

# IJREE

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## International Journal for Research on Extended Education

### General Contributions

**Pu Yu, János Gordon Győri** • Research Hotspot and Front Visualization of the Shadow Education System: Data from Web of Science

**Joakim Caspersen, Ingrid Holmedahl Hermstad** • Mechanisms of Persisting Inequality; Case Studies of Norwegian Daycare Facilities for Children

**Jasmin Näpfli, Kirsten Schweinberger** • When one Wants More than the Other: Multi-Professional Cooperation between Staff in Extended Education and Teachers

**Denise Montgomery** • Meeting the Needs of Young People During the COVID-19 Pandemic; Through Program Adaptations in Creative Youth Development Programs

### Book Review

**Melanie van den Hoven** • Shadow Education in the Middle East: Private Supplementary Tutoring and its Policy Implications

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## Preface

Dear Colleagues,

As we approach the conclusion of the COVID-19 pandemic, the resilience and dedication of the research community in advancing knowledge in the area of extended education have been truly remarkable. This is evident in the multitude of recent research papers submitted to the *International Journal of Research on Extended Education (IJREE)* for publication.

This issue comprises four outstanding research articles and a thought-provoking book review. Three of the articles explore various aspects of extended education in Norway, Switzerland, and the United States. The fourth article provides valuable insights into the trends and dynamics of research in the private tutoring domain. Additionally, we feature a comprehensive review of the book “Shadow Education in the Middle East: Private Supplementary Tutoring and its Policy Implications” by Mark Bray and Anas Hajar, which contributes significantly to our understanding of this educational phenomenon in the Middle Eastern context.

In the first article, the authors employ innovative methodologies using CiteSpace software to construct visual maps, enabling a comprehensive understanding of knowledge domains in the realm of shadow education. Their analysis, based on 351 documents sourced from the Web of Science database, reveals the rapid expansion of shadow education and emphasizes the need for increased collaboration within academia. The article also emphasizes the importance of recognizing the diverse forms of shadow education and the role of parental involvement in promoting self-driven learning abilities.

The second article delves into the dynamics of social inequality within Norwegian day-care facilities, known as Skolefritidsordning (SFOs). By re-analyzing a national evaluation of SFOs, the study uncovers new exclusion mechanisms resulting from policy reforms. It sheds light on the challenges faced by SFO staff in balancing system demands and children’s needs, providing valuable insights into the dynamics of social inequality within the extended education landscape.

Furthermore, the third article focuses on cooperation among extended education providers and partners in Switzerland. Through a quantitative survey conducted in a pioneering canton, the study explores the perspectives of cooperation partners and reveals the link between cooperation and job satisfaction. This research addresses a significant knowledge gap in understanding cooperation within extended education in Switzerland.

In the following article, the authors examine Creative Youth Development (CYD) programs and their adaptation to virtual program environments in 2020. By uncovering the challenges faced by organizations and presenting strategies for adapting culminating events during the pandemic, the study emphasizes the importance of youth leadership, connection, and creative strategies for engaging young individuals, with broader implications for the field of youth development.

Lastly, we present a comprehensive review of the book titled “Shadow Education in the Middle East: Private Supplementary Tutoring and its Policy Implications” by Mark Bray and Anas Hajar. The reviewer acknowledges the book’s significant contribution in defining the international scope and key elements of shadow education, as well as its exploration of the Middle Eastern context. By enabling cross-regional comparisons and fostering a global

conversation on private tutoring in the Middle East, the book enhances our understanding of this educational phenomenon in a meaningful way.

We extend our sincerest gratitude to the editors of IJREE and the dedicated reviewers for their invaluable contributions. It is through their unwavering support and commitment that IJREE has solidified its position as a world-renowned journal in the field of extended education.

With great enthusiasm, we invite you to delve into the articles featured in this issue. May they inspire fruitful discussions, spark new ideas, and contribute to the advancement of knowledge in our collective pursuit of excellence in extended education.

Sincerely,

Sang Hoon Bae

Editor-in-chief, International Journal of Research on Extended Education (IJREE)

## Research Hotspot and Front Visualization of the Shadow Education System: Data from Web of Science

Pu YU, János Gordon Győri

**Abstract:** This scientometric review takes 351 documents from 1992–2021 as the research object based on the Web of Science database. With the help of CiteSpace, this study aims to construct visualization mapping knowledge domains, display the research status in shadow education more intuitively, contribute opportunities for further research, and provide a more visual basis for dialog among researchers, policymakers and interested actors in the field. This study, by building coauthor, coword, and cocitation knowledge visualization maps, demonstrates cooperation among authors, research hotspots and frontiers in the field. Our results show that shadow education has experienced a rapid expansion over the last decade but that the scope of the collaborative circle of academia needs to be further expanded. Furthermore, because of shadow education's variable forms, researchers need to pay extra attention to the scope of its definition. Parents are involved in too many of their children's educational choices; learning requires more self-drive and improved self-learning ability.

**Keywords:** shadow education, visualization, hotspot, frontier

### Introduction

Regarding shadow education, which is widely known as private supplementary tutoring, the term 'shadow' has been used as a metaphor for how the curriculum changes as mainstream education changes (Bray, 2017); as schooling becomes increasingly global, so does shadow education (Yung & Bray, 2021). Almost one-third of all students aged 15 years from 64 societies worldwide are involved in shadow education (Entrich, 2020), a phenomenon that has become an inevitable and universal integral part of the learning culture worldwide and progressively evolved into an important sector that can share the functions of the mainstream education system (Kim & Jung, 2021). East Asia is probably the most notable shadow education region worldwide (Zhang & Yamato, 2018); for example, South Korea has the highest participation rate for shadow education globally, though such education is also especially prominent in Japan, Chinese territories, Singapore and so on (Kim & Jung, 2021). Shadow education in Western societies has also expanded visibly, for instance, in Australia (Watson, 2008), North America, and Europe (Kim & Jung, 2019). It is noteworthy that Denmark, which places a strong emphasis on equality in its pedagogy, has also witnessed recent growth in the use of shadow education (Mikkelsen & Gravesen, 2021). Although this phenomenon dates back centuries, its continuous growth is unavoidable (Baker, 2020).

Relevant research has become explosive and profound across societies, although this field has been neglected for quite some time (Gordon Györi, 2020).

Zhang and Bray (2020) took the first global comparative study of shadow education as a starting point and summarized the changes in focus and research methods in the associated research worldwide, characterized by an increasing refinement of research themes and scientific approaches. However, given the global diversity of shadow education, which varies across contexts and cultures, more than 20 related terms describe the phenomenon in English only (Kobakhidze & Suter, 2020). Moreover, regulations for shadow education vary, with many governments adopting a laissez-faire approach (Bray & Kwo, 2014). However, the rapid expansion of shadow education and its increasing diversity, in some cases going beyond the 'shadow' metaphor itself, poses the threat of more multifaceted impacts and complexity (Bray, 2021), such as those on educational ecology (Luo & Chan, 2022). Furthermore, learning culture is also affected, as Kim and Jung (2021) pointed out, with students acting like nomads, learning across the boundaries of mainstream schooling and shadow education. Shadow education is now an essential subfield of educational research, with a broad range of sub-disciplines associated (Hajar & Karakus, 2022), which is one of the focal points that need to be increasingly confronted by all actors.

A systematic review and analysis of the literature on shadow education can help us understand the existing research findings and provide ideas for further research, especially concerning insights into research frontiers and trends, which helps narrow the gap between the rapidly proliferating and changing reality of shadow education and subsequent research. However, traditional literature review methods are labor intensive and somewhat subjective, lacking a more visual mapping of the current state of shadow education research and its development. By analyzing and visualizing the scientific literature with the help of CiteSpace +- a free Java application, the rapidly growing study topic identification and research trends presented through the automatically labeled clusters' terms of cited articles (Chen, 2004) not only helps improve time efficiency and enhance visual readability but also provides researchers with more solid evidence of the interpretation and evaluation of research dynamics in the field. Big data plays an essential role in education; for example, Ye (2018) provided a scientometric visualization of the development profile and latest trends of big data research in education with the help of CiteSpace, not only showing the dynamics of the category of big data technology in the education sector but also pointing out the relative lack of research related to educational management, which provides a reference for which future topics need to be strengthened in the field. Moreover, Rawat and Sood (2021) applied CiteSpace and conducted visualized knowledge mapping on information and communications technology (ICT) applications in educational research. The structure of education research using ICT is demonstrated, indicating that higher education (categorized by formal education), distance education (categorized by nonformal education), and mobile devices are presently the most active topics in the field, contributing to the relevant personnel to further grasp the appropriate research path.

Given this, we present the research agenda through a more visual knowledge map based on the database with which we are working and through objective scientific bibliometrics with the help of CiteSpace and answer the following questions. (1) How is the research on shadow education progressing? (2) What does the research focus on regarding shadow education and its evolution? (3) What are the cooperation trends among authors in the shadow education field? (4) What are the research fronts, intellectual base and emergent trends of the shadow

education specialty? This study contributes to the construction of a more visual basis for dialog among researchers, policymakers and interested actors in the field to engage with relevant issues.

## Literature Review

The concept of shadow education in this research is guided by the definition characterized by Bray (1999) from the first global comparative study on shadow education, highlighting it as paid academic subject-based tutoring outside the formal schooling system for primary- and secondary-school students. The 'shadow' metaphor used to describe the phenomenon of private tuition or private tutoring, with the aim of preparing students "for the selective national school examinations" (Marimuthu, Singh & Ahmad et al., 1991, p. vi), dates back to early 1990 s, when the term 'shadow education system' was first coined and documented (Zhang & Bray, 2020). Stevenson and Baker (1992) then independently used the term 'shadow education' in the title of their academic research study with an explicit definition: 'a set of educational activities that occur outside formal schooling and are designed to enhance the student's formal school career' (p. 1639). In 1999, Bray gave a more specific definition of shadow education, framing its curriculum in terms of 'provision, privateness, and academic subjects' (p. 20), an approach that has since been widely followed.

However, the fuzzy boundaries of the concept of shadow education are one of the challenges of such studies. The shadow education phenomenon allows for the frequent interchange between private supplementary tutoring and private tutoring (Bray, 1999; Manzon & Areepattamannil, 2014; Bray, Zhan, Lykins et al., 2014), as well as among cram school (e.g., Yung, 2020), private tuition (Jelani & Tan, 2012) and supplementary education (Park, Buchmann, Choi et al., 2016). Kobakhidze and Suter (2020) summarized 22 terms that include shadow education to describe the phenomenon in an English context, but some of these terms, such as 'additional instruction, summer learning, engaged activities' (p. 1), cannot be related to the phenomenon at once. The mutual reference of similar concepts creates confusion. Furthermore, even the same term in different research contexts shapes the different areas of focus (Bray, 2010). Furthermore, due to the global nature of shadow education, which has a local label in each region, and its continued growth, for instance, in Denmark, the phenomenon is slowly entering the market in the form of 'homework help' (Mikkelsen & Gravesen, 2021, p. 550), which may further increase the difficulty of such research.

The study of shadow education started relatively late; the early research on shadow education focused on exploring the reasons for its emergence and mapping out the overall development landscape. Shadow education continues to expand under the combined effect of the demand and supply sides. The demand side expects shadow education to enhance competitive advantages (Fülöp & Gordon Györi, 2021), meet expectations (Yung & Zeng, 2021), contribute to reproduction (Tsiplakides, 2018) or be a means of opportunity hoarding (Hamilton, Roksa & Nielsen, 2018), even though no consensus has been reached on whether shadow education enhances students' academic achievement (Byun, 2014). On the other hand, the capitalized supply side of the industry drives demand (Feng, 2021), which provides space for the ongoing proliferation of shadow education. Zhang and Bray (2020) have

summarized the development of global shadow education since the 1990s, including its the main issues and reflections on the future research agenda, but lack an objective picture of the evolution of the research focus over time. The expanding scale of this global phenomenon, in which diverse and changing manifestations and technology-enabled education models are also permeating, as well as the complexity of collecting evidence on shadow education (Bray, 2010) further pose challenges for researchers in keeping up with the pace of its development. Thus, the visualization of the evolution of research themes in shadow education can help researchers grasp the overall context more intuitively and, thus, inspire future research approaches.

The continued expansion of shadow education has had profound impacts and has evolved from a relatively informal activity to a more systematic operation (Yung & Bray, 2021). Numerous studies have found that participation in shadow education is proportional to family background (e. g., Byun, Chung, & Baker, 2018; Jansen, Elffers & Jak, 2021). The exclusion of low-income families from such education raises issues of educational equity, runs counter to the public sector's emphasis on free and equal education (Matsuoka, 2019) and also results in negative attitudes and behaviors among students (Bray & Kobakhidze, 2015) and teachers (Liu & Bray, 2020) toward mainstream schooling. Thus, it is crucial to regard shadow education as an essential agenda for research, policy and educational development (Yung & Bray, 2021), not only for the maintenance of sound educational ecology but also for the necessity for students' personal growth, family harmony and social order. More needs to be done to keep up with such a changing pace. A growing number of governments worldwide have placed planning for shadow education on their policy agendas (Bray & Kwo 2014), but such planning is still much less evident the relatively robust regulating mechanisms of mainstream education, requiring visualization to attract more attention; policymakers should regulate shadow education before it becomes ingrained in the culture (Bray, 2021). Thus, the analysis of the cocited literature to identify and visualize the knowledge base of shadow education research contributes to policymakers and researchers keeping abreast of the research trends and helps bridge the gap with the fast-moving reality.

## Research Methods

### Data Source

Based on the Web of Science (WoS) database, a final sample of 351 data points was selected for this study, with the following selection criteria and process. The input data were retrieved from the WoS Core Collection based on the 'Topic' that comes with all years (1975–2021). The shadow education phenomenon is shaped by different contexts and can be manifested in various ways, frequently applying interchangeable terms as mentioned in the text above. As such, this study set the search terms as follows: 'shadow education', 'private tutoring', 'private supplementary tutoring', 'supplemental education', 'private tuition', 'extra-curricular tutoring', 'outside school tutoring', 'cram school', 'afterschool tutoring', and 'extra-school tutoring'. Only articles and book chapters were retained for the document type of this research. In addition, irrelevant documents outside the boundary of shadow education, as defined in this research, were excluded, such as those on shadow education for higher education, preschool,

adult education, peer tutoring, free-of-charge tutoring, school-community-organized collective tutoring, private tutoring for non-academic-based subjects, and institutions that provide tutoring only to students after high school graduation due to their failing of the college entrance examinations. As of December 31, 2021, 351 documents that met the screening criteria from 1992 onward were finally applied as the research data.

Nevertheless, it should be noted that the database used in this study has its limitations. The phenomenon of shadow education is universal, shaped differently by different societies and manifested in various ways. However, this study draws only on English-language literature, excluding data from the literature in other languages. Furthermore, this study analyses only data exported by the WoS Core Collection. Thus, the published numbers, cword analysis, author collaboration, and construction of cocitation maps all have that as their basis. Hence, the citation frequency of the references in this study is based on the above dataset and not on the citation frequency across all academic communities. Moreover, although the data on shadow education for this research was started in 1992, far earlier historical research on the topic can be found.

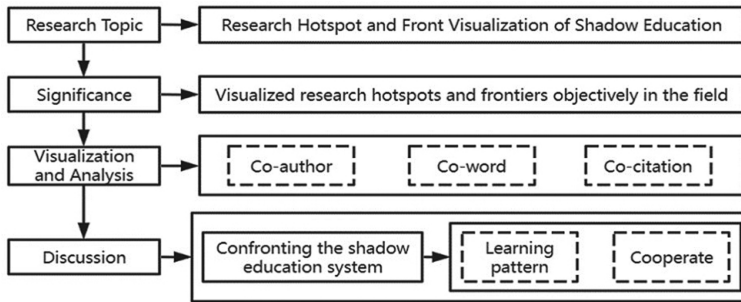
## Research Tool and Method

The software for scientometric and visualization analysis used in this study was CiteSpace, which is an information visualization software based on the Java application for analysis (Chen, 2004), with the functionality of visualizing research hotspots, detecting emerging trends, labeling specialties, and noting abrupt changes (Chen, 2006), represented by the cooperation network, co-occurrence network, and cocitation analysis network. The coauthor network indicates cooperative relationships among authors in a research area and reveals the distribution, the cooccurrence network reveals the research hotspot, and the cocitation reference network analyzes intellectual bases and research fronts (Chen, Chen, Hu et al., 2014). Thus, this study answers the following questions. (1) How is the research on shadow education progressing? (by presenting database-based annual publications of shadow education research). (2) What are the cooperation trends among authors in the shadow education field? (by constructing a coauthor map). (3) What does the research focus on regarding shadow education and its evolution? (by building keyword co-occurrence and cluster maps). (4) What are the research fronts, intellectual base and emergent trends of shadow education specialty? (by constructing a cocitation knowledge map and its clusters). Figure 1 shows the logic of this study.

First, the dataset shows the trend of the publication volume and author cooperation in shadow education research. Then, the visualization of research hotspots is displayed according to the cokeyword map. Next, we construct cocitation maps to analyze the research fronts. We expect that through these visual knowledge maps, which provide further empirical evidence for the development of the shadow education system, readers can more objectively and clearly distinguish and understand the structures and trends in how the shadow education phenomenon has developed.



Figure 1. Research Route

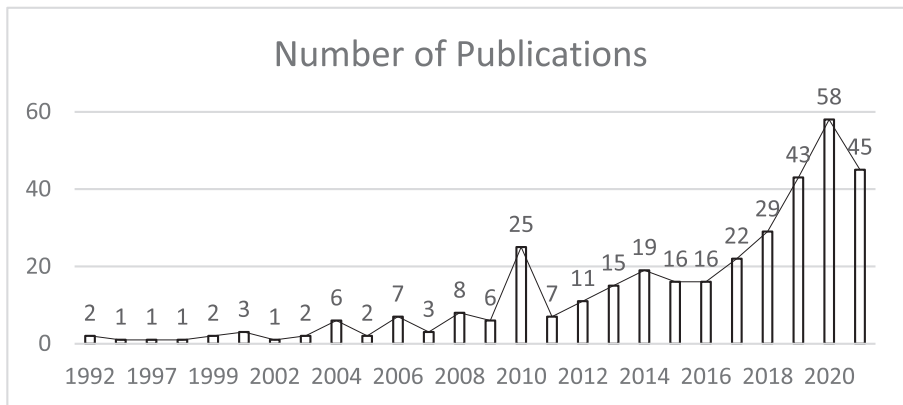


## Results

### Number of Publications

The output of papers in a research field directly reflects the scientific researchers’ attention to that field and the discipline’s theoretical level and development speed (Li, Li, Chen et al., 2019). With the help of an Excel spreadsheet, based on the 351 collected publications from the WoS Core Collection, Figure 2 shows the annual research output concerning shadow education from 1992–2021.

Figure 2. Annual Publications on Shadow Education (1992–2021)



The shadow education phenomenon is regarded as a part of the daily life of contemporary children (Bray & Lykins, 2012), which is the ‘subfield’ (Zhang & Bray, 2020, p. 335) of relevance to educational research. Nevertheless, this study is restricted to the dataset on which it is based. As shown in Figure 2, 1992–2009 was the initial stage of the topic when the output of studies was relatively small, which coincides with Bray’s statement that research in the shadow education field is increasing; however, this field remains in its infancy at that moment (Bray, 2010). Since 2010, shadow education has received more attention than in the previous



period, when publications attained the first small peak in that year. By the end of 2021, this 'infancy' seemed to have grown significantly. The prevalence of shadow education is still increasing in many societies (Yung & Bray, 2021), and research into this topic has become a subfield of education research (Zhang & Bray, 2020).

Shadow education is not a new phenomenon but rather a delayed research discourse. Until Bray's first vital private tutoring transnational research publication in 1999 by UNESCO's International Institute for Educational Planning, shadow education had received gradually increasing attention in the academic literature (Bray, 2009), and it has been disseminated quickly since 2009, when the sequel book was issued.

## Intellectual Communities

### Authors' Cooperation

Research cooperation is helpful for various resource exchanges and transfers. The microlevel cooperation network of CiteSpace is demonstrated by the coauthor map, visualizing the available research power. An author is selected as a node, and then, the CiteSpace function and parameter setting area are set. Moreover, the span is set to 1992–2021 with a time slice of 3, and the selection criteria are set to 'Top 50', representing the top 50 authors with the highest number of publications within the 3-year span. Figure 3 shows the constructed author cooperation network for shadow education, but only the thirteen core authors' names are shown.

Figure 3. Network Map of Author Cooperation



Each node represents an author. The nodes' connections represent cooperation between authors; when two or more authors appear in the same article, a scientific research cooperation relationship is formed (Chen, 2017). The larger the node is, the more publications by the author, and the thicker the connection line is, the closer the cooperation. Mark Bray is a crucial figure in spreading and carrying forward research on shadow education with the largest node and forming a prominent research community with more than half the most productive authors in the field. This communication circle focuses on the landscape, efficiency, implications, challenges, direction of shadow education, and correlations between mainstream schooling and social justice, which is the mainstay of shadow education research. Hyunjoon Park and Ji-

Ha Kim dominate the other visible knowledge-sharing community with a wide range of cooperation. Other authors have also contributed to the further development of shadow education research and created collaborations but to a lesser extent.

According to price law, half of all papers in the same field are written by a group of high-output authors, and the sum of these authors is approximately the square root of the total number of authors. Based on the formula for calculating the core author,  $N = 0.749\sqrt{n_{\max}}$  ( $n_{\max}$  refers to the number of papers by the author with the most significant publications), author Mark Bray, as both an independent author and a coauthor, published the most papers on shadow education based on the dataset, with 29 articles ( $N \approx 4$ ).  $N$  is the bottom boundary of the number of papers published by core authors. As such, authors with more than 4 publications are seen as core authors in this study. Thirteen authors are summarized, as shown in Table 1.

Table 1. Top 13 Most Productive Authors in Shadow Education

S/ N	Author	Number of pub- lications	S/ N	Author	Number of pub- lications
1	Mark Bray	29	8	Yu Zhang	6
2	Wei Zhang	10	9	Ji-Ha Kim	5
3	Kevin Waiho Yung	9	10	Jung-Hoon Jung	5
4	Hyunjoon Park	8	11	Liang Choon Wang	5
5	Junyan Liu	8	12	Rafsan Mahmud	5
6	Karin Guill	6	13	Vit Stastny	5
7	Magda Nusta Koba- khidze	6			

Data source: summarized by CiteSpace based on our dataset.

## Research Hotspots

### Cokeyword Network

The keywords in the articles offer a high-level summary of the topic, reflecting the research focus. The word co-occurrence network and its cluster analysis can display the research hotspots using CiteSpace (Chen, Chen, Liu et al., 2015). As such, cokeyword analysis is adopted in this study to search for the subject's hot topics and construct relationships, which term classify extracts from the literature according to title, author keywords, abstracts and keywords.

Figure 4. Hotspots in Shadow Education Studies

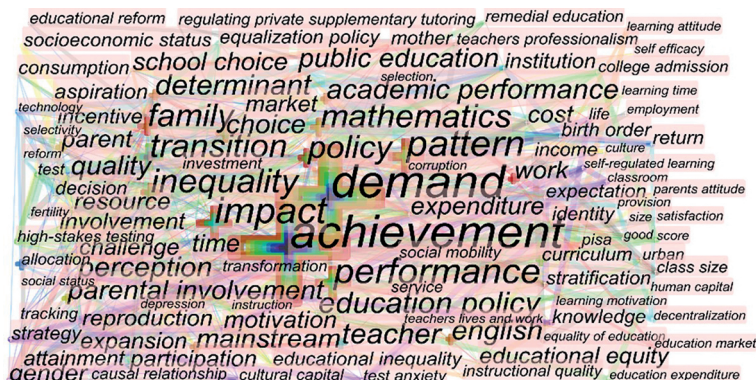


Figure 4-a

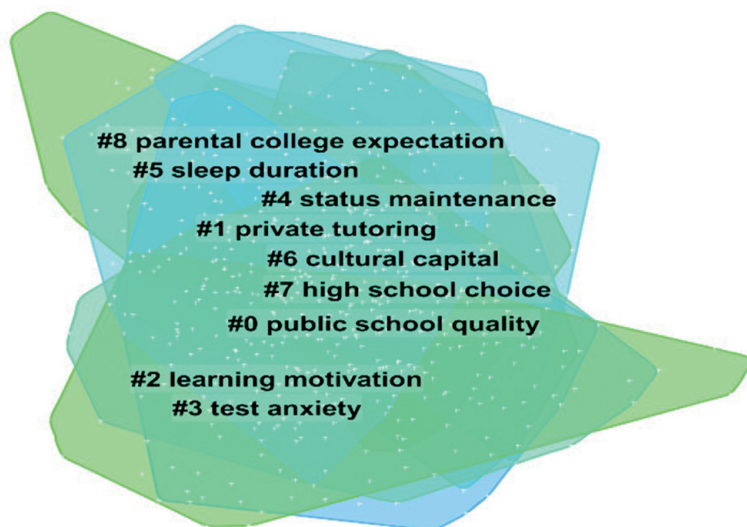


Figure 4-b

Figures 4a and 4b visually depict the hotspots in shadow education research. Figure 4a was constructed by picking the top 50 words for each year processed by the cokeyword network to present the thematic hotspots of shadow education. As shown in Figure 4a, each cross-shaped node represents a keyword, with the larger nodes appearing more frequently. Achievement, demand, pattern, impact, performance, inequality, transition, family, policy, and education policy are the top ten words applied in shadow education studies. Based on the visualization running results in Figures 4a and 4b show a cluster map of cokeywords constructed through the log-likelihood ratio (LLR) algorithm and present the research hotspots on shadow education. Nine prominent clusters are selected, revealing the hotspots in shadow education, the detailed information of seven of which is summarized in Table 2, with the mean year falling in

the period 2010–2016, representing the document’s mean year in the cluster. A silhouette value,  $S > 0.7$ , means that the clustering is convincing (Chen, Chen, Hu et al., 2014).

*Table 2.* Information Summary Form of the Cokeyword Network Cluster in Shadow Education Research

Cluster ID	Silhouette value	Mean year	Identity term (first five)
0	0.717	2014	public school quality; educational investment; professional misconduct; large family size; shadow curriculum
1	0.752	2010	private tutoring; afterschool program; afterschool participation; private tutoring expenses; high school
2	0.849	2016	learning motivation; learning attitude; learning well-being; annual incidence; incident myopia
3	0.78	2012	test anxiety; middling achievement; parent satisfaction; self-study hour; parent loyalty
4	0.813	2014	status maintenance; social status; low socioeconomic status (SES) family; SES; market competition
5	0.787	2016	sleep duration; somatic symptom; parent-child relationship; parental involvement; emotional distress
6	0.865	2015	cultural capital; private coaching; private tutoring; learning activities; supplementary education

*Data source:* summarized by CiteSpace according to the dataset employed.

Based on the cokeyword network with its cluster map and information summary in Table 2 above, the hotspots in shadow education research are classified as follows:

- Prestige orientation to shadow education. One primary purpose of students’ participation in shadow education is to achieve better academic performance in terms of mainstream examinations or international tests, especially for high school and university entrance exams, which enhance their competitiveness in terms of their further development. Moreover, shadow education should be used to maintain social status or opportunity hoarding.
- Participation conditions of shadow education. Educational decisions include the determinants of shadow education, such as fierce competition for further schooling, which has intensified the influence of educational determinants on, for example, Japanese students’ futures (Entrich, 2015). Such shadow education participation not only represents the students’ issue but also incorporates parents’ choices and involvement. However, the participation rate of shadow education is closely related to family background, such as SES and cultural capital. Thus, such market-based private supplementary tutoring has stopped some students from low-income families from entering the door to shadow education.
- Implications of shadow education. There has been much discussion among scholars on whether shadow education, as an exogenous aid, can help students obtain high academic achievement, but no consensus has yet been reached. However, the negative impact of shadow education on students (Hajar, 2018), such as their physical condition and sleep habits (Noh, Kim, Cheon et al., 2020), has received more attention. Some scholars have

shown that students' happiness in learning stems from their attitudes and motivations (Lo & Lin, 2020), in which internal impetus plays a vital role in driving self-directed learning and improving academic performance.

- Shadow education as a mirror. The interconnection between shadow education and mainstream education has received much attention. Whether this interconnection reflects the quality of mainstream education from the demand for shadow education or whether shadow education has surpassed the mainstream education that describes it metaphorically, this is an opportunity to reform formal education. For example, the coronavirus disease 2019 (COVID-19) pandemic has profoundly impacted the educational landscape, with the shadow education industry also encountering significant impacts and opportunities (Pimlott-Wilson & Holloway, 2021), and thus, mainstream education should take into account this mirror.

It is worth noting that in Figure 4a, the terms with high frequencies used to represent the shadow education phenomenon, such as shadow education (143), private tutoring (108), private supplementary tutoring (20), supplementary education (14), cram school (9), and private tuition (9), are excluded. The tradition of private tutoring has existed for several generations (Bray & Lykins, 2012), but 'shadow education' with a high rank indicates that this metaphor is widely accepted and recognized in the research field. However, the blurred definition of the shadow education phenomenon should be noted continuously. Table 3 summarizes the broad range of the definitions (in total 23) of shadow education phenomenon ranked by frequency and retrieved from the dataset. In addition to the top six abovementioned concepts, tuition, private education, afterschool programs, extracurricular activity, private supplementary education, remedial education, supplementary education, extra lessons, summer learning, supplementary tutoring, afterschool classes, afterschool tutorials, extra tuition, private coaching, private lessons, supplemental educational services and supplemental lessons also point to the shadow education phenomenon. Moreover, these concepts include only English expressions and not local terms shaped by different societies.

Table 3. 23 Terms for the Shadow Education Phenomenon

Term	Freq.	Term	Freq.
shadow education	143	supplemental education	3
private tutoring	108	extra lesson	2
private supplementary tutoring	20	supplementary tutoring	2
supplementary education	14	summer learning	2
cram school	9	afterschool tutorial	1
private tuition	9	afterschool class	1
tuition	6	extra tuition	1
private education	5	private lesson	1
afterschool program	4	private coaching	1
extracurricular activity	3	supplemental lesson	1
private supplementary education	3	supplemental educational service	1
remedial education	3		

Data source: summarized by CiteSpace according to the dataset employed.

### Academic Base and Research Front

The research front in a field is reflected in the articles actively cited by scholars (Chen, Chen, Liu et al., 2015). The references cited in an article provide valuable information about the academic connections among various scientific concepts (Chen, 2012), which reflects the objective laws of scientific development. Cited references constitute the academic base, which is the knowledge unit from a free state to reorganization through which new knowledge can be produced (Li & Chen, 2016).



Academic Base

Figure 5. Visualized Output of the Cocitation and Its Cluster on Shadow Education

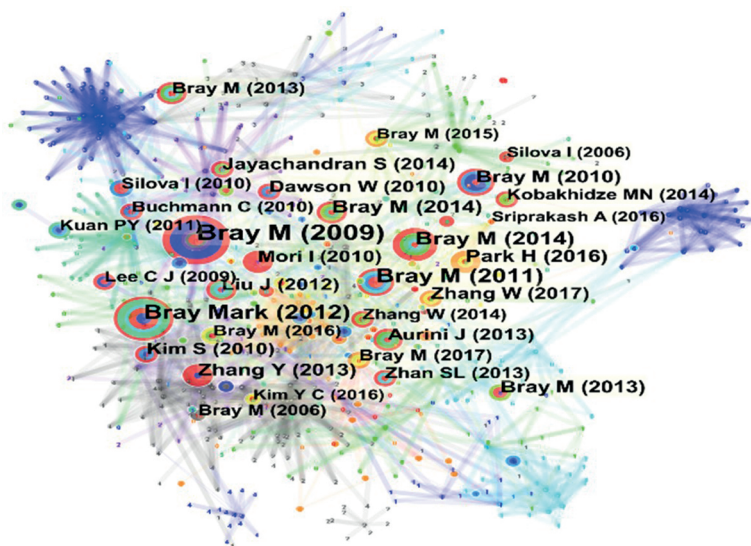


Figure 5-a

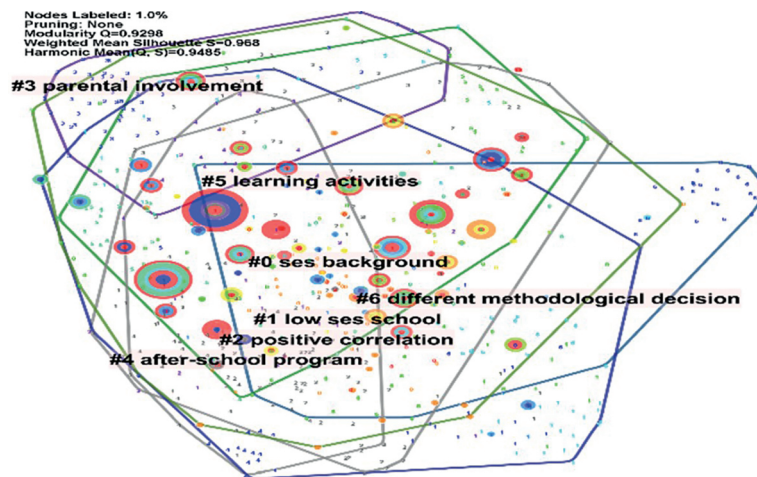
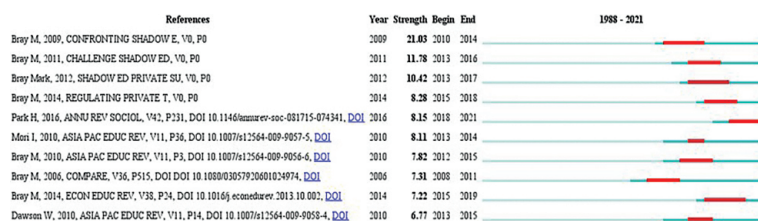


Figure 5-b

Figure 5a is a reference cocitation network map generated by extracting the top 50 cited references in each year for 1992–2021 from the dataset. These citations contain terminology at the forefront of research and indicate the intellectual base of shadow education. However, only the top 27 nodes are selected in the figure. Each node in the figure represents a reference, and the larger the node is, the higher the citation frequency. The links between nodes represent the

cocitation relationship between references. The top five ranked works by citation count are from Mark Bray as either the only author or the first author.

Figure 6. Top 10 References with the Strongest Citation Bursts



Citation bursts also provide evidence for classical references in the field. Figure 6 shows the top 10 strongest citation burst references. The beginning and end of the figure represent the start and end times of the reference burst represented by a red line, respectively; the higher the strength is, the stronger the burst. Table 4 displays the top 3 cited and strongest bursts of literature.

Table 4. Top 3 Cited Studies with Bursts

Citation rank	Published year	First author	Literature title
1	2009	Bray	Confronting the shadow education system: what government policies for what private tutoring?
2	2011	Bray	The challenge of shadow education. Private tutoring and its implications for policy makers in the European Union
3	2012	Bray	Shadow Education: Private Supplementary Tutoring and Its Implications for Policy Makers in Asia

Data source: summarized by CiteSpace according to the dataset employed.

As shown in Table 4, the most cited book, *Confronting the shadow education system: What government policies for what private tutoring?*, was published in 2009 as a sequel to *The shadow education system: Private tutoring and its implications for planners*, which was published in 1999, reviewed the work on shadow education over the past decade and explored opportunities for its further development (Zhang & Bray, 2020). This book is currently available in 15 languages in addition to English, namely, Arabic, Armenian, Azerbaijani, Bengali, Chinese, French, Georgian, Hindi, Kannada, Korean, Mongolian, Nepali, Sinhala, Urdu and Uzbek (Bray & Kwo, 2014). The contribution of this book to exploring the direction of shadow education research worldwide is encouraging.

The second-most-cited reference is *Shadow Education: Private Supplementary Tutoring and Its Implications for Policy Makers in Asia*, which was published in 2012 by Bray and Lykins and provides a vital map of shadow education in Asia. “Geographically, the study embraces a very diverse region, stretching from Mongolia in the north to Indonesia in the south, and from Georgia in the west to Japan in the east” (Bray & Lykins, 2012, p. 2). This study demonstrates the participation, supply, demand, and implications of shadow education



and further highlights that the increasing proliferation of shadow education cannot be ignored in the policy process.

The third-most-cited reference is *The challenge of shadow education. Private tutoring and its implications for policy makers in the European Union*, which is an independent report prepared for the European Commission, authored by Mark Bray in 2011. This report provides a picture of shadow education in the European Union based on geographic patterns, explains that shadow education exists in terms of both supply and demand and further explores its impact on students, families, and mainstream education, as well as its implications for policymakers. The report reveals widespread shadow education within the European context —“an important step in our effort to improve European education and training systems—as appraised by Brussels (Bray, 2011, p. 3).

### Frontier Hotspot

The research frontier represents the ideological status of a research field, which can be represented by the clustering of the emergent words of the cited references, exhibited by labels in CiteSpace (Chen, Chen, Liu et al., 2015). Figure 5b is a cocitation cluster network based on Figure 5a, in which each cluster is labeled by extracting nominal terms from the titles, keywords and abstracts of the cited references, constructed through the LLR algorithm. The cluster labels in the map reflect the fronts and the characteristics of shadow education research. The seven largest cocitation clusters are selected, and the number of references in clusters #0–6 decreases successively. Those clusters with labels are cluster #0, SES background; cluster #1, low SES school; cluster #2, positive correlation; cluster #3, parental involvement; cluster #4, afterschool program; cluster #5, learning activities; and cluster #6, different methodological decisions.

To understand the research fronts labeled for each cluster, this work explores the citers through further reading and finds the most relevant citer for each selected cluster, as demonstrated in Table 5, based on the running results from CiteSpace. The frontiers of shadow education research are summarized below.

**Determinants of shadow education.** Cluster #0 is labeled as SES background. Extensive studies have found that family SES positively influences students' participation in shadow education (e.g., Choi & Park, 2016; Zhang & Xie, 2016; Choi & Choi, 2016) and thus increases inequality when private tutoring, as an enrichment strategy, is effective (Ghosh & Bray, 2018). Cluster #1 is labeled as a low SES school. Addi-Raccah and Dana (2015) found that the intensity of students' participation in private tutoring is positively correlated with school SES. But for students studying in low SES school, which average scores are higher with low private tutoring participation than those with moderate or high attendance intensity. A study from South Korea showed that under a nonequalization policy, students are selected for different high schools based on their academic performance (Wang, 2015), where credentialism drives the demand for private tutoring (Ghosh & Bray, 2018). The global phenomenon of shadow education is still spreading (Yung & Bray, 2021); given the fee-based characteristics of shadow education and educational tracking, SES research is currently at the forefront of shadow education.

**Efficiency of shadow education.** Cluster #2 is labeled 'positive correlation', and cluster #3 is labeled 'parental involvement'. The effectiveness of shadow education has been heatedly discussed, as research shows mixed results. Many studies illustrate that students benefit from

participating in shadow education in terms of their academic performance (Dang, 2007; Choi & Park, 2016; Ha & Park, 2017). Nevertheless, some studies find the opposite relationship (e.g., Guill & Bos, 2014); some research concludes that the positive effect of shadow education on academic performance is affected by the type, duration and subject of such education (e.g., Byun, 2014; Ömeroğulları, Guill, Köller et al., 2020). Moreover, parental involvement in of the meeting of children's specific needs in shadow education selection and tracking significantly helps students in terms of their academic achievement (Park, Byun, & Kim, 2010). Given that shadow education participation is not always directly associated with academic performance improvement, the further exploration of this area is essential.

Educational pattern and equity. Cluster #5 is labeled learning activities, and cluster #6 is labeled different methodological decisions. As education patterns are changing, learning activities are no longer restricted to mainstream schools but can also reach different types of shadow education, either in person or online (Park, Buchmann, Choi et al., 2016). Many families believe that investment in shadow education is inevitable and that its use is no longer limited to wealthy families (Bray & Kwo, 2013). One study found that participating in shadow education not only improves test scores but also positively affects participants' self-esteem, confidence and interest in learning (Hajar, 2018), thus highlighting the significance of the shadow education curriculum (Kim & Jung, 2019a).

Furthermore, maintaining and promoting educational equity has always been an essential topic in shadow education research. The prevalence of household investment in private and fee-based shadow education is incompatible with the willingness of most governments to support free fundamental education at the official level (Bray & Kwo, 2013). As mentioned earlier, participation in shadow education is often linked to a household's capacity to pay. Cluster #4 is labeled afterschool programs. One study found that afterschool programs organized by public schools contribute to promoting educational equality, with evidence showing that afterschool program participation is more effective for families with lower incomes and in rural areas, compared to other types of families, in terms of reducing private tutoring expenditure (Bae, Oh, Kim et al., 2010). Moreover, afterschool educational broadcasting systems improve educational outcomes among students from low-income families (Ha, 2017), thus providing more opportunities for students whose families are in adverse situations or facing the inconvenience of geographical distance. Given the above factors, the focus on education equity in shadow education research deserves to be tracked, continuously promoted and updated with changes in educational patterns and policies.

Table 5. Most Relevant Citer in Each Cluster

Cluster ID and label	First author	Published year	Reference title
#0 SES background	Zhang	2017	Micro-neoliberalism in China: public-private interactions at the confluence of mainstream and shadow education.
#1 low SES school	Bray	2013	Behind the façade of fee-free education: shadow education and its implications for social justice.
#2 positive correlation	Dang	2008	The Growing Phenomenon of Private Tutoring: Does It Deepen Human Capital, Widen Inequalities, or Waste Resources?

Cluster ID and label	First author	Published year	Reference title
#3 parental involvement	Park	2013	Re-evaluating education in Japan and Korea: De-mystifying stereotypes.
#4 afterschool program	Bae	2010	The impact of afterschool programs on educational equality and private tutoring expenses.
#5 learning activities	Bray	2017	Schooling and its supplements: Changing global patterns and implications for comparative education.
#6 different methodological decision	Zhang	2015	Shadow Education In Chongqing, China: Factors underlying Demand And Policy Implications.

*Data source:* summarized by CiteSpace according to our dataset.

## Discussion

Based on the dataset used, this study visually explores the research on shadow education from 1992–2021. CiteSpace is employed to review the overall research and development in shadow education research. Shadow education began relatively late, but it has received increasing attention from scholars in recent years. Since 2010, the number of publications on shadow education have been increasing yearly.

The expansion of the shadow education phenomenon has become a space in which tutors, managers, and families can seek autonomy and alternate educational options; its institutional power has been strengthened in postmodern society (Mori & Baker, 2010). Over the past decade, the updated conceptualization of shadow education from a multilevel, interdisciplinary, and interdepartmental concept seeks transferability between shadow education and mainstream education; in fact, shadow education, as an innovative laboratory, aims to promote educational reform (Zhang & Bray, 2020). This area is no longer an overlooked research field, regardless of whether studies explore its underlying logic or further development. The role and practice of shadow education have steadily changed from a specific national logic to a global universalist ideology (Baker, 2020). However, the reality of shadow education is evolving much faster than is the related research, coupled with the fact that planning for shadow education is only on the agenda of a small portion of governments worldwide. Narrowing the reality of the rapid proliferation of shadow education and its research and regulation thus requires the concerted efforts of multiple actors.

The coauthor network constructed in this study reveals the existence of cooperation among researchers; only one circle of scholarly communication is more prominent and plays an essential role in shadow educational research. Even though other authors outside this circle have made vital contributions to the field, there is less widespread collaboration. The phenomenon of shadow education started much earlier than did the related research, and such a global phenomenon manifests itself in different forms in different places, even with various terms for the same region. Therefore, the expansion of communication and cooperation in the field of shadow education research can help scholars further deepen the connotation of and

learn from the phenomenon, hence helping promote the research and governance of shadow education and sound educational ecology.

The study demonstrates those research hotspots and fronts that have been paid attention by researchers in the field by the cokeywords and cocitation networks. The summary of research hotspots shows that the focus on shadow education research is diverse and has been integrated into contemporary family life: to demonstrate the exploration of students' achievement; the interactions among shadow education participation, education acquisition and family background; the influence of shadow education on mainstream education and its backlash; the challenge of shadow education in terms of policy enactment; and the discussion of its impact on social equity. Its underlying logic involves the motivation and attitudes of individual students, parents, teachers, family structure, economic status, cultural capital status, school education system and different cultural value orientations.

Nevertheless, it should be noted that even though the term 'shadow education' emerged much later than did the actual phenomenon, the metaphor used to describe it as mimicking mainstream school education has been widely recognized. However, the rapid expansion of shadow education is inevitable and universal and may continue to intensify in the foreseeable future (Baker, 2020). In its diverse forms, part of shadow education has surpassed its mainstream-education-based 'shadow' metaphor, resulting in more complex problems and impacts, particularly its negative impact on children's physical symptoms, as visualized above.

The shadow education system is complicated; moreover, in the era of big data and artificial intelligence, the development process of teaching and learning models for formal and shadow education is changing rapidly. Therefore, the further legalization and standardization of the industry and market of shadow education comprise an essential step for the facilitation of a sound education ecology, which needs more attention in the field, not only from researchers but also from the government, families, schools and society. Moreover, parents being involved in too many of their children's educational choices may intensify children's growth, especially their self-learning ability to adapt to the rapidly changing world, emphasizing and exploring the significance of self-driven learning, which is the basis for improving survivability and maintaining the continuity of lifelong learning.

Especially since 2020, COVID-19 has seemed to be creating a natural experiment in terms of school education and shadow education, as the latter can be compared to the former in a virtual space (Zhang & Bray, 2020), which challenges the trust crisis aspect in formal education. Although research on shadow education is trending in terms of vitality and maturity, its development faces the challenges of curriculum, nature, mode, scale, technology, innovation, development speed, regulations, governance, and legality with the transformation of mainstream education. Furthermore, especially for the comparative study of shadow education, 'the time is right to push forward a broader view of its origin, consequences, and future' (Baker, 2020, p. 5).

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# Mechanisms of Persisting Inequality – Case Studies of Norwegian Daycare Facilities for Children

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**Abstract:** In this paper, we analyse mechanisms of exclusion in Norwegian daycare facilities for children (“Skolefritidsordning – SFOs), which provide after-school care. Such mechanisms are analysed and discussed as unanticipated consequences of reform policy initiatives or simply as accepted trade-offs left to the SFO staff’s discretion. The data are taken from a re-analysis of a national evaluation of Norwegian SFOs. The results show several examples of new exclusion mechanisms occurring as old inequalities are addressed through social policy reforms. Examples from case studies are used to highlight and discuss the staff’s reactions and actions when faced with dilemmas of meeting demands from the system while taking care of demands from the children.

**Keywords:** unanticipated consequences, reform policy initiatives, inequality, inclusion, exclusion

## Introduction

Inequality in education is a persistent problem and remains a relevant topic for research. This also holds true for extended education provisions, as they are instrumental in fighting social and educational inequalities in many countries (Bae & Stecher, 2019). However, recent research (e.g. Entrich, 2021) points out that the relation between inequality and different forms of extended education is not straightforward, and empirical and theoretical clarifications are needed in order to shed light on the relation. In this article, we re-analyse a large qualitative dataset gathered as part of the results of a national evaluation of Norwegian daycare facilities for children (Skolefritidsordning – SFOs) (Wendelborg et al., 2018). Informed by the sociological concept of unintended consequences (Merton, 1936), we aim to identify how different mechanisms of exclusion work despite an inclusive mandate. The policies themselves, intended to result in more equality, create new divisions and demarcations instead, contributing to the subtle processes of exclusion of linguistically, culturally and socioeconomically diverse (LCSD) students in schools (Paniagua, 2017). For children, these subtle exclusions potentially mark them as visitors to the community of children in an SFO, not its members (Antia, Stinson, & Gaustad, 2002), leaving much work to the SFO staff to deal with the consequences. The main research questions addressed in this article are as follows:

1. Are there visible exclusion mechanisms in Norwegian SFOs?
2. Are there unintended consequences of the policy initiatives taken to deal with the exclusion mechanisms?
3. If so, how do the SFO staff deal with the unintended mechanisms of exclusion resulting from the policy initiatives?

As we see it, Norwegian SFOs constitute an interesting case for addressing questions of inequality. The Norwegian education sector has long been given the responsibility for a large variety of tasks, of which promoting social equality and providing equal opportunity are two of the most important tasks, as stated in the Education Act (1998), as well as in government white papers and research for decades. However, Norwegian SFOs have been paid less attention although they are formally organised under the responsibility of school leaders and the municipality. Studying mechanisms of inequality in Norwegian SFOs not only adds to the empirical, international body of literature on inequality in extended education but also sheds light on extremely relevant policy issues when further developing the national educational system in Norway.

### Norwegian Daycare Facilities for Children and the Inclusive Mandate

Norwegian SFOs were first established in the 1950s but were developed in their modern form in the late 1980s. An SFO provides school children in grades 1 to 4 with a place to stay before and after regular school hours, as the parents leave for work or other activities. In 1997, the starting age for compulsory school was lowered from seven to six years, creating an increased demand for providing care for the youngest school children. This was evident in the participation rates, which increased from about 50% of the first graders in 1999 to 82% in 2019–2020 and from 50% to 76% for the second graders (Utdanningsdirektoratet, 2021b). For third and fourth grades, the increase was smaller, from 40% to 59% and from 25% to 31%, respectively. The growth highlights an SFO as now more or less part and parcel of the start of school for most children in Norway.

The law (the Education Act) obliges all municipalities to provide daycare facilities for children from first to fourth grade, but the curriculum content, organisational setup and staffing are left to the municipalities' discretion. Until the fall of 2021, there have been no national curriculum guidelines, and different municipalities have chosen different ideological directions for the content, on a continuum ranging from emphasising school preparation and support to emphasising children's autonomous decision making and play, by simply providing the children with a place to stay between the end of the school day and their parents' work day (Wendelborg et al., 2018). Furthermore, the cost of using the daycare facilities varies from 4250 NOK (slightly more than 400 euro) per month, 20 hours per week in one municipality, to nothing at all in another, with an average cost of 2263 NOK per month (230 euro).

There are neither national competence demands nor established educational programmes to qualify the staff for employment in Norwegian SFOs, although a degree in a vocational programme in Child Care and Youth Work (upper secondary school) is regarded as the preferred qualification in many municipalities. However, this group of vocational programme graduates only comprises one-third of the SFO staff. In 2018 a little less than 30% held different bachelor's degrees and national equivalents, but they did not necessarily have a pedagogical/educational background (Wendelborg et al., 2018).

Moreover, inclusion is listed as a fundamental principle of the Norwegian government's work to improve the educational system, together with early intervention and well-adapted provision (Kunnskapsdepartementet, 2019). The national framework plan for an SFO states:

[An] SFO shall be aware that activities may lead to some children or groups being excluded due to, for example, finances, the need for special adaptations and linguistic or cultural differences. [An] SFO shall assess how the overall provision can be adapted to be as inclusive as possible. (Utdanningsdirektoratet, 2021a, p. 14)

There are also high hopes for SFOs' potential contributions that will help overcome social differences. The framework plan states, "By giving children the opportunity to actively participate in play, cultural and leisure activities together with other children, [an] SFO can help to even out social differences" (Utdanningsdirektoratet, 2021a, p. 20). The variations among municipalities represent a challenge to the principle of equal services and opportunities in the Norwegian welfare state model.

The variations in curriculum content, placement fees and service quality are differently addressed in various municipalities, and diverse local policy initiatives have been taken to address inequalities. These solutions can possibly bring new problems in terms of side effects that were either unanticipated or perhaps perceived as reasonable trade-offs between costs and benefits.

In the following sections, we first position our research in the broader literature on inequality in extended education before we turn to the data and methods used in our project. Our analyses highlight the mechanisms of inequality in Norwegian SFOs, the measures taken to remedy the inequality and the unintended consequences of the policy initiatives, as experienced by the staff. Finally, we discuss our findings' implications in light of our theoretical perspective and the presented research.

## Previous Research on Inclusion, Exclusion and Extended Education

Research on extended education and social inequality focuses on different perspectives. Bae and Stecher (2019) discuss research on extended education as a whole and distinguish among an outcome perspective (questions about the effectiveness of learning opportunities outside regular classes), a participation perspective (questions regarding who are using these opportunities) and a professionalism perspective (focusing on who are working in the field and what training they have received). Furthermore, they distinguish between research focusing on the perspective of each participant (individual perspective) and on how to design the activities and programmes effectively (institutional perspective). Research on social inequality in extended education can be found, highlighting all these different areas. However, Bae and Stecher (2019) argue for the need to closely examine the societal function of extended education, pointing specifically to how extended education and social inequality are linked to each other.

In surveying the research on inequality in extended education, a multifaceted picture emerges, with large national variations due to structural idiosyncrasies, as well as a general trend of social inequality being mirrored or reproduced through extended education programmes. Fischer, Theis, and Zücher (2014) have studied the role of all-day schools in reducing educational inequality in Germany. Based on a nationwide survey, they argue that all-day schools may contribute to narrowing the gaps between children belonging to higher socioeconomic classes and those belonging to lower ones in terms of school performance and in terms of providing their parents with support in school-related topics. The authors also find

that participation in extracurricular activities increases among children with lower socioeconomic status when all-day schools are introduced. The study highlights the potential for increasing social equality through extended education efforts. However, such changes require policy decisions and implementation in the educational institutions.

However, a study conducted in the German-speaking part of Switzerland finds that the odds of utilising extended education offerings in all-day schools vary. Students with an immigrant background are more likely to benefit from extended education, and such probability also increases with higher socioeconomic status (Schupbach, von Allmen, Frei, & Nieuwenboom, 2017).

In their study of the learning environments in extended education in Sweden, Boström and Augustsson (2016) argue that there is a research gap in the staff's perceptions on how they can enforce policy document guidelines and that they are often left to interpret and implement such guidelines, without specific legal directives.<sup>1</sup> The authors also point to variations in the physical learning environments in Swedish extended education, again leading to inequality in learning opportunities for school children.

Based on Korean data, Bae, Cho, and Byun (2019) describe how different subgroups use different forms of extended education provisions. The authors argue that this differential use of extended education may be linked to social stratification and thus questions of inclusion and exclusion. Simply stated, those with better economic opportunities also gain access to potentially better programmes.

In a study carried out in Russia (Kosaretsky & Ivanov, 2019), the focus is also on access, and it is pointed out that access to and participation in extracurricular activities are related to the geographical–territorial context, the urban–rural dimension, as well as the families' socioeconomic status and cultural capital. It is further highlighted that despite state-policy efforts to increase participation across different socioeconomic backgrounds, there is still some ground to cover in terms of social differentiation and the risk of exclusion – a point directly relevant to the research presented in this article.

On a similar note, Matsuoka (2018) points out that in the egalitarian Japanese school system, the interaction between the expectations of families with high socioeconomic status and the neighbourhood effects leads to differentiation in participation in out-of-school programmes (shadow education). The author further notes that in egalitarian educational systems, mechanisms of exclusion and differentiation are harder to identify, and calls for policy interventions regarding unequal learning opportunities, especially related to neighbourhood differences. However, since inequality in extended education seems to be a persistent global phenomenon, occurring in all contextual and regional settings, more in-depth empirical analyses of the mechanisms of exclusion, as well as research that can theoretically shed light on the relation between extended education and inequality, have been called for (Entrich, 2021).

1 The idea of “implementation” of policy in education is in itself also problematic and often contested (see, e.g., Priestley et al., 2021).

## Unintended and Intended Mechanisms of Exclusion

As stated in the introduction, in this article, we focus on the consequences of Norwegian education policies intended to promote social inclusion and equality, as well as why inequality and exclusion still seem to be persisting problems.

The term *unintended consequences* is often used in descriptions of the effects of policy (de Zwart, 2015), and it has been pointed out that “government regulation that is amply justified in principle may go terribly wrong in practice” (Sunstein, 1994, p. 1390). To map out what unintended consequences can entail, we turn to the sociological concept of unanticipated consequences of social action (Merton, 1936). Merton describes five factors leading to unanticipated consequences, and although his research focuses on the individual consequences of actions, the factors also have some relevance for studies on public policies.

The first factor is inadequate knowledge, which is linked to not only the large amount of knowledge needed to make decisions with high precision but also to a more technical point about how to approach the concept of causality in social sciences.

Second, we often make wrong predictions of actions, and these errors are often based on the assumption that actions in the past that have led to desired outcomes will continue to do so in the future. Merton (1936) refers to this as “fixed in the mechanism of habit” (p. 901). Third, he points to the fact that immediate interests often override long-term interests, which he describes as “the imperious immediacy of interest” (p. 901). Fourth, Merton argues that our basic values may require or give way to specific kinds of actions even though the long-term results may be different from what we want. Our values may leave us blind to alternatives, as we make no considerations of further consequences. Finally, Merton points out that in social sciences, the knowledge or fear of the consequences might have an impact on the action taken to such an extent that the consequences would not occur at all.

Merton’s (1936) ideas and concepts have been developed further by many scholars. Especially the sociologist Raymond Boudon (1982) builds explicitly on Merton’s ideas but focuses more on large-scale economic effects, as well as how “infinitesimal individual influences generate a social effect” (p. 1) and how individual responses to public policies result in unintended consequences. Boudon devotes most of the discussion to perverse effects, meaning that negative outcomes occur despite the positive intentions behind the initial action. Merton’s unanticipated consequences comprise a subgroup of perverse effects, in Boudon’s terminology. However, a distinction between perverse effects and unintended consequences is that perverse effects are not necessarily unforeseen. They are just different from the actors’ main intentions. Boudon points out that the effects that the actors did not explicitly intend “may be positive, negative, or positive and negative at the same time, for some or for all, and that, besides this, the actors (all or some of them) may or may not attain their objectives” (p. 8).

The difference between Boudon’s (1982) use and understanding of unintended consequences and his teacher Merton’s (1936) use is interesting, as it lends weight to speculations about whether or not outcomes are really unanticipated or whether they can be described as perverse but expected consequences or even trade-offs between desired outcomes and available resources. In education policy (and this probably holds true for all policies), it has been argued that there is often a necessary trade-off between costs and effects of measures and actions taken (e. g., Gustafsson, 2003), which may lead to policy options that are not necessarily the most effective or even bring perverse effects. Relating back to the international research literature’s focus on why inequality in extended education programmes still exists,

we argue that a close examination of how policy is dealt with on the ground level is necessary to promote a more profound understanding of the mechanisms of inequality.

When professionals in SFOs work within the structural frames of local and national policies, the available resources and the demands that they face in their day-to-day tasks, they bring with them their knowledge, experiences, values and attitudes and try to make the best of the situations that they encounter (Freidson, 2001; Lipsky, 2010). However, these actions may also produce unintended consequences and even perverse effects, despite their good intentions.

## Methods

In this article, we elaborate on and re-analyse the findings obtained from the national evaluation of the Norwegian SFOs, carried out in collaboration between NTNU Social Research in Trondheim, Norway, and the University of Stockholm, Sweden, in 2017–2018 (Wendelborg et al., 2018).

More specifically, we draw on data from ten case studies about SFOs. At each institution, the researchers participated in the children's daily activities for a full day. In total, the researchers conducted 50 staff interviews, each with 2–6 participants, as well as individual interviews with leaders and 4–5 parents at each institution. The researchers also held informal interviews with the staff and some parents, and of course, with the children, providing context and understanding. All interviews and case visits (except one) were done by two collaborating researchers, who also shared and validated each other's note afterwards. The interviews were recorded. In their observations or informal talks, the researchers had to rely on their notes and case profiles that were written immediately afterwards and validated between them.

The theme for this article, exclusion mechanisms, was discovered through inductive data analysis (e.g., Creswell, 2007). The researchers wrote extensive case profiles for the evaluation and discussed the data together. By working on the case profiles, they discovered how unintended exclusion mechanisms emerged as a relevant topic from the data. The topic was mentioned but not elaborated in the evaluation (Wendelborg et al., 2018).

For this paper, the researchers reviewed the exclusion mechanisms to explore them further. Food, cost and access formed relevant categories. Validity standards in qualitative research have been debated by many scholars, and as pointed out by Whitemore, Chase, and Mandle (2001), the issue creates "the necessity to incorporate rigor and subjectivity as well as creativity in the scientific process" (p. 522). This is the case for this analysis as well. It is important to state that the categories serve as examples, but there could very well be (and certainly are) other mechanisms functioning. Our presentation is based on the cases that illustrate our main findings on these categories emerging from the data. The selected quotations were transcribed and cited verbatim, translated from Norwegian to English for this article.

In the following sections, we focus on describing the inequalities and the consequences of trying to remedy the inequalities. We then discuss the implications with relevance to the theoretical framework and the research literature presented earlier.



## Unanticipated Exclusion Mechanisms in Norwegian SFOs

### Meals in SFOs

One unintended exclusion process is related to food and meals. In the particular case presented in the following sections, the consequences of the policy under implementation are clearly foreseen. Nevertheless, the policy is still implemented, hoping for the best outcomes, and trust in the staff's competence and compassion seems to be the solution when perverse effects are encountered.

The SFOs are not required to provide meals for the children, but most do, although these meals vary greatly, ranging from instant soups in disposable cups to full meals prepared by hired chefs. The costs are paid for the parents but should only cover direct costs.

In one of the municipalities that we visited, ensuring inclusion and alleviating child poverty have long been action items on the local government's agenda, and the SFO has been provided free of charge for all families whose incomes are less than 46,000 euro per year.<sup>2</sup> For those earning higher incomes than this amount, a full-time placement for each child costs about 300 euro per month. According to one project leader responsible for implementing the municipal policy changes, the SFO was now regarded as a central element in realising the goals of inclusion and decreasing inequalities, the idea being that those children who were not placed in the SFO were the ones who would benefit the most from it. "If we use the money now, we will save money in the long run" was a statement repeated by many of the interviewees throughout the municipality.

One element of this new policy was providing food in the SFO. Previously, two schools in the same municipality had tried serving free warm meals twice a week and free sandwiches on the other three school days, with positive feedback from the children and their parents. These two schools had also tried offering free placements for all children, which of course meant that all participation was free for all. However, when extending the food policy to all schools, it was considered too expensive, and it was decided that everyone who wanted food would be required to pay 15 euro per month. The food was restricted to sandwiches. Those who did not pay would not receive any food.

The case of the differentiated food arrangement showed how the staff practised discretionary decision making. The project coordinator pointed out that such a differentiated arrangement would require a lot of organising, and which children received food and which ones were not given food would be obvious. The outcome could very well be more visible exclusion compared with the previous situation and be counterproductive to the overall goal of social inclusion. The project leader argued on this point in the following way:

The decided policy is that all wanting food should pay for it. I can, of course, have my own opinion about this. The dilemma is that we do not want parents choosing that their children do not participate in the SFO... so ideally, everyone should choose to pay for food. But if in the fall [when the arrangements are implemented], we find that some children do not bring any food, and this is repeated every day, I have told the staff that we should follow our hearts and make sure the children are fed. And then we must address the parents and encourage them to pay for the food. And if they cannot afford it or won't pay, we must address the politicians and try to change the system. But for now, we stick to our guidelines. (Project leader in the SFO)

2 The median income for a Norwegian household in 2017 was 51,000 euro per year, according to Statistics Norway (2022).



Even though the rules are seemingly clear that all who want food should pay for it, the staff deviates from this, following their hearts. Interestingly, this is still perceived as “sticking to the guidelines” – suggesting the discretionary space as somewhat larger than “just” the guidelines, extended by the staff’s competence. When interviewing the staff, they also acknowledged the upcoming dilemma.

We’re talking about 15 euro a month. But some parents do not have 15 euro extra at the end of the month. There are a number of factors combined here. It will be very interesting to see how this plays out. Because the children [in the two schools receiving food for free] are really enjoying it, and they want to continue. (SFO staff member)

The arrangement and the preceding quotes highlight the dilemma faced by the staff when new policies are introduced. In this particular case, potential negative effects are foreseen, but the policy is still implemented, with high hopes for the competence and especially the warm hearts of the staff. However, as shown in the next example, related to access and participation, a warm heart does not guarantee that commitment to the children’s best interest will be the outcome.

## Cost and Access

The most visible exclusion mechanism in the Norwegian SFOs is the cost, that is, the price paid for placement. As indicated in the introduction, the price varies greatly among municipalities (Figure 1). This means that adjacent municipalities may have highly different costs. For instance, the municipality of Sunndal, located in Central Norway, charges 95 euro per month for 20 hours per week, while the adjacent municipality of Oppdal charges almost 250 euro per month. Whether this variation is regarded as problematic surely depends on political and ideological viewpoints and is also related to the curriculum content and plans for the daycare facilities. However, it seems obvious that high costs create hindrances to participation. To remedy this, municipalities have developed different moderation strategies.

In some larger cities (which also function as municipalities), free places have been allocated to specific schools and school districts. These are characterised by a large number of low-income families, which is also closely correlated to a high percentage of minorities. However, school districts are somewhat arbitrary and often divide neighbourhoods, quarters and even streets, implying that children with similar or the same socio-demographic characteristics belong to different schools. In Figure 2, the district borders separating Lilleby, Lade and Strindheim in Trondheim (Norway’s third most populous municipality/city) are shown on the left, and a close-up of a section of the border between Lilleby and Strindheim is shown on the right. Lilleby has free part-time places for all students from first to fourth grade, while Strindheim charges about 190 euro per month for a part-time place (<12 hours a week). Per year, this equals a difference of 2090 euro (payment for 11 months) within the same municipality, and it also depends on the side of the street where a child lives. Thus, the aim to remedy the socio-demographic inequality mechanisms with pinpointed policy measures creates new socio-demographic divisions within neighbourhoods.

Another unanticipated consequence of the policy of providing free part-time places for specific schools is that divisions are created within schools. However, the free part is typically limited to less than 10–12 hours per week. The staff report that some parents do not pick up their children at the end of the regular school day (typically up to 20 hours per week). This

Figure 1. Monthly Cost of SFO Placement for 20 Hours a Week (in euro) in All Norwegian Municipalities. (Taken from the national information on primary and secondary schools (Utdanningsdirektoratet, 2021b).

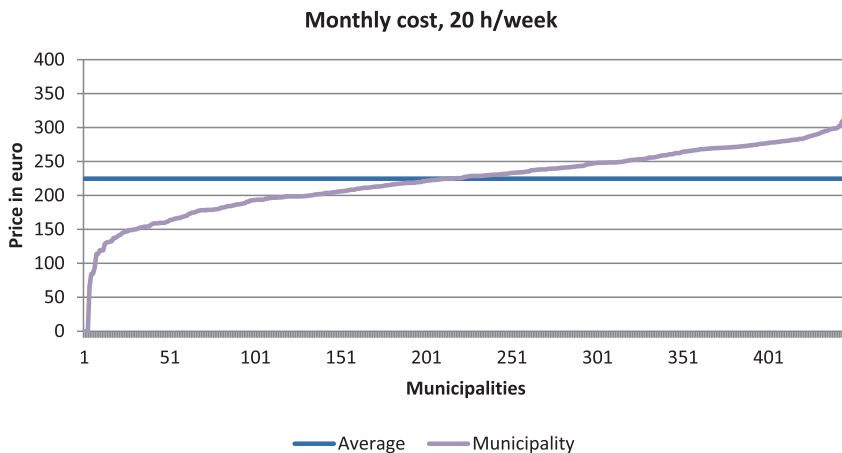


Figure 2. School District Borders Separating Lilleby, Lade and Strindheim in Trondheim, Norway (left); Close-Up of Borders between Lilleby and Strindheim School Districts (right).



creates a challenging dilemma for the staff. Should they send the children outside, knowing that they will linger in the school yard until the end of the day, or should they defy the system and allow the children to participate in the activities, without their parents having paid for participation? It could be argued that the SFO staff are put in a situation where they need to choose between loyalty to the system and caring for the children.

One SFO leader in one of the municipalities describes the situation in this way:

We notice at half past three, when their free hours at SFO come to an end, some children are not picked up. Then the parents try to find solutions, saying, “Just send him out; let him wait outside,” but then, the staff are competent, and one says, “When I left at four o’clock, the child was still sitting there, waiting.” Then, after a while, we call their parents, since we are concerned about how well the children are taken care of. (SFO leader)

A number of interesting issues surface from this quote: (1) The problem is acknowledged. It is problematic that some children are not picked up, and the staff have to find a solution to this. (2) The staff are described as competent, even though (3) they are seemingly more loyal to the system and send the children outside. (4) They handle the problem by addressing the parents,

not the system. The consequences of the implemented policy, which is originally designed to increase social equality, creates new, visible and tangible social divisions between the children.

## Mechanisms of Exclusion

The case studies highlight examples of exclusion mechanisms occurring after policy initiatives have been implemented. The first case, where access to food is prioritised, shows that policies tend to rely on the warm hearts and competence of the staff carrying out the policy in the institutions. In other words, to make the policies inclusive in practice, the policy initiatives rely on the staff's discretion.

The second case, focusing on access, clearly shows that the staff follow the clear rule of sending the excluded children outside. The discretionary acts intended to rely on warm hearts and competence are overruled by the external factors in the decision-making process.

Both the policy reforms and the responses to the policies can be analysed with reference to Merton's (1936) list of the five factors leading to unanticipated consequences. To recapitulate, the five factors are inadequate knowledge, wrong predictions of actions, being fixed in the mechanism of habit, immediate interests that often override long-term interests, values that may leave people blind to alternatives, and knowledge or fear of the consequences that may have an impact on the action taken to such an extent that the consequences do not occur at all. The last point seems to be a central element when planning reforms. The example concerning food, where knowledge of potential consequences is left to the "warm hearts" of the staff to handle, illustrates that this is at least an element that is more or less taken for granted.

However, it could also be argued that reforms based on inadequate knowledge and wrong predictions of actions are not rare. The policy reforms are often chosen because they fall into a pattern of how problems are normally solved (*fixed in the mechanism of habit*), and immediate interests often override long-term interests. One reason for this may be that values leave those who develop policies blind to other alternatives. For instance, this could correspond to political/ideological demarcations, where targeted versus universal policies are valued differently in different political parties. As such, policy reforms are formed in a distinct political landscape. In Norway, as SFOs are left to the control of municipalities, this opens a multitude of idiosyncratic solutions in different municipalities.

Although we lack direct data on the SFO staff's considerations and judgements when dealing with challenging situations, it seems likely that they sometimes choose the easy way out by adhering to the demands of the policy reforms (sending children outside) rather than choosing a line of inclusion by addressing the system instead. One way to explain this could be that they prioritise immediate interests over long-term interests – it is easier to comply with the rules and quickly solve the situation than start a longer process of opposition. However, it may also be that their actions are formed by inadequate knowledge – they are not tuned in to the consequences in terms of social exclusion resulting from their actions. In this light, professionalisation through a systematic pursuit of epistemic and ethical reflections and competence will enable the staff in general to make better judgements in difficult situations.

## Conclusion

In this paper, we have discussed and shown how social inequality in SFOs may occur as consequences of social policies that were originally intended to reduce social inequality. Relating back to the international research literature, it has pointed out that inequality in extended education is a persistent phenomenon, despite policy efforts aiming to reduce inequality. Entrich (2021) emphasises the need for new explanations concerning the relation between extended education and inequality. We would argue that a viable way forward to clarify this matter is to conduct detailed studies of the mechanisms playing out in daily life in different forms and types of extended education. Much of the research on inequality in extended education is focused on different forms of shadow education from an outcome and participation perspective (Bae & Stecher, 2019) The overall mechanism in play is in most cases restricted to the question of access and focused on outcomes. However, our findings highlight the need for research focusing on the *nexus* of professionalism, participation and outcomes, as well as the need to study this in various forms of extended education provisions.

Inequality in education, including extended education, is not static but created and maintained through individual social actions within organisational–political boundaries, with all their intended and unintended social consequences. Hopefully, this paper contributes to a more informed understanding of how social inequality is maintained but may be remedied. In this study, we have illustrated examples of exclusion mechanisms, but as mentioned in the Methods section, there could very well be other mechanisms in operation. We also need more knowledge on the number of policies to which these mechanisms apply, and how many are affected. More extensive research is needed on other possible exclusion mechanisms, as well as their extent on a national scale.

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# When one Wants More than the Other: Multi-Professional Cooperation between Staff in Extended Education and Teachers

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**Abstract:** In 2021 the Swiss Teachers' Association (LCH) demanded that extended education offerings (EEO) should be the responsibility of schools and not outsourced, which in turn also implies a new cooperation partner for the schools. Till today not much is known about this cooperation. This study investigates this cooperation from the perspective of the cooperation partners – the teachers (N=233), school leaders (N=64), staff (N=349) and leaders (N=67) of the EEO by means of a quantitative survey in a pioneering canton in Switzerland. The findings show that cooperation is rated as “good”—but for different reasons—by the cooperation partners and that cooperation is linked to job satisfaction.

**Keywords:** cooperation, teacher, staff of extended education offerings, job satisfaction

## Introduction

For some years now extended education has been expanding in Switzerland. This has been triggered by societal developments such as demographic change, changes in the labour market and family structures as well as the sobering PISA results (Schuepbach et al., 2017; Schuepbach, 2018a). The expansion of extended education is not a unique feature of the Swiss education system or of other European countries such as, for example, Germany (Kunze & Reh, 2020; Mattes & Reh, 2020) or Sweden (Klerfelt & Stecher, 2018). In fact, it is flourishing all over the world (Bae, 2018). Expectations associated with this expansion are high, ranging from improved equity, inclusion and educational outcomes to a better work-life balance (Herzog, 2009). However, studies show that extended education in its current form does not always have the expected effect (Sauerwein et al., 2019; Schuepbach et al., 2012) and that the effects that do occur depend on its quality and its structure (e.g. its linkage to the school) (Zuechner & Fischer, 2014). If the EEO is more closely linked to the school a higher degree of cooperation and participation occurs (Forrer Kasteel & Schuler, 2010) and the EEO can contribute even more to equal opportunities, as more time is available, to support (dis-advantaged) children in the integration and educational development. EEO represents a different learning arrangement and allows children to be perceived differently than in school, thus enabling a more “holistic perception” of the child (Lago & Elvstrand, 2019; Näpfl & Strittmatter, 2021).

In Switzerland the cantons and municipalities are responsible for implementing EEO, and therefore a multitude of structurally different offerings can be identified, the different emphases of which are also expressed in the various terms used (Schuepbach, 2018b). We will follow the proposition of Schuepbach et al. (2017, p. 58) and will consequently use the term “extended education offerings”. The Swiss Teachers' Association describes the advancement



and expansion of EEO as one of the most significant current developments in the Swiss education system alongside the introduction of inclusive education and digital transformation (LCH, 2021). The LCH demands that EEO should be the responsibility of schools in terms of both content and organization and that together they should form a “school living space”. If the EEO are organized by others than the school the quality of EEO can’t be (equally) guaranteed and a systematic coupling of the two systems isn’t possible (LCH, 2021) which are, as mentioned before, both key conditions for the EEO’s effect (Chiapparini et al., 2018; LCH, 2021).

With the increasing importance of learning in extracurricular and out-of-school educational contexts (Kielblock, et al., 2020), multi-professional cooperation is becoming crucial (Olk et al., 2011) and an essential requirement for successful school development, especially in the implementation of all-day schools (Jutzi et al., 2016; Jutzi & Woodland, 2019; Maag Merki, 2015) and in the discourse on school quality (Fend, 2006; Speck et al., 2011). Even though regular teaching and EEO are usually considered as two distinctive organisations, EEO often serve as a bridge between home and school for children and their parents, which is another reason why cooperation between the two organisations is essential.

Findings on teacher cooperation indicate that teachers who do cooperate are less stressed and report higher job satisfaction, as cooperation is seen as a reflection of the social climate in school (Olsen & Huang, 2019; Toropova et al., 2021). Notwithstanding the higher levels of difficulty in multi-professional collaboration, Valentin, Fischer, and Kuhn (2019) demonstrate that aspiring professionals can be taught to understand collaboration as a form of professional and emotional support and to recognize the benefits of collaboration for improving school and classroom practice.

To date there has been little research on multi-professional cooperation between teachers and staff of EEO in Switzerland and there is a particular need for further research on opportunities for multi-professional cooperation (Schuler et al., 2019, p. 94; Boehm-Kaspar et al., 2016). Initial findings suggest that a lack of understanding of the other profession is an impeding factor for symmetrical professional collaboration in Switzerland (Schuler Braunschweig et al., 2019).

This study investigates multi-professional cooperation between teachers at primary schools and the staff engaged in EEO in a pioneering canton in Switzerland. Results from teacher cooperation shows that cooperation is linked to job satisfaction. We would like to find out whether this effect can also be found in multi-professional cooperation settings. Higher job satisfaction and the accompanying lower turnover rate would lead to lasting relationships between children and the staff of EEO, which also has an influence on the well-being of the children (Bloechliger & Bauer, 2016). So, this study examines the relationship between multi-professional cooperation and job satisfaction.

## Context of the Study and the Situation in Switzerland

The education system in Switzerland is federally governed, and the 26 cantons are responsible for the schools. So, not surprisingly, there are no national guidelines on the organization of EEO. There is only an obligation that all cantons provide “a demand-oriented offer for the care



of pupils outside regular school time” (EDK, 2007, § 11, sect. 2). Some cantons, namely, those pioneering cantons in extended education, regulate the EEO in their laws governing cantonal public schools (Schuepbach & von Allmen, 2013, p. 19). Other cantons regulate extended education offerings in their cantonal social services laws. The state of EEO in Switzerland is therefore heterogeneous: they can be compulsory, meaning that all pupils attend certain EEO time slots in addition to regular hours of school instruction, or they can be non-compulsory, meaning that parents can choose from different modules. Another distinguishing feature is whether the school itself or other providers are responsible for the organisation of the EEO (BFS, 2020). This has an impact on the location of EEO (Schuepbach, 2014) and on the cooperation between schools and EEO. Thus, the degree of cooperation between schools and EEO differs from canton to canton. Some are already close to fulfilling the demands made by the LCH whereas in other cantons, no fields of cooperation have been regulated.

The canton studied is one of the pioneering cantons in Switzerland in the field of EEO. The focus of the EEO is on social skills and is leisure-oriented, but homework support is also becoming increasingly important. Opportunities for cooperation arise especially in homework support, but also in jointly planned and implemented projects. Parents can choose different time slots (modules) for their children to attend, which means it is not compulsory even if at least four fixed modules must be chosen for one year. In this canton the school comprises EEO and regular classroom teaching. Therefore, the concept of “school” is expanded from a focus exclusively on teaching to include EEO. As part of the school, the EEO are also the responsibility of the school principal but have their own EEO leader. A hierarchical structure is therefore created linking the EEO and the teaching domain. Cooperation between the two domains and its implementation must be laid down in the guidelines of the school. So even if it is a non-compulsory offering – our data stem from a canton which regulates cooperation between the teaching domain and EEO – it already fulfils the demands made by the LCH (2021).

## Review of Literature

We will first take a brief look at the definitions of collaboration and cooperation. Then we will review findings on cooperation in school and finally look at the cooperation between EEO and teachers.

### Cooperation and Collaboration – a brief Look at Definitions

Roschelle and Teasley (1995, p. 70) describe cooperative work as a task that is accomplished by dividing it among participants, where “each person is responsible for a portion of the problem solving,” and they see collaborative work as “the mutual engagement of participants in a coordinated effort to solve the problem together”. In their widely used cooperation model Graesel et al. (2006) distinguish between three levels of cooperation. The first level, *exchange*, means that information and materials are exchanged. The second level, *division of labour*, implies a need to coordinate goals and responsibilities in completing the common task. The third level of cooperation is *co-construction* where the cooperation partners profitably com-

bine their knowledge and skills (Graesel, et al., 2006). According to Spiess (2018), successful cooperation requires that the cooperation partners agree on goals, exchange information and support each other and can thus develop mutual *trust* while maintaining a certain degree of autonomy. On examining these different definitions, *collaboration* seems to be what Spiess (2018) calls a successful cooperation and what, in the model of Graesel et al. (2006) is called *co-construction*. We further use the term cooperation as it fits for the different forms and intensity of collaborative working.

## Cooperation in Schools and its Effects

Conditions for successful cooperation as well as the expected effects for teacher and multi-professional cooperation are similar, but differences can be found: the cooperation partners in multi-professional cooperation differ in profession and thus in terms of their goals and roles. Differences in training standards, socialization and salaries are additional challenges that further influence the success of multi-professional cooperation. Therefore, crucial conditions for successful multi-professional cooperation are: clarity of goals, roles and tasks as well as individual attitudes towards and perceptions of cooperation (Luetje-Klose & Urban, 2014; Wichmann, 2014).

## Cooperation between School and EEO

In Germany, where more and more all-day schools are being established, the degree of cooperation between schools and EEOs is generally low and usually takes the form of exchanges rather than collaboration (Boehm-Kasper et al., 2016; Fussangel & Graesel, 2014). Similarities are found for Sweden and Switzerland, where it is reported that there is a lack of knowledge of the other profession and the cooperation was generally “doing something before or after the other” (Schuler et al., 2019, p. 92).

It is evident that EEO and regular teaching are viewed as autonomous divisions: one is responsible for teaching and the EEO for organized free time. The cooperation partners differ in how they understand educational objectives and the tasks of EEO (Boehm-Kasper et al., 2016). EEO staff should be accorded greater recognition since they have the potential to extend learning through employing different approaches without undermining the role of the teachers (Gaiser et al., 2016).

EEO staff have a greater desire to cooperate than teachers, who often pragmatically state that they simply do not have time to collaborate (Arnold, 2009; Holtappels et al., 2008; Speck et al., 2011) and that this cooperation does not directly affect their practice (Niehoff et al., 2014). Specific interventions – for example, in teacher education – are needed to change these attitudes (Valentin et al., 2019). To date, the research is not very clear on whether collaboration has an effect and in which direction this effect goes. Positive (rewards) and negative effects (costs) are discussed. According to the *social exchange theory* the explanation of behavior in social relationships is based on rewards and costs that arise in the interaction of two or more interactants. Following this cooperation must be for both rewarding. For the teachers the cooperation means a reduction in workload, as they can delegate some non-instructional tasks to the non-teaching staff – as they see the EEO as a “service” (Boehm-Kasper et al., 2016). For

the EEO, a closer connection to the school (Dahl & Karlsudd, 2015, p. 23) leads to a clearer professional identity, higher professional status as they share the curriculum (ibid., p. 32) and strengthen their understanding of their profession (Jutzi et al., 2016). Cooperation also comes at a cost, as time slots must be found and roles, functions and tasks negotiated. Insufficient knowledge of each other's field of work and asymmetrical collaboration are two key obstacles to cooperation, reported in this field (Boehm-Kasper et al., 2016; Bueckel et al., 2014; Chiapparini, 2017; Chiapparini et al., 2018, Schuler et al., 2019). Cooperation needs trust as there is uncertainty regarding the intentions, competencies work quality and reliability of the partner, especially at the beginning of the cooperation. Structural problems and asymmetrical cooperation make it difficult to build trust between the cooperation partners (Fabel-Lamla, 2012).

## Research Questions

In the context of this study multi-professional cooperation is considered from the perspective of the cooperation partners involved and the following questions will be answered:

- (1) How do the cooperation partners perceive their cooperation and task performance of EEO as well as their job satisfaction?
- (2) What is the task of EEO and what do the EEO staff see as their responsibilities?

EEO fulfil different tasks with differing orientations. We assume that EEO staff see academically oriented tasks as less their responsibility than recreation and social competencies-oriented tasks.

- (3) Are task performance, cooperation and job satisfaction linked among EEO staff and among teachers?

Spieß (2018) places emphasis on the different tasks of the cooperation partners and that there should be clarity about these tasks as a condition for successful cooperation. Thus, it is assumed that there is a positive link between task performance and cooperation among EEO staff. Findings from teacher cooperation shows that cooperation is positively linked to job satisfaction and so we will investigate if this link can also be found for the EEO staff (Olsen & Huang, 2019; Toropova et al., 2021).

For the first and third question, differences in perception of the cooperation partners will be examined as multi-professional cooperation between EEO and teacher is – as reported above – often asymmetrical; revealing this asymmetry is one goal of this paper.

## Methods

The research adopted a quantitative approach to explore cooperation and task performance among EEO staff and the job satisfaction of teachers and EEO staff. To achieve this, a cross-sectional survey was conducted of all EEO staff as well as of all school leaders, and a sample

of teachers at ten primary schools in one Swiss canton. Participants received a link to an online questionnaire via email. Each participant was assigned a personal ID code to pseudo-anonymize the data. Data was collected between 2018 and 2019. For each subject, the affiliation to the domain of EEO and the domain of teaching, respectively, as well as the function (leader vs staff) was recorded. Table 1 shows the sample.

Table 1. Sample

domain	EEO	Teaching
function	leader	staff
N	64	233

42.6% of all the participants are younger than 40 years old. 54.5% of the participants have less than seven years of experience in their role and 39.5% work more than 3.5 days per week.

The instrument used was developed in 2016 by a group of experts consisting of teachers and school leaders, representatives of the Department of Education and the School of Education FHNW and was reviewed and tested by various researchers. The questionnaire was adapted by EEO experts for use with EEO staff members.

*Cooperation* was measured with 5 items on a six-point response scale, with higher values being associated with a higher perceived quality of cooperation (e. g. “The cooperation between the EEO and the other areas of our school works well.”;  $\alpha=.86$ ). *Task performance of the EEO* was measured with 5 items on a six-point response scale, with higher values being associated with a higher perceived quality of *task performance of the EEO* (e. g. “The EEO support living together and a sense of belonging for the whole school.”;  $\alpha=.87$ ). *Job Satisfaction* was measured with 5 items on a six-point response scale, with higher values being associated with a higher job satisfaction (e. g. “I enjoy working at this school.”;  $\alpha=.91$ ). For the three scales the calculated Cronbach Alpha coefficient of reliability is above .80 indicating high reliability.

*Social-competencies oriented task* was measured with 5 items (e. g. improvement of conflict-resolution skills,  $\alpha_{\text{actual}}=.83$ ,  $\alpha_{\text{ideal}}=.76$ ) and is reliable.

*Recreational-oriented task* was measured with 3 items (e. g. free playtime,  $\alpha_{\text{actual}}=.63$ ,  $\alpha_{\text{ideal}}=.62$ ). For this scale the calculated Cronbach Alpha coefficient of reliability is above .60 indicating insufficient reliability. Results regarding this scale are viewed with appropriate caution.

*Homework support* is measured by one item.

For each of the three task areas, the current implementation quality and its significance in the ideal state were assessed. Both aspects were measured using a four-point rating scale, with higher values being associated with higher implementation quality respectively higher importance.

## Results

### Research Question 1: EEO Cooperation, Task Performance and Job Satisfaction

Three, one-way-between-groups analyses of variance with subsequent planned contrasts were conducted among leaders and staff, respectively, to explore the impact of the two different domains in primary schools on EEO cooperation, task performance and job satisfaction. Three contrasts were defined: one to test whether the EEO staff members' assessments are different from those of the teaching staff; and one each to see whether there are differences between EEO and teaching staff on the leadership and staff levels, respectively. The homogeneity-of-variances requirement was checked and if violated, the more robust Welch F-test was used. The means and standard deviations are presented in Table 2.

Table 2. Descriptive statistics

	EEO		Teaching			
	staff		directors		staff	
Scale	M	SD	M	SD	M	SD
Cooperation	4.31	0.91	4.25	0.70	5.06	0.82
Task Performance EEO	5.13	0.71	5.06	0.60	5.29	0.79
Job satisfaction	5.12	0.88	5.04	0.74	5.05	0.94

There is a statistically significant difference for cooperation (*Welch's F*(3, 169.662)=38.29,  $p<.001$ ). Planned contrasts indicate that the mean score for cooperation is significantly lower for the domain EEO compared to the teaching domain ( $t(215.014)=9.15$ ,  $p<.001$ ,  $d=1.71$ , large effect) and that this finding is present on the leadership level ( $t(116.71)=5.04$ ,  $p<.001$ ,  $d=0.80$ , large effect) as well as on the staff level ( $t(405.896)=9.23$ ,  $p<.001$ ,  $d=0.91$ , large effect).

Furthermore, there is a statistically significant difference for EEO task performance (*Welch's F*(3, 177.214)=.04,  $p=.031$ ). Planned contrasts indicate that the mean score for EEO task performance is significantly lower for the EEO domain compared to the teaching domain ( $t(479.406)=2.32$ ,  $p=.02$ ,  $d=0.22$ , small effect) and that this finding is present on the staff level ( $t(122.643)=3.18$ ,  $p=.002$ ,  $d=0.47$ , small to medium effect). However, it is noticeable that there are no significant differences in the assessment at the leadership level ( $t(116.867)=1.71$ ,  $p=.09$ ,  $d=0.27$ , small effect).

Finally, there is a statistically significant difference for job satisfaction (*Welch's F*(3, 182.158)=5.60,  $p=.001$ , small effect). Planned contrasts indicate that the mean score for job satisfaction is significantly lower for the EEO domain compared to the teaching domain ( $t(223.578)=2.22$ ,  $p=.027$ ,  $d=0.38$ , small effect) and that this finding is present on the leadership level ( $t(122.643)=3.18$ ,  $p=.002$ ,  $d=0.47$ , small effect). However, it is noticeable that there are no significant differences in the assessment at the staff level ( $t(457.314)=-0.94$ ,  $p=.348$ ,  $d=-0.09$ , negligible effect).

### Research Question 2: Tasks of EEO

Table 3 shows that for the three different tasks the difference between the actual state and the ideal is significant. Actual state refers to the degree to which the EEO are currently fulfilling the given tasks in their job. Ideal refers to the degree to which they would like to fulfil this task.

Table 3. Tasks – Actual State and Ideal: Paired Sample Statistics

	Actual State			Ideal		
	N	M	SD	N	Mean	SD
social competencies oriented task	246	3.26	0.42	247	3.76	0.31
recreational oriented task	246	3.37	0.48	247	3.68	0.37
Homework Support	246	3.28	0.68	245	3.11	0.76

The EEO staff want significantly more social-competencies oriented and recreational-oriented tasks as well as significantly less responsibility regarding homework support than they currently have.

### Research Question 3: Correlation

The Pearson Product-Moment Correlations are presented in Table 4. It was found that the correlation between cooperation and task performance is significantly lower for EEO staff than for teachers ( $z=-6.26$ ,  $p<.001$ ), while the correlation between cooperation and job satisfaction is significantly higher for EEO staff ( $z=3.40$ ,  $p<.001$ ).

Table 4. Pearson Product-Moment Correlations between Cooperation and Task Accomplishment on the part of EEO as well as Job Satisfaction

		Task Accomplishment on the part of EEO	Job Satisfaction
Cooperation	Total	.60***	.42***
	N=512		
	EEO	.43***	.57***
	N= 243		
	Teaching staff	.77***	.33***
	N=274		

Note. \*\*\* $p<.001$  (two-tailed)

## Discussion

This paper is focused on the multi-professional cooperation between the domains of teaching and EEO. On the one hand, a comparison of the subjective quality of cooperation, task performance and of job satisfaction was made, at both management and staff levels, between the domains of teaching and EEO. In addition, the perspective of the EEO staff regarding their individual areas of responsibility was examined more closely. Finally, the correlates of the quality of cooperation were investigated.

The results show that the cooperation between the domains of teaching and EEO is rated generally as good but significantly worse by the EEO than by teachers and school leaders. The reasons for this different view on cooperation may lie in the structural setup. The school leader is the EEO leader's organizational superior, which represents a hierarchical gradient that is also transferred to the cooperation between the staff (Bucher & Näpfl, 2019). Supporting this thesis, empirical findings showed that EEO staff report a lack of appreciation for their work and that their tasks are hierarchically classified (Boehm-Kasper et al., 2016; Schuler et al., 2019). Furthermore, there are different degrees of willingness to cooperate (Bloechliger & Bauer, 2016): the EEO staff are more willing than the teaching staff to cooperate, which is also a possible explanation for the difference in the rating of the quality of cooperation. Teachers may be less demanding as far as cooperation is concerned and therefore more easily satisfied.

The task performance of EEO staff is rated significantly worse by the EEO staff themselves than by the teachers. It is noticeable that there are no significant differences in this assessment at the leadership level, which could be explained by the fact that school leaders have more cooperation channels than the staff.

The results show that job satisfaction is rated significantly worse by the EEO leader's than by the school leaders. As cooperation is one of the factors most closely related to job satisfaction (Toropova et al., 2021, p.71), this result may also be due to the structural design of the cooperation, which is accompanied by varying degrees of autonomy. Since the school leaders is at the same time cooperation partner and supervisor of the EEO leader's, the latter is not on an equal footing with the school leaders.

Teachers view the quality of cooperation and task performance by EEO staff as more closely related than do EEO staff. The subjective quality of cooperation and task performance by the EEO staff is more closely related for teachers than for the EEO staff. This result might be explained by the fact that the tasks of the EEO are perceived differently. The EEO currently carry out more academically-oriented tasks and fewer recreational and social competencies-oriented tasks than they would ideally like to. But it is the academically-oriented tasks that lead to a direct and immediately apparent workload relief for the teaching staff – which can be seen as a benefit of cooperation. Currently, EEO are performing tasks that they would see as less within their purview, but which have direct positive effects for teachers. That is in line with Boehm-Kasper et al. (2016) who found that teachers but not the EEO perceived cooperation as a potential workload relief. There is already a close link between the teaching staff and EEO in the canton, but there is also potential for improvement in terms of clarifying tasks and defining areas of cooperation so that the cooperation is beneficial for all. Here, there are currently still diverging perceptions of the roles of the EEOs and the teachers, which currently affect subjective perceptions of cooperation, especially by the EEOs. This is of particular importance because the relationship between cooperation and job satisfaction is stronger



among EEO staff than for teachers. This may be an indicator of the greater importance that EEO staff place on cooperation. Also incorporating other research findings (Niehoff et al., 2014), we suggest that EEO staff want to work more closely with teachers, while teachers are more cautious about the outcome of working with EEO staff. According to the social exchange theory the EEO staff sees more benefits in the cooperation – as their work would be more valued. In comparison, teachers fear that cooperation costs more time than it brings benefits (Niehoff, et al., 2014) and “expect the other professionals to adjust and to fit into the scholarly system” (Schuler et al., 2019, p. 93). Here, specific interventions seem to be indicated to bring about necessary changes in attitudes (Valentin et al., 2019) and to realize a winning multi-professional cooperation, as it is already described hypothetically (Jutzi et al., 2016; Jutzi & Woodland, 2019; Gaiser et al., 2016; Maag Merki, 2015; Näpfli & Strittmatter, 2021; Schuler et al., 2019), also in practice.

### Limitations and Future Research

It is important that the limitations of the current study are understood. The data stems from a canton that offers a specific form of EEO. The question that arises is to what extent the form of EEO influences the results and thus to what extent the results can be transferred to other forms of all-day schooling. The data was collected in the years 2018 and 2019 and so before COVID-19, which changed a lot for the work of EEO (e.g. group compositions or active engagement). This could affect the perception of extended education.

All data were collected via self-reports which can lead to higher correlations because of the common method variance – so future research should examine the reported links using a multi-method approach.

Regarding the cooperation between the EEO and the teaching domain, we could formulate several assumptions depending on the form of EEO: where the school is the provider of the EEO, the implementation of multi-professional cooperation should be easier to organize and thus more extensive. Further, it can be assumed that where EEO are compulsory, more areas of cooperation can arise since tasks can be more easily transferred from the school to EEO than if they are non-compulsory. Further research in this field should look at the different forms of EEO.

This paper is a first attempt to capture the individual attitudes toward the multi-professional cooperation between teachers and the EEO staff. But the EEO staff belong to a certain school. This may result in EEO staff from the same school being more similar than EEO staff from different schools (nested data). Future research should also examine the schools influences by conducting a multi-level approach.

### Conclusions

A perceived higher quality of cooperation is linked with a higher level of job satisfaction for both cooperation partners: benefits seem to outweigh the costs associated with increased cooperation. Possible benefits to teachers may include a reduction in workload that comes from cooperating with EEO when they can transfer some of the work to them. The EEO staff

may feel more appreciated for their work. Cooperation between EEO and teaching staff seems to be important as satisfied staff have a higher commitment to remain in post, from which the children also benefit (Bloechliger & Bauer, 2016). For a successful cooperation it is essential that the tasks and goals are clear for the cooperation partners which till now is not so as EEO staff is feeling misunderstood as teachers expect them to adjust and fit into the school system (Schuler et al., 2019, p. 93).

Considering the increasing number of children in EEO and the constantly growing demands on teachers, the cooperation should be explored further. If the two domains are connected more closely, there will also be new opportunities for EEO staff to take on new tasks. But the defining of new tasks or the transfer of tasks from teachers to EEO is problematic as long as EEO are non-compulsory.

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# Meeting the Needs of Young People During the COVID-19 Pandemic Through Program Adaptations in Creative Youth Development Programs

Denise Montgomery

**Abstract:** Creative Youth Development (CYD) is a holistic approach to engaging young people through the arts and creativity to support them in thriving in all aspects of their lives. Young people consistently rank culminating events – performances, exhibitions, youth summits, screenings of their films – as a powerful motivator and key aspect of their involvement in creative youth development programs.

This article features insights from a qualitative research study in the United States that explored how CYD programs adapted culminating events to the largely virtual program environments of 2020. Findings include challenges organizations faced in 2020; strategies for adapting culminating events during the COVID-19 pandemic, ranging from centering core principles of youth leadership and prioritizing connection with young people to creative strategies for engaging youth, including positioning new event formats as opportunities for youth to co-create entirely new experiences and events; and implications for the youth development field.

**Keywords:** adapt, arts, culminating, holistic, pandemic

## Introduction

Creative Youth Development (CYD) is a holistic approach to engaging young people, typically ranging from ages 8 through 18 and up to age 24, through the arts and creativity to support them in thriving in all aspects of their lives. Creative youth development is distinct from arts exposure programs and traditional conservatory programs in a number of ways, including: the emphasis on youth leadership and amplification of youth voice; immersion in a creative community with traditions and rituals that support a sense of belonging; the deep relationships with caring adults that includes reciprocal learning; hands-on skill building and original creative expression; provision of wraparound services such as mental health counseling that are commonly part of CYD; and in dosage, with CYD programs often involving 6 or more hours per week of involvement by young people. Many CYD programs in the United States enjoy longevity of participation among youth, regularly spanning three to seven years of active participation. Creativity and belonging are central components of creative youth development, and participation in CYD programs is transformative in the lives of young people.

Some exemplary creative youth development programming in the United States includes programs at these organizations: IHood Media in Pittsburgh, PA; A Reason to Survive (ARTS) in National City, California; Artists for Humanity in Boston, Massachusetts; David's



Harp Foundation, in San Diego, California; Destiny Arts Center in Oakland, California; Mosaic Youth Theatre of Detroit in Detroit, Michigan; Spy Hop in Salt Lake City, Utah; and VOX ATL in Atlanta, Georgia.

In 2020, the COVID-19 pandemic forced CYD programs to rework their program models, and organizations that maintained programming largely did so in virtual settings. A key consideration for many organizations in adapting CYD programming was that young people consistently rank culminating events – performances, exhibitions, youth summits, screenings of their films – as a powerful motivator and key aspect of their involvement in creative youth development programs (Montgomery et al., 2013). The essence of the challenge was how to adapt CYD programs' culminating events to online programming while maintaining what is powerful and engaging about these events: the excitement of reaching a focal point in the creative process; the thrill of performing live or of showing creative work at a public event; the gratification of audience connection; and the sense of shared endeavor in working toward a common goal with peers.

Through their innovative approaches to adapting programming to the realities of the COVID-19 pandemic, CYD programs demonstrated the creativity that is in their DNA. These programs also demonstrated steadfast commitment to maintaining connection with young people at a time when connection was tenuous and constrained in many realms of young people's lives.

Even prior to the COVID-19 global pandemic, students in the United States experienced among the highest rates of loneliness in the country, with 47.9% of students reporting loneliness (*U.S. Loneliness Index*, 2018). Globally, anxiety and depressive symptoms among young people doubled during the pandemic, as 20% of youth experienced anxiety symptoms and 25% of youth experienced depressive symptoms (Racine et al., 2021).

CYD's holistic approach is particularly needed and powerful at this moment with the ongoing, as of this writing, COVID-19 global pandemic and with the aftereffects of a pandemic characterized by heightened social isolation and incidence of mental health diagnoses and challenges among youth (Murthy et al., 2022). Creative youth development programs foster belonging and connection among youth participants and with artist mentors as central components of CYD. Belonging is an essential component of mental health (Allen, K. et al., 2022). CYD programs' prioritization of and approaches to supporting connection and belonging among young people contribute to youth mental health and well-being, making the strategies identified through this research useful in ongoing efforts to support youth mental health and well-being through creative youth development programs.

## Methodology

This applied research project sought to understand the challenges CYD programs faced during the COVID-19 pandemic and to identify strategies for CYD programs and other youth programs with regard to adapting events to virtual environments. The research was designed in consultation with CYD practitioners, funders, and others involved in the field of creative youth development.



The methodology included an online survey in combination with in-depth interviews, participation in group discussions among CYD practitioners, and one-on-one conversations with CYD stakeholders. 125 respondents from throughout the United States, including 21 states and the District of Columbia, completed the survey. The organizations who participated in the survey represent a range of staff sizes; budgets; and stages in their evolution as organizations; and artistic disciplines, including music, visual art, theatre, dance, creative writing, and media arts. Individuals completing the survey were CYD practitioners who were directly involved with adapting programming and events in CYD programs during the Spring and Summer of 2020.

Results were analyzed via statistical analysis for online survey questions involving numerical responses. For open-ended questions with narrative responses, the author used textual analysis to identify themes and to tabulate responses to understand the prevalence of responses and to identify examples of effective practice. The in-depth interviews provided further examples of strategies and provided context and supported clarity and nuance regarding the unique challenges and experiences of CYD practitioners and youth program participants during this unprecedented time. The in-depth interviews and dialogue with colleagues also provided the opportunity to probe themes and findings from the online survey responses.

The author conducted three in-depth interviews with four individuals, each of whom are full-time CYD professionals who were directly involved in adapting programming and culminating events during Spring and Summer 2020 in the height of the COVID-19 pandemic. The interviewees included: Paula Conrad, Co-Executive Director and Stan Strickland, Co-Executive Director, President and CEO, Express Yourself of Beverly, Massachusetts (joint interview); Cat Corral, Co-Founder & Artistic/Executive Director, transcenDANCE, Lemon Grove, California; and Brandon Steppe, Founder and Executive Director, David's Harp Foundation, San Diego, California.

Additionally, the author had numerous conversations regarding the project, including research design and survey questions, with the following field experts who were in frequent dialogue with CYD practitioners as they were engaged in adapting programming, including culminating events, during Spring and Summer 2020: Arielle Brown, Knowledge and Strategy Associate, The Lewis Prize for Music; Matt D'Arrigo, Co-Founder & Director, The Clare Rose Center for Creative Youth Development; Founder, A Reason to Survive (ARTS), a CYD program in National City, California; Erik Holmgren, Program Manager, Creative Youth Development, Massachusetts Cultural Council; Katie Lorge, Creative Youth Development Programs Manager, Clare Rose Foundation; and Käthe Swaback, Program Officer, Creative Youth Development, Massachusetts Cultural Council.

Further, the author participated in numerous group forums among CYD professionals during the Spring and Summer 2020 that focused on adapting programming, including culminating events. These forums included: San Diego Creative Youth Development Network meetings of CYD professionals based in San Diego, California, and CYD National Community Conversations, online Zoom forums for CYD professionals throughout the United States, hosted by the Massachusetts Cultural Council in 2020 and 2021.

## Findings

### Culminating Events Are a Powerful Motivator and Key Aspect of Youth Engagement

Young people consistently rank culminating events – performances, exhibitions, youth summits, screenings of their films – as a powerful motivator and key aspect of their involvement in creative youth development programs (Montgomery et al., 2013). Survey respondents affirmed the importance of events to their CYD programs and to youth involved in their programs prior to the pandemic. Ninety-one percent (91%) of respondents said that culminating events were extremely important or very important to their organizations.

### Cancellations Were a Reality

Widespread event cancellations occurred during the Spring and Summer of 2020, with fifty-two percent (52%) of the responding organizations reporting that they cancelled events. The decision to cancel events was difficult for many organizations given the disappointment for young people and program staff alike, particularly in the context of the cancellation of so many school and community activities, from socials and proms to field trips, performances, and classroom parties.

### Virtual Events Became the New Normal

The awareness of the importance of events to youth program participants prompted a substantial number of organizations to persevere and find a way to hold their events. Twenty-nine percent (29%) of CYD programs adapted their culminating events and held them in Spring or Summer 2020. Of the events that took place, 87% of events were virtual, 10% were a hybrid format of virtual and in-person, and 3% of events took place in person.

*Figure 1.* Promotion for *This Is Now*, a 2020 art projection series of youth artwork organized by Artists for Humanity of Boston, Massachusetts, United States. Copyright Artists for Humanity



Table 1: Adapting Culminating Events Summary of Select Survey Results

On a scale of 1 to 5, how important have culminating events such as performances, exhibitions, and screenings been to your organization PRIOR to the pandemic? [1 = not important at all, and 5 = extremely important]	1	2	3	4	5	Weighted average
	Not Important at all 0%	A little important 1.61%	Somewhat important 7.26%	Very important 37.1%	Extremely important 54.03%	4.44
	0	2	9	46	67	Total respondents 124
Have you cancelled or postponed your Spring/Summer 2020 culminating event(s)?	Postponed 18.70%	Cancelled 52.03%	Neither - we are holding our events as previously scheduled 29.27%			Total Respondents 123
What are some of the ways you have adapted your event(s)?	23	64	36			Total Respondents 122
		Example response "Although we cancelled in person events, we have held film screenings, music performances, and radio doc listening parties via platforms such as Twitch and Vimeo."				Total Respondents 120
Are your redesigned events INTERACTIVE, and if so, how?		Example response "[Yes.] Youth can invite family and friends to culminating events, which include virtual exhibitions and performances. Youth act as docents in these virtual spaces, to share their creative works and discuss how they participated in curating the virtual gallery."				Total Respondents 122
What are your top three challenges in adapting your culminating event(s)?		Example response "Translating the interactive, relational, networking of our events to online/virtual."				Total Respondents 113
Are you involved in developing or participating in any ALL NEW events/culminating events, such as a citywide, online youth arts festival? If so, please describe the event and/or collaboration.		Example response "Our organization just headlined a drive in cinema style event with Pittsburgh's City Theatre that included live performances from multiple arts organizations in the city."				Total Respondents 113

	1	2	3	4	5	Weighted average
On a scale of 1 to 5, how important have culminating events such as performances, exhibitions, and screenings been to your organization PRIOR to the pandemic? [1 = not important at all, and 5 = extremely important]	Not Important at all 0%	A little important 1.61%	Somewhat important 7.26%	Very important 37.1%	Extremely important 54.03%	Total respondents 124
How are you DOCUMENTING your reimagined culminating events?	Example response "Our culminating event of a poetry reading was documented through a saved video through facebook live and uploaded to youtube."					Total Respondents 117
Have young people been more involved in planning and implementing culminating events?	Yes 39.34%	No 60.66%				Total Respondents 122
Have there been more youth employment opportunities related to adapted events?	Yes 21.31%	No 79.51%				Total Respondents 122
Are community members or others more available to attend and participate?	Yes 57.98%	No 45.38%				Total Respondents 119
What is your BEST ADVICE on how organizations can adapt culminating events in ways that honor young people's work and accomplishments?	Example response "try to reimagine events, not just put existing events online, and work with young people to do that reimagining"					Total Respondents 106
						Total survey respondents 125

## Programs Demonstrated Imagination and Creative Courage in Redesigning Events

Organizations reimagined and redesigned events. Examples of event adaptations include:

- Creating a film or video in lieu of a live performance;
- Shifting to an online platform and converting what had been a mega event into multiple, shorter events featuring fewer young people per event;
- Mounting outdoor exhibitions of young people’s work viewable from motor vehicles with organized viewing times so that young artists could view the car parade of supporters from a distance;
- Socially-distanced teen summits that connected youth from across organizations and geographies; and
- A nighttime, outdoor, large-scale projection series of featuring young people’s visual art.

CYD programs who held events tapped into their creative courage as artists and program staff to attempt new approaches and formats and shared that, in doing so, they felt they were modeling healthy risk-taking and flexibility for and with the young people in their programs (P. Conrad & S. Strickland of Express Yourself, personal communication, June 20, 2020). This quote from a survey respondent epitomizes the healthy, self-compassionate orientation that some CYD programs took with regard to adapting culminating events: “...we were, frankly, flying by the seat of our pants, and overall proud of what we accomplished.”

## Challenges of Maintaining Programming and Adapting Culminating Events

The top three challenges that creative youth development organizations reported experiencing in adapting events during the pandemic included:

1. Engagement and Motivation Among Youth Program Participants
2. Technology and Connectivity
3. Staff Capacity, Aptitudes, and Stress

Additional challenges that CYD programs highlighted facing during the pandemic included family engagement, communication, loss of venues, and revenue loss.

With schools shifting to online platforms in Spring 2020, the prospect of opting-in for virtual CYD programs did not appeal to many students. Therefore, maintaining programming was the foremost challenge for CYD programs during the pandemic and was requisite before programs could consider figuring out how to adapt their culminating events.

In the Spring of 2020 and into the Summer, CYD programs worked hard to maintain lines of communication and modes of connection with youth program participants, scrambling to deliver tablets, adopting platforms and applications that young people could use on their smartphones, and telephoning and texting youth and their families. Stephen Aguilar of University of Southern California documented the digital divide with regard to access to devices such as laptops and tablets as well as Internet connectivity during the pandemic, publishing “Guidelines and Tools for Promoting Digital Equity” in Spring 2020 (Aguilar, 2020). Children and families had a heightened need for access to technology and the Internet

during the pandemic, and numerous CYD programs helped as they prioritized this need among youth in their programs.

CYD program staff considered the full context of the pandemic, its impact on young people, and of the necessary shifts in expectations with regard to programming. One respondent commented “For youth arts performances, it [what has driven our decisions] has been recognizing all of the challenges that youth are currently experiencing related to health concerns, financial concerns, school stress, and more, and then making sure the virtual arts activities or events that we are hosting are appropriate in consideration of all of those factors.”

Not only were programs weighing what was possible with regard to youth engagement in planning and implementing adapted culminating events, they also considered the demands on staff. The myriad unanticipated impacts on organizations and on staff members’ personal lives proved stressful. While survey respondents expressed resolve in maintaining contact with youth, they also reflected how learning and migrating programming to new technology platforms was a key source of stress.

Additionally, some programs experienced lack of interest from youth regarding the prospect of online culminating events. One survey respondent shared, “I imagine this will shift with time, but our youth were more or less deflated by the idea of virtual culminating events and there was a lot of disappointment and disengagement.” Another CYD professional, described their organization’s top challenge regarding adapting events during the pandemic, “Creating the energy and feedback that a live audience gives.”

However, many organizations viewed the culminating events as a source of youth engagement to be leveraged. Further, the link between constraints and creativity is widely documented across fields and professions, including among artists, architects, scientists, and engineers. CYD programs innovated in the face of pandemic constraints, particularly regarding being in the same physical space. As educator Brandon Rodriguez asserted, “Constraints aren’t the boundary of creativity, but the foundation of it” (Rodriguez & Farkas Gelley, 2017). Specific strategies and examples of CYD programs’ creative adaptations are discussed further in this paper.

## Opportunities Sprung from Challenges

While organizations faced substantial challenges during Spring and Summer 2020, opportunities emerged with regard to events during the pandemic, including broader community attendance, expanded youth leadership, and youth employment opportunities. Specifically, fifty-eight percent (58%) of organizations reported that community members were more available to attend their events. Community members who attended events included elected officials, creative industry professionals, funders, program alumni, family, and friends of youth, program staff, and board members, all of which was engaging for young people. Further, with features such as the “chat” function on Zoom, attendees were able to give direct, real-time encouragement and support to youth with an immediacy that helped to mitigate the disappointment of not being in the same physical space with the audience. CYD programs forged connections, built awareness, and grew their networks as community members logged on to virtual events.

As shared previously, survey respondents listed family engagement as a challenge during the height of the pandemic. Some families were less available to attend online events as work, school, and childcare all changed, increasing demands on families. At the same time, the convenience of being able to attend an event without having to drive across town resulted in some young people experiencing an increase in their family members' attendance at culminating events. In some cases, family members who live in different states or countries attended events for the first time.

Additionally, and in line with CYD principles and overall youth development principles for high engagement, thirty-nine percent (39%) of responding CYD programs reported increases in youth leading events during the pandemic. Given that youth voice is a core value of creative youth development programs (Creative Youth Development National Partnership Website, n.d.; Montgomery, et al., 2013), it is striking to see such a substantial increase in this aspect of CYD programs because programs would have been starting from a baseline of strong youth leadership. Youth helped to reimagine events, provided critical support with technology, supported their peers, and played key roles in producing culminating events during the pandemic as well as performing and sharing their creative work.

Further, CYD organizations also reported a 21% increase in youth employment opportunities related to culminating events. In these paid roles, young people helped bring needed operating capacity, program support, and technology skills to their organizations. CYD programs were also keenly aware of pandemic-related job losses and the inability of people ill with COVID-19 to work, all of which most severely affected communities of color within the United States (Maye et al., 2020), and sought to be an additional source of family income or source of income for youth.

## Trends in CYD Programs During the Spring and Summer of 2020

A number of trends in CYD programs in Spring and Summer 2020 emerged from the research. A key trend was organizations taking unprecedented steps to maintain connection with young people. Program staff knew that nothing else would be possible if they were not able to be in contact with youth or if youth chose to not be in contact. Programs reallocated funds to purchase devices to provide youth, made widespread shifts to virtual programming, and personally and persistently reached out to youth.

CYD programs prioritized mental health of youth, teaching artists, and staff. Programs sought to continue to provide a psychologically safe and nurturing space, social connection and belonging, and opportunities for creative expression. Organizations with social workers and mental health professionals on staff continued to provide, and in some cases, increased, mental health counseling for youth. Other programs made referrals to mental health services. Programs prioritized self-care and peer support for adult staff.

Another trend was the focus on meeting basic needs. CYD programs listened to youth program participants and their families and addressed the food insecurity that grew during the pandemic, particularly among communities of color (Maye et al., 2020). One CYD leader created a weekly drive-through food distribution program for teens experiencing hunger.



Youth program participants inspired and helped others during the COVID-19 pandemic. Youth exercised their agency and employed their creativity in providing inspiration, helping others meet practical needs, and addressing critical issues such as racial equity and social justice. Young people involved in CYD programs organized food drives, created community murals, and engaged in activism.

*Figure 2.* A young artist celebrates completion of an outdoor mural with a message of encouragement made during the COVID-19 pandemic in a program of ArtReach in San Diego, California, United States. Copyright ArtReach



All-new, citywide events emerged as a pandemic trend in CYD programming. Collaborating across organizations provided new experiences for youth and attendees. One example was the Drive-In Arts Festival at Hazelwood Green, which multiple organizations collaborated on to hold in Pittsburgh, Pennsylvania. These citywide events fostered unity in communities and helped programs reach new audiences.

Some citywide events were virtual while others were outdoors, and creating outdoors was another trend during the pandemic. Youth collaborated on murals and dance videos that were filmed outdoors, sometimes with solo performances that were edited into a unified piece.

The single biggest trend with regard to program formats was the move to virtual programming and events. Organizations employed a range of platforms and applications to support virtual programs and events. Youth media organizations generously gave advice and modeled amplifying youth voice on virtual platforms.

But given the challenges of the pandemic, more was required than migrating to virtual platforms. CYD programs needed to strategize, experiment, and adapt during the pandemic, particularly when proceeding with culminating events. Their successful approaches are discussed below.

## CYD Programs Used 11 Key Strategies to Adapt Culminating Events

Eleven (11) strategies for adapting events emerged from this research. The strategies are organized into three sub-categories: *Guiding Principles*, *Youth Engagement Strategies*, and *Event Structure and Some Conditions for Success*. The 11 strategies include:

### *Guiding Principles*

1. Youth Led, More than Ever;
2. Prioritize Connection;

### *Youth Engagement Strategies*

3. Give Young People the Opportunity to be Part of Creating Something Completely New;
4. Provide One-on-One Support;
5. Leverage the Increased Availability of Community Members to Attend;
6. Work Across Geographies;
7. Make it Interactive;
8. Make it Celebratory, Make it Special;

### *Event Structure and Some Conditions for Success*

9. Hold Shorter Events with Smaller Groups of Young People;
10. Get Help with Technology; and
11. Allow More Time for Planning.

Figure 3: 11 Strategies for Adapting Culminating Events During the COVID-19 Pandemic. Copyright CultureThrive

<b>Guiding Principles</b>	
	1. Youth Led, More than Ever
	2. Prioritize Connection
<b>Youth Engagement Strategies</b>	
	3. Give Young People the Opportunity to be Part of Creating Something Completely New
	4. Provide One-on-One Support
	5. Leverage the Increased Availability of Community Members to Attend
	6. Work Across Geographies
	7. Make it Interactive
	8. Make it Celebratory, Make it Special
<b>Event Structure and Some Conditions for Success</b>	

	9. Hold Shorter Events with Smaller Groups of Young People
	10. Get Help with Technology
	11. Allow More Time for Planning

## Guiding Principles

### Youth Led, More than Ever

While expanded learning and youth development practitioners widely embrace youth voice as a foundational program element and core value, participants in this study reiterated the importance of youth voice during this time of rapid change and global crisis. “Lean into the practice. Nothing for them without them,” implored one respondent. Practitioners emphasized the need to ask and keep asking youth what they want in programming and events given how much everything was shifting and because of the loss of control youth were experiencing in many aspects of their lives. “Be off the charts nimble...Let the young people tell you what they want to do and work with them to make it happen,” advised one practitioner in response to the question regarding top advice during the pandemic. With regard to events, another practitioner shared, “Engaging the young people in the planning stage and in the development of the solution helps to build their confidence and increases their level of participation.” Ensuring that programs and events were youth led was also a strategy for engaging young people, which helped programs to address their top pandemic challenge of youth engagement.

### Prioritize Connection

CYD practitioners who participated in this research prioritized maintaining connection with youth during the pandemic above other programmatic concerns. As such, modified core programming, such as Art 160’s drop-in virtual studio sessions, took priority over public-facing events. Practitioners expressed empathy and awareness for all that youth were coping with during the first six months of the pandemic. One program staff member shared, “... recognize and honor that the world is different right now and that if the work is a little different as a result or if not all youth are able to step up, that is ok. They may be dealing with a lot, and the art can reflect that and provide a release/way of processing what they are dealing with.”

The healing and nurturing aspects of being part of a creative community were important aspects of what CYD programs brought to young people during the pandemic. One survey respondent discussed what his program learned by listening to young people in the early weeks of the pandemic: “We have learned that providing youth space to connect deeper with their artistic passion in a social online setting (opposite of what their distance learning school model is) was more important than a reimagined event for them in this season. These informal listening parties simultaneously honored young people’s work and provided additional opportunities to connect during these challenging times.”

Just as youth voice was imperative, so was youth choice. In contrast to some teachers demanding that students turn on cameras for virtual classes, CYD programs employed an opt-in model with regard to participation and cameras. Programs were flexible, encouraging, compassionate, and nimble. Artist mentors let students know that they were there for the students, including by reaching out to young people directly for one-on-one contact and through social media messaging such as Spy Hop of Salt Lake City Utah’s graphically designed post declaring, “With an uncertain future... We’re Here for Our Youth.”

## Youth Engagement Strategies

### Give Young People the Opportunity to be Part of Creating Something Completely New

One inventive pandemic program strategy traded the inability to hold typical events, such as live performances, for entirely new forms of culminating events. Dancers at transcDANCE, a CYD organization in Lemon Grove, California, were accustomed to staging a live dance performance each June. Executive and artistic director Cat Corral determined that a high-quality film of dancers performing outdoors would be a way to showcase students’ work during the pandemic, so she reallocated funds to contract with a professional filmmaker. Students’ disappointment about the cancelled live performance morphed into excitement about performing during filming and about having their performance-on-film as part of their artist portfolios. When the film was complete, transcDANCE held a virtual release party so that students had a focal point for the film’s release and so the young dancers got to experience feedback from a live, albeit virtual, audience.

High quality films or recordings of performances or exhibitions are an enduring source of pride and enable youth to share their work across virtual platforms. One research participant shared, “Creating a video or documentary style project allows the young people to have something to take away. It also allows them to share their work with people all over the world via email, Facebook, Instagram, Snapchat, Twitter, and YouTube. It’s also a great tool for them to look back on and recognize how they contributed to creating something amazing during a challenging time in the world.”

In the summer of 2020, following the murder of George Floyd in Minneapolis, Minnesota, Detroit Youth Choir (DYC), also in the midwestern United States, collaborated with Imagination Detroit to film Detroit Youth Choir – Glory – We Are One – featuring IndigoYaj and Kid Jay, a powerful live action video filmed primarily on the streets of Detroit. John Legend wrote the song “Glory” for the 2014 film *Selma* about the civil rights movement in the United States during the 1960s. DYC selected the song and altered the lyrics to reflect their modern-day call for racial justice in the wake of ongoing racism and police brutality in the U.S. The students of DYC created a video that, with its closeups of singers expressing deep conviction about the song lyrics, coupled with aerial footage of students marching down Woodward Avenue in Detroit painted with the words “Power to the People” as they sing, was a platform to merge their talents as young singers with their desire for change as activists. The video proved to be a powerful medium for Detroit Youth Choir and is likely something that participants will be proud of for the rest of their lives.

World Café Live and Mighty Writers, both of Philadelphia, Pennsylvania, provided young people with the opportunity to write poetry that was then set to music composed by a professional musician and ultimately performed before a live, virtual audience. The program, “Mighty Songs for the Moment,” proved engaging for youth and audience alike. A World Café staff member shared, “During this [virtual] residency, our teaching artist worked with young poets, turning their poetry into songs. During a digital release party, students spoke about their creative process and performed poetry/songs live. This was our first virtual education event; 40+ members of the community logged in to listen and celebrate young voices.” This strategy of entirely new experiences may be particularly potent for programs working with adolescents, given that older youth are drawn to novel experiences (UCLA Center for Developing Adolescent, n.d.).

### Provide One-on-One Support

At a time when young people had lost so much, some CYD programs recognized that one-on-one attention was something that they could provide that would be something young people could gain. This strategy was most often reported by music organizations. For example, Art of Elan in San Diego, California, is an organization of professional musicians that offers a Young Artists in Harmony youth program with A Reason to Survive (ARTS), a CYD program in nearby National City, California. Art of Elan continued its Young Artists in Harmony residency in Spring 2020 in a virtual format that included weekly, one-on-one sessions with professional Art of Elan musicians/teaching artists.

Programs discussed the importance of providing one-on-one support to connect with young people and to get a sense of their well-being. In some cases, there was also a practical dimension to the one-on-one support, which was to adequately prepare students for virtual, culminating events. A survey respondent advised, “Be sure that students are interacting virtually with teachers/directors/conductors regularly one-on-one...[to] understand the struggles that each young artist is facing.”

### Leverage the Increased Availability of Community Members to Attend

As discussed earlier, virtual platforms and altered schedules opened possibilities for community members such as artists, elected officials, and other civic leaders as well as program alumni to honor and celebrate CYD youth program participants’ creativity and creative endeavors. Some programs tapped into people’s heightened availability to directly involve them in virtual programming. For example, Mosaic Youth Theatre of Detroit included program alumni in its December 2020 virtual Perform-A-Thon. Involving program alumni not only provides inspiring and relatable role models, it also conveys a powerful message of belonging: “Once you are part of our organization, you will always be part of this family.” With increased social isolation among young people during the pandemic, experiences and messages of community and belonging in CYD programs were a form of support. Support flowed in both directions between youth and community members who attended virtual events as many youth performers and artists viewed sharing their art with community members as a way to uplift the community during the pandemic.

## Work Across Geographies

Events and programming that linked participants and attendees who were in different locales and who were from different organizations put a fresh spin on virtual programming. Working across geographies could be exciting and engaging and an antidote to the tedium that was a common experience among youth during the pandemic. In one bi-coastal collaboration, WNYC’s Radio Rookies of New York, New York partnered with YR Media of Oakland, California, to produce “Young America Speaks Up”, which featured content created by young people from throughout the United States.

## Make it Interactive

The National Young Artists Summit in 2020 was a creative youth development multi-day culminating event. During the Summit young creatives from throughout the United States engaged with one another about being young artists, about global and domestic issues, and about the creative youth development field.

In other events and gatherings, youth created together via virtual platforms. One quick-to-pivot CYD organization director shared, “We actually reimagined all of our online time to be 100% interactive as we found that young people would not participate if it was not interactive. One example of this is our Beat making breakouts where young people could interact in Zoom socially or move freely to breakout rooms where our Artist Mentors were producing music live with input from youth. The music was then transferred to youth via a phone app called ‘Bandlab’ where they added their own vocals to the instrumentals.”

Across artforms and genres and event program elements, real-time interactivity among youth was the predominant form of interactivity in virtual, culminating events. Audience members’ primary role was encouragement. That being said, audiences were sometimes invited to participate in the live event as an audience engagement strategy, whether by dancing or singing or responding verbally. A program noted in its survey response, “We also hosted an open mic poetry slam where the audience joined in and performed.”

Audiences also asked questions and provided feedback. A survey respondent wrote, “Students in most cases had opportunity to share work, and receive direct feedback, praise, and advice from mentors, peers, and audience members. In larger events we employed Zoom panel features and offered Q&A opportunities to the audience.”

Some interactivity was prompted, such as by an on-camera host inviting attendees to comment in chat features. One survey response read, “YouTube Premiere allowed us to release the films in a way that people watched them in real time and could comment together.” Interactivity also took the form of structured polls. A CYD program staff member described the role of a poll in their program’s virtual event: “In one instance, a student playwright edited their play to include Zoom as the place for the script, and built into the play an alternate ending where an audience poll affected the ending of the performance.”

## Make it Celebratory, Make it Special

A typical element of culminating events is joy and celebration, so finding ways to make the event adaptation celebratory is important. Express Yourself of Beverly, Massachusetts moved



its large, annual culminating event online in Spring 2020. The organization provided pizza and t-shirts to students and families to enjoy during their livestreamed culminating event.

Another organization with annual traditions for graduating high school seniors figured out how to honor and celebrate these teens with individually-tailored gifts and a way to share in the moment as a community. “We sent our senior gifts to our graduates and had them do an unboxing during a Zoom event and share their personalized awards with everyone. This was in conjunction with screening their work and having Teaching Artists give short speeches,” shared a survey respondent from a CYD program. “The unboxing was probably the highlight of the event.”

## Event Structure and Some Conditions for Success

Some nuts-and-bolts strategies emerged from the research, and respondents were eager to share the lessons from their successes and failures.

### Hold Shorter Events with Smaller Groups of Young People

With school, work, socializing, and many leisure activities such moving entirely or substantially online, *virtual fatigue* became a watchword and a reality. CYD programs that were designing opt-in activities such as virtual events had to confront virtual fatigue of both youth participants and audience members as they adapted culminating events during the height of the pandemic.

A contributing factor to virtual fatigue is not feeling seen or heard in the digital space. CYD programs discerned that multiple, smaller virtual events featuring fewer young people could help give youth a sense of being in the spotlight.

Additionally, smaller-scale events can foster a sense of connection with audiences in a digital space. “...online and small — focused for larger impact,” summarized one survey respondent in describing their organization’s formula for success.

Virtual events that maintain audience engagement are shorter in duration than typical live events. Organizations that discussed specific timespans as being successful recommended 30 minutes to 1 hour maximum for the audience portion of a virtual event. Youth and program staff sometimes chose to also have their own, non-public space for celebration and sharing following the public event. Just as performances moved online, so did cast parties, closing circles, and group reflections.

### Get Help with Technology

Identifying, acquiring, and effectively using technology were important conditions for success in adapting culminating events to virtual environments during the pandemic. For organizations without needed expertise on their existing staff, getting help with technology was essential for multiple reasons: to understand what was possible creatively and technically, including vis-à-vis connectivity; to learn and train others, adults and youth alike, on new apps and platforms and other forms of technology; and to support smooth implementation during live, virtual events.

Organizations sought help in a variety of ways, including learning from peers. Youth media arts programs such as David’s Harp Foundation in San Diego, California and 1Hood



Media in Pittsburgh, Pennsylvania and others provided early and ongoing leadership, sharing expertise and advice with their colleagues. Youth themselves provided leadership, advice, and technical support. CYD programs also partnered with creative industry. Some programs secured new volunteers or contracted with people or firms with technology expertise.

### Allow More Time for Planning

The exploratory, experimental, and iterative nature of unexpectedly and fundamentally re-designing a culminating event was time consuming. Numerous respondents and interviewees reported that adapting events took more time to plan than what was typical in pre-pandemic program timelines and program cycles. “Allow 4 times the amount of planning time!” wrote one respondent. “...allow time for research and planning on what it will take to implement,” echoed another.

Involving youth in the planning also required time and was, as always in process-oriented CYD, of central importance to young people’s experience. Programs also discussed additional support to help young people prepare for events taking place in new and unfamiliar formats. A program staff member advised, “...include them [youth] early in the process and planning, and rehearse rehearse rehearse.”

### Implications

For CYD program staff during the pandemic, living their commitment to youth meant proceeding with imperfect solutions. Program staff modeled a healthy orientation toward unanticipated challenges as being flexible in the face of unanticipated challenges is healthy for people and for organizations (Noam, 2020).

CYD programs responding to the survey and in interviews encouraged others to persevere in finding ways to adapt culminating events. CYD programs, as all youth programs during the COVID-19 pandemic, faced significant challenges with regard to maintaining programming and adapting events. The very acts of strained CYD program staff taking the time to share words of encouragement and insights on programming and events during the pandemic by responding to the survey and by granting interviews were themselves acts of generosity and commitment to young people.

French philosopher Voltaire’s aphorism “The best is the enemy of the good,” is reflected in these words of encouragement from a survey respondent:

“Keep going. It’s not perfect, but everyone is in the same boat, and the effort and caring you show the kids and families means more than ever.”

In December 2021 United States Surgeon General Dr. Vivek Murthy issued an Advisory on Protecting Youth Mental Health. The report outlines the significant impact of the COVID-19 pandemic on the mental health of young people in the United States, discusses the pre-pandemic declining overall state of youth mental health, and identifies the state of youth mental health in the United States as a crisis. The Advisory calls for investment in and support of young people’s mental health and well-being to be a priority across public, private, and social sectors in the U.S.

Creative youth development programs have an important role to play in that they contribute to youth mental health and well-being by supporting belonging, which in turn supports optimism (Noam, 2021). Prioritizing connection with young people is the right choice and is a lesson to carry forward beyond the pandemic (Montgomery 2021).

## Conclusion

The strategies for adapting culminating events in creative youth development programs during Spring and Summer 2020 as COVID-19 pandemic lockdowns were enacted throughout the United States can be useful going forward.

The field of CYD demonstrated innovation and commitment to young people through its creative adaptations of culminating events. The strategies the field employed centered foundational principles of prioritizing connection and youth leadership. Creative strategies for youth engagement, including framing new event formats as opportunities for young people to be part of creating something completely new; providing one-on-one support; leveraging the availability of community members to attend; working across geographies; and coaxing joy by making events celebratory and special; are worth employing going forward to effectively engage young people in CYD programs.

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### Shadow Education in the Middle East Private Supplementary Tutoring and its Policy Implications by Mark Bray & Anas Hajar

Melanie van den Hoven

While some call the phenomena of supplementary lessons, private tutoring or private tuition, Mark Bray and Anas Hajar in their 2023 book develop the construct of ‘shadow education’ to define its international scope and key elements and describe its outlay in the Middle East. This contribution enables ‘after school schooling’ to be comparable across regions, and ultimately, to bring private tutoring in Middle East into the global conversation. From the executive summary, the scope of what shadow education is – and is not – is immediately clear. Shadow education is fee charging, academic, and supplementary. The provision concerns children and teens in mainstream schools as a means of remediation or enrichment. Therefore, shadow education excludes lessons aimed at personal development, such as music lessons, religious training and sports. The Introduction also unpacks when online learning is ‘shadow education’. For instance, when online learning replaced regular lessons during the recent COVID pandemic, it was outside of scope, but becomes in scope when it supplements lessons taught in school for review.

From the outset, the reader gains an overview of how shadow education operates in the Middle East. The spotlight is on teachers in government schools on employment visas with far less attention on university students who take up a few hours for cash payments. However, there is attention on tutorial centers, although this service is not as prevalent as in Korea and Hong Kong. The growth opportunity for the region, outlined in detail in the last chapter, is for the development of regulations governing practices in schools and tutoring centers. With this orientation, the book sheds light on reported practices in 12 Middle Eastern countries, which have been neatly divided into two subgroups according to income: the wealthier GCC countries (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, the UAE, and Yemen) and poorer Levant countries (Iraq, Jordan, Lebanon, Palestine, and Syria). All countries are similar for the dominant use of Arabic and the official language and cultural values shaped by Islam.

There are several strengths of the book. One strength is evident from the Forward and Introduction: the collaborators’ subject matter expertise. Mark Bray, as the first author, builds on his reputation and contributions for “popularizing the metaphor” (Rahmouni, 2023, p. 1) via prior studies on Africa and Hong Kong and from leadership with UNESCO’s International Institute of Educational Planning. The second author, a regional expert in multicultural education with command of Arabic, enables access to Arabic language research reports, which are not available in English. Data sources include literature reviews in English, and, also, questionnaire data and input from policy makers and the media in the two languages. This means the reader gains valuable insights in under-reported zones, such as the use of WhatsApp for tutoring in Yemen. Thanks to UNESCO’s Regional Center for Educational Planning in Sharjah, the United Arab Emirates, data collection within the region was facilitated by hosting

a bilingual policy forum with 33 educational players of ministry personnel, researchers and teachers.

Another strength is the book's accessibility. The Routledge Focus book is a lightweight, soft cover book with 102 pages and 94 of pages of core reading. It is also open access so can be freely downloaded at <https://www.routledge.com/Shadow-Education-in-the-Middle-East-Private-Supplementary-Tutoring-and-Bray-Hajar/p/book/9781032329802>. The book is organized into seven chapters with clear headings and sub-headings to move the reader from the global picture to the regional distinctions. The chapters succinctly clarify drivers of demand and supply for readers new to the topic. The book succeeds in reframing 'shadow education' so educational stakeholders can see the gains for their constituents when using a consultative approach to develop regulations which accommodate the perspectives of teachers, students and their parents.

Another strength is the book's internal cohesion. From the first chapter to the last, the core argument builds in a logical fashion. The first chapter situates the phenomena of private tutoring within its global context, drawing on previous research internationally, such as the UK, the Nordic countries, and East Asia. This chapter positions shadow education as a form of supplementary education, which mirrors the curriculum of mainstream education but exists in its shadows. It shows that shadow education responds to gaps in provisions for students requiring remediation and those seeking enrichment. The second chapter on global perspectives on shadow education identifies when tutoring is conceptualized as a problem and as a resource for teaching and learning. It also gives space to understand the costly implications for parents who must cope with the inadequacies of poorly resourced schooling.

The third and fourth chapters establish the contextual features which support comparison but tune into differences between countries, drawing on internal diversity, student performance on internationally benchmarked assessments, and different influences on private and government schools among other factors. Chapters 3 and 4 provide snapshots using available data presented via useful tables and charts to provide concise summaries of research reports. Readers interested in an overview of the quality of educational provisions and available research benefit from bullet points of key tutoring takeaways, as seen from survey data on page 31, and themes from qualitative research on page 37. The fifth chapter is short with research showing what is known about the effectiveness of supplementary education.

Chapters 6 and 7 convince the reader of viable pathways to bring private, supplementary tutoring out of the shadows. The main argument is that policy makers should focus on improving the overall quality of education especially for all. The way to do this is better oversight with policies that support equitable approaches to schooling and avenues for the motivated to learn more and those who need support to catch up. The authors also suggest bottom-up collaborative partnerships, including engaging parents and teachers' unions so voices of civil society are captured and establishing links between ministries to align on strategies and common priorities. Despite patchy reporting of the phenomena of shadow education in the Middle East, the book makes the most of available data by targeting the problematic issues, such as corruption and social stratification where benefits are afforded to the urban and rich. Using the global backdrop, the potential to see supplementary teaching as a resource appears. If policy makers recognize that shadow education can be a complement to local provisions of schooling, visions of extra lessons being locally coordinated by progressive educational leaders appears.

Within the text there are consistent references to gaps in research, which shows the command of the literature review. Unfortunately, there is only a summative paragraph on page 76 about the need for greater partnerships with researchers in universities. Given the significant barriers in accessing high-quality empirical data for in-depth quantitative analysis of trends (Shockley, 2022), this book, or a follow-on book, should make bolder directives to policy makers. Policy makers should guide researchers with targeted grants for research in the following areas:

- Large scale mixed methods using census data and jurisdiction-wide surveys so subregional patterns of shadow education can be deduced. Ministries of Education should know more about time commitment across the academic year and holidays, subject matter preferences and difficulties, and needs of different types of learners (i.e. male or female, age group, achievement levels, etc.).
- Qualitative case studies on perspectives of parents and the factors influencing their decision-making (e.g., financial resources, peer pressure, school resources, and individual needs of their children). Local school leaders can benefit from a picture of internal diversity (e.g., employment and family status) and the impact of contextual and geographical factors (e.g., a greater range of choices in urban settings versus no choice in rural settings).
- Qualitative studies on the gendered experiences of schooling and supplementary lessons with a focus on the choices of additional math and science lessons given the poor performance on international benchmarks. National governments often need to report on gendered dimensions of academic performance.
- In-depth studies of teachers' experiences with tutoring to use both anonymous surveys and, when possible, ethnographic interviews. Researchers are well qualified to capture authentic experiences, if enabled to do so. In addition, there is scope for a future book to take on board other related topics not addressed. One is other service providers in the region, namely private staffing, such as full-time governesses and nannies, as well as university students who may work in a more piecemeal fashion. There is also value in learning more about and more attention to literacy in Arabic among national and non-nationals in order to drive Arabic language teaching above the current subpar status (Chazy & Thomure, 2022). In sum, *Shadow Education in the Middle East Private Supplementary Tutoring and its Policy Implications* succeeds in bringing shadow education in the region into view, and convinces the reader that regulatory frameworks are needed. However, what policy makers need more of is targeted research. With better quality information, meaningful after-school provisions can be imagined so all stakeholders benefit. Good teachers can earn an honest extra salary, and motivated children can accelerate and underachievers can get the attention they need with only a minor investment for parents. This book provides welcome insights about instances where progressive thinking has achieved this vision. This book advances thinking on what has before been construed as the underbelly of education. Shadow education can link with mainstream schooling, and, in so doing, come out of the shadows of an unregulated marketplace, and become an additional channel for satisfying learning.

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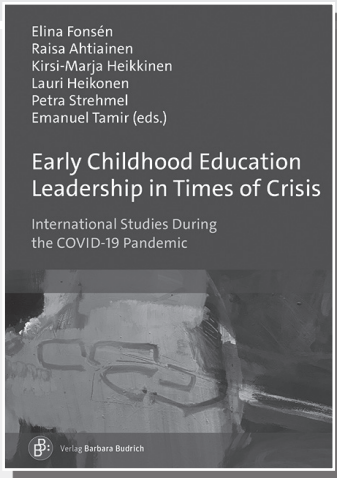
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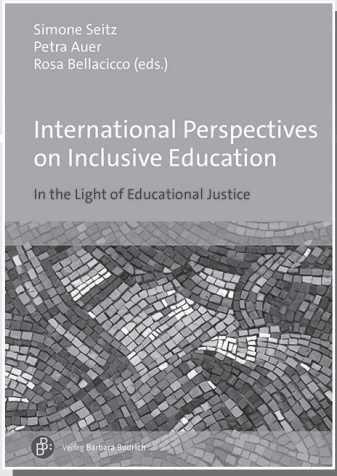
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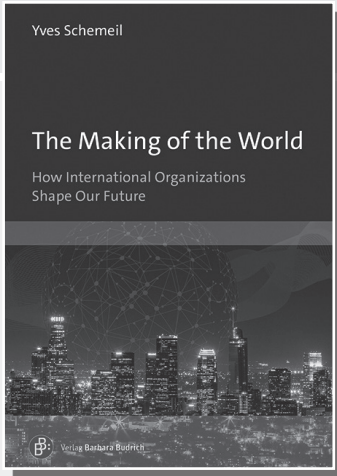
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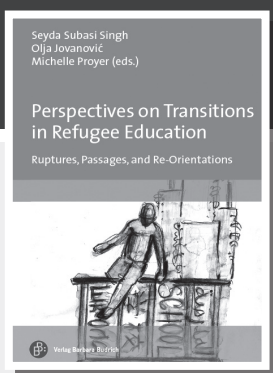
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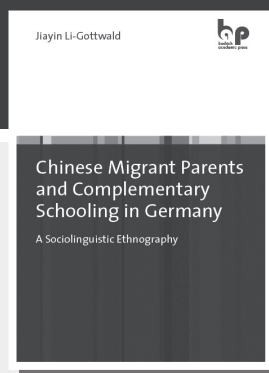
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