

# Educational Outcomes and Poverty (RECOUP)

## Methodology Workshop

15 May 2006 Room GS4, Faculty of Education, Hills Road

Chair: Shailaja Fennell

Attendants: Madeleine Arnot, Patricia Jeffery, Roger Jeffery, Martyn Rouse, Nidhi Singal, Bolormaa Shagdar and Doctoral students Solava Ibrahim, Arathi Sriprakash and Rosie Peppin Vaughan

1. Welcome, Coffee and Introductions
2. The major event of the day was the presentation by Dr. David Clark *Poverty, Time and Vagueness: Integrating the Core Poverty and Chronic Poverty Frameworks* from the Global Poverty Research Centre, University of Manchester.

The presenter has introduced his framework of analysing and measuring poverty which is based on Qizilbash's original framework known as the Core Poverty Framework with the poor defined as the core poor, the vulnerable and the non-poor but extends the former by incorporating duration and time. The aim is to find out about poverty, ways to map it out and define various dimensions of poverty given its vagueness. The core dimensions/measures of poverty identified in this framework were education, health and health care, housing, water, freedom, jobs, nutrition, safety, self-worth, respect, survival and religion.

According to the authors the Chronic Poverty framework does not concentrate on process contrary to the livelihood approach. The framework distinguishes between five categories of poor – chronically core poor, transitory core poor, chronically vulnerable, transitory vulnerable and never poor. Accordingly, poverty is seen as a vague concept. The key poverty insights of the framework is that it distinguishes between core poverty prevention and core poverty eradication measures, allows to separate the poor into chronically poor, transitory poor and never poor based on the time factor, i.e. the duration in which poor individuals and households stayed poor. The combining of two frameworks facilitates deeper understanding of poverty in that poverty is not only a vague predicate but that we can also distinguish its meta-dimensions such as depth, breadth and duration of poverty. Clark notes that the extended framework opens up ways for incorporating other dimensions in the future to offer more holistic approach to understanding, measuring and addressing poverty.

3. In the afternoon the participants were invited to comment and ask questions on the presentation.

The questions asked were about the units of analysis (individuals or households), the role of gender in the framework, and whether there were any attempts to establish causality in this poverty analysis or to look at poverty from intergenerational perspectives. Examples of questions are as follows:

- If poverty and education are multidimensional how do we bring these two concepts together?

- Whether we can use poverty models and thresholds (admissible standards/cut-offs) used in chronic poverty framework in our research if we are arguing that basic education is a core dimension of education? Can we use five criteria of poor defined in chronic poverty approach as a sampling frame?
- Can we do this since education and schooling are two different things: education is important and schooling is not?
- What is our own conceptual framework on poverty and education, do we need to have one?
- Are we interested in chronic poor, transitory poor or whatever?
- Whether we need to be talking about the quality of education too?
- Whether we can establish a threshold for the poor which would be the norm/standard of education for the poor to get rid of poverty?
- Whether bringing in an enormous area of threshold effect in our analysis will complicate our research?
- What we are going to measure in terms of educational outcomes?

Further discussions were held regarding the phases and methods used and the reasons why he used these methods and the particulars of methods, i.e. sampling design, questionnaire structures, questions, respondent groups, field sites etc. It was agreed that David Clark would send the results of his research to workshop participants, especially those related to dimensions of education in his poverty analysis. The participants found that the chronic poverty approach was helpful in terms of providing new insights for understanding and locating the poor in the context of the RPC research. Also, it was noted that the notion of transition and life stages adopted by Clark and others were helpful for developing narratives of success. The participants agreed that they needed a time dimension in researching poverty and educational outcomes.

These discussions were followed by the review of Karen Moore's paper 'Thinking about youth poverty through the lenses of chronic poverty, life-course poverty and intergenerational poverty'. The participants found the paper as very useful particularly for the value given in this analysis to intergenerational aspect of poverty.

4. Madeleine introduced the Methodological Handbook and distributed copies to all participants. She pointed out that the idea behind the handbook was to start the creation of a common base of knowledge for Northern and Southern researchers. She asked the participants to think about the role of Northern researchers and the sort of knowledge and expertise they would like to count on and refer to, as the beginning of a process to which the Southern partners could then contribute. She suggested that there were two ways in which the knowledge could be developed: a) production of co-authored publications by Northern and Southern partners and b) production of joint publications and sharing of field expertise based on field reports. The issue of how best to use the handbook was discussed. It was suggested that the handbook could be used in future training workshops or it could be seen as a contribution to long-term publication record of the RPC. She noted that the handbook attempted to bring together papers that help us to understand how to design and conduct educational research in a developing country context.

**Action:**

1. By the next meeting of Theme 1 members to be held in Cambridge on 3-5 July 2006 the following papers will be added to the Methodological Handbook:
  - Doing research on educational outcomes (Martyn);
  - Researching educational policy and education finance (Chris);
  - Policy analysis (Bolormaa);
  - Comparative, cross-national research (Madeleine).
2. Members should review the existing briefing papers and send their comments to Madeleine by 15 June after which she will prepare the papers for dissemination among Southern partners.

## **Theme 1 Meeting**

**16 May 2006, Room GS4, Faculty of Education, Hills Road**

Chair: Roger Jeffery, Theme Coordinator

Present: Madeleine Arnot, Shailaja Fennell, Patricia Jeffery, Martyn Rouse, Nidhi Singal, Bolormaa Shagdar

### **1. General News**

- a. Madeleine briefed the participants on the progress of PhD studentships and potential funding arrangements/agreements and invited proposals regarding candidates for these fully funded studentships.
- b. Madeleine also noted that members needed to have publications targets, and described recent talks with Routledge on their interest in a book series on Educational Outcomes and Poverty.
- c. Roger informed of his plans to visit CORD in India in July and asked other participants' to join him if they planned any visits to India around this time.

### **Actions:**

- 1.1 Theme 1 needs a secretary who will attend all meetings, take minutes, maintain a filing system and coding of documents and provide general support to theme members. Detailed structure of the filing system was suggested (available from BS);
- 1.2 Members should send comments on communications strategy, risk management and project logframe (annexed to the Inception Report) to Chris asap.

### **2. Intranet and Communication Issues**

Bolormaa gave a briefing on the status of Internet and internal communication issues. She noted that the use of Intranet facilities was inadequate and asked members of Theme 1 to explore ways in which they could improve their communication via Intranet. She asked Roger and Shaila to help create a link to the RPC website from their institutional websites. Then the issue of establishing listserves for the RPC members was discussed. Participants decided that for Theme 1 they would have two mailing groups: one unmoderated list for Theme 1 Northern researchers only and one for all Theme 1 members moderated by Roger. In moderating the list Roger will liaise with Chris.

Issues raised, concerns expressed were:

- There is currently very little communication between Northern and Southern researchers;
- The budget for videoconferencing seems to be inadequate; Theme 1 would like to be able to hold videoconferencing sessions with Southern partners;
- Whether Skype is a viable option for communication (free telephone conversation via PC for those with broadband connections);
- National conferences should cover as many people as possible, including Northern partners.
- An educational community in each country should be included in our target audience for dissemination activities;

- All researchers should aim to disseminate outputs through BERA, BAISE and other professional conferences and symposia held at Oxford and elsewhere;

**Action.**

2.1 Bolormaa will create two mailing lists for Theme 1 members.

**3. Research Ethics**

Roger spoke on the ethics of research and briefly introduced ethical clearance procedures followed in his department at the University of Edinburgh. It was agreed that Roger and Madeleine are responsible for ethical clearance in Edinburgh and Cambridge, respectively. It was also agreed to ask Chris to make sure that other Themes obtain their ethical clearances from their respective institutions. The group agreed that further discussions on research ethical issues under Theme 1 were needed.

**Action.**

3.1 Roger will put questions/headings for discussions on ethics (ethical safeguards, training, sensitivity, interviewing women etc) and produce a draft ethical protocol, for discussion at the 3-5 July meeting.

**4. Conceptual and Methodological Papers**

Madeleine led discussions on the conceptual papers. It was agreed that a few more needed to be written. On the methodological papers, the meeting noted the decisions taken the previous day.

**Action:**

4.1 The following new papers will be added by end of August 2006:

- a) Family concepts (Patricia);
- b) Educational Finance and organizations (Chris to be asked);
- c) Policy analysis (Bolormaa);
- d) Ethnicity (Madeleine will find a student);
- e) Cross-national comparative studies (Madeleine);
- f) Educational Outcomes (Martyn).

4.2 Madeleine will email Theme 1 Northern partners asking their feedback on methodology briefing papers as soon as possible. Authors will be asked to revise their papers according to feedback received and send revised drafts by 4 July for second review at the 3-5 July meeting. The final version of papers will be sent around to Southern partners and their opinions will be sought on whether they would want to use the briefing notes as a basis for co-authored pieces. A year later these briefing notes might be reprinted as a co-authored handbook.

**5. Inception reports and activity plans**

Bolormaa introduced Southern partners' activity plans and the draft outline of the RPC 5-year plan (aggregate plan). The participants were asked to comment on the structure

and outline of the aggregate plan as well as provide suggestions for the breakdown of activities for each project under Theme 1. The participants noted that planning and scheduling could not proceed without agreeing first on the research design and approval of project TORs. The participants analysed the plans in terms of the start and finish date of activities under each Theme.

**Action:**

5.1 Southern partners' activity plans need to be revised based on the proposed project TORs, training workshop plans and an outline of the RPC 5 year plan to be provided by Northern partners (PI, All);

5.2 Northern researchers to finalise project TORs and agree training workshop plans with Southern partners (All, Bolormaa to coordinate);

**6. Planning training workshops**

Preliminary plans for conducting training workshops in each country were discussed and agreed based on timetables provided in Southern partners' activity plans and Northern researchers' availability slots (Table 1). It was noted that some partner plans lacked data and consistency/clarity to support planning and scheduling of training workshops (for instance, no reference in Ghana plan to disability project training).

**Table 1. Training workshops plan**

	<b>Ghana</b>	<b>Kenya</b>	<b>India</b>	<b>Pakistan</b>
Generic qualitative training	Jan 07 MA/MR/Leslie	Mar – Jun 07 MA/MR/Fatuma	15-30 Nov 06 SF/NS/RJ/PJ/MA	Oct-Nov 06 SF/NS/RJ/PJ
Disability training	???	???	Nov 06	Nov 07
Health and Fertility training	???	???	??? RJ/PJ	Sep 08 RJ/PJ
Youth, gender and citizenship training	Oct 08 MA	??? MA	???	Dec 08 MA
Training on data analysis			Apr – Jun 08 RJ + ?	??? RJ + ?

It was agreed that the generic qualitative training workshop would involve 10 days training of desk and field researchers in qualitative research methods, including introduction to qualitative data, interview types and other data collection methods, ethical issues/concerns, introduction to specific lenses (disability and gender) and some preliminary data analysis skills.

Issues raised included whether the Southern partners had committed appropriate resources to conduct statistical meta-analysis by qualified statisticians. On the one hand, such analyses could generate patterns of performance linked to socio-economic context, and show us whether and how schools fail to meet the educational needs of the poor. On the other hand, the need for and possibility of these meta-analyses in all the partner countries was not clear, and doubt was expressed over what was the right way forward.

#### **Action.**

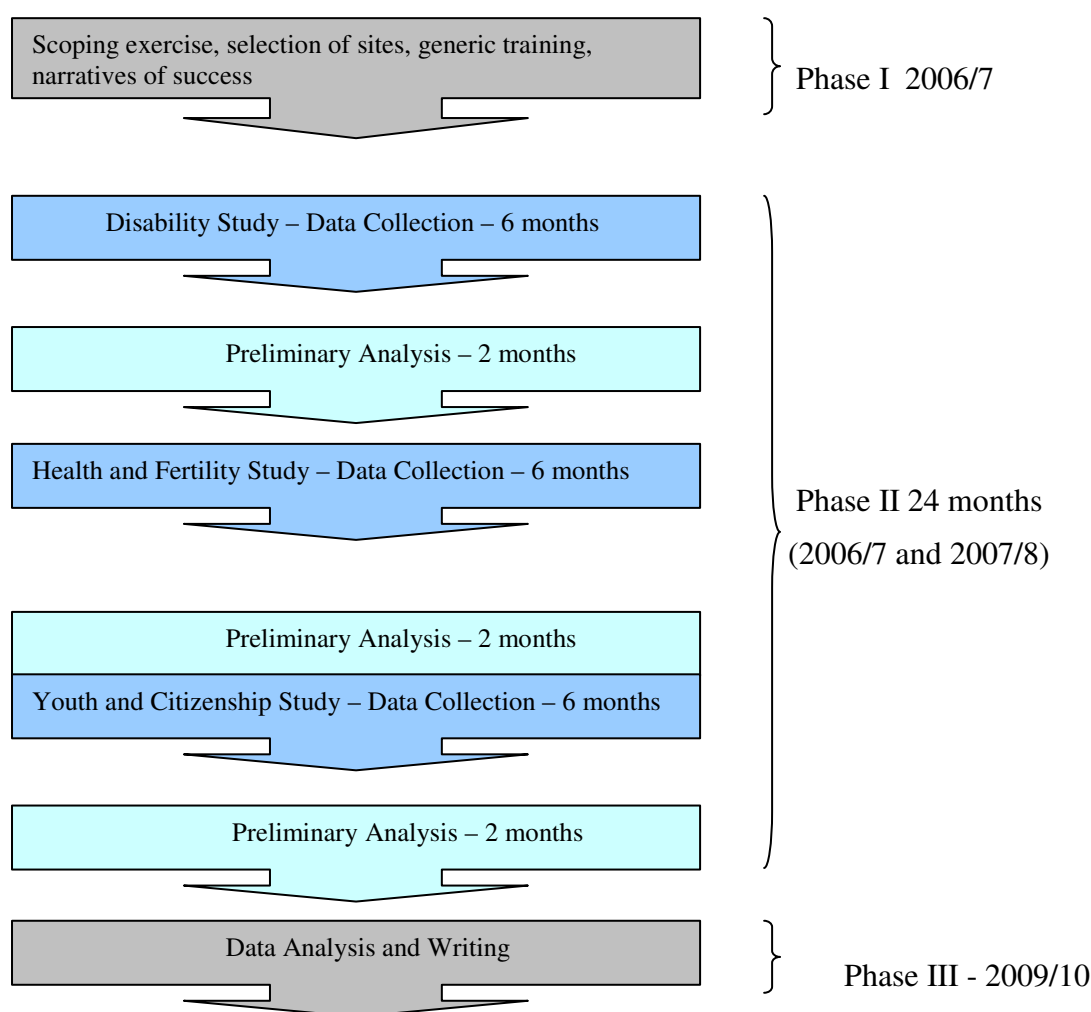
**6.1** Chris to be asked to investigate via UNESCO what initial mapping documents, containing important base data for Theme 1, are already available.

**6.2** Roger to negotiate dates for training workshops in Ghana and Kenya (proposed: Ghana – early Jan 07; Kenya – late Jan early Feb 07). Martyn, Shaila and Madeleine are not available during the first two weeks of October, though Martyn can do late September.

#### **7. Planning the next research design phase**

Further discussions were held on the design of three strands of projects under Theme 1, including sampling design, sample size, phases of research, methods, interviewee profiles, and staffing needs (researchers). It was agreed that major methodological tools for Theme 1 were the literature reviews, scoping exercises, stages of progress, narratives of success (identification of narratives only) and household census. A simple sequential model was suggested (Fig 1), whereby in each country two teams in two different districts work sequentially. However, the sequence would not necessarily be the same in each country (since this might pose problems for the Northern researchers most closely involved with each sub-project). ***NB after the meeting it became clear that the needs of the Theme 2 qualitative project had not been considered in this timetable, and some further iterations of this model would be needed.***

Figure 1 Sequential model of Theme 1 qualitative projects



**Action:**

Roger to discuss these proposals with Southern PIs, after consulting Chris.

**8. Training Manuals**

There will be a generic training and a short-term specific training of field researchers. Generic training will involve 15-16 attendants in addition to trainers in each country. The generic training will be followed by three further short workshops immediately before the fieldwork starts. These will be 3-4 day programmes with only the research team led by the local project leader and the Northern specialist on that topic (for instance, Nidhi, Madeleine, Roger). Halfway through data collection there will be another training on indexing of data (data analysis at different levels for different people).

**Action:**

8.1 Nidhi and Shaila will find out what is needed for the training manual and circulate ideas on the training manual for response by 4 July. These will be revised and sent to southern partners by the end of July. Southern partners to be asked to send their feedback by September 2006.

8.2 Roger will get the dates for the generic workshops pinned down.

## **9. Amended TORs for each of the three sub-projects and field centres**

### **Action:**

9.1 Roger will write field centres piece by end of May and give to Chris before circulating to southern partners

9.2 Theme 1 northern partners will review the TORs in the light of the discussions held on 16 May by 14 June. The aim of this review is to ensure that the TORs clarify for southern partners the kind of research northern researchers would like to undertake and roughly what resource implications will it have in terms of HR.

9.3 Roger will contact southern Principal Investigators to find out whether they have recruited qualitative researchers and discuss the possible strategies for dealing with gender-sensitive interviewing

9.4 We need to find ways to strengthen the relationship between qualitative and quantitative work.

## **10. Feedback to household questionnaire**

The following issues were raised for feedback to Geeta for her consideration:

- The arguments against double-questioning were particularly strong with respect to the disability questions: it was felt that if an enumerator asked a general quick question at the beginning and was not told of any disability then, they would not give the disability questions a thorough going through later on. It was felt to be important that disability was raised as an issue only once, and then treated properly for all household members.
- There are hetero-normative assumptions throughout the questionnaire, and it would be better if some of the pre-coded answers did not assume (for example) that all were likely to get married.
- As it stood, the questionnaire did not seem to be taking on board all the educational issues we were concerned about
- Too much focus on investments in schooling and lack of interest in financing of schooling and gender
- Too much interest on attendance and completion and not on patterns of attendance, repetition, inter-school transfer etc

### **Action:**

10.1 Roger to raise these issues with Chris and ask for an assurance that the qualitative researchers would be able to make contributions to the revision of the household questionnaire.

10.2 Bolormaa find out from Chris

a) what is the status of literature reviews and what Theme 1 northern researchers can do to help out southern partners to complete it;

b) what role does Chris see for northern partners once literature reviews arrive;

- c) who is providing bibliographies on Themes 2 & 3;
- d) whether we should be sharing our bibliographies with the Quality and Access RPCs

### **11. Review action plan (Annex 2 of last meeting's minutes)**

Apart from progress on getting the concerns of the qualitative researchers reflected in the revision of the household questionnaire, the remaining tasks seem to have been completed.

### **12. AOB**

There was no other business and the meeting closed at 16.45

**Annex 1. Agenda of the Methodology Workshop, 15 May 2006 ‘Researching Educational Outcomes and Poverty Pathways’**

11.00	Welcome and Coffee
11.30-12.30	Dr. David Clark <i>Poverty, Time and Vagueness: Integrating the Core Poverty and Chronic Poverty Frameworks</i>
12.30-1.30	Discussions
1.30– 2.30	Lunch (sandwiches provided)
2.30-4.00	Discussions
4.00- 4.20	Tea break
4.20– 5.20	Prof. M. Arnot: Methodological Handbook

## **Annex 2. Agenda of Theme 1 Meeting of 16 May 2006**

1. Matters arising from meeting of 6/7 March, not otherwise covered
  - a. Intranet site and communication issues (BS)
  - b. Ethical issues (RJ)
  - c. Dissemination and output plans (BS)
  - d. Conceptual papers – poverty, ethnicity, disability etc (?)
2. Other news (All)
3. Inception reports and activity plans (BS, RJ)
  - a. Ghana
  - b. India
  - c. Pakistan
  - d. Kenya
4. Amended TOR for each of the three sub-projects and field centres
  - a. Disability (MR/NS)
  - b. Health and Fertility (RJ/PJ)
  - c. Youth Gender and Citizenship (MA/SF)
  - d. Field centres (RJ)
5. Progress on the Methodology Handbook (MA)
6. Planning training workshops in each partner country (BS)
7. Planning the next research design phase
  - a. Scoping studies (RJ)
  - b. Literature reviews (MA/NS)
  - c. Statistical and national reviews (MA/NS)
  - d. Bibliographies (RJ, others).
8. Comments on the household survey
9. Review action plan (Appendix 2 of last meeting's minutes)
10. AOB

### Annex 3. Theme 1 2<sup>nd</sup> Meeting Action Plan

Action	Person responsible	Timetable	Notes
<p>1. <u>General</u> Provision of secretarial support to Theme 1 (minutes taking, filing and coding of documents)</p>	KG		
<p>2. <u>Communications</u>  Create two mailing lists for Theme 1 members</p>	BS		
Create links from Edinburgh and Development Studies websites to the RPC website	RJ, SF	ASAP	
<p>3. <u>Ethics</u>  Put headings/questions for discussions on ethics and produce an ethical protocol</p>	RJ	3-5 July	
<p>4. <u>Methodology handbook – additions:</u> -Doing research on educational outcomes -Researching educational policy, finance and organizations - Policy analysis - Comparative cross-national research</p>	MR CC  BS MA	15 June	
All review briefing papers and send comments to Madeleine	All	4 July	
Prepare the papers for dissemination to southern partners	MA		
<p>5. <u>Activity plans</u>  -Southern partners' activity plans need to be revised based on the proposed project TORs, training workshop plans and an outline of the RPC 5 year plan to be provided by Northern partners (PI, All); -Northern researchers finalise project TORs and agree training workshop plans with Southern partners</p>	PI, All  All, BS to coordinate		
<p>6. <u>Training workshops</u></p>			

Obtain initial mapping documents from UNESCO	CC		
Change training timetables for Ghana and Kenya	RJ		
Pin point the dates for training workshops	RJ		
<u>7. Training manuals</u>			
Explore ideas for the training manual and circulate for response	NS and SF	4 July	
Send to southern partners	NS and SF	end July	
Southern partners send their feedback		Sep 06	
Produce field centres piece	RJ	End May	
<u>8. TORs</u>			
Review of TORs	All	14 June	
Contact southern partners about recruitment process	RJ		
<u>9. Feedback to household questionnaire</u>			
Put the issue of changes to Chris	RJ		
Find out about literature reviews	Bolormaa		