# Editorial

## Wayne Hugo

> Keep your heart with all diligence; for out of it are the issues of life
> Proverbs 4:23

Where do we place the *emotional* in the analytical structures we have to think about education? The question sounds strange, combining in one sentence emotions and feelings with analysis and thinking. It also sounds dubious, automatically placing the emotional within the analytical when emotions are more like the colours analysis live in. We could use an old favourite like Basil Bernstein to help us. One of his deep insights was that instructional discourse is embedded within a regulative discourse. By regulative discourse Bernstein meant the rules of social order around *moral values*, behaviour, orderliness, character, identity and attitude. By instructional discourse Bernstein meant the way *knowledge* is taught – the way it is selected, sequenced, paced, and assessed. Regulative discourse holds the instructional discourse within it. The moral and social order gives the ordering framework within which the teaching of knowledge takes place.

Can we place the emotional within the regulative as a subgroup? Can we say that emotions are a part of the regulative discourse around "conduct, character and manner" (Bernstein 2000, p.34). This could be helpful, as it would give us a place, within the massive architectonics of Bernstein for emotions, and it would be a very powerful place. But many of us would balk at seeing the emotional as a part of the moral order. There is something very different about how the emotional works to the moral, although they definitely can come together. There are people who are emotionally intelligent, but morally manipulate this sensitivity. You can be emotionally gifted and morally abusive. Also, there have been strong cases made out for holding onto a moral position no matter what your feelings or emotions are about the case. The moral order is about duty to follow a principle, no matter what your feelings are, or so Kant would have us believe with the categorical imperative. Where can we look to find a theory that holds 'knowledge', 'morality' and 'emotions' together in some kind of synthesis within education? Curiously, within the Western tradition, we find solid accounts of how knowledge, morality and emotions work together in the ancient Greek, Christian, and Jewish traditions, and these accounts extend into the enlightenment era.

There are two simple intellectual moves one can make to find these accounts – open out to the wisdom traditions; and shift from binaries to trichotomies – think in threes rather than twos. The ancient masters of trichotomies were Aristotle, Plotinus, and Augustine, and the modern masters are Kant, Hegel and Peirce. I cannot go through them all in an editorial, but we can use Aristotle's *Rhetoric* and his distinction between three artistic modes of persuasion: logos, ethos, and pathos as a looking glass to locate how the instructional, the regulative, and the emotional work together. Logos is about how actual content is organised in a speech towards a purpose (much like instructional discourse); ethos is about the character, conduct and manner of the speaker (much like regulative discourse), and pathos is about the emotional tango between speaker and listener. Emotions, in this account, are not some subversive obscuring of lucid thought, some boiling cauldron that destroys clear and cold thinking, it is a necessary facet of how a person works towards convincing someone to make a *judgemen*t. When we look through the traditions we find that knowledge and morality do not exist alone, they come in an emotional sea that needs to be skillfully stroked through.

Binaries are a great way to start the quest of understanding how education works as it limits you to two options and this can help when working with multiple distinctions and layers. Dealing with just two categories simplifies things. Bernstein is really good for beginners in educational theory – he teaches you to think in twos. But working in threes releases all sorts of potentialities: witness God the Father, Son and Holy Spirit; body, soul and spirit; thesis, antithesis, synthesis; id, ego, and super-ego. For those of us thinking in an education world saturated with Bernstein, binaries can become a default mode – the instructional and the regulative, classification and framing, strong and weak, sacred and profane.[1] Knowledge and Morality somehow feel more energised, alive and complex with Emotions added to make a triad. It's like a whole facet of existence has been left out when emotions did not feature, and we could not feel it. . . because it was emotions being left out.

---

[1] I am talking about a simplified Bernstein used for teaching purposes. He was a master theoretician who used the full range, including trichotomies – witness the Pedagogic Device with its three levels.

We don't have to leave out emotions any more – they have been put back on the agenda with the excellent research of Carola Steinberg, who not only thinks deeply about what emotions in education are, but is prepared to do exacting empirical work that throws up fascinating issues and insights around emotions and education, especially around assessment. Here is one insight on emotions around assessment that take four points to establish itself:

- We normally give ourselves credit for a positive outcome we have been involved in; and give others the blame if the outcome is negative.

- This protects our reserves of positive emotional energy. We get a double dose reward when the outcome is positive (positive outcome and credit for the positive outcome); and only a single negative dose if the outcome is negative, as we tend *not* to take responsibility for the outcome.

- Teachers tend to give learners the credit if they do well in an assessment and partly blame themselves if the learner does badly.

- This drains positive emotional energy as you only get a singly positive dose if the learner does well and a double negative dose if the learner does badly (double blow of learner doing badly and taking the blame for it).

  Insight – positive emotional energy is hard for teachers to sustain when assessing, especially if learners are struggling.

As a teacher and father I know how important positive emotional energy is in the classroom, both for the teacher and the learner. We need to understand the dynamics of emotions in education and find a place for it in how we train our teachers and deal with professional development. Carola Steinberg firmly sets us on the path towards it.

If Steinberg takes us into another dimension, then Fiona Jackson shows us how to do a nuanced analysis of two well established dimensions of educational analysis – Specialisation and Semantics – as worked with in Legitimation Code Theory (LCT). LCT is continuously struggling to get closer to a full and rich but still principled account of how education works. It unusually combines theoretical nuance across a wide array of dimensions with rigorous empirical analysis. Fiona Jackson gives us a detailed example of how

to use LCT when analysing pedagogy within a poetry lesson at a micro level. Pedagogy is Medusa like for any interested education academic. It consists of multiple wriggling dynamic strands, each of which risks turning into a rigid and stultified element. Medusa was defeated by a mirrored shield that enabled one to see her complexity and dynamism within its burnished surface without getting frozen by seething reality. It is this kind of shield that LCT provides, or so one could believe after reading Jackson's intricate analysis that tracks the dynamics of the lesson without turning it to stone.

The third paper of this edition – *Skilled reading in isiZulu: what can we learn from it?* – contains some vital insights that need wide scale publicity. The way skilled readers read in English has a notably distinctive pattern from how skilled readers read in isiZulu, implying that the pedagogy for learning how to read in English and isiZulu has to be different. We cannot just take how we teach learners to read in English as the template and replace the content with isiZulu. The way isiZulu works partly demands a different kind of curriculum and a different kind of pedagogy. It is a similar mistake to how we translated reading books from English to isiZulu. What are simple sentences to learn in English can become highly complex sentences in isiZulu due to its agglutinative nature. IsiZulu forms long and complex words by combining elements together. A simple sentence in English is not necessarily a simple sentence in isiZulu. We need to differentiate how we teach reading in English from how we teach reading in isiZulu. Sandra Land provides us with key research that helps pursue this vital project.

At the heart of what Sandra Land is writing about is the terrible educational reality that if you speak an African language at home rather than English, then your chances of doing well in school are severely curtailed. This is not only because 'African Language' is a proxy for strongly disadvantaged conditions in our post-apocalyptic/apartheid world; but because the way African languages are taught and used in South African schools is a travesty. At the same time, we cannot overlook the continued drastic impact socio-economic disadvantage has on educational performance and the way language and disadvantage tango. It seems, no matter what educational option or strategy is chosen, the poorest children in South Africa lose out. It's a wicked problem wrapped up in a social mess. By wicked problem I mean an intractable situation that has all sorts of other problems and interdependencies wrapped up inside of it, where attempts to solve the problem only seem to throw up more problems; much like what happens when trying to chop off one of the

snakes on Medusa's head – ten more grow in its place. By social mess I mean the following 14 points (Horn and Weber, 2007, pp.6–7):[2]

1. No unique 'correct' view of the problem;
2. Different views of the problem and contradictory solutions;
3. Most problems are connected to other problems;
4. Data are often uncertain or missing;
5. Multiple value conflicts;
6. Ideological and cultural constraints;
7. Political constraints;
8. Economic constraints;
9. Often a-logical or illogical or multi-valued thinking;
10. Numerous possible intervention points;
11. Consequences difficult to imagine;
12. Considerable uncertainty, ambiguity;
13. Great resistance to change; and,
14. Problem solver(s) out of contact with the problems and potential solutions.

This is the world we work within when attempting to improve education in South Africa – a social mess containing a wicked problem.

We see this in how the progression rule is playing out within the Further Education and Training phase. Learners who failed in the FET phase were being held back from writing Matric because they would dramatically impact on the pass rates of the affected schools. This resulted in a massive spike in dropout rates for learners who had managed to get to the FET phase but were deemed not capable of passing the matric exam. Even though the policy was that learners could only be held back once a phase, schools desperately kept learners who had already failed once out of matric. This resulted in unacceptably high dropout rates and forced the department to insist that schools automatically progress learners who had already failed once into matric, *no matter what their grade 11 mark*. The schools mostly dealing with this issue of progression were the poorest and the most rural, precisely the schools that did not have the resources to cope with the extra pedagogic and

---

[2] New tools for resolving wicked problems is a freely available generic pedagogic text that actively teaches how to solve wicked problems using specific tools and steps. See http://www.strategykinetics.com/New_Tools_For_Resolving_Wicked_Problems.pdf

social demands of dealing with failed and older learners. The impact of this progression rule on the emotional wellbeing of FET teachers has been damaging. Worse, in order to cope with the extra pressures of matric teaching, teachers are taken away from teaching grade 10 and 11 to focus on the Grade 12s, resulting in the overall problem only getting crueler. How this sorry tale played out in the Free State is well told by Angela Elisabeth Stott, Hercules Dreyer and Peet Venter in the fourth article of this edition. Their clear analysis and warning of the consequences only read more dramatically after the farce around the 2015 results played out in a way that has seriously damaged the credibility of the National Senior Certificate.

The fifth paper on teacher migration by Gavin George and Bruce Rhodes offers sobering comparisons between what teachers earn in South Africa in comparison to our neighbours like Zimbabwe on the one hand, and more developed countries like England and the USA on the other. Zimbabwean teachers can earn more than double their salary if they migrate to South Africa; and South African teachers can earn more than double if they migrate to England or the USA. More importantly, as teachers become more experienced, they increasingly earn more overseas due to high salary jumps with promotion. South Africa, with its much flatter salary progression paths, risk losing its more experienced teachers, especially if they are emotionally disenchanted and exhausted by South African teaching conditions. This is not to say that, relative to most South Africans, teachers earn well. They do, but not in comparison to their professional peers, and not over a twenty year period.

The sixth paper by Jan Heystek and Lorinda Minnaar focusses on principals' perspectives of key factors that contribute to sustainable quality education. Given that there is a strong drain on the emotional energies of many of our teachers, and that in comparison to their peers in many developed countries South African teachers don't earn well, it is important to put some emphasis on what does work. Just as importantly, we have to continuously ask the Opportunity Cost question – what is the cost of our choice, given that it prevents us doing something else that is also worthwhile. When resources are spent on one strategy to improve education we should always hold in mind what else we could have used the resources for. When billions of Rands get spent on reforms that show hardly any benefit, then it is not only their failure that should concern us, but what else the resources could have been used for. Heystek and Minnaar argue that we should be allocating our resources very

carefully, given how limited they are, and that resources should go to places where strong traction is gained. They put it well:

> Dedicated and well-qualified teachers who teach disciplined learners in a safe environment should receive priority in any action principals and Departments of Education take to improve and sustain the quality of education in the Western Cape and possibly in all South African schools.

As Matthew 13:12 has it in the King James version:

> For whosoever hath, to him shall be given, and he shall have more abundance: but whosoever hath not, from him shall be taken away even that he hath.

That sounds wicked to me.

## References

Bernstein, B. 2000. *Pedagogy, symbolic control, and identity: theory, research,* critique. Rowman & Littlefield Publishers: London.

Horn, R.E and Weber, R.E. 2007. *New tools for resolving wicked problems: mess mapping and resolution mapping processes.* Strategy Kinetics.

Wayne Hugo
School of Education
University of KwaZulu-Natal

hugow@ukzn.ac.za