



Introduction

The Role of Context in Scaling Up Educational Change

Helen Janc Malone¹

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Abstract

This special issue focuses on the role of context in scaling up educational change. The featured articles explore interventions from across the globe examining the central question of what facilitates scaling up an intervention, whether adopted externally or homegrown. Each of the articles address a unique set of factors that play a role in scaling up innovations and the mutual influence between local context and new or external interventions. The four articles focus on large-scale interventions and draw attention to the role of context—inclusive of culture, values, beliefs, traditional practices, and educator voice. The issue leaves readers with illustrative case studies, guiding questions, and lessons learned that can inform both practitioners and policymakers.

Keywords Educational change · Scale · Context · Culture · Reform · Replication

1 Introduction

Scaling up promising practices has become one of the focusing discussions in education, with policies often calling for system-wide implementation of new approaches and innovations, whether homegrown or “transplanted” from other contexts (Hargreaves and Shirley 2012). Yet, borrowing from Bronfenbrenner’s (1979) ecological systems theory, individuals are influenced by their most immediate environment, interactions within their community and local contexts, and the broader societal practices.¹ Meaning, any scaled up intervention that makes its way into a school will be negotiated among local actors and influenced and shaped by the local contexts where it is to be tested and embedded (Hargreaves and Shirley 2012; Malone 2017). Looking at what world’s top performers have achieved or have in

¹ The role of context has recently been highlighted by one of the issue editors in: Malone, H. J. (2017). Broadening professional communities through collaborative partnerships. *Journal of Professional Capital and Community*, 2(4), 190–199. <https://doi.org/10.1108/JPC-08-2017-0019>; Malone, H. J., & Jacobson, R. (2016). Supporting and empowering teachers: The role of school–community partnerships. In J. Evers & R. Kneyber (Eds.), *Flip the system: Changing education from the ground up* (pp. 261–276). Oxon, The Netherlands: Routledge.

✉ Helen Janc Malone
hjanc@me.com

¹ Institute for Educational Leadership, Washington, DC, USA

common, or replicating a local model that might have shown progress under a unique set of circumstances, devoid of contextual factors, could potentially lead to start/stop attempts at scaling up promising ideas (Hargreaves and Shirley 2012; Harris 2013).

This special issue examines the myriad contextual factors that shape and influence the possibility of educational strategies to scale up a given intervention on a system level. The issue considers both non-traditional contexts and well-established examples, examining approaches to scaling up innovations and interventions from across the globe, with a more specific focus on India, Vietnam, and Ontario (Canada). The articles in this issue give a cross-cultural perspective on scaling up interventions, providing new perspectives on the importance of context in educational change discourse, from building egalitarian teacher collaboratives that encourage mutual support and learning on a school level to the contextual considerations needed to move an approach on a systems level involving hundreds, if not, thousands of schools.

This issue is not designed to cover all aspects of educational change or to address any one contextual dimension individually. Furthermore, this special issue does not engage in the debates over scaling up, scaling down, replication, or innovations of any particular reforms or strategies. Rather, the featured articles offer illustrative case study examples of various approaches and considerations and are not designed to make generalizations of how any given strategy could be borrowed or adopted in another context. In fact, that is part of the analysis offered by the authors, that context plays a critical role, a dimension that deserves further consideration both in policy creation and practice implementation (See Hargreaves and Fullan 2012; Hargreaves and Shirley 2012).

2 Overview of the issue²

This special issue opens with a contribution by Alma Harris and Michelle Jones, *Why Context Matters: A Comparative Perspective on Education Reform and Policy Implementation*. They draw from their comparative, mixed-methods study of seven systems—Australia, England, Indonesia, Hong Kong, Malaysia, Russia, and Singapore. In this article, Harris and Jones provide a comparative analysis of the role context plays in policy implementation, in particular, in school leadership preparation and development. They argue that the seven systems have engaged in strategies that have been identified in research as effective; however, the interactions of effective strategies and different systemic, political, and cultural traditions have led to diverse interpretations and thus, variable results, especially at scale. Drawing on human and social capital theories, Harris and Jones highlight two elements that are often, in their view, seldom considered within the current discourse on educational change: context and culture. They note that national culture, inclusive of the level of centralization, systemic and political structures, and socioeconomic dimensions play critical roles in education leaders' perceptions and actions. Meaning, in systems that are more centralized, hierarchical, and prescriptive, education leaders tend to be less open to innovation, experimentation, and collaborative praxis, as such approaches counter the traditions, structures, and role construction in which they operate. They conclude that policy implementation could be better anticipated and understood if context and culture were considered alongside systemic, structural, and technical components of educational change.

² Scholars from across the field of educational change were invited to submit proposals for this special issue. The two special issue editors selected article proposals that offered a range of perspectives on the focusing topic and invited full articles. Article submissions underwent double-blind peer review, followed by an editing process to ensure high-quality submissions for this issue.

Building on the foundation of Harris and Jones' contribution, the next two articles offer case study examples from India and Vietnam, imparting important lessons on the interplay of scale and context. Tricia Niesz and Kelli Ryan lead the second article, *Teacher Ownership Versus Scaling Up System-Wide Educational Change: The Case of Activity Based Learning in South India*, examining the balance of scaling up a pedagogical intervention in South India, the Activity Based Learning (ABL), while creating teacher ownership as a social movement strategy. Their research questions pose two central areas of foci, how has the ABL movement evolved over time and how do educators make meaning of the new approach to teaching and learning. The authors argue that many educational change efforts to scale up interventions focus on technical aspects, whereas ABL emphasizes the grassroots, social movement aspects that can drive change at large scale. Using qualitative methodology comprised of 45 interviews with various school and community partners, Niesz and Ryan analyze how a teacher-driven pedagogical shift through ABL can lead to greater teacher ownership for individual student learning, moving away from textbook-driven, didactic approaches that once dominated the regional classrooms. They suggest that creating space for local ownership of an educational policy, driven by the input of teachers and an "egalitarian participation" throughout a process, could lead to adoption and implementation of a given reform more effectively. The authors caution, however, that even a movement-like scale up approach could become subject to political shifts and changing policy environments. As authors cite, it is only through deep change (Fullan 1993) that reform can take hold at scale, one that is malleable to fit local contexts and that puts teachers as central actors in the process of change and innovation.

The third article dives further into the considerations related to local context on the one hand, and macro-level policy change on the another, offering a cautionary example of the dialog between innovation and tradition. Hang Le in *Another Textbook Project? The Implementation of Escuela Nueva in Vietnam* argues that implementation of the long-standing, well-studied, and widely used Columbian Escuela Nueva schooling model in Vietnam, Vietnam Escuela Nueva (VNEN), has faced challenges once encountered with traditional, textbook-centered approach to learning. Using a qualitative case study approach, Le examines implementation of VNEN in two rural Vietnamese schools and how varying interpretations of the original model interact with the local culture and context. Although Escuela Nueva offers student-centered approach that invites group work and active engagement in the learning process, the interaction with the local pedagogical traditions have led, according to Le, to an interpretation of the strategy as a mechanical process to transform student learning.

Le's article offers an analysis of unintended consequences of intervention borrowing and teleporting (Hargreaves and Shirley 2012), and warns that success of scaling up an intervention goes beyond the extent of spread of an intervention across a number of schools. Rather, she argues that efforts are shaped by local beliefs and values, history, and present contexts (Emirbayer and Mische 1998). Furthermore, Le's article offers a conversation about the intersection of a traditionally centralized education system and new policies that redefine teachers' roles in the learning process. Le notes that the model itself offers opportunities to reimagine learning, couple autonomy and collaboration within the profession, and embed flexibility in the design to be responsive to the local context.

This special issue concludes with a highly regarded comprehensive system, among the world's top performers. *Transforming an Education System Through Professional Learning: Developing Educational Change at Scale in Ontario*, by Pamela Osmond-Johnson and Carol Campbell, explores a sustained, whole-system reform focused on improving professional learning in Ontario, Canada. Drawing from provincial improvement work undertaken between 2005 and 2014, their study combines extensive document review, publicly available data, and interviews with key respondents, offering an analysis of the ingredients in

implementing a province-wide educational change. As the authors argue, putting in place whole-system supports that build capacity of educators and students alike, fostering quality and leadership, and establishing policy environment that prioritizes sustained efforts led to important gains. Authors note that Ontario is an illustrative example of change that is first and foremost driven by practice, professional collaboration, and internal accountability, which then informs policies and strategies at scale. Investment in a culture of collaborative inquiry (see Earl and Hannay 2011; Timperley 2011) allows for professional learning to take hold as a key vehicle for spread of ideas and innovation, supported through government, teacher unions, and schools. Meaning, educational change Ontario was grounded in individual development, which allowed it to move toward large-scale collaboration.

3 Conclusion

Moving positive educational change forward requires continuous calibration of factors. As Fullan (2016, p. 68) reminds us, “Intrinsic dilemmas in the change process, coupled with the intractability of some factors, the uniqueness of individual settings, and variations in local capacity, make successful change a highly complex and subtle social process.” Systems guided by external policy and accountability alone could face challenges in scaling up innovation if focused primarily on technical components of an intervention. As the special issue authors remind us, shared practitioner values, beliefs, goals, processes, and opportunity to authentically collaborate facilitate likelihood of an intervention implementation in a way that both honors the strategy and the context in which it is situated. The four articles underscore that context plays an important role in scaling up educational change, whether on a whole-systems level or within a cluster of schools (see also Hargreaves and Fullan 2012). Interventions, according to the contributing articles, however large on a school-level practice, ought to integrate shared ownership and cultivate sense of agency, community, and educator voice. As Harris and Jones remind us in their opening article, culture and context must be considered when scaling up innovations, from both policy and practice perspectives.

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