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Financial Considerations of Undergraduate Female Married Students: A Qualitative Analysis

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Financial Considerations of Undergraduate Female Married Students: A Qualitative Analysis

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Abstract

This qualitative, phenomenological research study, involved in-depth interviewing 23 female, undergraduate, married students attending a private, selective Midwest university. Three main themes were found regarding the students' perceptions of their respective financial situations. First, participants described that, in contrast to a single (unmarried) lifestyle, the importance of their budgeting practices significantly escalate. These considerations directly relate to paying bills and school loans, resulting in consequential patterns of limited spending. Second, women in the study described the importance of discussing finances with their future spouse before getting married. Other preemptive efforts included saving money beforehand, as well as pre-discussing financial habits or expectations. Finally, married students described the mindset changes they found necessary when adjusting to married life as an undergraduate student. These included finding less expensive alternatives or "doing without," as well as shifts in their perceptions of finances from individual budgets to collective financial outlooks.

Keywords: married students; financial stress.

Consideraciones Económicas de las Estudiantes Casadas: Un Análisis Cualitativo

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Resumen

Este estudio de investigación cualitativo fenomenológico involucró 23 entrevistas a estudiantes casadas que asistían a una universidad privada del Medio Oeste. Se encontraron tres temas principales en cuanto a la percepción que tenían las estudiantes de sus respectivas situaciones económicas. En primer lugar, las participantes describieron que, a diferencia del estilo de vida de soltera, la importancia de sus prácticas de elaboración de presupuestos aumentaba significativamente. Estas consideraciones estaban directamente relacionadas con el abono de facturas y los préstamos escolares, resultando en patrones consecuentes de gasto limitado. En segundo lugar, las mujeres en el estudio describen la importancia de discutir las finanzas con su futuro cónyuge antes de casarse. Otros esfuerzos preventivos incluyen el ahorro de dinero previamente, así como el discutir con antelación hábitos o expectativas económicas. Por último, las estudiantes casadas describen los cambios de mentalidad que percibieron como necesarios cuando debieron ajustarse a la vida matrimonial como estudiantes universitarias. Estos incluyeron encontrar alternativas más baratas o "prescindir" de ellas, así como cambios en su percepción de una economía individual a una perspectiva financiera colectiva

Palabras clave: estudiantes casadas; estrés económico..

In the world of undergraduate university admissions, the ticket-price of tuition is one assumed hallmark of education's quality. As a result, higher tuition often is found in more selective institutions. Higher rankings in *U.S. News & World Report*, wealthier alumni, and increased status for the university are all potential benefits a school may reap by maintaining a high tuition (Carey, 2008; Chan, Chau, & Chan, 2012). Although many students do receive financial aid for tuition and room/board at Harvard University, for example, the price in 2004 was an overwhelming \$39,880 per year (Cauchon, 2004). Similarly, in 2008-2009 American University in Washington D.C. charged \$41,000 for a full-time student (Young, 2008). The point is that prices of undergraduate education from a broad range of universities are shocking to tuition-paying parents, partly due to the prestigious connotation tied to high tuition rates.

Furthermore, these high rates are increasing drastically each year. Research by the nonprofit group Project on Student Debt ("College students," 2007) found that prices of public universities had increased up to 57% in the last five years and both students and parents have not generally been aware of how proportionately high college costs have risen during that time frame (Seyedian & Yi, 2011). Petersl et al. (2011) suggests that the plight may be even worse for college students belonging to some minority groups. Shea (2003) reported that 16 states had raised their university tuition rates over 10% in the preceding year. As extreme examples, The University of Virginia and the University of California increased their tuition costs 30% and the University of Arizona increased theirs almost 40%, all within one year (Shea, 2003). Today, young families are looking ahead at saving towards college costs for their children and are seeing projected "numbers that are so astronomical you might think they were a line item in NASA's budget" (Friedhoff, 2008 para. 2). In sum, universities annually raise their tuition and fees as current students, as well as future students, watch with anxiety.

Knowing this, it follows that student debt is reaching incredible amounts. Universities are attempting to cap the amount of student loans, depending on the family income (Porter, 2007). However, this has hardly curbed the debt of a typical undergraduate student. Wang (2003) found that student debt increased 74% from 1997 and the

average undergraduate student had \$16,500 of student loan debt. More recently, two-thirds of college students will graduate with an average of \$20,000 in school loan debt (“College students,” 2007). Student debt has increased exponentially in the past 10 years. Potentially, average contemporary college students today will have an additional \$7,000 of school debt than they would have had 10 years ago (Friend & Collins, 2007). Current students graduate from universities with an overall unhealthy financial burden, particularly for students in the liberal arts where starting incomes for B.A. graduates have not kept pace with increasing tuition costs.

As a result, many students choose to work a part-time or fulltime job throughout their years at a university. Manthei and Gilmore (2005) reported that over half of working students (57%) would not choose to work while attending classes, if it were not necessary in order to stay in college. The students indicated concerns that their college employment will weaken their academic strength and will cause them additional stress. Moreover, fewer than half of students involved in the study found work to be an enjoyable part of their week. Fillion (2006) reported that working more than 10 hours a week in college could negatively impact grades and cause a lack of involvement in social events with other students. Obviously, work must be balanced with many other competing activities in the lives of undergraduate students.

Davis and Lea (1995) reported that, over a decade ago, college students with low-income and high amounts of debt had relatively tolerant attitudes towards debt. They found that the longer the students attended the university, the more relaxed they were about their accumulating debt. Students did not commonly change their lifestyle, because they perceived their financial situation to be only temporary. Because of these future financial expectations, many students may be deterred from relatively low-paying occupations like teaching or social-work (Rainry, 2006). Instead, many are more likely to pursue potentially high-paying careers (Friend & Collins, 2007). In fact, beginning doctors, lawyers, M.B.A.s, and Ph.D.s often accumulate over \$100,000 of debt due to their education (“College students,” 2007). A significant amount of the published research on students’ attitudes towards school debt presently is focused towards these types of high-cost professions and the total debt assumed as a result of college and attending graduate school.

Since it was not practical to study all students' perceptions of their college finances, we selected a subgroup for particular appraisal in the present study. This is the subgroup of married, undergraduate students. The assumption that married students experience similar financial demands as single students do is reasonable due to national tuition increases and even some added stressors since they care for family, rather than only individual needs, during their college years. To our surprise, a paucity of research literature exists that addresses married students' financial situations and needs. Particularly, we searched the databases of PsychINFO, Academic Search Complete, Psychology and Behavioral Sciences Collection, SocINDEX with full text, Women's Studies International, Sociological Collection, Contemporary Women's Issues, and LexisNexis Academic and located no published, empirical studies. [Selvaratnam \(2007\)](#) reported that the majority (81%) of undergraduate students would like to get married, but they tend to wait until after graduation or until after they begin their careers. This current trend of marrying later in life may be reflected in the lack of academic literature relating to married undergraduate students' financial lives. [Lobron \(2008\)](#) reported that the overall average marriage ages are now 25 for women and 27 for men.

Given the scarcity of research conducted to date in this domain, we selected qualitative research as the most appropriate means of investigating the construct of married students and their college finances. Qualitative methods most often are most appropriate when investigating new domains where research is relative virgin ([Johnson & Christensen, 2004](#)). That is, when researchers must inductively explore a topic, due to lack of previous literature for providing direction in hypothesis testing, then qualitative protocol most often is warranted. Results from such qualitative approaches can provide meaningful findings from which later quantitative researchers may derive theories and meaningful hypotheses. In fact, without this type of exploratory, qualitative information, salient quantitative research—at least in theory—may not be possible ([Flick, 2006](#)). In sum, we believe that the results from the present study will have a potentially useful heuristic value, leading to productive future quantitative designs ([Creswell, 2008](#)) and more plenary understandings of the construct-at-large.

Method

Participants

Individuals comprising the participants for the present study were matriculated at a private, selective, comprehensive university, located in a Midwestern state in the USA. We focused specifically on females in this study, since homogeneity of sample in qualitative designs generally tends to generate more clear themes and enhance a study's internal validity. We believe that sufficient gender differences likely exist in how males and females perceive the married student experience. Consequently, researching male married students warrants a separate, follow-up study to the present one.

From the Office of Student Services, we obtained a list of all married students attending the university from which the sample was drawn. Female students who were senior and juniors were drawn at random and interviewed, continuing this process until saturation (Hesse-Biber & Leavy, 2006) was experienced when evaluating the interview transcripts. In qualitative methodology, saturation occurs when adding new participants to the sample no longer provides significant novel findings but, rather, the same general themes reoccur in the data set. Following experts such as Guest, Bunce, and Johnson (2006) and Slayton and Llosa (2005), this signals the sample size is sufficient for the intended purpose of the study. We found saturation to occur with 23 individuals and consequently discontinued interviews after that number of interviews.

Each of the participants in the sample self-identified as being Caucasian. Given that 94% of the 3,000 individuals in the student body at the institution from which the sample was drawn were Caucasian, our sample for the present study generally reflected the make-up of the students attending the institution. The ages of the students ranged from 20 – 25 (four of the individuals preferred not to reveal their respective ages). The sample was reasonably divided equally between seniors (14) and juniors (10). From a qualitative research perspective, we utilized purposeful and criterion sampling (Marshall & Rossman, 2006) when selecting the individuals for the study—drawing names randomly—once

the individuals qualified with respect to being (a) married students, (b) females, and (c) juniors or seniors. All of the individuals invited to participate in the study agreed to do so and there was no attrition, including students continuing to the end of each respective interview.

Procedure

We designed the study to be a phenomenological, qualitative research inquiry (Creswell, 2012). This means that we endeavored to understand and report the personal constructs and worlds of the participants from their own perspectives. We are clear that some authorities (e.g., Anfara & Mertz, 2006) in phenomenological and grounded theory qualitative methods believe that theory should have an integral role in the research design and interpretation of the study's results. In this paradigm, theory elucidates and helps to shape the meaning of results produced via qualitative methodology (Mason, 2002). Other authorities (e.g., Glaser, 1998), in contrast, believe that theory should not have a role in designing or interpreting the findings of qualitative research studies. In this model, researchers use disciplined restraint—portraying the results as objectively as possible, without the use of an interpretive grid or theory in either the research design or interpretation of the study's results (Raffanti, 2006).

Naturally, we are not going here to resolve this debate that likely will continue among qualitative researchers for some time (Bailey, 2007). However, we do state explicitly our own, longstanding commitment to the more traditional model of qualitative research design: theory should have no role by the researcher. Rather, in this paradigm, it is the role of the reader to apply theory to the findings that are objectively presented by the researcher. This best allows the results of a qualitative study to be viewed from multiple perspectives and to be applied in a variety of contexts, depending on the reader's milieu. In short, the lack of the use of theory in both the methods and discussion sections of the present article is not an oversight. Rather, it is the application of an accepted protocol for conducting apt qualitative research studies (Kinckheloe & McLaren, 2005).

We utilized semi-structured interviews (Alvesson, 2011) in the present study. This approach allowed the participants to express their

sentiments, tell their stories, and digress at points from the general topic at hand in order to convey their perspectives and elucidate their points. The results provided some rich-and-thick descriptions of participants' experiences, many of which we share in the present article in the quotations cited. The names used in order to enhance the article's readability, obviously, are pseudonyms.

We used open coding (Maxwell, 2012) strategies when analyzing the participants' transcripts. This is an inductive protocol that examines the repetition, of phrases, words, and key constructs. Inductively, we attempted to bracket, as much as humanly possible, our own pre-conceived biases and report the common perceptions of the participants' transcripts. This involved moving from the specifics of the data provided to the general themes that emerged from coding the transcripts. Sometimes codes that initially seemed promising were dropped as the analysis progressed, due to lack of board support among the participants (Bereska, 2003; Marshall, 2002). Following Gay, Mils, and Airasian (2009), coding strategies included procedures of asking key questions, concept mapping, organizational review, and visually displaying the findings.

The analysis involved continually comparing (Chenail, 2012) the various interviews with one another. Commonalities were appraised among each of the participants. This process produced the initial codes we used which eventually loaded-into the resultant themes reported in the present article. The use of NVIVO-8 software was a significant aid with the thematic analysis and helped to locate texts that were most germane to the study's results and reported themes. Per Lewins and Silver (2007), the software was used in order to augment the human dynamics involved with the analysis process, including intuition, not to supplant or substitute for it.

Internal validity for the study was enhanced by a number of elements that were embedded into the design and implementation of the research. The research team held regular meetings to confer independent appraisals regarding possible codes and initial themes. The results reported in the present article reflect the consensus of all the research team members vis-à-vis clear themes that represent the participants' sentiments. Member checking (Metro-Jaffe, 2011) involves conferring

team members vis-à-vis clear themes that represent the participants' sentiments. Member checking (Metro-Jaffe, 2011) involves conferring with participants in order to ensure that the conclusions drawn from the study aptly represent the perspectives they believe. The participants in the study indicated their sentiments that the overall themes reported, indeed, reflected their own understandings of married student life.

Consultation with a researcher who was independent of the study (Silverman, 2006) also enhanced internal validity. This is a qualitative research protocol that encourages autonomous scrutiny of findings by an individual who is an expert in research methodology. The researcher was able to aptly trace the conclusions back to the original transcript data, seeing the natural connections between the findings reported and the participants' words. In short, internal validity was affirmed both by individuals within the study (member checking) and outside of the study (independent reviewer).

Generating a data-trail (Rodgers, 2008) also enhanced the study's internal validity. This is a qualitative research method whereby the research team generates a systematic procedure of grounding each proposed finding to be reported in a study with the transcript data from participants. In this way, each of the conclusions drawn can be verified relative to both the quantity and quality of supporting evidence for its reporting in the findings. Data audits help to reduce research fraud and they provide useful information for future researchers wishing to further pursue the research topic or design in other contexts—providing concrete starting points and data on which future studies can be built.

In sum, we endeavored to generate a research design and protocol that represented utmost rigor in the tradition of qualitative, phenomenological research (De Wet & Erasmus, 2005). Embedding elements of internal validity into the study's blueprint and following-through to the implementation of its execution helped to provide confidence in the outcomes reported in the article's conclusions. While all research studies possess limitations, and we report ours at the article's end, the gestalt of the research design and implementation followed standard and generally accepted procedures in order to help ensure the quality of the final product relayed in the results section that follows (Cope, 2004).

Results

Females in our sample reported three main considerations regarding their finances while matriculated as undergraduate married students. First, participants described that, in contrast to a single (unmarried) lifestyle, the importance of their budgeting practices significantly escalate. These considerations directly relate to paying bills and school loans, resulting in consequential patterns of limited spending. Further, women in our study described the importance of discussing finances with their future spouse before getting married. Other preemptive efforts included saving money beforehand, as well as pre-discussing financial habits or expectations. Finally, married students described the mindset changes they found necessary when adjusting to married life as an undergraduate student. These included finding less expensive alternatives or “doing without,” as well as shifts in their perceptions of finances from individual budgets to collective financial outlooks.

Importance of Budgeting Escalates

As married students described their financial situations and their perceptions regarding spending, all participants related these financial dynamics back to monthly bills and other pressing financial responsibilities. Bills for rent or utilities, in particular, were new realities for almost all of our participants, as most previously were campus residents before living off-campus as married students. Mary, for example, explained that once becoming a married student, she and her husband were responsible to meet mortgage payments, gas bills, and all the other house-related payments. Participants explained that, because they now faced the challenge of meeting monthly deadlines for bills and responsibilities, the importance of budgeting only increased. Carla summarized most participants when discussing the necessity of pre-planned spending: “Um, we have to budget for everything—for gas, for groceries, for saving, for all the bills, because bills come first. Um, I think that probably is the biggest thing with the marriage right now, we budget everything.” Females in our study further emphasized the surprise of the potency that this dynamic held in their marriage. That is

not to say women previously were unaware that finances would be a priority but, rather, that the participants reportedly were taken by the extent to which bills dictated or limited their spending. Tina, for example, echoed the basic plan most participants described relating to their budgeting practices:

Budgeting is so important! We went to a [seminar on finances] and that was so helpful. We have everything divided into categories, but we just have to be careful and not splurge unless we know we have a little extra. I mean, there are so many bills. You don't even begin to realize how many bills you have until you are married!

Married students also explained that, resulting from their perceptions of budgeting's importance and necessity, frivolous spending no longer was a typical option. Repeatedly, participants explained efforts that both they and their spouse extended in order to work towards staying within the means of their budget. One female, depicting the sentiments of most participants, relayed her decision only to spend cash when making purchases, with the hopes of bracketing her spending within pre-set limits. Another married student, Tonisha, described the extent to which she and her spouse wished to stay within budget, reflecting its importance in the eyes of these females: "Our last grocery shopping trip, we had to write down how much everything cost! That is the worst it has ever gotten, writing down how much everything costs and calculating it, down to a few items, to make sure that we weren't going over our budget." The females also explained that, generally, their overall budgets involved tighter living as married students. Describing bills and mortgage payments as "reality checks," participants emphasized the importance of consequential and prudent money management. Terri summarized most females' sentiments regarding the expenses that went hand-in-hand with married living:

Our budget, it's definitely way tighter. We have to pay \$700 for health insurance for both of us. So, yeah, like, there are so many unexpected, well, not unexpected, but just things you don't think about. Like, insurance and groceries and car insurance and car repairs, and we have to pay for our utilities.

Finally, participants explained that added financial pressures were experienced as they worked to pay off school loans. Females in our sample were in various stages when it came to paying for their education. At this particular university, tuition alone over the span of four years totaled over \$80,000. Because of this relatively steep tuition expense, many of our participants were employed in order to help pay off the debt they already had acquired while attending school. Working to pay off this much debt requires self-discipline, even from single students. Naturally, adding mortgage payments or rent and utilities to this financial responsibility, such as women in our study described, significantly increased the financial burden most participants reported experiencing. Kari aptly summarized participants' experiences in this regard:

We budget a lot. We try to keep track of everything, because we're trying to minimize what we're spending right now, so it's kind of work and school. You know, that's just what we've got to do. And we're paying off school loans, so we budget everything. We know exactly what we spent in what areas each month, just because we want to make sure we're not throwing away money in various things, from the beginning, you know, to pay off school loans and things like that.

Furthermore, women explained the long-term future benefits they hoped these present financial patterns would hold throughout their marriage. Because most participants were relatively newly married couples, these females hoped that frugal spending patterns made now would carry over into their outlook on spending and prudence later on, contributing to the overall success of their marriage. Amanda, for example, explained:

Budgeting is really important, because [this university], it's kind of expensive, and the housing around here isn't the best rate either. So, if [we] didn't want to start off [married] life in debt, [we have] to spend a long time making up for that, especially with school. So, it's definitely important, especially in the first couple of years, to kind of be under [budget] a little bit and kind of build up some saving and then be able to go from there. I would definitely say [it's been important] to budget, epically in the first couple of years

[of marriage]. Because then [we] start [our] habits, and kind of don't need the budget as much just because [we'll] be like used to being in these lines—you kind of engrain it in your mind.

Forethought Enhances Married Student Success

Participants emphasized the importance of placing money into savings before becoming married. The females in our study were living off limited incomes because of the added expenses associated with married life and their needs to cover college expenses and stay in school. Consequently, females, such as Chris repeatedly explained the importance of saving up money while single—before encountering the added financial responsibilities of married life. Students in our sample continually remarked that, if they had not engaged in some preemptive financial planning prior to marriage, then their present financial strains might become psychologically overwhelming. Susan explained:

I think a budget is really important. That's something we've really been working though these first couple months of marriage. We, well, [my husband] especially, read up a lot on finances just so that, you know, we'd start off on a good foot and so we wouldn't make silly decisions and things. And we saved a lot for this year, since we aren't working, just to get us through until we get jobs. But yeah, it's interesting because we have this amount of money, we're not adding to it all year, and it's got to last us all year. So, definitely a budget is huge, because we don't want to be near the end and be in trouble and be like, "Ah, we don't have enough money for rent!" or whatever, so yeah, we've definitely utilized budgeting.

Moreover, participants explained that, before marriage, when they spent time discussing issues related to relationship-reflection, these talks often revealed each individual's personal values. In this light, participants emphasized the important role that finances would play later in their married life. A couple's values often are revealed by discussions surrounding money, since it is a limited commodity in most households. Participants explained that conflicts with their respective spouse concerning finances easily could arise in their marriages. Ruth illustrated this, emphasizing the preemptive steps that she could take in

order to lesson financial tensions, such as saving beforehand: "I would say definitely make sure your finances are in a good place, because to start off together, that would be such a huge stress to, like, not have enough money right off the bat...because those things just add stress, unneeded stress, to the relationship."

Additionally, married students in our sample detailed the important role that discussing key financial issues had played in their marriage. Describing some of the stress that money-related issues often cause for newly married couples, participants further emphasized the importance of investigating their respective husband's financial background, as well as their outlook on spending and saving. Sarah illustrated: "You have to see how you are spending-wise with money. Definitely pay attention to that. Are you more of a spender all of the time, and are they more of a penny-pincher? That's going to cause problems. Because you have to compromise with money all the time." Participants further contrasted these financial considerations that accompanied married life with those of pre-marriage, emphasizing the transition they experienced in relation to their outlook regarding finances. Specifically, wives described their realization that finances would change with marriage and the consequent need to discuss these issues beforehand with their fiancés:

When I was single, I didn't even think about it, because I don't buy stuff or need a lot when I'm just on campus, and you don't really need to buy stuff because you eat [in the cafeteria]. So, even before we got married, when we were talking about getting married, I had to sit down and I had to ask him, "Ok, how much money do you have in your account? How much do I have in my account?" and we had to go through all of this.

Finally, participants shared some of the budget realizations they encountered which required addressing pre-existing financial expectations that either they or their husband held before getting married. Specifically, females described fighting against tendencies of expecting a comfortable financial situation, or a lifestyle similar to what their parents worked for years to enjoy. Furthermore, women in our sample seemingly understood the need to alter such false-expectations and to embrace their present financial situations. Tammy explained her

need to adjust spending patterns acquired while single, when financial burdens were significantly lighter:

At times, I think I'm like not able to buy anything, and it's really not [like that]. But I do cut out coupons on the weekend, and it's, like, what I am doing, it's so weird. And it's hard, because my family, like, my parents don't need to watch what they spend and so it's, like, they go to the store and "Oh, you like that? We'll just buy it." But I had to, like, look at the price per pound and all this stuff, so it takes forever to go shopping! (And I'm, like, I don't have this kind of time!)

Finally, participants explained that their overall outlook regarding finances was optimistic because they seemingly understood this phase of life as a married student was temporary. That is, females in our sample viewed college as preparation for a job, which they could not yet attain without completing this phase of education. Understanding the transitory nature of their present situations, participants resultantly reasoned that their present limited budgets hopefully were not indicators of future financial prospects. Amy illustrated:

You have to be willing just to, like, not, like, my parents got married later, so they had an amazing house [right away]. Like, you just have to know that it's going to be meager for a while, but, like, just to be willing to enjoy the nothingness that you have which is good, and be willing to budget...and [learn to] be good at that.

Necessary Adjustments for Successful School Marriages

Participants in our study first identified numerous areas of their lives which routinely are impacted by finances. In particular, the females highlighted specific activities in which they are unable to participate or which they enjoy less often because of cost. Finances seemed to affect married students' lives significantly in multiple areas, ranging from grocery shopping, to eating out, to watching movies in theaters, to buying new clothes. Married students seemed highly aware of the stifling effects of limited finances, as Jane illustrated:

I never shop anymore. Clothes, shoes, never, oh my gosh. I use to go out and always get my hair done, all kinds of stuff like that. Just those little self-pampering things like going to get manicures, pedicures all the time. Now, I don't do it. And I mean that's a huge difference...and that's stuff, like, my [single] friends will go do that and I'm just like "I want to go, but I can't."

Participants reported understanding that a married lifestyle required changes in spending patterns. Contrasting their former budgeting practices with necessary, limiting decisions they now made as married students, females seemingly were able to separate the two lifestyles and recognize their need to shift mentalities. Pam explained this perspective held by most participants and their overall willingness to "go without" when necessary:

Every little thing counts. So, whereas before it was just kind of like get the bills paid and do whatever else you want to do with the money, now every little bit has to go to something. So, I think probably compared to my friends, from what I can see, they're way more carefree than what we are. And we're just like, "Sorry, can't do that. Don't have the money."

Further, participants explained that with their marriage came a change in financial perspective. What once seemed highly important females explained, may be intentionally overlooked now because of the potential financial strain such indulgence might cause. Erin, like most participants, emphasized her increased willingness as a married student to make lifestyle sacrifices:

I'm definitely, it's not like I overspent what I, like made [when single], but I had the freedom to just go shopping and go, like, buy clothes or buy shoes. And, like, now I don't have the freedom to do that, because you realize what's more important, and you realize you can go without certain things...but it's hard because with my single friends, they aren't as careful. So I'll find them asking us to go out to eat a lot or go get ice cream a lot or go do something that costs money...and a lot of the times we have to reject social opportunities like that because we want to be careful with our money.

While participants described their efforts toward frugality, they also shared cheaper alternatives to the activities which they felt must temporarily be forgone. These free or less expensive alternatives demonstrated both the creativity and flexibility of the married students in our sample. Females related going on picnics, utilizing free library resources, playing board games, and many other “cheap” activities that focused more on spending quality time than on the rush or exhilaration experienced from expensive excursions. Alisha illustrated this perspective that was similarly related by most participants:

Going out to eat was a big thing; we used to do that three to four times a week. We probably eat out once or twice a month now. And I like to cook, so it’s working out good. We used to go to a lot of movies, and now maybe we’ll rent them, so just stuff like that. Also, gifts, and we haven’t bought any clothes yet. I’m sure we will, but that’s something that I’m happy. I’m content. My mom gives me a hand-me-down, so I’m content with that. Just little things, but we’re also finding things that we like to do, like tennis and bike rides. I guess it’s just changing your way of life so that it doesn’t revolve around money and things that cost money.

Overall, participants seemingly took in stride the necessary adjustments that accompanied married lifestyles, especially in the realm of finances. Specifically, participants seemed willing to “go without” when necessary, reflecting their relatively strong commitments to budgeting. Pam aptly summarizes the sentiments of most participants in regards to the limiting aspects of finances as a married student:

Sometimes you might have a hundred dollars left in the bank for the rest of the month, but you can’t go spend it on whatever you want, clothes or a treat for yourself because you never what’s coming around the corner, you know. It’s kind of like you have to, “Save it for a rainy day.”

Finally, participants shared a necessary shift in their own mindset regarding their present view of finances. Previously, when single, females in our study described having an individualized outlook towards their money. This stands in sharp contrast, however, to the partnership-finance-model our participants adopted following marriage. As Robin stated: “I am more careful with my money now than when I was single

because I know that it's not just my money anymore." Furthermore, participants related considering their spouse's needs when making purchases. That is, married students seemingly understood the value of reasonable selflessness in a healthy marriage, which seemingly related to their financial realm. Christina explained:

I think when I was single, like, I was a good saver, but I didn't have to like think about spending as much. Like, if I wanted something then I would just get it. But now, it's totally different. Like, I can't just go shopping with girlfriends and, like, get whatever I want. You know, I have to talk about it and make it a mutual decision. [Thinking] is it something I need? You have to communicate a lot more about things like that.

Participants also explained that, as their mindsets shifted toward a collective financial outlook, their need to communicate also escalated. Females explained that, especially when credit and bank accounts were shared, being in regular communication regarding finances became a crucial element contributing to their overall marriage happiness and success. Hannah aptly illustrated this sentiment, as also expressed by most of our participants, when describing the importance of communicating and finances.

Um, I think, when there's two of you spending money that's in one bank account it can more easily turn into, "Hey, where'd all the money go?" you know. Um, because you spend it at different times, you don't realize how much you're spending or how much the other person's spending. So that can be a difficulty so you definitely have to communicate and be, keep your eye on what you're spending things on and, um, cut out things that aren't necessities...I usually always ask [my husband] before I buy anything. So, um, that's definitely, you know, a change. When you're single you just buy whatever you want, but now it's "Hey, I was thinking about buying this can we afford this right now?"

Finally, participants explained their need to consider the unknown when planning a budget. In addition to coordinating with their spouse regarding pressing financial needs, participants also described their changed outlooks regarding the importance of not spending money unnecessarily. Females in our study attributed this shift in thinking to

their adoption of more futuristic, long-term outlooks that accompanied marriage. Katrina summarized, emphasizing the marriage-centered outlook our participants seemed to have adopted:

In order to have enough money to pay our bills and buy stuff that we want and do stuff that is fun, we have to budget. And because [my husband], he is a spontaneous kind of person, he would be more that way if I didn't keep track of it. It's incredibly important, especially with emergencies that come up, you not only have your emergencies that come up, but now you have to think of this other person and stuff that might happen to them, or if he gets sick or something we have [university] insurance and that's it, so it's kind of very limited, which means budgeting, it's huge.

Discussion

Current trends regarding the steep costs of higher education directly impact the financial strain experienced by undergraduate married students, as particularly noted by the college females from our sample. Wang (2003) detailed student debt to have increased 74% since 1997, suggesting the females we interviewed likely face significantly greater financial burdens than the married students of previous generations. Friend and Collins (2007) further reported that, on average, college students today graduate \$7,000 more in debt than they would have 10 years ago. Overall, the challenges related to finances shared by our participants seem only to be increasing. As the average debt loads with which students graduate increases, the financial strain students experience also likely will intensify. This trend toward escalating educational costs enhances the importance that undergraduate students become aware of how finances likely will impact potential student-marriages relative to debt, spending, and budgeting.

Participants in our sample attributed financial stresses they experienced, in part, to the limited income they and their husbands presently are able to make. Because married students in our sample were undergraduates, job options and salary ranges naturally were limited. Manthei and Gilmore (2005) describe the stresses most working students undergo trying to balance academics with their work schedule, as well as students' perceptions that working detracts from their overall

academic performance. Undergraduate students who are married not only face the challenge of balancing work with academics, but they also face additional time demands associated with married life. Because [Fillion \(2006\)](#) found working more than 10 hours a week while a full-time undergraduate student has stifling effects on extracurricular and social activities, married students may find even more substantial, negative results from adopting such schedules. That is, when single students make decisions to take a job while in college, they are not neglecting a marriage partner, as is the case for married students. As Fillion suggested, students should seek balance when planning work into their schedules, and this admonition seems of particular importance for undergraduate married students.

Throughout the participants' interviews, there seemed to be a social psychological "common enemy" phenomenon at work. Sometimes intimate bonds occur between two opposing individuals or parties through an exposure to traumatic experiences focused around a "common enemy." The focus of individuals in these cases shifts from personal concerns to a collective mindset, where both parties become focused on overcoming the perceived obstacle at hand. Nations often form unanticipated military or economic alliances, for example, when faced with common enemies. These "bonding" type experiences seemingly occurred with participants in our study and their spouses. These women described financial need similar to that of a "threatening foe" in relation to their marriage, and couples seemingly rallied together during these times of financial difficulty in order to meet the challenge of this perceived enemy. The overall results of this phenomenon within the context of marriage appear positive, and seemingly increase the couples' regular discussion of finances, viewing the financial effort as a joint endeavor toward the achieving the victory over college poverty.

We also note the overall positive light with which married undergraduate females portrayed the current state of their respective marriages. In particular, despite the difficult financial situations they faced being married, almost all women affirmed their personal decisions to marry as undergraduate students. This is of particular interest considering [Selvaratnam's \(2007\)](#) findings that most college students not only hope to get married but tentatively plan to wait until sometime after graduation. Additionally, [Lobron \(2008\)](#) indicated that the average

age at which contemporary men and women marry has increased to 25 and 27 for women and men respectively. Because the average young adult today marries several years after finishing college, the married student population remains a significant minority. Better understanding the challenges faced by married students and the specific perceptions they generally hold may prove valuable in assisting this segment of the student population as they face unique challenges—apart from those faced by the typical undergraduate student. Officers in student life divisions of campus universities have vested interest in seeing student marriages succeed. Providing assistance and guidance, as needed, in the domain of finances may help keep student marriages successful. Sharing the findings of the present study (among other important data, of course), in pre-marriage workshops could help get student marriages off to a healthy start.

We did not administer psychological tests or formally survey students' levels of present marriage satisfaction as part of the present qualitative research study. Nonetheless, throughout the interview process, the married students did not share significant concerns about their marriages that overtly signaled either dysfunction or discontentment. In fact, the women generally described their marriage experiences quite positively. That is to say, none of the participants volunteered information during their interviews that suggested undue strain was present in their marriages. Moreover, our present observations during the interviews with these married students did not suggest that these women were living in the midst of unhappy marriages. In short, while participants spoke of financial stress in their respective marriages, they did not portray overall unhappy marriages.

The female students in our sample appeared to possess a level of maturity beyond their chronological years. When compared with their single cohorts, females in our sample seemed amply aware of responsibility-laden life issues, such as finances, that many single students are not yet required or likely ready to comprehend. In particular, these females were able to disclose the realities of life in ways that suggested generally higher levels of maturity. Our findings seem to suggest that females who choose to marry while in college have acquired levels of prudence not possessed by their typical single peers. It is difficult to determine whether females who seriously date and

marry while in college already possess significant levels of maturity, or whether the evident maturity displayed is acquired through the realities that accompany the pragmatics of marriage. Regardless, we suspect that maturity played a significant role to the overall reported marital satisfaction that females in our sample communicated.

Self-discipline was a common thread among each of the themes reported in the present study. Repeatedly, married students affirmed the importance of financial self-control and budgeting, attributing much of their financial success to such practices. Self-discipline may be a trait which relatively mature college students had possessed prior to marriage. However, the practice of self-control also has been the result of life experiences that demonstrate its cultivation. In short, we do not know if self-disciplined people are those who self-select to marry young, or if they learn to be disciplined after marrying due to their increased financial responsibility. Reviewing the interview texts, comparing students' reported pre- and post-marriage spending habits, suggest that most likely females learned more self-discipline, even if they possessed reasonable measures before marriage.

Finally, there is a sense in which participants in our study exercised a process of "trading pleasures." Married females in our sample described significant levels of stress associated with budgeting and applying self-discipline to their lifestyles. Additionally, delayed gratification seemed to be a cogent force driving participants' monetary choices. Students appeared to be willing to trade the immediate potential pleasures of money-spending for the longer-term pleasures of lowered debt after graduation. Further, since the females in our sample generally spoke of having fulfilling marriages, they seemingly were more willing to trade "money pleasure" for perceived "relationship pleasure" with their respective spouses. At least to some extent, all of life consists of trading pleasures, *quid pro quo*. In the present context, this meant trading short-term financial pleasures for what students in our sample appeared to deem longer-term pleasures in relationship-enhancement with their respective spouses.

Limitations and Future Research

All good research identifies the limitations of a study and reports them (Price & Murnan, 2004). Since all participants in the present study were Caucasian, future researchers should extend the present study with samples that include married students who are minorities. Particularly, a study of Hispanic female married students, a study of African-American female students, and a study of Asian-American female married students would provide interesting comparisons with the findings of the present research study. Additionally, a meta-analysis (Mio, Barker-Hackett, & Tumambing, 2006) among the various minority married student groups and the present Caucasian sample likely would prove very interesting. Various ethnic groups are known to possess some characteristics that are relatively independent of other minority groups (Shirae & Levy, 2004), and homogeneity of sample often produces the most clear themes in qualitative research studies (Creswell, 2009). Consequently, mixing minorities groups in the context of the present qualitative research studies might not provide as fruitful as would be studying the groups separately then comparing the results of the individual studies among themselves.

Obviously, since the present study focused on married student females, future researchers should replicate this research design, using male married student samples. Comparing the results of those studies with the findings of the present one likely would produce useful insights. Additionally, participants from the present study were sampled from a private, selective, comprehensive, Midwestern university. Future researchers should replicate the present study, exploring the perceptions of married students attending institutions that have different characteristics such as being open enrollment, larger, liberal arts, and located in different parts of the country. Such studies might find potential differences among student bodies that have varying demographic characteristics.

And finally, we believe that future researchers should follow-up the present study using quantitative methods. As previously stated, often qualitative methods are very useful for conducting research where little empirically is known regarding a particular construct (Johnson, Christensen, 2004). Qualitative results can provide highly useful data

for generating meaningful hypotheses that quantitative researchers can test statistically (Sarafino, 2005). Surveys, longitudinal, and correlational designs naturally might follow the findings stated in the present study. That is, the results reported here potentially can provide guides for quantitative researchers to generate heuristic theories that can be tested by reasonable hypotheses.

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Towards a Southern Theory of Student Equity in Australian Higher Education: Enlarging the Rationale for Expansion

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Towards a Southern Theory of Student Equity in Australian Higher Education: Enlarging the Rationale for Expansion

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Abstract

Student equity in Australian higher education is a numbers game. While university student recruitment departments focus on ‘bums on seats’, equity advocates draw attention to which bums, in what proportions and, more to the point, which seats, where. But if the counting of ‘bums’ is crude, so is the differentiation of seats. Just distinguishing between courses and universities and scrutinizing the distribution of groups is a limited view of equity. This paper proposes an expanded conception for student equity and an enlarged regard for what is being accessed by students who gain entry to university. Drawing on Connell’s notion of ‘southern theory’, the paper highlights power/knowledge relations in higher education and particularly for ‘southerners’: those under-represented in universities, often located south of cut-off scores, and whose cultural capital is similarly marginalised and discounted. The paper concludes that taking account of marginalized forms of knowledge requires thinking differently about what higher education is and how it gets done.

Keywords: higher education, student equity, social inclusion, widening participation, power/knowledge, cultural capital

Hacia una Teoría del Sur sobre la Equidad Estudiantil en la Educación Superior Australiana: Ampliar la Base Lógica para la Expansión

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Resumen

La equidad estudiantil en la educación superior australiana es un juego de números. Mientras que los departamentos universitarios de reclutamiento de estudiantes se centran en tener a alumnos que “hagan bulto”, los defensores de la equidad llaman la atención sobre quién “hace bulto”, en qué proporción y, especialmente, dónde. Pero si el recuento de las personas que “hacen bulto” es crudo, también lo es la diferenciación de los mismos. Sólo distinguir entre los cursos y las universidades, y escrutando la distribución de los grupos es una visión limitada de la equidad. Este artículo propone una concepción de la equidad estudiantil más expansiva, y una visión ampliada de lo que se está requiriendo para el acceso de los estudiantes que logran entrar en la universidad. Partiendo de la noción de Connell sobre la 'Teoría Sur', el artículo destaca las relaciones de poder/saber en la educación superior y en particular en el caso de los 'sureños': aquellos insuficientemente representados en las universidades, a menudo localizados en el límite sur de los resultados, y cuyo capital cultural es igualmente marginado y no tenido en cuenta. El artículo concluye que el tener en cuenta formas de conocimiento marginadas requiere pensar diferente sobre lo que es la educación superior y cómo se lleva a cabo.

Palabras clave: educación superior, equidad estudiantil, inclusión social, ampliar participación, poder/conocimiento, capital cultural.

The interest of this paper is in the concept of 'equity', specifically what this means for students in higher education and particularly its expression within Australia's higher education system. Recent policy announcements by the Australian Government ([Commonwealth of Australia, 2009](#)) to increase the participation of under-represented groups in higher education, particularly the participation of people from low socioeconomic backgrounds, is the latest in a growing number of policy initiatives by OECD nations to expand and widen their higher education provision. Others include but are not restricted to HE expansion agendas in the UK (target: 50% of 30 year olds with a degree by 2010; [DfES, 2003](#)), in Ireland (target: 72% of 17-19 year olds participating in HE by 2020; [Bradley et al 2008, 20](#)) and in the USA (target: 60% of 25 to 34 to hold college degrees by 2020; [Kelly 2010, 2](#)). The rationale for expansion tends to be more about giving their respective nations a competitive edge in the global knowledge economy ([Sellar, Gale & Parker 2011; Gale 2011b](#)). Equity features in these arrangements to the extent that expansion (from mass to universal participation; [Trow 1974; 2006](#)) is dependant on 'raising the aspirations' of people who previously have not been all that interested in higher education.

In this paper I provide a policy and conceptual analysis of these equity arrangements, arguing that previous conceptions of equity are increasingly inadequate for pursuing social inclusion in higher education. Student equity in Australian higher education (HE) remains officially defined by and more generally understood in terms of the Australian Government's 1990 policy statement, *A Fair Chance for All* ([Department of Employment Education and Training, 1990](#)). In brief, the policy describes equity in terms of the proportional representation of social groups within the university student population: 'bums' on seats or, to be fairer, particular bums on particular seats. On the face of it, these are matters that have more to do with what happens immediately before and at the point of university entry, than with what students experience once they have entered. There has been little regard for what students bring to university, to the learning environment and experience, and little regard for what they are potentially able to contribute.

In responding to this absence, my argument is for a 'southern theory' of HE. [Connell \(2007\)](#) uses this term to draw attention to the fact that

much social theory (informing HE) is produced in, and from the perspective of the global north. Despite claims to universality, these theories fail to account for voices and knowledges from non-dominant peoples. The phrase 'southern theory' 'calls attention to the centre-periphery relations in the realm of knowledge', specifically that a variety of knowledges and ways of knowing have been denied voice in social theory and that they have their own contributions to make. 'Northern' and 'southern' are used by Connell:

... not to name a sharply bounded category of states or societies, but to emphasise relations – authority, exclusion and inclusion, hegemony, partnership, sponsorship, appropriation – between intellectuals and institutions in the metropole and those in the world periphery. (Connell, 2007, pp. viii-ix)

Drawing on a 'southern' disposition, the paper seeks to move thinking about equity towards new 'relations in the realm of knowledge', to see what this might mean for student equity in HE in particular, with emphasis on what happens once students enter university. It seeks to point in a particular direction, to give conceptual directions rather than name precisely what such an approach means for practice in particular sites.

The paper begins with a consideration of current student equity policy in Australian HE, before addressing more epistemological concerns. While the intention is to problematize current policy and practice in student equity, this does not simply mean the replacement of one definition with another. Proportional representation as a definition of equity remains useful symbolically and politically because of its potential for arguing for broader and deeper equities in HE. However, a more sophisticated approach to equity needs to account not just for bodies but also for what they embody (Sefa Dei, 2008; Dall'Alba & Barnacle, 2005; Bourdieu, 1990; Turner, 1996), specifically, their knowledges and ways of knowing. These are issues taken up later in the paper.

Understanding equity

The problems encountered by some social groups in accessing Australian HE are now well rehearsed. Australians from high

socioeconomic backgrounds are currently three times more likely to enter university than people from low socioeconomic backgrounds (Bradley, Noonan, Nugent, & Scales, 2008, p. 30). Indigenous Australians constitute 2.2 percent of the nation's population but only 1.3 percent of all university students (Bradley et al., 2008, p. 28). And while a quarter of Australians live in regional and remote areas, only 18 percent are represented within the HE student population (Bradley et al., 2008, p. 28; Department of Education, Employment and Workplace Relations [DEEWR], 2009a). The 2008 Review of Australian Higher Education (the Bradley Review) has now popularised these figures within Australia, particularly the comparatively low levels of participation by students from low socioeconomic status (SES) backgrounds (Bradley et al., 2008, p. 28).

Perhaps less well known is that while 8 percent of Australians have a disability, university students with disabilities only constitute 4 percent of all HE students (Bradley et al., 2008, p. 28; DEEWR, 2009a). Yet, despite receiving a small but important mention in the Bradley Review (2008, p. 29), there is nothing in the Government's budget response, Transforming Australia's Higher Education System, which mentions students with disabilities (Commonwealth of Australia, 2009). While their participation has improved over time, it is still short of where it needs to be. Students with disabilities seem to have fallen off the policy radar, at least from recent government announcements.

In 1990, A Fair Chance for All also identified people from non-English speaking backgrounds (NESB) and women in non-traditional areas as under-represented in Australian universities (Department of Employment Education and Training, 1990). On crude numerical measures, the participation of people from NESBs has significantly improved since that time. Because of this, they appear to have dropped off the mainstream equity agenda. However, there is a need to disaggregate these figures to distinguish between the HE participation of skilled migrants and people who have migrated to Australia as refugees. Similarly, women continue to be grossly under-represented in non-traditional areas, specifically in engineering, at both undergraduate and postgraduate levels (DEEWR, 2009a) but this also does not appear to be an issue of current policy concern. As in the UK, gender equity has lost its critical edge (David, 2011).

The low participation of these 'equity' groups has been a concern in Australia for some time. For instance, the proportion of students from low SES backgrounds in HE has hovered around 15 percent for at least the last two decades and more probably since the expansion of Australian HE in the post-war Menzies era (Gale & Tranter, 2011). We know this because of the statistical data generated by the Australian Government since 1990. Indeed, equity has become defined by these statistics (Gale, 2011a). On one level, the Federal Government's policy directions for HE perpetuate this understanding of student equity, that it is a matter of numbers. Framed in this way, Australian universities are now being asked to 'lift their game', to raise the number of Australians from low SES backgrounds enrolled in their institutions to 20 percent by 2020. At the same time, they are being invited to enrol more undergraduate students, to increase the overall participation of Australians in HE, to 40 percent of 25 to 34 year olds by 2025. The extent to which institutions contribute to reaching these targets is the subject of compacts: negotiated agreements between government and each institution.

There are at least three questions that arise for policy and practice from the current statistical precision that is applied to conceptions of equity: How can we, indeed should we, account for differences within equity groups? How can we account for differences between equity groups? How confident can we be that we are measuring what we claim to be measuring?

The first and second questions concern the imagined and real differences within and between equity groups, which are not well acknowledged by their current official definitions (see Martin, 1994). For example, people from low SES backgrounds are not a homogenous group. They can differ by race/ethnicity, social/cultural capital, geographical locations and the interrelations between these. In the same way, socioeconomic status as a category does not 'capture' all differences, as it is conceived within current Australian Government policy. For example, in the Bradley Review and in the Federal Government's policy response, low SES appears to have become an umbrella term for all under-represented groups, including Indigenous peoples and people from regional and remote areas. While it is true that many of these Australians are from low SES backgrounds, it is also the case that many

are not. Moreover, even those who are, their socioeconomic backgrounds do not describe in full their particular social, cultural and political circumstances. Increasing the participation of people from low SES backgrounds is now being articulated as both a target for the sector and a 'catch-all' for all under-represented groups.

To its credit, the Government's budget paper, *Transforming Australia's Higher Education System*, announced its intention to support 'a review of the effectiveness of measures to improve the participation of Indigenous students in higher education' (Australian Government, 2009, p. 14), due to report in September 2012. Nonetheless, the Government is still of the view that 'The steps to improve low SES student participation will impact on and benefit Indigenous students' (Commonwealth of Australia, 2009, p. 14). The same concessions have not been afforded other equity groups, including people from regional and remote areas of Australia, despite the fact that of all groups their participation in HE has seen the largest reduction over time (Bradley et al., 2008, p. 29). In effect, in the current equity policy hierarchy, Indigenous people and people from regional and remote areas are located first and second respectively under the low socioeconomic banner, while students with disabilities are less conveniently subsumed and indeed are displaced from current policy debates.

The third issue with utilising a narrowly statistical approach to defining equity involves the question of precision, in particular in how socioeconomic status is measured. Much national debate has focussed on the inefficiency of the current ABS-generated measure of the employment and education attainment of individuals within postcodes (e.g. DEEWR, 2009b; James, 2009; Phillimore, & Koshy, 2010a; Sellar & MacMullin, 2010; Sealey, 2011; Ross, 2011a). One of the problems with this measure is that it does not take account of wealthy and high status areas within low SES postcodes, or of poorer and lower status areas in middle and high SES postcodes. Naturally, universities are concerned about the lack of clarity around these issues, particularly those with current student populations that include people from low SES backgrounds who originate from and/or live in middle and high SES postcodes. In recognition of these difficulties, the Australian Government has established an interim measure of SES² that combines data from an Australian Bureau of Statistics socioeconomic index

(collected at the level of census districts) with Centrelink³ data on individual students. The Australian Government has foreshadowed that even ‘better measures of low socioeconomic status will be developed which are based on the circumstances of individual students and their families’ (Australian Government, 2009, p. 14).

However, the value of the current and arguably flawed measure is its regard for context and that it is not purely derived from economic considerations. The danger in any new measure is that it becomes so focused on individuals and their individual circumstances, that it loses any sense of the influence of these individuals’ socio-cultural contexts, which constitute the group.⁴ In developing a new measure of SES, it is important not to lose sight of ‘family’, and ‘community’, in calculations. There is a danger in reducing SES to a single measure of an individual or their parents’ financial and/or educational attainment alone, which does not take account of the way in which individuals negotiate their social and cultural lives in combination with others.

Responding to equity targets

These definitions of equity have implications for what we imagine to be the purposes of HE. At one level they draw attention to what is missing, what is not considered in policy on student equity. For instance, an emphasis on equity as proportional representation tends to focus our minds on what happens before students get into HE. It draws attention to the point of entry, almost to the exclusion of other considerations. In the current policy configuration, equity is seen to be achieved once students have entered in the right proportions. Obscured from view is the impact of proportional representation on HE itself. If the Australian Government and Australian universities are successful in achieving the proportional representation of equity groups within HE, it is not difficult to imagine that their increased presence will have an impact on what happens within universities (discussed below). But it is worth considering the extent to which this constitutes ‘success’, at least in policy terms.

First, the Government’s target of 20 percent of university students derived from low SES backgrounds by 2020, falls short of the 25 percent of all Australians from low SES backgrounds. Hence, even if

the target is reached, proportional representation will not have been achieved. The task is even more difficult when we take into account that Australians from low SES backgrounds are not evenly spread across the nation. In some parts they are more heavily concentrated, in other parts less so (Phillimore & Koshy, 2010a; 2010b). Responding to such observations, the Government has announced ‘excellence targets’ or institutional variations to the sector’s equity target in proportion to an institution’s history and the low SES population of the political jurisdiction in which the institution is located (Trounson, 2011). Some acknowledgement has also been given to universities that draw significant student numbers from outside these state boundaries, whose mission or *raison d’être* is national or even global. But given the way in which equity is currently defined – as proportional representation – even breaking down the sector target into institutional targets is not enough. HE is not all the same. For equity to have real teeth, proportional representation also needs to apply across institution and course types. Short of this, it will be difficult to argue that the policy or at least its equity intent, has been successful.

Second, equity ‘success’ must consider what happens once enrolments of equity groups reach their proportional representation within the university student population. The implications of this are not lost on the HE sector or on government. Indeed, they are often raised by some as reasons for not increasing the numbers of underrepresented groups in universities (Gallagher, 2009). The most common claim is that many students from disadvantaged backgrounds are not sufficiently prepared for university (Ross 2011b). To enrol them in a HE would require a lowering of academic entry standards measured in terms of eligible ATAR (Australian Tertiary Admission Rank) scores. This is such a widely and deeply held view that it is hard to dislodge even when faced with evidence to the contrary. Richard Teese’s research, for example, clearly demonstrates that students with low ATAR scores are highly correlated with low SES, and vice versa. In other words, the ATAR is more indicative of socioeconomic status than it is of a student’s academic potential (Teese & Polesel, 2003). Echoing Teese’s sentiments, George et al. argue that ‘the TER [Tertiary Entrance Rank; a form of ATAR] is an authoritative measure that rewards the cultural resources characteristic of the most economically powerful groups in

society' (George, Lucas, & Tranter, 2005, p. 144).

The fallacy of the claim that enrolling more students from low SES backgrounds will inevitably lower academic standards is also born out in the research on these students' university performance. The evidence from large numbers of small and large-scale research projects across the country and across different university types, is that university students from low SES backgrounds perform at or about the same as their peers (Dobson & Skuja, 2005; Tranter, Murdoch, & Saville, 2007; Dobozy, 2008; Win & Miller, 2005). If there is any variation, it would seem that students from low SES backgrounds perform better than their peers in the 'soft' sciences and not as well as their peers in the 'hard' sciences (Dobson & Skuja, 2005). Disparities in school facilities and in access to experienced science and mathematics teachers, could reasonably explain the soft/hard science variation. However, the spectre of the lack of preparation of students from low SES backgrounds is enough to have some in HE deflecting attention away from their equity responsibilities. How can we achieve the government's equity targets, they argue, if schools do not present us with adequately prepared students? Certainly, more could be done to ensure the quality of schooling for all students. Yet, it could equally be argued that universities are intimately involved in the nature of schooling: in directly and indirectly determining its curricula (Gale, 1994), in valorising academic over vocational pathways, and in preparing its teachers. However, this is to take away from the evidence that students from low SES backgrounds perform well at university when given the opportunity to participate.

In need of support

Even among those who are prepared to accept this evidence, some suggest that achieving the Government's low SES target will require enrolling students who are qualitatively different from those students from low SES backgrounds who have been enrolled to date. Others have determined that if their institution is able to reduce or even eliminate the attrition rate of their current population of students from low SES backgrounds,⁴ they will meet their low SES targets. Both point to the need for increased support at university for students from equity groups, in order for them to be successful. This is generally conceived as co-

curricula activities that provide students with support outside regular classes: in study skills (including literacy and numeracy skills) but also in mentoring, counselling, accommodation, health care, childcare, and so on. It is an argument that has found traction in government policy. For example, the 2009 budget document on HE (Australian Government, 2009, p. 13) announced a new Higher Education Participation and Partnership Program (HEPPP) involving an enrolment loading (of \$A325m) to encourage universities to enrol students from low SES backgrounds. As well as being an incentive to encourage universities to enrol students from low SES backgrounds, the Australian Government's explicit intention is that the additional funding will be used 'to fund the intensive support needed to improve their completion and retention rates' (Australian Government, 2009, p. 14). This compares with \$A108m over the same period, which has been set aside to support university outreach activities or what are now called partnership activities with schools and vocational education and training providers. In funding terms, the HEPPP establishes a 3 to 1 ratio in favour of supporting students from low SES backgrounds enrolled in university, over activities that enable and encourage these same students to gain access to university.

There is considerable belief embedded in this policy initiative, that support for students from equity groups, particularly students from low SES backgrounds, is needed in order for them to be successful at university. Indeed, some suggest that it is because of the support they have been provided to date that students from low SES backgrounds have performance and attrition rates comparable with their peers. However, there is minimal evidence to support this claim across the sector. Student support provided by universities across the nation is quite varied, not just in its range but also in its quality and quantity. Indeed, elite universities compared with 'equity' universities – with arguably lower levels of student support in the former – demonstrate lower rates of attrition by students from equity groups (Group of Eight, 2009). One explanation for this might be that elite universities enrol more students directly from school. For example, 82 percent of the University of West Australia's first year students are in this direct-from-school category (Skene & Evamy, 2009). Whereas, the 2009 Government budget document notes that 'adult learners... comprise a

large proportion of students who require additional support' (Australian Government, 2009, p. 15). However, a closer examination of the retention statistics indicates that "those institutions with a higher proportion of disadvantaged students [often 'equity' universities] retain them at a higher rate than they do the overall student population, and perform better in this regard than more prestigious universities with lower low SES participation rates" (Parker & Peters, 2011).

More research is required in this area of student support in order for the sector and government to be able to make informed judgements at a policy and system level about what forms of support are needed and with what effect, for what kinds of students, and in which contexts. Co-curricular activities are an important part of the university student experience but there is a fundamental problem with our conception of student equity in HE if these student support activities constitute all there is to equity. Vince Tinto's phrase, that 'access without support is not opportunity', is now well known (Tinto, 2008; see also Smith et al., 2011). However, opportunity confined to support is not equity. This is because 'support', by definition, is not designed to challenge what a HE means. Rather, its purpose is to reinforce what it currently is. Mentoring, for example, is "about the maintenance and reproduction of the existing hierarchy and the status quo, [with] the primary beneficiary [being] the institution" (Margolis & Romero, 2001, p. 80; Gale & Parker, *in press*). The primary function of a university's support services is to enable its students to engage effectively with the university's teaching and learning programs. In this sense, student support is peripheral to the central activity of universities. The mainstream activity of universities – the legitimation and dissemination of certain forms of knowledge – is taken as a given, as normative. It is students who must adjust to it in order to be successful. Support services provide the mechanisms for students to achieve this, if they do not come to university with the capacities and resources to achieve this on their own.

Effectively, students are not just 'supported' but positioned as requiring change, adjustment, up-skilling, additional resources, and so on, in order to fit in to established patterns of participation. In its most positive sense, support services provide students with ways of coping with university, even mastering it. Typically, it is not the university, its teaching and learning programs or its administrative structures that

adjust to accommodate different kinds of students. Indeed, many academics who deliver the university's teaching programs would regard adjusting those programs to accommodate different kinds of students as a threat to academic standards. For some, accommodating equity to that extent is in clear opposition to excellence as it represents:

... a distraction of scarce resources for an unattainable vision of an undifferentiated university system ... The serious risk is a drift to mediocrity ... as some universities will divert resources to do what they cannot do well. ... Every university cannot be expected to contribute equally to the nation's achievement of research excellence and equity of higher education access. Policy should enable each institution to play to its strengths. (Gallagher, 2009; see also Gale, 2011a).

Improving the student learning experience

Nevertheless, the government is of the view that 'to achieve [its] ambitious attainment targets there will also need to be an increased emphasis on improving the student learning experience in order to boost retention, progress and ultimately, completion rates' (Australian Government, 2009, p. 15). Given that explicit targets for the completion rates of students from low SES backgrounds have not been set, student equity appears subsumed by a productivity agenda (Gale & Tranter, 2011). It is the 40 percent attainment target (noted above) rather than the 20 percent participation target that informs the rationale for improving the student learning experience. While student diversity has become an important concept in this field, there is a need for a stronger social justice rationale and direction beyond what is evident in the government's current policy agenda and in institutional practice. This necessarily will involve unsettling 'the centre-periphery relations in the realm of knowledge' (Connell, 2007, p. viii), as Connell describes the problematic of 'northern theory', suggesting a counter-hegemonic or southern theory of HE (Connell, 1993, p. 52; 2006; 2007). The prime motivation is a commitment to and understanding of social justice but there is also potential benefit for all (Milem, 2003). Indeed, a mature understanding of social justice, 'a sophisticated approach' (Bradley et al., 2008) to equity, needs to be able to conceive of 'multiple payoffs'.

For example, in “a multidisciplinary analysis of the research literature”, Jeffery Milem (2003, p. 129) has found that heterogeneous university student populations exhibit higher levels of academic achievement than homogenous university student populations and that the greatest gains are by “majority students who have previously lacked significant direct exposure to minorities” (Milem, 2003, pp. 131-132). But it is not the sheer presence of different students that generates this effect. The educational benefits for all university students in more diverse cohorts include: “greater relative gains in critical and active thinking ... greater intellectual engagement and academic motivation ... [and] greater relative gains in intellectual and social self-concept” (Milem, 2003, p. 142). In fact, institutions and their staff who fail to engage with the diversity of their students also fail to see this academic improvement (Association of American Universities, 1997). In short, creating space for and valuing “diversity in colleges and universities is not only a matter of social justice but also a matter of promoting educational excellence” (Milem, 2003, p. 126).

Clearly, the most effective site to engage in changing HE is from the centre. Student support services are important and essential but they are largely peripheral to the mainstream of HE. A student equity agenda for HE must centre on the student learning environment and experience if it is to challenge the exclusion of certain bodies and what they embody. Drawing on Gale and Densmore’s (2000) typology of social justice, a southern theory of HE can be characterised by three important dimensions. First, in the most ideal of circumstances, learning environments and experiences are such that students are appreciated for who they are and for how they identify themselves. Second, there are opportunities in these environments and experiences for all students to make knowledge contributions as well as to develop their understandings and skills. And third, all students are provided with genuine opportunities to shape how their learning environments and experiences are structured. These dimensions provide a more robust social justice framing for the ‘diversity principle’ in current thinking on first year HE curriculum (Kift & Nelson, 2005, pp. 230-232). Indeed, the principle is about ‘engaging with difference’ (Hayes, Mills, Christie & Lingard, 2006) rather than with merely celebrating the presence of diversity or variety.

In the past, and in much of the present, universities have tended to make assumptions about the knowledges and understandings of their students, even in relation to those who have come from privileged backgrounds. HE learning environments and student experiences have been informed by what Paulo Freire (1996, p. 52) has termed a 'banking concept' of education: with academics making deposits in the minds of their students from which they (both) are able to make later withdrawals. Knowledge has been assumed to reside in the cloisters of the university, in the hands and heads of its dons. Indeed, universities and their scholars have positioned themselves as the legitimate, almost exclusive, producers of knowledge (Connell 2007).

However, we are beginning to understand that this is not necessarily the case, at least in some cases. For example, Australian HE is starting to come to terms with the importance of Indigenous knowledges, although this is more prevalent in places like Canada and in parts of Africa. Apart from a distinctive body of knowledge, Indigenous peoples also have different ways of engaging with and expressing knowledge, for example through narrative. Narrative is not a teaching or research method traditionally employed in universities. Indeed, it has been and still is regarded by many as 'unscientific'. Yet there are things that all students can learn from a narrative approach. Similarly, international students are now very much part of the landscape of Australian universities. Their very presence, and in such numbers, has changed Australian HE for domestic students, for the most part for the better. They have challenged our epistemologies and ontologies and prompted many Australian academics to think differently about the kind of HE offered to all, not just to students who come from overseas. Internationalising the curriculum may be regarded by some as a matter of translation, positioning teaching staff as interpreters. However, for many Australian academics it is more importantly about recognising and being informed by different ways of thinking about and engaging with the world, informed by the social and cultural backgrounds of their international students.

These are matters of pedagogy as much as they are about curriculum. Improving the student learning experience is not simply about teaching students about foreign places or Indigenous knowledges, although there is certainly a place for that. It is also about the need for a curriculum

that provides room for different ways of thinking about, and different ways of engaging with knowledge, and inserting different kinds of understandings into the learning environment and experience that perhaps have not been part of Australian HE before. It is about how we structure the student learning experience in ways that open it up and make it possible for students to contribute from who they are and what they know. It is about an enriched learning experience for all students.

To take this further, arguments for Indigenous and international contributions to HE need to be generalised across all equity groups (Connell, 1993, p. 52). For example, students with a physical disability do not simply comprehend their disability as physical. It is also experienced socially and culturally and understood by them as socially and culturally constructed. In the same way, people from low socioeconomic backgrounds come to university with sets of knowledges about the world, of how to engage with the world, and of what the world is, that are potentially different from and valuable to others (Luttrell, 1989; Zipin, 2009; Gonzáles, 2005). One example is the way in which formal learning environments regard relations between pure and applied knowledge. For some people from low SES backgrounds, knowledge has no value outside of its use or application. But the dominant perspective in formal learning environments is that one needs to learn the theory before it can be applied in some practical situation. 'Even where periods of practicum, work experience, or projects are incorporated into programs, they are usually presented as opportunities to practice or apply the knowledge and skills gained' (Dall'Alba & Barnacle, 2005, p. 719). The relation is uni-directional: knowledge of the pure must precede knowledge of the applied. Hence:

... increasingly, knowledges and skills which could once only be acquired 'on the job,' and which had no existence outside of their use or application, are now deemed to have a formal component, which is a knowledge like any other; their practical component now presupposes a mastery of the theory of which the practical component is the application. Nursing and tourism become university subjects, knowledges which have to be learned in such a way that the students can draw upon their stock of formal knowledge and 'apply' it according to context. (Seth, 2007, pp. 38-39)

Similar distinctions are formed between ‘street’ and ‘institutional’ knowledge, with what students learn informally and from practice not being valued within formal learning environments. The point is that valuable ways of understanding and engaging with the world, which have different understandings of the relations between pure and applied knowledge or that do not even make this distinction, are hence denied, suppressed or lost to others in the learning environment.

One method of translating this theoretical acknowledgement of marginalised knowledges into real world curriculum is through what is known as a ‘funds of knowledge’ approach (Moll, Amanti, Neff, & Gonzáles, 1992; Gonzáles, 2005). This includes recognising that all students come with valuable understandings that can contribute to the education of others. This requires identifying and inviting students’ knowledges into the learning environment and using them to develop curricular. Students are then positioned differently, because they are now expert in the kinds of knowledges that inform the learning experience. Complementing this approach, Zipin (2009) argues that we also need to identify ‘funds of pedagogy’. It is not just the knowledges from students’ different socio-cultural groups but also the ways in which students learn in those groups, which need to be taken into account. Finding a way of bringing those into the formal learning environment is far more challenging to the logic of HE.

Conclusion

The way HE policy currently defines student equity is in terms of student numbers and, superseding all others, numbers of students from low SES backgrounds. It is not a highly nuanced account although it is politically useful to some degree. At the same time, university student support services, including co-curricular activities (that is, first generation First Year in Higher Education (FYHE) approaches) and enhanced curricula design (that is, second generation FYHE approaches) (Wilson 2009),⁶ are increasingly being positioned as what student equity means within HE. These activities are important but they do not constitute all there is to student equity. A more sophisticated approach entails the creation of space in HE not just for new kinds of student bodies but also for their embodied knowledges and ways of

knowing. Within this paper, this is referred to as a southern theory of HE and constitutes a third generation approach to FYHE. It applies not just to Indigenous peoples or international students, their knowledges and ways of knowing, but has relevance for the epistemologies of all socio-cultural groups, including people from low SES backgrounds. In short, an expanded understanding of student equity requires an expanded understanding of higher education. The alternative is a diminished HE for all university students.

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Notes

1 Professor Trevor Gale is the Chair in Education Policy and Social Justice at Deakin University, Australia. Previously he was the founding director of Australia's National Centre for Student Equity in Higher Education. He is the founding editor of *Critical Studies in Education*. His latest books are *Schooling in Disadvantaged Communities* (Springer 2010) with Carmen Mills and *Educational Research by Association* (Sense 2010) with Bob Lingard.

2 Interestingly, the new measure suggests a lower rate of participation in university by people from low SES backgrounds.

3 Centrelink is the Australian Government's social security agency. One category of payments is 'Youth Allowance', which is an age-related (16-20 years) and means-tested payment for young people looking for full time work and/or engaged in study.

4 Margaret Thatcher once famously claimed that 'there is no such thing as society', that we are simply a collection of disparate individuals or 'individuals plural'. Of course, this gives no account of the way in which individuals negotiate their lives in combination with others. Indeed, our very lives involve others. We are social beings and social arrangements govern our interactions. We do this in collectives or groups: individuals interacting with each other in groups, groups interacting with other groups, and rules that govern our interactions.

5 It is worth noting that the attrition rate for university students from low SES backgrounds is not appreciably different from their peers. However, it is the case that Indigenous students at university have higher rates of attrition than other university students. Among the reasons for this, Indigenous people completing their first year of university education are highly sought by government and industry for positions of employment.

6 Wilson (2009) characterizes first and second generation first year experience (FYE) approaches in terms of: (1) university student support services (including course advice and student decision-making support and other co-curricular activities (including orientation activities); and (2) curricula activities (curriculum, pedagogy, assessment) as

well as the broad curriculum of institutions.

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Higher Education Expansion, Social Background and College Selectivity in the United States

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Higher Education Expansion, Social Background and College Selectivity in the United States

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Abstract

Drawing on two recent cohorts of baccalaureate degree-holders (1993 and 2000), this paper takes a new look at the factors that influence students' choice of undergraduate institution in the United States. The two cohorts span a period that was marked by rapid institutional and enrollment growth in U.S. universities. Yet, it remains uncertain whether or not this greater expansion has reduced the effects of social origins on college choices. The findings reveal that educational decisions were indeed influenced by socio-economic effects. Both parental income and education exhibited strong, positive effects, which remained stable across cohorts. At the same time, students' abilities also had a significant impact on selectivity decisions. Students who attended private, non-religious high schools were also more likely to graduate from more selective institutions, while gender effects largely subsided once controlling for academic ability.

Keywords: college selectivity; postsecondary expansion

Expansión de la Educación Superior, Origen Social y Selectividad Universitaria en Estados Unidos

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Resumen

Recurriendo a las cifras recientes de graduados de Bachillerato (1993 y 2000), este artículo proporciona una nueva mirada sobre los factores que influyen en la selectividad por parte de la institución universitaria en Estados Unidos. Las dos series de datos abarcan un período que estuvo marcado por el rápido crecimiento institucional y de la inscripción en universidades estadounidenses. Sin embargo, sigue siendo incierto si esta mayor expansión ha reducido el efecto del origen social en la selectividad de la universidad. De hecho, los resultados revelan que las decisiones educativas estuvieron influidas por factores socioeconómicos. Tanto los ingresos de los padres como su educación mostraron efectos potentes y positivos, que se mantuvieron estables a través de las series de datos. Al mismo tiempo, las capacidades de los estudiantes también tuvieron un impacto significativo en las decisiones sobre la selectividad. Los estudiantes que asistieron a institutos privados y no religiosos tenían también más probabilidades de graduarse en instituciones más selectivas, mientras que los efectos del género disminuían en gran medida una vez se había tenido en cuenta la habilidad académica.

Palabras clave: selectividad universitaria, expansión postsecundaria

In the last few decades, the barriers to college and university access have been greatly reduced, as individuals from a variety of socio-demographic backgrounds increasingly enter higher education. Governments around the globe have gone to great lengths to expand higher education, in order to improve the equality of opportunity at postsecondary institutions. Yet, structural expansion has often come up short in reducing 'real' inequalities, as some less privileged students get absorbed into an expanding subordinate sector of higher education (e.g., community colleges) where future employment opportunities are less lucrative and prestigious (see [Brint and Karabel 1989](#)). Still, the reality is that more and more students are making the transition to higher education, as pressures to expand enrolments continue to spread worldwide ([Shavit et al., 2007](#); [Schofer and Meyer 2005](#)).

What implications does this postsecondary expansion have on students' institution choices? As higher education transforms from an elite to a mass- and now a nearly universal-based system, the selectivity of a student's school may play a greater role in the sorting and selection of students. Employers and students are increasingly valuing the selectivity of the school attended. While selective colleges do not necessarily provide enhanced environments or employ 'best practices' for cognitive development (see [Pascarella et al. 2006](#)), graduates from highly selective schools typically obtain higher earnings, are more likely to continue their education, and experience more stable employment ([Mullen et al. 2003](#); [Dale and Krueger 2002](#); [Marini and Fann 1997](#)). Existing studies have explained these trends in various ways. More selective schools may impart skills and knowledge more efficiently in their students, may 'signal' aptitude or abilities to potential employers, or may provide graduates with greater social capital and network connections (see [Gerber and Cheung 2008](#) for a review). As more and more students enter undergraduate education, the prestige or selectivity of their institution has become an effective way of securing more favourable labour market opportunities ([Bobbitt-Zeher 2007](#); [Dale and Krueger 2002](#); [Davies and Guppy 1997](#); [Loury and Garman 1995](#)).

This paper employs the 1993-94 and 2000-01 cohorts of the Baccalaureate & Beyond Surveys (details in Section 3 below) to examine and compare the characteristics of recent baccalaureate degree-holders across institutions of varying selectivity. The two cohorts span

a period that was marked by rapid institutional and enrollment growth in U.S. universities. Despite some mild growth throughout the early 1980's, enrollments at degree-granting postsecondary institutions grew at an accelerated rate (20 percent) from the late 1980's to the early part of the 21st century (NCES, 2009). Much of the enrollment growth and rising completion rates resulted from substantial gains in participation by women (Buchmann et al. 2008). At the same time, we have also witnessed efforts to increase the access of financial aid to low-socioeconomic students in higher education institutions (Geiger and Heller 2011), and growing institutional participation in affirmative action plans for racial minorities (Grodsky 2007). Yet, it remains unclear whether or not these trends have translated into greater meritocracy in the selective pathways students pursue within the larger postsecondary system.

This paper seeks to extend our knowledge of the qualitative or 'horizontal' dimensions of inequality students encounter in their postsecondary choices (Zarifa 2012; Ayalon and Yogeve 2005, Karen 2002; Lucas 2001; see Gerber and Cheung 2008 for a review) by taking a new look at the factors that influence students' choice of undergraduate institution in the United States. Researchers have increasingly understood the importance of this point of selection, but few have compared choices across multiple cohorts, nor have they examined this issue during the recent period of postsecondary expansion.¹ Furthermore, by taking a look at degree-holders and the selectivity of the school they attended during their undergraduate careers, the findings uncover the relationships between social origins and the final rather than initial (i.e., application behaviours) choice of institution. At a time when only about 57 percent of students in pursuit of their first bachelor's degree at 4-year institutions are obtaining a bachelor's degree at that institution within 6 years (NCES, 2011:72), it has become increasingly important to trace the effects of social origins not only at the time of enrollment but more importantly at the time of completion.

The analyses were guided by two sets of research questions. First, in a climate of increasing postsecondary access and heightened student competition are individuals from more privileged socio-demographic backgrounds (e.g., according to race, gender, socioeconomic status)

more likely to obtain degrees from more selective institutions? Do these effects hold when controlling for the effects of academic ability and aspirations? Second, have these patterns changed over time? That is, are socio-demographic effects consistent across cohorts?

Literature Review

Socio-economic Status, Academic Achievement and Aspirations

As access to higher education continues to increase, it remains unclear if and how much of an influence socio-economic status (SES) may now have on institution choices. Earlier studies show some degree of consensus that SES has an impact on entering a selective institution, yet it remains less clear whether or not SES continues to have an influence, once measures of motivation or academic achievement enter the mix. Researchers often uncover social background effects operating indirectly through one's academic performance and educational and career expectations (Mullen et al. 2003; Davies and Guppy 1997; Hearn 1991; Ethington and Smart 1986). In this sense, academic ability (as a product of social origins) becomes the major influence on student choices. Such a situation also leaves room for educational and occupational expectations to have a greater impact on student decisions (Goyette and Mullen 2006).

Hearn's (1991) influential work on the academic and non-academic influences on college destinations set the foundation for the debate. His examination of the 1980 cohort (High School and Beyond) of high school graduates uncovered the presence of indirect parental background effects operating through academic outcomes in high school and students' educational aspirations. The presence of these indirect effects, he argued, stood in opposition to meritocratic norms, as entry into resource rich, selective or prestigious universities is a function of not only achieved characteristics (e.g., test scores, grades), but ascribed characteristics (e.g., gender, race, SES). Hearn (1991) found academic ability and aspirations to be the strongest predictors of student choices, yet he also found traces of direct non-meritocratic effects. For example, father's education, mother's education and parental income all had positive effects on selectivity.

More recent studies have also shown some degree of empirical support for the presence of strong, direct SES effects in school selectivity choices (Karen 2002; Davies and Guppy 1997). Karen's (2002) examination of the 1992 cohort of the National Education Longitudinal Study revealed that even though much social selection takes place prior to one's choice of postsecondary institution, family income and father's education had strong direct effects, even once controlling for academic factors. For Davies and Guppy (1997), strong direct SES effects on selectivity choices were indeed accompanied with strong ability effects. Moreover, the authors also revealed the presence of a 'combination effect'. When including an interaction term for SES and ability, the authors found high-SES and high-ability students were more likely to enter selective schools. Thus, there appears to be an added advantage to having significant SES resources and the ability to perform well in school (Davies and Guppy 1997:1431).

Given the recent expansion of higher education and increased access to postsecondary programs, it is uncertain whether or not the influence of SES has declined (or become more indirect) relative to academic ability or expectations. A recent study on the college opportunity expectations of high school seniors shows support for increasing indirect effects of socio-economic status. Turley, Santos and Ceja (2007) found a growing influence of parents' education and income across the 1972, 1982 and 1990 cohorts of high school seniors on students' expectations of attending a four-year or selective college. It remains unclear whether this trend has continued in recent years or whether or not it is representative of the relationships between social origins and the actual institution attended.

Race and Gender Effects

In addition to social background effects, race and gender may also play a role in determining one's choice of postsecondary institution. Hearn (1991) showed that African Americans entered lower selectivity institutions, and for Hispanics, no significant trends emerged. Moreover, this finding was reconfirmed in Karen's (2002) replication study using the NELS data. Hurtado et al. (1997) examined the college application behaviours with a particular focus on racial groups.

Compared to other racial groups, Asian Americans exhibited higher degree expectations and applied to a larger number of colleges, while Latinos to have the lowest degree attainment expectations, apply to the least number of colleges, and least likely group to immediately enter higher education (Hurtado et al. 1997:64). Overall, Hurtado et al. (1997) claim socioeconomic characteristics are strongly tied with academic ability among Asian students, leading the authors to suspect SES plays more of an indirect role in the college choice process.

Despite the documented successes of Asian students at various junctures of the education system, recent studies reveal some improvements in access for other racial groups. Grodsky (2007), for example, found that affirmative action programmes for African American students are more widespread than previously assumed, and an increasing number of institutions have expanded these initiatives to include Hispanic students. As a response to prevailing historical arrangements and as a response to the political climate, selective schools sought to include African Americans in their affirmative action plans. Unfortunately, Grodsky claims the same cannot be said for individuals from lower SES origins.

Researchers also suggest that men are more likely than women to enter selective schools (Karen 2002; Dale and Krueger 2002; Jacobs 1999; Persell et al. 1992; Hearn 1991). Even after taking academic factors out of the mix, it would seem that families continue to invest more heavily in their sons' rather than in their daughters' education. In their examination of the pathways to selective colleges, Persell et al. (1992) found women need greater levels of cultural capital than men to enter selective institutions. That is, in order for women to attend selective colleges at the same rates as men, they need to have more economic, cultural, and educational assets. Interestingly, Persell et al. (1992) found that gender inequalities may be greatly reduced if women attended a private boarding school. Specifically, the authors (1992:216) found that 10.3 percent of male and 9.3 percent of female public high school graduates enrolled in selective colleges in 1980. For elite boarding school students, nearly 78 percent of the females and 76 percent of the females attended selective colleges².

Others have demonstrated that institutional attributes may also greatly influence the proportion of women found in highly selective schools (Jacobs 1999). Typically, more selective schools offer fields with high concentrations of men (e.g., engineering), while less selective colleges, on the other hand, are more likely to offer fields that are traditionally highly concentrated with women (e.g., education). At the same time, women may be further selected into less selective colleges by virtue of their greater propensity to enrol part-time. Less selective colleges were also less likely to offer part-time programs, contributing further to women's selection out of highly selective institutions.

Methods

Data

This study draws on the 1993 and 2000 cohorts of the Baccalaureate and Beyond Longitudinal Studies (B&B) from the National Center for Education Statistics (NCES) in the United States. The B&B surveys are nationally representative samples of recent college and university graduates, providing extensive information on the educational and early labour market experiences of bachelor's degree-holders. Respondents in the 1993 cohort were followed up in 1994, 1997, and 2003, while the 2000 cohort was re-interviewed in 2001. The 1993-94 B&B provides information on the educational experiences of a cohort of recent baccalaureate graduates, who received their degrees during the 1992-93 academic year. Students selected into the B&B were first interviewed in the National Postsecondary Student Aid Study (NPSAS, 1993). A subsample of 12,478 baccalaureate degree recipients (the B&B) was selected from the NPSAS respondents. These individuals either indicated in the CATI interview that they graduated in the 1992-93 academic year or were identified as having done so in graduation lists provided by the institutions. Of the 12,478 cases that were selected as potential participants in the B&B sample, just over 1,500 were found to have ineligible graduation dates (i.e., fell outside the July 1, 1992 to June 30, 1993 time frame). A final total of around 11,000 cases were considered eligible to participate and interviews were completed for just

over 10,000 (92% response rate) of these respondents.

The 2000-01 B&B survey was also collected using computer-assisted telephone interviews and draws on a cohort of students who obtained their bachelor's degree during the 1999–2000 academic year (as identified in the NPSAS, 2000). As in the previous cohort, a subsample was drawn from confirmed and potential baccalaureate recipients yielding a total of approximately 11,700 students. Approximately 1,500 ineligible respondents were eliminated yielding an overall response rate of 86 percent and a final B&B sample of just over 10,000 students³

To ensure that the B&B samples were consistent across cohorts, a number of restrictions were placed on the analyses. Specifically, the analyses were limited to students who completed their degree in a particular cohort, did not previously obtain a bachelor's degree prior to this degree, and were citizens of their country of education.⁴ The sample used in the analyses consisted of only students who completed their degree program in 1993 ($n = 10,062$), did not previously have a bachelor's degree by July 7, 1992 ($n = 9985$), were citizens of the United States ($n = 8884$), did not attend or transfer in their undergraduate degree from an HBCU (Historically Black College or University) ($n = 8690$), and have institutional level data available ($n = 7126$).⁵ For the 2000-01 B&B cohort, the analyses were limited to only those students who completed their degree in 2000 ($n = 9896$), obtained their first bachelor's degree at this time (9336), were U.S. citizens ($n = 8960$), did not spend any time at an HBCU ($n = 8803$), and have data on the bachelor's institution ($n = 7133$).

Analyses

The statistical analyses contain ordinary least squares regressions. A series of models were estimated to predict what factors affect one's choice of institution for each of the two B&B cohorts. Many of the variables of interest are modelled after previous research that explores the link between social origins and selectivity and/or type of postsecondary institution (e.g., Mullen et al. 2003; Karen 2002; Davies and Guppy 1997; Persell et al. 1992; Hearn 1991; Stolzenberg 1994; Ethington and Smart 1986; Mare 1980). Previous studies have

operationalized selectivity using the average scholastic aptitude test (SAT) scores of the freshmen class of postsecondary institutions. This paper employs the seventy-fifth percentile combined SAT score of the first-year class as an indicator of school selectivity. Supplementary SAT data was obtained from the IPEDS data (available from the National Center for Educational Statistics) and linked to the B&B data by using the common institutional identifiers. For each of these models, a number of key explanatory variables were entered in several stages. Base models include a number of controls, and subsequent models include family background variables, measures of ability and aspirations, and interactions of particular theoretical interest. In addition, graphical displays are used to aid in the interpretation of statistically significant interaction effects (Fox 2008; Preacher et al. 2006).

Variables

Socio-demographic variables such as age (in years), marital status, gender, and racial background or ethnicity were entered into the first sets of models. Detailed descriptions and coding for all variables can be found in Tables 1 and 2. All of these variables were quite similar if not identical across cohorts. Successive models included theoretically and empirically relevant measures of family background, ability, and aspirations. Parent's level of education, parental income in dollars (B&B calculation)⁶, and high school type were used to measure the influence of family background. Since parents who hold bachelor's degrees themselves have a familiarity with university experiences and may confer certain advantages to their children, the variables on parental level of education were recoded into two distinct categories: 1) parents with less than a bachelor's degree and 2) parents with a bachelor's degree or higher. To explore differences between private and public high school influences on postsecondary choices, a measure for high school type was included as a set of four of dummy variables (i.e., public; private, non-religious; private, Catholic; and private, other religious). In addition to ascriptive and family background influences, existing studies also suggest that student ability and educational

aspirations are important predictors of field of study and postsecondary institution choices. Respondents' SAT combined score was included to measure ability, and students' reported educational expectations or plans to pursue a Master's degree or higher provided a measure of educational aspirations.

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Table 1

Variable Descriptions for the 1993-94 Cohort of the Baccalaureate and Beyond Survey

Variables	Variable Descriptions
Marital Status	Coded 0 = Single/Previously Married, 1 = Married
Age	Student's age on 12/31/1992
Gender	Student's gender: coded 0 = Male, 1 = Female
Race	Student's race/ethnicity: set of dummy variables where 'White' is the reference category and other categories include 'Black', 'Hispanic or Latino', 'Asian', and 'Other'
Parents' Education	The highest level of education of either parent: coded 0 = Less than bachelor's, 1 = Bachelor's or higher
Income	Parent's income of dependent students or income of independent students
Aspirations	Highest post-baccalaureate educational plans or expectations: coded 0 = Below Master's, 1 = Master's or higher
High School Type	Student's high school type: set of dummy variables where 'Public' is the reference category and other categories include 'Private, Catholic', 'Private, not religious', 'Private, other religious'
SAT Score Combined	Merged SAT or ACT score quartile
Institution Selectivity	Institution's 75th percentile combined SAT math and verbal scores of the incoming class in 2005 (Source: IPEDS 2005)
Weights	44 replicate weights used to generate BRR variance estimates for cross-sectional analysis of respondents to the B&B:1993/1994

Source: 1993-94 Baccalaureate and Beyond Survey.

Table 2

Variable Descriptions for the 2000-01 Cohort of the Baccalaureate and Beyond Survey.

Variables	Variable Descriptions
Marital Status	Coded 0 = Single/Previously Married, 1 = Married
Age	Student's age on 12/31/1999
Gender	Student's gender: coded 0 = Male, 1 = Female
Race	Student's race/ethnicity: set of dummy variables where 'White' is the reference category and other categories include 'Black', 'Hispanic or Latino', 'Asian', and 'Other'
Parents' Education	The highest level of education of either parent: coded 0 = Less than bachelor's, 1 = Bachelor's or higher
Income	Parent's income of dependent students or income of independent students
Aspirations	Highest post-baccalaureate educational plans or expectations: coded 0 = Below Master's, 1 = Master's or higher
High School Type	Student's high school type: set of dummy variables where 'Public' is the reference category and other categories include 'Private, Catholic', 'Private, not religious', 'Private, other religious'
SAT Score Combined	SAT combined score, derived as either the sum of SAT verbal and math scores or the ACT composite score converted to an estimated SAT combined score from agency-reported or institution-reported SAT or ACT scores
Institution Selectivity	Institution's 75th percentile combined SAT math and verbal scores of the incoming class in 2005 (Source: IPEDS 2005)
Weights	64 replicate weights used to generate BRR variance estimates for cross-sectional analysis of respondents to the B&B:2000/20

Source: 2000-01 Baccalaureate and Beyond Survey.

Results

Descriptives: Comparing the B&B 1993-94 and 2000-01 Cohorts

Table 3 contains descriptive statistics for each of the two B&B cohorts. No major differences over time are evident across marital status, age, gender, race, parent education, income, and high school type. New bachelor's degree-holders are more likely to be single, around age 25 (on average), female, White, have a parent with at least a bachelor's degree, an annual household income of about \$50,000 USD, and previously attended a public high school. For aspirations, the great majority of students in the 2000-01 cohort are still planning on pursuing a Master's degree or higher, though the relative percentage of students doing so dropped slightly since 1993-94.

Table 3

Descriptive Statistics for Variables from the 1993-94 and 2000-01 Cohorts of the Baccalaureate and Beyond Surveys of University Graduates in the U.S.

	1993-94		2000-01	
	Mean/Proportion	BRR SE	Mean/Proportion	BRR SE
Marital Status				
Single/Previously Married	0.71	0.011	0.72	0.008
Married	0.28	0.011	0.28	0.008
Age	25	0.169	25	0.118
Gender				
Male	0.46	0.008	0.44	0.006
Female	0.54	0.008	0.56	0.006
Race				
White	0.85	0.008	0.80	0.007
Black	0.04	0.004	0.06	0.004
Hispanic or Latino	0.05	0.004	0.07	0.005
Asian	0.04	0.003	0.04	0.003
Other	0.01	0.002	0.02	0.002
Parent Education				
Less than bachelor's	0.48	0.009	0.46	0.008
Bachelor's or higher	0.52	0.010	0.54	0.009
Income	51,292.08	1288.999	58,883.12	681.109
Aspirations				
Below Master's	0.17	0.006	0.30	0.007
Master's or higher	0.83	0.006	0.70	0.007
High School Type				
Public	0.83	0.006	0.85	0.006
Private, Catholic	0.06	0.003	0.09	0.006
Private, not religious	0.04	0.003	0.03	0.002
Private, other religious	0.07	0.006	0.03	0.004
SAT Score Combined	2.52	0.024	1098	2.669
Institution Selectivity				
IPEDS 75th Percentile School SAT Score	1232	4.350	1232	3.100
n	7126		7133	

Source: 1993-94 and 2001-01 Baccalaureate and Beyond Surveys.

Note: Estimates and standard errors are survey weighted using balanced repeated replicates. SAT scores in the 1993-94 B&B survey were reported on a four-point scale.

Regression Results for Selectivity, B&B 1993-94

In Model 1, institutional selectivity is regressed on only students' demographic characteristics (see Table 4). Multiple and single-df tests indicate that all terms in Model 1 contribute significantly to changes in selectivity choices ($p < .001$). Moreover, both married ($p < .001$) and older individuals ($p < .001$) are significantly less likely to enter a more selective institution. Consistent with existing research (e.g., Karen 2002; Dale and Krueger 2002; Jacobs 1999; Davies and Guppy 1997), women are also significantly less likely than men to graduate from selective institutions. Part of these inequalities of course may be explained by the courses offered at selective institutions and the limited number of part-time programmes also offered at selective institutions (see Jacobs 1999). Finally, in terms of racial differences, only one significant finding emerges. Asian students ($p < .001$) are more likely than whites to graduate from selective institutions. This finding is also similar to the racial effects found in previous research (see Xie and Goyette 2003).

In addition to the demographic characteristics in Model 1, Model 2 includes measures of family background. Interestingly, the effects from Model 1 change very little with the addition of these terms. Both parent's education as well as family income have a significant impact on college selectivity ($p < .001$). Students whose parents hold at least a bachelor's degree were significantly more likely to graduate from a more selective school than those with less education ($p < .001$). As well, individuals from more affluent family backgrounds were also more likely to attend more selective schools ($p < .001$). In Model 1, the demographic characteristics explained about 10 percent of the change in selectivity choices ($R^2 = 0.097$). Once family background characteristics are included in the models, the R^2 improves to 0.136.

In Model 3, measures of skill and aspirations are added to the OLS models. Nearly all of the variables in Model 2 maintain their effects, despite the addition of these new terms. One exception is that the gender effects have largely dissipated. Similar to previous studies (Davies and Guppy 1997; Turley et al. 2007), once social background and skill effects are included in the model, the impact of gender on student school

choices no longer holds a statistically significant influence. As in the previous models, parents' education and family income have significant effects on school choices ($p > .001$). At the same time, SAT scores also have a positive effect on one's selectivity choices ($p > .001$). The strong family background effect, even once controlling for academic ability shows some evidence of direct socio-economic effects. Finally, students' high school type is found to have a significant impact on selectivity choices ($p < .001$). Much of this effect is attributable to students who attended a private, non-religious high school, as these individuals were on average entering more selective postsecondary schools than students in any other category ($p < .001$). This finding may reflect trends in student performance across sectors, as students from private high schools typically show higher levels of performance (Coleman, Hoffer and Kilgore 1982; Coleman and Hoffer 1987). Overall, we can see that the addition of skill, aspirations and high school type significantly improved the fit of the models, as the R^2 nearly doubled in Model 3 ($R^2 = 0.232$).

The final model (Model 4) in Table 4 includes interactions between income and academic ability and income and student aspirations/expectations. Significant interactions with either term indicate that it is a combination of income with ability or income and aspirations that influences school choices. Indeed, the results in Model 4 indicate that income does interact with student's SAT scores ($p < .001$). As Davies and Guppy (1997) also found several years earlier, the effect of family income on selectivity choices, continues to vary by one's academic ability (i.e., SAT score). To further grasp these findings, Figure 1 displays the fitted values of the interaction.⁷ The lines show the relationship between ability and school selectivity for individuals from low, moderate and high SES backgrounds. The figure indicates that students who come from more affluent family backgrounds and possess a high level of ability are more likely to attend a selective school than their counterparts from moderate and low-SES families with similar abilities.

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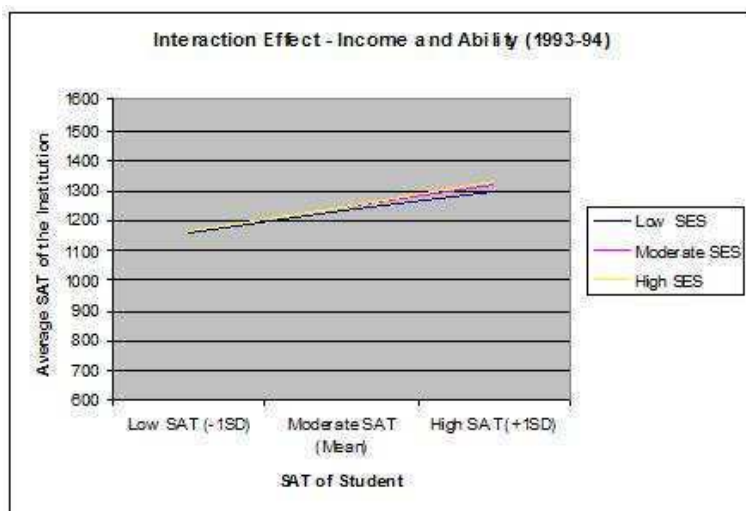
Table 4

OLS Regression Models of Institutional Selectivity Choices for the 1993-94 Cohort of University Graduates in the U.S.

	Model 1		Model 2		Model 3		Model 4	
Constant	1623.134	(36.060)	1407.429	(41.190)	1344.736	(40.101)	1516.587	(52.861)
Marital Status			***		***		***	***
Single/	---	---		---	---	---	---	---
Previously Married								
Married	-25.612	(4.410)	-23.382	(4.220)	-19.109	(4.017)	-18.955	(4.062)
Log(Age)	272.139	(26.510)	*** 212.942	(25.127)	*** 208.678	(24.316)	*** 204.476	(24.069) ***
Gender			***		***		***	
Male	---	---	---	---	---	---	---	---
Female	-15.371	(3.550)	-15.399	(3.567)	-5.471	(3.416)	-5.417	(3.440)
Race			***		***		***	***
White	---	---	---	---	---	---	---	---
Black	-11.203	(8.254)	0.929	(8.088)	17.544	(8.320)	15.578	(8.419)
Hispanic or Latino	19.959	(13.355)	-7.523	(12.658)	-0.693	(11.797)	-2.089	(12.208)
Asian	49.440	(9.757)	49.883	(9.790)	46.828	(9.488)	45.127	(9.709)
Other	31.666	(18.932)	36.440	(18.013)	25.811	(15.677)	26.315	(15.984)
Parent Education					***		***	***
Less than bachelor's	---	---	---	---	---	---	---	---
Bachelor's or higher	---	---	35.188	(3.399)	21.213	(3.427)	20.698	(3.467)
Log(Income)	---	---	25.203	(4.219)	*** 17.886	(3.643)	*** -21.509	(8.699) *
Aspirations								
Below Master's	---	---	---	---	---	---	---	---
Master's or higher	---	---	---	---	-1.425	(4.102)	6.464	(37.002)
High School Type							***	***
Public	---	---	---	---	---	---	---	---
Private, Catholic	---	---	---	---	5.436	(5.380)	6.316	(5.353)
Private, not religious	---	---	---	---	50.735	(9.067)	49.639	(8.802)
Private, other	---	---	---	---	0.115	(5.426)	0.686	(5.387)
SAT Score Combined	---	---	---	---	35.323	(2.197)	*** -39.614	(11.225) **
Income * SAT Score Combined	---	---	---	---	---	---	16.549	(2.514) ***
Income * Below Master's	---	---	---	---	---	---	---	---
Income * Master's or higher	---	---	---	---	---	---	-1.757	(8.309)
n	7126		7126		7126		7126	
R²	0.097		0.136		0.232		0.237	

Notes: * $p < .05$; ** $p < .01$; *** $p < .001$; Multiple-df tests are reported for sets of dummy regressors. BRR standard errors for complex survey designs are in parentheses. Additional models included interactions between income and gender, race, parent education, and high school type, but none of these additional terms significantly improved the overall model fit.

Figure 1
Interaction Effect - Income and Ability (1993-94)



Regression Results for Selectivity, B&B 2000-01

In Table 5, identical models are estimated for the 2000-01 cohort of the Baccalaureate and Beyond survey. In Model 1, the selectivity of the institution is regressed on the demographic characteristics of bachelor's degree-holders. As in the previous cohort, all variables in the model have a significant impact on students' school choices ($p < .001$). Moreover, married individuals are less likely than single individuals to enter into selective institutions ($p > .001$). As respondents' age increases, they become less likely to pursue a degree at a selective institution ($p > .001$). In terms of gender, women are significantly less likely to enter more selective institutions than men ($p < .001$). For race, Black and Hispanic or Latino respondents are significantly less likely to enter more selective institutions than White respondents ($p < .05$), while Asian students are more likely than Whites to enter selective institutions ($p < .001$).

Model 2 adds family background variables to further explain institutional selectivity choices. As in Model 1, all of the demographic effects maintain their effects. In addition, parents' education and family income are also shown to have significant effects ($p < .001$). As in the previous cohort, students from more educated and more affluent families are more likely to enter selective schools. Similar to the previous cohort, the R^2 values for the models improve with the addition of social background variables (0.100 to 0.142).

When controlling for academic ability and aspirations in Model 3, the gender effects dissipate once again. In addition, the effect of race decreases slightly in strength ($p < .05$), as only the significant effect for Asian Americans relative to whites holds. In terms of family background effects, respondents whose parents obtained a bachelor's degree or higher were much more likely to enter into more selective institutions ($p < .001$). Family income also has a significant positive effect on one's selectivity choices ($p < .05$), but the strength of this effect has weakened slightly across cohorts. In terms of aspirations, no significant effects emerged. SAT scores, however, have a significant positive effect on selectivity choices ($p < .001$). Once again, a strong high school effect on selectivity choices ($p < .001$) is noticeable, even when controlling for all other factors in the model. As in the previous cohort, the addition of skill, aspiration and high school type variables greatly increases the model fit, as the R^2 nearly doubles from 0.142 in Model 2 to 0.265 in Model 3.

Finally, Model 4 includes two interactions with family income, to further explore the relationship between income and ability and selectivity decisions. As in the first cohort, only the interaction between academic ability and family income is statistically significant ($p < .001$). Figure 2 displays the fitted values for the interaction between income and ability. As in the 1993-94 cohort, the relationship between ability and selectivity varies by SES background. Moreover, there is some evidence to suggest that SES is having a stronger influence on the relationship, as individuals from low-SES backgrounds with high levels of ability appear to be losing ground to individuals from higher SES backgrounds.

Table 5

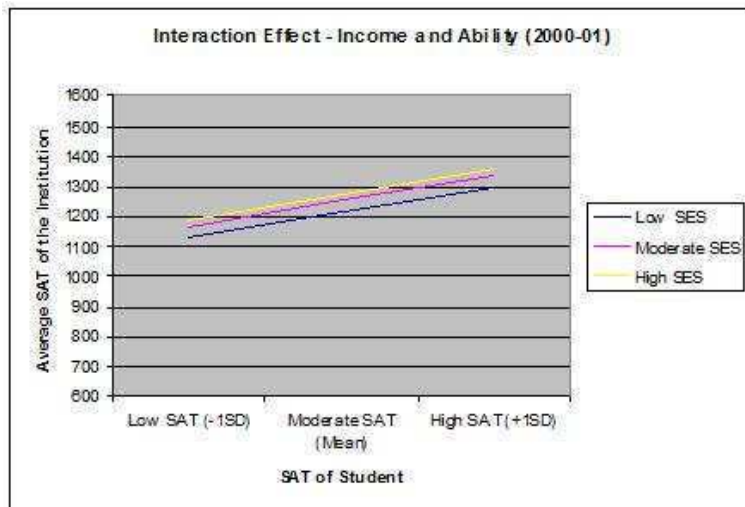
OLS Regression Models of Institutional Selectivity Choices for the 2000-01 Cohort of University Graduates in the U.S.

	Model 1		Model 2		Model 3		Model 4	
Constant	1622.856 (40.338)		1441.102 (40.297)		1156.815 (41.490)		1750.268 (98.928)	
Marital Status			***		***		***	***
Single/Previously Married	---	---	---	---	---	---	---	---
Married	-29.818 (4.331)		-27.317 (4.229)		-22.124 (3.807)		-20.610 (3.815)	
Log(Age)	270.617 (28.088)		*** 198.803 (27.248)		*** 175.464 (26.818)		*** 171.173 (26.318)	***
Gender			***		***			
Male	---	---	---	---	---	---	---	---
Female	-12.238 (3.486)		-11.755 (3.353)		-3.341 (2.900)		-3.264 (2.898)	
Race			***		***		*	*
White	---	---	---	---	---	---	---	---
Black	-22.676 (9.224)		-13.130 (9.110)		3.145 (10.092)		0.437 (9.942)	
Hispanic or Latino	-18.034 (8.799)		-6.170 (8.918)		1.462 (8.277)		0.636 (8.197)	
Asian	39.048 (9.632)		41.138 (9.470)		30.391 (8.684)		29.769 (8.857)	
Other	-0.212 (11.594)		0.674 (11.944)		2.779 (11.249)		2.633 (11.325)	
Parent Education					***		***	***
Less than bachelor's	---	---	-----		---	---	---	---
Bachelor's or higher	---	---	44.105 (3.400)		21.729 (3.253)		21.700 (3.260)	
Log(Income)	---	---	12.632 (2.964)		*** 5.890 (2.723)		* 125.261 (18.912)	*
Aspirations								
Below Master's	---	---	---	---	---	---	---	---
Master's or higher	---	---	---	---	5.701 (2.864)		-39.632 (24.658)	
High School Type							***	***
Public	---	---	---	---	---		---	---
Private, Catholic	---	---	---	---	3.990 (3.934)		4.045 (3.983)	
Private, not religious	---	---	---	---	44.462 (8.349)		43.756 (8.532)	
Private, other religious	---	---	---	---	11.412 (7.789)		12.725 (7.534)	
SAT Score Combined	---	---	---	---	0.256 (0.011)		*** -0.275 (0.084)	
Income * SAT Score Combined	---	---	---	---	---	---	0.116 (0.018)	***
Income * Below Master's	---	---	---	---	---	---	---	---
Income * Master's or higher	---	---	---	---	---	---	10.046 (5.255)	
n	7133		7133		7133		7133	
R²	0.100		0.142		0.265		0.276	

Notes: * $p < .05$; ** $p < .01$; *** $p < .001$; Multiple-df tests are reported for sets of dummy regressors. BRR standard errors for complex survey designs are in parentheses. Additional models included interactions between income and gender, race, parent education, and high school type, but none of these additional terms significantly improved the overall model fit.

Figure 2

Interaction Effect - Income and Ability (2000-01)



Comparisons of Selectivity Results

Overall, few real differences occur over time. The rather short period of time (seven years) between the two B&B cohorts may account for this lack of change. Despite this short time frame, there is some weak evidence that the role of aspirations in predicting selectivity choices may be increasing over time. In 2000-01, students from privileged family backgrounds are still entering more selective institutions, but aspirations appear to have an increasing influence, though they are not quite significant at the 0.05 level. Moreover, the interaction effect between income and student aspirations is also nearly statistically significant in the latest cohort. While it may be too early to tell, it may not be enough for students to have the resources and know-how to enter more selective institutions. As shown previously at the graduate level, students may increasingly have to carry with them a high level of motivation or educational expectations (Mullen et al. 2003).

Conclusions

Despite decades of school reforms and a larger movement toward postsecondary accessibility in the United States, this paper demonstrates that selectivity choices remain influenced by social origins. By drawing on two recent cohorts (1993-94 and 2000-01), this paper updates trends previously established in studies that drew on data from the early 1970s to the early 1990s (Turley et al. 2007; Karen 2002; Davies and Guppy 1997; Persell et al. 1992; Hearn 1991). The paper also uniquely extends work in this area by examining the effects of social origins on selectivity decisions among a relatively privileged group who not only applied and enrolled in college, but also completed their degrees.

Attending a selective school has been (and continues to be) greatly influenced by social origins. In many cases, students are unequally slotted into these various educational outcomes by a combination of family background, demographics, ability and aspirations. Both parent income and education exhibited strong, positive effects over time. At the same time, considerable evidence for indirect effects emerged, as ability had a significant impact on selectivity decisions. In addition, coupling a high level of ability with a privileged family background remains a key ingredient to increasing one's likelihood of attending a selective college.

This paper makes an important contribution to a growing body of literature charting the less obvious, qualitative or 'horizontal' avenues of educational inequality in expanded postsecondary systems (Zarifa 2012; Gerber and Cheung 2008; Ayalon and Yogev 2005; Lucas 2001). Future research may wish to answer Gerber and Cheung's (2008) call for analyzing data from a wider range of countries to examine how national postsecondary systems may relate to these new educational inequalities.

A new line of inquiry is charting the level of system-wide inequality across postsecondary institutions in terms of their resources (Davies and Zarifa 2012). Future strands could attempt to link processes of social background, selectivity choices, and institutional inequality both in the U.S. and cross-nationally. Not all countries have such an explicit hierarchy of institutions. Yet, in countries where the hierarchy of institutions is less explicit and potentially flatter, the returns to attending

a selective school may also diminish. In such situations, it is also possible that social origins may play a more modest role.

For decades, researchers have documented the importance of higher education in the process of social mobility, calling numerous times for governments and policymakers to improve access to colleges and universities. While, in a previous era, students were largely sorted by their entry into postsecondary education, today's students encounter additional exclusivity in their quests for entry into more prestigious schools, programs, fields of study or college majors. As higher education becomes nearly a universal stage in the life course for many of today's youth, these findings highlight a new (yet strangely familiar) challenge for educational officials and policymakers – how to expand higher education and increase access in ways that reduce less apparent but substantial social inequalities.

Notes

1 Karen (2002) predicted the selectivity choices of the 1992 cohort of high school graduates and made comparisons to Hearn's (1991) work on the 1980 cohort. More recently, Turley et al. 2007 compared high school seniors and the effects of social origins on college expectations across three cohorts (1972, 1982 and 1992).

2 The B&B data do not identify elite boarding schools, but a set of four dummy variables (i.e., public, private Catholic, private not religious, private other religious) for high school type are included in the analyses.

3 The B&B sampling design consists of multiple sampling stages and stratified sampling at each stage. Consequently, statistical analyses used the survey package in R and svy commands in Stata to employ balanced repeated replicate (BRR) weights to adjust the standard errors for the complexity of the sampling procedures.

4 Unfortunately, given the sampling design of the B&B surveys, the data do not contain information on students who initially entered other kinds of institutions and dropped out, and also individuals who may have initially entered a four-year institution but did not persist to a degree in that sector.

5 As in previous research on selectivity (see Thomas 2003), students who attended or transferred from an HBCU were excluded from the analyses to provide a more accurate picture of the inequalities racial minorities may face in their school choices. Traditionally, the principal mission of HBCU's has been the education of African Americans, and even today graduates from HBCU's account for a disproportionate percentage of all African American graduates nationwide (see <http://www.ed.gov/about/inits/list/whhbcu/edlite-index.html> for details). That is, the picture of access in HBCU's may look quite different from the rest of the population of postsecondary institutions, confounding the true level of racial inequality in entering particular schools.

6 Students under the age of 24 were generally considered to be dependent on their parents for financial support. For independent students, the B&B surveys collected information on the income of the student. The B&B surveys deemed students to be independent if they met any of the following criteria: 1) age 24 or older at the time of degree completion, 2) a veteran of the U.S. Armed Forces, 3) enrolled in a graduate or professional program beyond a bachelor's degree, 4) married, 5) orphan or ward of the court, or 6) have legal dependents other than a spouse.

7 The graph is produced using the estimated regression equation and allowing ability (as measured by SAT scores) to take on a range of values, holding all other predictors at their sample means/proportions (see Fox, 2008; Preacher et al. 2006).

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The Sociology of Education in Australia: A Political and Intellectual Trajectory

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The Sociology of Education in Australia: A Political and Intellectual Trajectory

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Abstract

The sociology of education is fundamentally concerned with the role of education in social reproduction and change. In Australia such a focus informs fields like gender and education, vocational education and lifelong learning, policy sociology in education, cultural sociology of education, literacy, social justice and education, globalisation and education. This article examines the political and intellectual trajectory of Australian sociology of education. It points to the productivity of educational research in areas such as gender, literacy, and policy and to the failure of sociology of education to address the reproduction of Indigenous and ethnic disadvantage. The paper argues that the theoretical and methodological innovations that characterise sociology are a disciplinary strength, but that it is necessary for the sociology of education in Australia to fully grapple with issues of Indigenous and minority education and more recently issues of environmental sustainability.

Keywords: Australian sociology of education; Australian educational research

La Sociología de la Educación en Australia: Una Trayectoria Política e Intelectual

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Resumen

La sociología de la educación se refiere fundamentalmente al papel de la educación en la reproducción social y el cambio. En Australia, tal enfoque abarca campos como el género y la educación, la formación profesional y el aprendizaje permanente, la sociología política en la educación, la sociología de la cultura en la educación, la alfabetización, la justicia social y la educación, globalización y educación. Este artículo examina la trayectoria política e intelectual trayectoria de la sociología de la educación en Australia. Se centra en la productividad de la investigación educativa en áreas tales como el género, la alfabetización, y la política y el fracaso de la sociología de la educación a la hora de abordar la reproducción de las desventajas indígenas y étnicas. El documento sostiene que las innovaciones teóricas y metodológicas que caracterizan la sociología son una fuerza disciplinaria, pero que es necesario para la sociología de la educación en Australia lidiar completamente con cuestiones indígenas y educación de minorías y más recientemente con temas de sostenibilidad ambiental.

Palabras clave: sociología de la educación australiana, investigación educativa australiana

Émile Durkheim, founder of the sociology of education understood education to be the process by which societies replicate the conditions of their social existence. Education serves to develop in individuals the physical, intellectual and moral states demanded by particular societies and particular social locations (Durkheim 1956). Unfortunately, often occluded in functionalist readings of Durkheim's work are the dynamic aspects of his reasoning and his critical project. Durkheim gave weekly one-hour lectures to primary school teachers for fifteen years; his fundamental concern was raising their critical awareness of 'pedagogic' so that they would be able to interrupt the repetition and reproduction of the system of education they had experienced (Collins 1997, xxi).

Durkheim stressed that societies 'determine the ideal that education realizes' (Durkheim 1956, 70) and that it is not individuals, but societies that drive the prevailing forms and features guiding education. Although educators cannot create, destroy or transform education at will, they can act on it if they come to understand its nature and conditions. By understanding past and present educational systems and making historical comparisons education can learn how it came to do what it does. Only by grasping what education was in the past can educators understand how they contribute to its interruption or reproduction. The purpose of this article is to examine how education has been understood in Australia, by tracking its political and intellectual trajectory in the sociology of education. The article underlines the robust productivity and innovation undertaken in the field of education in Australia. In emphasising the point that 'education is an eminently social thing' (Durkheim 1956, 28) my aim is to resist the prevailing trends that reduce the study of education to individual matters of teaching, learning and training and the importance of the discipline to the initiation of transformative educational projects and pedagogy.

In Australian higher education the sociology of education can be found in fields of study such as gender and education, vocational education and lifelong learning, policy sociology in education, cultural sociology of education, literacy, social justice and education, globalisation and education. Courses are mainly located in faculties and schools of education, rather than in sociology departments. For the most part, sociological orientations to education are embedded in a broad

range of foundation courses in various education programs. This situation is partly due to the distinctive political development of the sociology and education in Australia, and partly due to the enlargement of its intellectual trajectory since the establishment of sociology in Australia in the 1970s.

The sociology of education in Australia has expanded its initial focus from an interest in the nature and role of schooling as a system and school education as an institution, to include a broad range of educational processes and practices. The fundamental concern of the sociology of education with questions of schooling, meritocracy and inequality, have expanded beyond the realm of schools and teachers to address wide-ranging issues such as cultural diversity, environmental sustainability, family relations, gender and sexuality, globalisation, internationalisation, knowledge and epistemology, leadership, learning communities and networks, lifelong and workplace learning, literacy, curriculum and pedagogy, teachers work and popular culture. A key issue for the sociology of education in Australia is how to advance interdisciplinary work across this extensive education research agenda.

A glaring absence in both Australian sociology and the sociology of education is the failure to fully address Indigenous and ethnic disadvantage. Notable exceptions are found in the ground-breaking work of [Tsolidis \(1986\)](#) on the education of non-English speaking girls, [McConaghy \(2000\)](#) on Indigenous education and colonialism, and [Kalantiz \(1985\)](#) and [Rizvi \(1985: 1990\)](#) on multiculturalism and racism. However, apart from [Kalantiz \(1986; 1988\)](#) [Matthews \(2002\)](#) and [Tsolidis \(1996\)](#) studies rarely address the persistent impact of multiple educational disadvantage to do with Indigeneity and/or race and/or ethnicity and/or gender and/or sexuality.

In the 1970s, concern with how societies transmitted cultural beliefs and values located the sociology of education at the very core of sociology ([Goodman 1972](#)). The ability of the sociology of education to address both theory and practice gave it the capacity to stimulate theoretical and methodological innovation. This is why it became: 'the most vibrant and respected area of sociological research' ([Karabel 1978 cited in Saha and Keeves 1990, 91](#)). Educational research in Australia remains vigorous. In tracking the distinctive political and theoretical trajectory of Australian sociology of education, this article highlights

the distinctive contribution of research into education gender, literacy and policy to sociology. In addition, it points to the growing importance of methodological developments and at work researching the relationship of education to sustainability and environmental issues.

Education is fundamentally interested in the transmission of culture, values, beliefs, knowledge and skills. These may be directed towards the achievement of knowledgeable individuals, rational thinkers, sustainable communities, and/or individual and national economic advancement (Rizvi and Lingard 2010). The moral, social, political or economic purpose of education, and practices directed towards the achievement of its goals are neither self-evident nor automatically given. Education research is concerned with understanding and investigating the contestations, decisions, deliberations and impositions that constitute the purpose and practice of education. In contemporary Australia this requires comprehension of the dynamic and ongoing restructuring of educational institutions and systems at all levels, as well as the massive expansion of educational practices into all spheres of life (Ferguson and Seddon 2007; Lingard and Gale 2010).

Below I provide a brief account of the development of the sociology of education in Australia. Details of courses taught in the field are based on a desktop survey of higher education courses and programs in the sociology of education. The account presented here is based on the discipline as officially and institutionally established in university courses and professional associations, it should be acknowledged that sociology of education research also occurs in many other locations and disciplines (Lawrence Saha personal communication, 1 Aug 2011).

Development of the sociology of education in Australia

The sociology of education came to prominence in Australia in the 1960s, several decades after the establishment of education as a disciplinary field. In fact, both education and sociology emerged as major social sciences in the 1970s during the rapid expansion of schooling, and in the wake of major social and technological changes (Goodman 1972).

Sociology developed unevenly in Australia and was not established as a distinct discipline until the 1950s. The first undergraduate department of sociology was established in 1959 at The University of New South Wales, and at Monash University in Melbourne in 1966 where programs were dominated by functionalism and positivism (Marshall et al. 2009). The growth of other undergraduate programs coincided with the expansion of tertiary education, which virtually doubled in 1970 from 163,377 to 327,000 (Musgrave 1982).

Today sociology has low visibility in a higher education sector increasingly directed towards narrow vocational preparation. It usually appears as a major or minor offering within a school or faculty of social science and /or arts. Currently the dominant focus of sociological courses include: Methodology; Health, Medicine and the Body; Deviance, Social Control and Criminology; and Feminism, Gender and Sexuality (Marshall et al. 2009). The Australian Sociological Association (TASA) is the main professional association for sociology but there is no nationally funded network - similar to the UK's Curriculum, Sociology, Anthropology and Politics (C-SAP) - which supports disciplinary sociology teaching and learning. In 2009, thirty-five of thirty-seven Australian public universities offered undergraduate sociology and twenty-one offered it as an Honours specialisation. Although seventy-seven TASA members listed education as a special interest in 2009, only six education courses were offered in sociology programs (Marshall et al. 2009).

Since the early 1970s most teaching and research in the sociology of education has been undertaken in schools of education rather than Australian sociology departments (Goodman 1972). Early research was more interested in the practical problems of teaching, educational psychology and the history of education than the social consequences of education (Barcan 1992). The global financial crisis of the 1930s, and challenges to the future of democracy posed by the rise of communism in Russia, and fascism in Germany, stimulated interest in the relationship between education and social change. This in turn generated concern about the role of schools in social replication, reform and change (Barcan 1992). The importance of educational research at this time was recognised in the establishment of the Australian Council

of Educational Research (ACER) in 1930 by the Carnegie Foundation. It engaged in a substantial program of educational testing to develop normative understandings of individual intelligence. It also developed curriculum materials and researched educational structures and processes (Saha and Keeves 1990).

By 1967, almost all of the sixteen faculties of education in Australia and New Zealand universities offered sociology of education or course in the social foundations of education. The sociology of education in Australia reached its zenith in the 1970s and 1980s when it was compulsory in teacher education programs and paved the way for research that stood in contrast to widely taught educational administration subjects derived from social psychology. The 1970s saw the growth of the Australian school system and conflict between teacher unions and State Education Departments. Government reports at this time were mostly in the ‘political arithmetic tradition’:

that is couched in terms of descriptive statistics and overtly atheoretical, though covertly broadly structural functionalist. Much of this work was contained in mimeographed reports from State Education Department Research Branches and it was also largely upon such work that the Karmel report relied (Musgrove 1982, 209).

According to Musgrove (1982), the Karmel Report hit a ‘raw cultural nerve’ because it drew attention to the fact that education did not give all Australians a ‘fair go’. It highlighted unequal educational provision for those from low socioeconomic backgrounds, migrants, Aborigines and girls, and called for compensatory mechanisms, decentralisation and community participation. A pivotal debate at this time concerned the source of educational inequity, the effect of class and its relationship to capitalism. Critical accounts of education focused attention on the role of schooling in the replication of social inequality and capitalist relations of production. In the UK, (Bernstein 1977) showed how the pedagogical communications in the family and schools advantaged middle-class children. The social reproduction thesis, following (Bourdieu and Passeron 1977) and (Bowles and Gintis 1976) reinforced Bernstein’s work to highlight the correspondence between education reform and the labour force needs of capitalism (Connell 2004). Schools

were regarded as reinforcing and transmitting the linguistic and symbolic capital of the middle class. The cultural dissonance between working class families and middle class schooling resulted in social inequality while at the same time reinforcing class divisions and replicating capitalist modes of production. However, missing from this account was an understanding of the complex and contradictory role of class and gender in students' responses to schooling (Arnot 2002). The focus on school / economic relations of many critical scholars in Australia at this time accorded family and gender relations little significance.

The publication of *Making the Difference: Schools, Families and Social Division* (Connell, Ashenden and Kessler 1982) offered important insights into the relationship between schools and society. Theorising family, school, class and gender relations the study described life in schools:

It was equally a study of families and their strategies, of the life histories of teachers and pupils, and of the ways family practices and personal trajectories intersected with the institutional arrangements of education systems to produce class inequalities in education. These dynamics only came into view because . . . we were studying the working class and the ruling class at the same time (Connell 2004, 17).

Class and gender relations occur within family, school, and workplace relations. While they have different and sometimes related histories, they are interdependent spheres, which interact to:

create dilemmas (some soluble) provide resources (or deny them) and suggest solutions (some of which don't work): to which the family and the school must respond in its collective practice (Connell, Ashenden and Kessler 1982, 73)

Although *Making the Difference* included descriptions of school life it was not a school ethnography in the same sense as those generated in the UK which were mainly derived from sociology students 'applying relatively simple sociological conceptual frameworks to historical data' (Musgrove 1982, 211). In Australia innovative quasi- anthropological studies investigated school/community relationships; sexism and

promotion; education of Aborigines, migrants, ethnic groups and curricula developments (Musgrave 1982).

The 'new sociology of education' stimulated by Knowledge and Control: New Directions for the Sociology of Education (Young 1971) had a big impact in UK and USA. Although (Branson 1980) and (Musgrave 1980) claim it made few waves in Australia, it found its way into introductory sociology courses of the late 1970s. Informed by phenomenological perspectives, Young's edited collection interrogated the organisation of knowledge; its social definitions and management particularly in relation to the curriculum. Its muted impact in Australia was to some extent due to the pragmatic and somewhat uncritical approach of curricula and educational interventions derived from a tradition of measurement and social arithmetic. In addition, teaching and research informed by the history of education had a longer and stronger grounding than sociological approaches. Importantly, the control of Australian education by State bureaucracies left little opportunity for curriculum research by teachers and educationalists, indeed such work was regarded as problematically progressive and radical (Davies 2004). Concern about the effects of inequality was limited to local studies of classroom interactions and curricula, and often neglected theorisations of the ways social structures connected to, and shaped daily lives (Branson 1980).

Since the late 19th century, the Australian education system has been based on the provision of free, compulsory and secular school education. Each of the six colonies, later to become States of Australia, introduced state education acts outlining their legislative responsibilities for public education. State governments continue to hold responsibility for the provision of educational services in Australia. However, the Commonwealth Government decides eligibility requirements for higher education funding, research and allocation of student places; in addition it has assumed increasing responsibility for funding private (non-government) schools. This funding anomaly has left state governments with greater responsibility for public (government) schools, which cater disproportionately to disadvantaged students. The cornerstones of free public education in Australia have been substantially eroded by neo-liberal policies concerned with stimulating market values such as school choice, competition and accountability measures (Meadmore 2001).

Tension between the Commonwealth government and the States remains a defining characteristic of Australian education. Since 2009 the Australian Government has funded state and territory governments provided they commit to national school performance and reporting requirements involving national testing, national reporting, reporting to parents, publishing performance information and information for school-level reporting (Matthews 2011).

The States have legislative and regulatory responsibility for the registration and accreditation of teachers and teacher training and provide most teacher education funding in universities however a range of national agreements and Commonwealth financial conditions impinge on the regulatory capacity of the States (Matthews 2011). The Australasian Forum of Teacher Registration and Accreditation Authorities (AFTRAA) was recognised in 2006. Its Framework for the National Recognition of Approved Pre-Service Teacher Education Programs (AFTRAA, 2006) set out the broad requirements that each authority in the Australian States and Territories must include in their program approval process. It requires teachers to know, understand and take account of the disciplines they teach, learning philosophy, teaching and learning theories and diverse social cultural and special learning needs. Faculties of education have traditionally responded to the need for teachers to be able to understand social political and ethical dimensions of teaching by providing courses in: the philosophy of education; the history of education; comparative education; and the sociology of education.

During the 1980s, State restructuring in Australia sought to achieve greater productivity and competitiveness through a proliferating mesh of accountability regimes. Education became the effect of a reconstituted relationship between the Commonwealth government and the States in the creation of a national economic infrastructure, which subsumed social and cultural agendas. Key aspects of educational restructuring involved corporate managerialism, devolution and marketisation (Taylor et al. 1997). Corporate managerialism sought efficiency and effectiveness by measuring outcomes and performance through the application of performance indicators tied to strategic mission statements. At the same time as it centralised performance priorities, devolution decentralised decisions about how centrally determined

priorities would be achieved. Finally, marketisation brought the logic, purpose, language and practices of the market to education. Reconceptualised as a quasi-market, schools were regarded as producing educational outcomes in a competitive environment, where consumer choice facilitated the success or failure of its 'products' (Marginson 1997; Taylor et al. 1997).

The National Goals of Schooling (1997) linked funding to testing in an effort to achieve equity through the measurement of student outcomes. A decade later accountability mechanisms moved into the classroom in the form of national literacy and numeracy tests. The first Australian National Assessment Program - Literacy and Numeracy (NAPLAN) was initiated in 2008 to test students in Years 3, 5, 7 and 9. Teachers and researchers challenged standardised tests for narrowing the curriculum and causing schools to teach to the tests. The publication of NAPLAN data on the My School website in 2010 confirmed fears that NAPLAN information would be used to identify 'successful' and 'unsuccessful' schools. Policy initiatives, such as the proposed payment of teacher bonuses based on test results, demonstrate government misunderstanding of how schools and classrooms work. Moreover, aggregated test results tell teachers and educationalists what they know already – 'that results largely reflect the student demographic' (Reid 2010, 21) and that simplistic measures of success and failure in literacy and numeracy do not take into account complex and deep seated social, cultural and educational factors.

The fraught relationship between educational institutions and government is based on a longstanding expectation that education research should simply inform and legitimate state policy (Singh 1994). Government funding priorities reinforce State prescriptions, as well as research paradigms that avoid complexity by privileging empirical, quantitative approaches such as computer modelling and psychometrics. Concealment of State interests in managing educational issues is not necessarily deliberate, but as Yates (1993, 177) observes occurs because: 'contested meaning, contested lines of exclusion and inclusion, contested vision, are excluded in the terms of its own discourse'. Reports informing educational policy rarely indicate authorship and are often based on specially prepared consultancies using specially prepared social statistics; processes of policy formation and sociological research

are assumed to be irrelevant (Singh 1994). Policy proliferation in education over the last three decades has increasingly sought to manage and control teacher's work by auditing the minutiae of educational practice in all sectors and every level. In response, Australian education research since the 1980s has increasingly directed attention to exposing the way policy restricts the meritocratic and social justice capacity of education, while at the same time directing education towards transmitting a particular kind of culture (Connell 1998).

Mapping the field

In the 1970s a major factor in the spread of the 'sociological perspective' in Australia and New Zealand tertiary institutions was teaching sociology to students of education (Bates 1973). Today it is difficult to ascertain the extent to which a sociological perspective is addressed in the twenty-six universities offering teacher-training programs because the titles of many courses course content difficult to assess. A desktop survey of teacher training programs identified foundational courses arrayed under the following titles:

- Education and Society
- Social Justice and Education
- Education: Social and Historical Contexts
- Education Theories and Practices
- Education Change and Society
- Education Culture and Diversity
- Schools and Societies
- Social Perspectives on Education
- Global Perspectives in Education
- Philosophical and Social Contexts of Education
- Cultural Politics of Education

As stated earlier, the provision of courses in philosophy, history, comparative education and the sociology of education is common in faculties of education, although the professional orientation of many universities has diminished the visibility of its disciplinary work (Terri Seddon personal communication, Aug 1 2011). Indeed, a good deal of teacher training focuses on the technical aspects of educational practice, rather than the provision of sociological perspectives able to assist

teachers to understand and address the social and political aspects of education.

Australian educational research has a strong tradition of research expertise in gender, sexuality, ethnicity and multiculturalism stemming from feminist and Indigenous critiques of the failure of mainstream educational research to address and represent the experiences of marginalised and minority groups. In the early 1990s groundbreaking research investigated gender equity policy in education and the formation of gendered subjects (Henry and Taylor 1993; Yates 1993b). Much of this work was funded by federal gender equity curriculum reform projects interested in the complex dimensions of gender disadvantage and their intersection with ethnicity, poverty, rurality and sexuality. A focus on non-sexist education and equality of opportunity in the 1970s and 1980s gave way in the 1990s to mainstreaming and a focus on different dimensions of inequality. This in turn paved the way for approaches to Indigenous education. Importantly the alliance of activists and ‘femocrats’ in Commonwealth bureaucracies facilitated the landmark National Policy for the Education of Girls in 1987 (Gilbert 1998). According to Gilbert (1998), little mention was made of sexuality in the report, however it did recognise ethnic and Indigenous diversity, and the impact of racism and school structures. The National Action Plan for the Education of Girls 1993-1997 addressed gender relations, naturalised sexualised practices and the social construction of femininity and masculinity. It also inadvertently paved the way for equity matters concerning girls and education to be subsumed by ‘stories about the boys’, which drew on ‘biological inheritances’ (Gilbert 1998, 19). Naturalised discourses of gender were challenged by researchers who reiterated the relevance of social and embodied constructions of masculinity and their impact on literacy and schooling (Gilbert and Gilbert 1998).

The adoption of multiculturalism in Commonwealth policy in the 1970s established Australia as a world leader in multicultural education. Pedagogical and curricular innovations at this time included: English as a Second Language provision; first language maintenance; community language teaching; culturally inclusive curricula; parent participation and antiracism. However, in the 1990s multicultural education was charged with inconsistent implementation and lack of focus.. More

recently, it has been downgraded in the Australian national curriculum (Lo Bianco 2010). Parallel but separate developments facilitated the centralisation of Aboriginal policy and the inclusion of Indigenous languages and perspectives in school curricula (Lo Bianco 2010). Since the 1960s the ongoing and profound educational disadvantage of Indigenous Australians has remained the focus of government reports and policy. The failure of government interventions in Indigenous education is due to the complexity of a problem that involves intergenerational disadvantage and trauma, ongoing socio-economic disadvantage, lack of sustainability of school reform and embedded racism, as well as top down policy governance models (Gray and Beresford 2008).

Concern with educational inequality have generated an abundance of research that describes neo-liberal reforms in education and the impact of these on social justice. Policy sociology in education examines the ideological and discursive production of policy at national and global levels from Bourdieuan perspectives (Lingard, Rawolle and Taylor 2005) and the application of critical discourse analysis to track social justice and equity goals (Taylor 2004).

Sociological analysis of literacy reforms has given rise to a rich vein of critical studies of literacy and literacy education (Luke 1989). Fundamental to this work is the idea that literacy is socially and politically constructed and 'in and of itself, can neither enslave, emancipate, cognitively enable or preclude' all that has been claimed for its practice (Luke 1989, 11). The absence of a historical and sociological understanding of literacy enables a great many problematic assumptions to go unchallenged. These include: a) manufactured moral panics periodically generated about the crisis of literacy and declining literacy standards, b) the assumption that literacy simply involves the technicist application of best practice pedagogies and is devoid of 'ideological concerns and political agendas' (Luke 1989, 2), and c) the idea that literacy has the capacity to drive economic, political, social and personal development and emancipation. A 'multifaceted literacy myth' has dominated 20th century educational discourse and asserts that:

for a given society literacy is a prime engine of economic, cultural and social development; that for the individual – that entity invented in the Enlightenment – literacy is a necessary and sufficient cause for cognitive development and social participation; that institutional transition – literacy via schooling – is a viable means for achieving the above; and that pedagogical science . . . can deliver the goods (Luke 1989, 2).

Awareness of the impact of economic and cultural conditions of communications conducted through new media and technology gave rise to the multiliteracies approach developed by The New London Group (Group 1996). Multiliteracies was a response to the increasing diversity of both students and texts in schools. To counter increasing pressure on teachers to devise ever more precise scientific quantitative mean-ends directed basic skills, The New Basics Project (DET, 2004) and Productive Pedagogies Projects (Heyes et al. 2003; Lingard et al. 2006) sought to initiate radical changes that would enable students to ‘read’ the multiple and conflicting textual, visual, audio and gestural communication mediums of the 21st century. The maxim of multiliteracies is that new times demand new approaches and which engage with ‘blended forms of textual and symbolic practice’ (Luke and Luke 2001, 96).

Tasks and priorities

Forty years ago Goodman observed that studies of educational inequality made disadvantaged groups the ‘objects’ of research and relied too heavily on ‘descriptive empirical research supported by statistical data’ (Goodman 1972, 121). Sociological approaches were needed to grasp the connection between education and economic, political, social and cultural aspects of society. While we may have moved into an ‘age of uncertainty’ brimming with new and competing post-traditional ‘theories of the contemporary’ (Kenway and Bullen 2000, 266), approaches to research drawing on quantitative statistical data are still privileged in Australian education policy. A major task for the sociology of education is research able to address continuing patterns of inequality. This means going beyond qualitative/quantitative research binaries or attempts translate the ‘facts’ of quantitative science

into actions and generating instead broad and rich multidisciplinary data comprising equally rich interpretations and analysis (Luke, 2007; 2010). Indeed, a strength of today's sociology of education is its capacity for methodological and theoretical innovation derived from 'descriptive and interpretive, quantitative and qualitative, empirical and hermeneutic approaches that draw from varied theoretical models of education and schooling, knowledge and culture, the learner and society' (Luke, Green and Kelly 2010, viii).

Despite research achievements in the areas of gender, literacy, and policy detailed above, low achievement persists among students from remote, low socio-economic, and non-English language backgrounds. Indeed Australia has the 'worst Indigenous educational outcomes of any comparable Western settler society' (Gray and Beresford 2008, 204). A major priority for the sociology of education is work that addresses the replication of social educational inequality and the on going effects of settler colonialism and racism (Grey and Beresford 2008). The reproduction of educational inequality is also of concern in the education of newly arrived refugee students in Australia (Matthews 2008). Apart from finding methodological balance and a means to address the replication of Indigenous and ethnic disadvantage, a final priority for the sociology of education is the importance of understanding and addressing climate change and unsustainability. There is growing awareness of the fundamental connection between social and environmental justice and the relevance of education to the achievement of environmental sustainability (Matthews 2009: Fien and Tilbury 2002).

In detailing the political and intellectual trajectory of the sociology of education in Australia I have highlighted its expansive research agenda, the cutting edge work undertaken in studies of gender, literacy and neo-liberal education policy, and the missed opportunity to expand critical studies into research examining Indigenous and ethnic underachievement. I have also pointed to the urgent need for the sociology of education to address pressing issues of environmental sustainability. My intention in this article has been simply to demonstrate the continued relevance of the sociology of education to understanding the relationship between education, social change and social transformation.

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Global Crises, Social Justice and Education

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Reviews (I)

Apple, Michael W. (2010): *Global Crises, Social Justice and Education*. New York: Routledge. ISBN 978-0-415-00597-9

Global Crises, Social Justice and Education” is a sociological study of power relationships that occur in education as a result of globalization, and how social movements can tender alternatives to these relationships. This paper provides a strong theoretical and empirical basis, and advocates for a critical sociology of education.

The first chapter is aimed at laying the foundation for the future analyses focusing on how education and globalization are related and at defining the context in which this relation is developed, a raising immigration and an increasing integrated international economy. This context affects education by transferring the values of the global economy, which in most cases involves a reproduction of the neoliberal and neoconservative ethic in terms of relationships based on dominance and subordination. The work attempts to present a positive outlook on how these relationships materialize, by focusing on the practices of four specific areas where social movements achieve a relative amount of success in their claims and involve not a complete change in the educational policy but a challenge to these power relations.

Each of the next four chapters is devoted to a different region allowing a thorough and insightful review of each case, paying enough attention to their different realities and backgrounds, and proving that educational policies are influenced by the international economy. These regions cannot be understood as a complete panorama but instead provide examples of how critical educators and social movements are necessary to deal with the political designs that, even being different in each country, work against social justice. Moreover, the examples from these countries illustrate how reform movements have appeared worldwide as rooted facets of globalization.

The first case, “New Literacies and New Rebellions in the Global Age,” is dedicated to the United States, specifically to student activists in the immigrants rights movement. This chapter is a call to educators to support the efforts of students, providing opportunities to create a

network of potential partners, as other organizations related to globalization and social justice, and to acquire useful knowledge for activism, for example applying digital literacies in campaigns for social justice. In this way progressive movements rise against the consequences of an economic liberalism that requires public schools to transfer some specific knowledge to access the labor market, knowledge that is likewise determined and set by the ruling classes, which in turn perpetuates inequality.

The second case, "From the Rightest "Coups" to the New Beginning of Progressive Politics in Japanese Education," uses an historical perspective to explain the current neoliberal trends calling for the return to imperial traditions and a pre-war model State intervention, taking rhetorical elements from British and American experiences. In 2006 the Liberal Government started reviewing the educational law of 1947, this law replaced the law of 1890, the latest placed education as an obligation of the state while the law of 1947, developed after the WWII, identified education as a human right. Liberals understood that law of 1947 was a Western imposition so they wanted to return to the values of 1890. Progressive organizations fight against the control of the State on all fronts (social policies, labour market, education, etc.) which in turn generates frustration among the populace and allows a space of action for these organizations, that win adherents every day.

"Israel/Palestine, Unequal Power, and Movements for Democratic Education," the third case, is a critical examination of the relationships among social conflicts, education, the state and differential power in society. It offers three examples of schools that are the result of the community activists' work. These counter-hegemonic schools made progress in areas related to inequality and disparity on the basis of ethnic origin, religion, and gender - all highly contentious issues in the Israel/Palestine world. The case illustrates the different forces that participated in each project and how they were developed, beginning with different political commitments and ideologies from different structural locations. Despite the inherent differences of each project there is an undeniable value of "conscious building of coalitions" between the school and communities it serves.

Latin America is the last of the four cases, although the example is focused on Mexico, specifically in the experience of two popular

educational institutions that focus their work on women in rural Mexico with low income, these community-based educational responses are occurring throughout Latin America. These experiences, that are forms of responses to Neoliberalism, develop forms of civil society that are consciously critical and offer alternative spaces of participation, structures and ideologies to fight against conservative movements. The authors end this chapter calling for unified resistance.

The last chapter is a cry for action aimed at progressive educators and activists, inciting them to learn with one and other to try to form a “decentralized unity.” Also reports that some retrogressive movements are adapting the ways of doing used successfully by the progressive movements and civil society. To do this, the authors say that there must be a process of disarticulation and articulation of the progressive discourses and languages which can transform them into elements of hegemonic powers. To understand this process, they proffer the employment of structural and poststructural theories, understanding them in terms of an equal dialogue with complementary objectives.

Apple et al.’s work is not especially interested in the idea of radical change to the overall system but in providing theoretical and practical tools that will show progress in civil societies around the world. The novelty is that by making a critical analysis the authors focus on what social, cultural and educational movements have done and can do to fight against these relationships, seeing these movements as agents of radical change.

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Las Redes de Apoyo Social

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Reviews (II)

Requena Santos, F. (coord). (2011): *Las Redes de Apoyo Social*. Madrid: Civitas. ISBN 978-8-447-03716-2

E una época en que la investigación y la docencia de la sociología de la educación tienen un foco tan importante en las relaciones entre escuela, familia y comunidad, es necesario tener en cuenta los análisis actuales de las redes informales en que se dan esas relaciones. En ese sentido es una buena noticia que dos de los trabajos aquí presentados hayan sido escritos por dos miembros de la Asociación Mediterránea de Sociología de la Educación.

Este libro ha sido elaborado por el grupo de investigación “Redes y estructuras sociales” de la Universidad de Málaga y su contenido proviene de una investigación I+D+i. El valor, el trabajo investigador, que tiene cada una de las personas que ha escrito cada capítulo se ve perfectamente conjuntado por un Coordinador que sabe trabajar en equipo y potenciar las redes de las que está tan necesitada la sociología. Dos de los capítulos han sido elaborados por miembros de la Asociación Mediterránea de Sociología de la Educación.

Félix Requena Santos plantea en el primer capítulo el marco teórico con un énfasis en el apoyo social que se agradece más en estos momentos de crisis en que estamos viendo y viviendo en las escuelas cómo a un número creciente de niñas y niños les está comenzando a faltar lo fundamental incluyendo una suficiente nutrición. En el último capítulo del libro se concreta en la jubilación y especialmente en las relaciones entre personas jubiladas y activas, tema que se va a ir poniendo cada vez de más actualidad en la sociología dados los cambios sociales que están dando en este ámbito.

El segundo capítulo, escrito por María Ortega Gaspar, aborda globalmente el apoyo social informal, las ayudas diversas recibidas por los españoles a través de sus redes informales. Mercedes Fernández Alonso analiza en el segundo capítulo los modelos de apoyo social desde la perspectiva de un individuo ante una situación de necesidad (doméstica, económica o afectiva) con la que puede encontrarse en cualquier momento de su vida.

Tienen mucho interés para la sociología de la educación dos trabajos centrados en la inmigración. En el capítulo 7, Roger Campdepadrós Cullell estudia, con datos de la Encuesta Nacional de Inmigrantes en España de 2007, los distintos papeles jugados por la red familiar y la comunidad étnica en la consecución de un determinado nivel de vida y movilidad social. En el capítulo 8, Verónica de Miguel Luken y Mark Tranmer analizan qué tipo de ayuda se intercambia entre inmigrantes y españoles, y en qué difiere de la prestada por los propios inmigrantes.

Dos trabajos abordan un tema sorprendentemente muy poco tenido en cuenta por gran parte de la sociología de la educación: las relaciones entre el emparejamiento y el conjunto de redes de apoyo familiar. El capítulo 5, elaborado por María Dolores Martín Lagos, compara las principales características de la relación entre madre e hijo/a emancipado/a en 15 países europeos. En el capítulo 9, Luis Ayuso Sánchez analiza cómo las posibilidades de que una persona viuda pueda volver a emparejarse dependen mucho de su posición respecto a las redes de apoyo familiar en las que están insertas.

El capítulo 6, escrito por Ainhoa de Federico de la Rúa, analiza el papel de las redes de amistad como sistemas de apoyo en las diferentes sociedades. Así realiza una importante contribución a subsanar la sorprendente poca importancia que hasta ahora la sociología ha dada a la amistad, cuando sabemos que juega un papel muy importante en las vidas individuales y colectivas de las personas, además de influir notablemente en la configuración de nuestras instituciones y redes informales.

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