What do you hope to do in the future after studying this program?

Appendix B

