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Zofia Pawlaczek

M.Sc., Pg.Cert.

**Physical Education in Post-Communist Poland: A Transitory  
Journey**

Thesis submitted for the degree of Doctor of Philosophy

University of Durham

School of Applied Social Sciences

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## ABSTRACT

Zofia Pawlaczek

### Physical Education in Post-Communist Poland: A Transitory Journey

In 1989 the fall of communism in Poland led to a shift in political governance from totalitarianism to a decentralized democracy. Changes to society were all embracing and reforms became central to implementing deep cultural change in a population that had for the last 43 years been subjected to authoritarianism. Physical education (PE), which belongs to the definitional framework of physical culture (PC), was ideologically driven by Marxist theories. Since then education reforms have led to new conditions of autonomy for interpreting curriculum, meaning that PE teachers have become accountable at local levels of governance. This study has been carried out to capture the transitory journey of PE as it adapts to reforms that are underpinned by decentralist policies, and conveys the voices of teachers at the individual level. A sequence of interviews (n=33) were conducted, which overlapped a process that included the construction of an open-style questionnaire that provided words from informants (n=348) in Poland's reforming PE system. These words were used to discover a grounded theory on *physical education in transition*. The theory is explained by a *globosity of change* concept, which provides an explanation of reforms. It has emerged that three layers construct this concept and that teachers are required to make 1) ideological, 2) structural, and 3) individual transitions. Further to this, two significant dimensions of transition were crossed to form a Four Scenarios Model. The model captures an analytic story that shows how teachers from different political eras make up the profession. Adaptations to the three layers go beyond the school context as an entire nation shifts to a new socio-cultural tempo so as to get in step with the metronomic pace of a culturally new Poland, one that is democratized, belongs to the European Union (EU) and understands the challenges of new economic frames.

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## ***Publications Resulting from the Study***

### **CONFERENCE PRESENTATIONS**

**Pawlaczek, Z.** (2000). The Impact of Transitional Politics on Sport in Post-Communist Poland. Proceedings of the 5<sup>th</sup> Annual Conference of the European College of Sport Science, University of Jyväskylä, Finland, July 19-25.

**Pawlaczek, Z.** (2002) Physical Culture in Post-Communist Poland, Leisure Studies Association: Leisure - Our Common Wealth, July, University of Central Lancashire, Preston

**Pawlaczek, Z.** Emergent Dialogue Amongst the Physical Educators of Post-Communist Poland. (2004) Australian Council for Health Physical Education and Recreation National/International Biennial Conference, 6<sup>th</sup>-10<sup>th</sup> July University of Wollongong, NSW, Australia. Presentation and Discussion of Paper.

### **JOURNAL ARTICLES**

**Pawlaczek, Z.** (2003). Physical Culture in Post-Communist Poland: Sport, Leisure and Social Inclusion, LSA. No.82. pg 231-249

Declaration – No part of this thesis has been previously submitted for a degree at this or any other University.

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*“Reforming the policy process - in the same vein a country may decide to change its educational policymaking process. Doubtless none will undertake drastic action, such as shifting abruptly from a centralized to a decentralized form of organization or vice versa.” (Merritt and Coombs, 1977, p.255-56)*

This thesis is dedicated to the memory of Anna Marciniak 1926-2003

## LIST OF ABBREVIATIONS

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AWF	- Akademia Wychowania Fizycznego (Physical Education Academy)
EU	- European Union
GKKFiT	- Główny Komitet Kultury Fizycznej i Turystyki (Head Committee for Physical Culture and Tourism)
GUKF	- Główny Urząd Kultury Fizycznej (Head Organisation for Physical Culture)
KEN	- Komisja Edukacji Narodowej (National Education Commission)
KS	- Klub Sportowy (Sports Club)
KSMM (Ż)	- Katolicki Stowarzyszenie Młodzieży Męskiej i Żeńskiej (Catholic Society for Male and Female Youth)
PA	- Physical Activity
PC	- Physical Culture
PE	- Physical Education
POS	- Państwowej Odznaki Sportowej (National Sports Awards)
PZPR	- Polski Związek Partii Robotniczej (Polish United Workers' Party)
SHSWF	- Sekcja Higieny Szkolnej i Wychowania Fizycznego (Department of School Hygiene and Physical Education)
SKS	- Szkolne Kluby Sportowe (School Sports Clubs)
TG Sokół	- Towarzystwo Gimnastyczne Sokół (Gymnastic Society – Sokół)
UKS	- Uczniów Kluby Sportowe (Students' Sports Club)
USSR	- United Soviet States of Russia
YMCA	- Young Men's Christian Association
ZHP	- Związek Harcerski Polski (Polish Scouting Association)

## PREFACE

### BACKGROUND TO THE THESIS

As a way of providing the reader with an understanding of *why* I have conducted this study, I have judged it important to show its initial starting point by locating political events within my personal sphere and, hence, I will write this section in the first person before reverting back to the third for the remainder of the thesis. On the “18<sup>th</sup> August 1989, President Jaruzelski<sup>1</sup> asked the Solidarity<sup>2</sup>-backed Catholic intellectual, Tadeusz Mazowiecki, to form a government, and six days later he formally became the first non-communist Prime Minister in Eastern Europe for over forty years” (Henderson and Robinson, 1997, p.78) thus, leading to the deconstruction of communist governments across Central and Eastern Europe. Zamoyski (1990) summarizes the events with the following description:

“In 1944 Stalin himself had declared that trying to establish communism in Poland was like fitting a saddle to a cow . . . Poles achieved [deconstruction] without upsetting any entrenched interests or provoking dangerous reactions . . . there was nothing dramatic about the events, and no heady celebrations . . . Poland was free once more . . . Shortly after the Polish elections, the Hungarians dissolved their communist party and began a series of reforms that led to a declaration of independence from the Soviet bloc. A couple of months later, the Czechs brought down the rule of the party in their country, and soon after that, the people of Eastern Germany threw out their communist leaders and tore down the Berlin Wall.” (p.397)

The original moment in the summer of 1989 was communicated to me by my mother, in a phone-call at the family home in Swindon, Wiltshire. She was on vacation with my father, sister and youngest brother, witnessing the historic moment, and shamelessly at the time, I was not remotely

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<sup>1</sup> In December 1981 Marshall Law was imposed in Poland under the leadership of General Jaruzelski to control a growing and more powerful social discontent with Soviet style communism (Henderson and Robinson 1997).

<sup>2</sup> A 10 million strong trade union movement led by Lech Wałęsa that was the embodiment of Polish opposition to communism (Prizel 1998).

interested in these events as I had not visited the country since my childhood in the 1970's, when communism and associated excellence in elite sport performance was at its celebrated height<sup>3</sup> (Koterlitzov ud, Riordan 1991, Riordan 1992).

A visit in 1990 was to change this interest, where I observed the social confusion, (from a Westerner's point of view), emanating from the lifting of restrictions on personal freedoms on the ordinary lives of residents in central Łódź. This confusion was depicted through some interesting and often sad scenes of streets cluttered with individuals selling anything and everything, from home grown pickled gherkins to what seemed to be the entire belongings of a family trying desperately to earn some zloty's<sup>4</sup>. Given that my visit had occurred seven months after the historic event, seeing translated copies of George Orwell's '1984' in the windows of book-shops seemed to be a symbolic emphasis of the newly acquired freedoms of expression, which had been seriously absent in Polish culture from the moment World War II broke out (Davies 2003). I began to wonder how a nation and more acutely a society, adapts to changes in political culture, particularly if those changes appear to be swinging from one extreme to the other: from a centralized and authoritarian communist approach to that of a devolved and democratic one (Levitas and Herczynski, 2001). I remember my grandmother, to whom this thesis is dedicated, boasting that she had experienced in succession, Independent Poland (after the 1<sup>st</sup> World War), Nazi-occupied Poland, communist Poland and once again a free Poland, although she was not too happy about the opening up of free-markets as this under-cut her own black-market ventures and she did not live long enough to witness Poland formally joining the European Union (EU) in May 2004. This all

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<sup>3</sup> Riordan (1992, p.3) explains that – “The principal reason for this targeting of the Olympics for world supremacy [was] an attempt to gain recognition and prestige for the communist states and their brand of communism, and thereby to advertise that brand, especially in the Third World, as being superior to the capitalist system.”

<sup>4</sup> Polish currency

made me start to wonder about stability and the seemingly constant changing political situation that seemed to be a historic condition in Poland (Prizel 1998). To add to this, I also saw my grandfather appear a little lost during this period as his constant gripe about communists, which was always carried out in a pugnacious bellow, began to feel misplaced and there was talk of a need for a generational shift to truly accommodate the long-awaited changes away from communism (personal communication with Skoczylas 1999b, personal communication Wentel 1999). The paranoia that was a cultural condition of communism would, therefore, take a little longer to dispel (this is reflected in some of the interviews in the study as some interviewees refused to go on record). Old anxieties that were once dominated by the lack of personal freedoms were soon replaced with new ones such as personal and institutional accountability, all of which were exacerbated by rises in inflation and unemployment, leading to poverty - the initial consequences of democratic governance. It was not until 1996 when I was holidaying in the Polish mountains that I was struck by what appeared to be high levels of participation in outdoor recreation. I imagined that these were new leisure behaviours that accompanied a nation in transformation. This was a naïve projection of my own cultural experience, as highlighted in the course of this study. More importantly, the mis-perception drew out a significant limitation in me as a researcher, that is, being connected to a nation through parentage does not automatically lead to a congruent understanding of it. In addition, I found myself not liking some of the aspects of change as the Poland I knew of as a child was safe because it was disciplined, for reasons linked to the extreme communist regime as it had instilled a fear in people that arrested anti-social behaviour. A transitional Poland was contending with changes in lifestyles and I was now witnessing rowdy drunken groups of men terrorising beggars in the late night. Street cafes, nightclubs, Irish bars and English dialogue were slowly altering the shared social-spaces of the country so that the major cities of Poland, in my view, came to resemble many other cities I had been to in Europe. When viewed

through its historical vista it was a return to its past (personal communication Kosiba 2003). In many ways, undertaking this study compelled me to view critically some of the cultural features of Poland. The post-war generation of Poles that had settled in Great Britain were a fiercely patriotic group and Poland was some sort of *Never-land* steeped in legend, literature and courage. At the beginning of this study, when I reflect back, I often wonder if that is all I originally knew of Poland as the process of research introduced new dimensions and details to my own understanding. My personal discovery of physical culture<sup>5</sup> (see Chapter 2) was to alter my thinking about Poland as it brought into sharper focus the socio-historical dimension that I had been aware of, and only knew about, from a geo-political point of view. All in all I made seven trips to Poland for this study with the longest trip being one month and the shortest one week. I met many people who were dedicated to working in all areas of physical culture and who saw it as a part of human life that could bring significant value to it. My final research trip included some socialising with friends that I had made and I was taken to Kazimierz in Kraków, where Polish Jews<sup>6</sup> were once again emerging as part of its cultural fabric. It was part eerie, part exhilarating, as young and old mingled together in moody late night cafes listening to chill-out music. Physical Culture has existed in Poland for centuries (Skrzypek 1960, Demel 1969, Wroczyński 1985, Szymanski 1990, Gaj and Hądzelek 1997) and it thus became an important research aim of mine to understand the role of Physical Education within this broader context and secondly to place it all within a process of transition and thus discover something new.

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<sup>5</sup> Physical Culture – this is an essential context for the research firstly because it is multi-faceted and subsumes physical education within its definitional and legal framework; and secondly because it intersects with the context of education thus creating its own cultural context.

<sup>6</sup> Before World War II Poland had been the home-nation for “more than half the world’s Jewry” (Prizel, 1998, p.40). The Holocaust during the WWII had annihilated 3 million Jews thus leaving Poland’s ethnic make-up in a state of complete homogeneity (Davies 1984, Henderson and Robinson 1997).

## CHAPTER 1

### 1.1 INTRODUCTION TO THE RESEARCH QUESTION

There is no standard approach to generating research questions (Olszewski-Walker and Avant 1988, Strauss 1987, Cohen, Manion and Morrison 2000, Kosiba and Madejski 2001, Robson 2002). A common situation within research that is involved in professions of reflective practice, such as teaching and or nursing, is that a problem arises or evolves due to the nature of thinking about the context of one's work and its impact on those who exist within it (Walker-Olszewski et al 1988). This could be a theoretical concern, a calculation of variables being manipulated or the emergence of yet un-described adaptations to transition within a physical education context (as this study presents). It is this last example where research questions were intuitively positioned, which Robson (2002) describes as being a result of the 'knowingness' of a professional context necessary for devising questions. Using grounded theory as a method was considered to be relevant for this study. This was because the method permits the central research question to be devolved into precise areas of inquiry and was judged to be the most appropriate approach to a large area of inquiry. Without labouring an explanation on grounded theory at this point<sup>7</sup>, the initiation of research questions for that reason occurred through a series of sequential, yet over-lapping events. Ideas about education in transition came about through the development of knowledge as a teacher in higher education influencing the way that personal experience transcended through reflections on possible research problems and questions. This experiential reflection provided the study with a set of perspectives on education reform in Poland. The timeliness of this reflection cannot be under-estimated as the emergence of new laws, associate membership in Europe and visible changes to socio-cultural values were presenting themselves as the outcomes of a politically

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<sup>7</sup> This occurs in chapter 3

reconstructed nation (Adamus-Matuszynski 2004). This timeliness is essentially a characteristic of the process for generating research questions (Cohen, Manion and Morrison 2000, Robson 2002, Marvast 2004). In addition to capturing events as they happened, there was also a need to describe the related changes to physical education as an overall contribution to understanding education reforms in Poland as “the character of education is intimately linked to the content and organisation of society and culture” (Seddon, 2001, p.308). Understanding Polish history was also a necessity as

“ . . . Poland is a *historic* nation with an indigenous national elite and a powerful sense of distinctiveness and identity . . . perpetuated by a peculiar collective memory of the idea of Poland . . . [which] is particularly problematic because of centuries of alienation from Europe and domination by foreign rulers . . . Thus, the issue of national identity has had a far greater emotional impact in Poland than in many Western countries with more developed civil societies.” (Prizel, 1998, p.38-39)

So, when locating this condition within an educational context it would elicit personal and collective histories relating to this collective memory. Portraying teacher and curricula struggles during this period of distinct movement would serve as a documentary of its time. For the purpose of *real world value*, as Robson (2002) describes it, dimensions of the past and future needed to be a part of any research question in this study. This is because the area under investigation was in a state of flux and thus the methodology employed would need to cope with this for practical and theoretical reasons. Grounded theory was, for that reason, judged to have the mechanistic necessities for such a complex, dynamic and unpredictable situation.

## 1.2 AIMS OF THE STUDY

After this decision to employ grounded theory methodology, a research question was constructed so that an essential starting point could be established. This question was –

- How will physical education change during political transformation in Poland?

The question was general enough to capture the minor themes and strands within its frame and its aim thus, became twofold: (a) to elucidate the experiences and consequences of professional and pre-service teachers of physical education in the context of political transformation and hence, education reform in the work setting; and (b) to formulate a logical, systematic, and explanatory theory on teacher adaptations to education reform in a formerly authoritarian political culture. As sometimes occurs when concepts and processes emerge in grounded theory, because of aims to develop theory as close as possible to the ground – that is theory, which is *grounded* in localised accounts and experiences, the original purpose itself transformed and the aims of the research evolved so that two key areas were identified as the questions underpinning this grounded theory. These were: (a) to elucidate the experiences of professional and pre-service teachers' *concerns* about education reform (b) to formulate a logical, systemic and explanatory theory of *physical education in transition* in response to socio-political redevelopment. It is these two aims that overarch the entire process in terms of linkage, themes and processes associated with the construction of this Grounded Theory of Physical Education in Transition.

### 1.3 INTRODUCTION TO THE RESEARCH CONTEXT

Most educationists in the West are aware of continual changes being affected upon the teaching environment (Apple 1978, Gitlin and Margonis 1995, Da Silva 1999, Apple 2000, Rhoten 2000, Apple 2001, Aslund and Hewko 2002, Gomez 2003, Bates 2004) as these are the consequences of democratic governments responding to the driving and or restraining forces of the macro and micro world of economics to which they subordinate public services (Giddens 1994, Corrales 1998, Apple 2001, Levitas and Herczynski 2001). Corrales (1998) explains that in the 1990's the politicisation of education had occurred as a proponent of changing politics and economic frames and had increasingly become a priority for governments. The two reasons given for this were that

“[1] . . . improving the quality of education is increasingly seen as a source of international economic competitiveness of nations. In a globalized economy, countries compete with one another for markets, foreign investment, technological development, and hosting of multinationals . . . [and 2] high quality education has become synonymous with self-sustained development, especially in the developing world.” (Corrales, 1998, p.3)

Reforms in Poland, however, were (and continue to be) more acute because of the intense drive to break from an authoritarian communist past (Melosik 1991, Zawadowska 1995, Scott 2002, Gomez 2003, Adamus-Matuszynska 2004, National Ministry of Education and Sport 2004). Political re-development was for that reason a central goal of education reform (Salitra 2003), which was also to include a strategic nod in the direction of EU membership (Melosik 1991, Elsner 2000). Such politicization of education in Poland was not an unfamiliar tradition, particularly as the period of 1945-89 was characterised by the inflexible presence of communist politics (Shimoniak 1970, Krawczyk 1996, Prizel 1998, Scott 2002). This is reflected in the thesis through the historical exploration of physical culture, which maps the development of an important cultural phenomenon to which physical education is tied and shows a consistent presence of political culture imposing itself on important social functions. The difference or uniqueness of this study through a grounded theory was to explore the phenomenon of a transiting Polish society, in the context of education reform, whose collective belief was that the western-democratic model was the only solution in reforming its past (Melosik 1991, Zawadowska 1995, Levitas and Herczynski, Scott 2002, Duczmal 2003, Gomez 2003, Salitra 2003). Adamus-Matuszynska (2004) cites Staniszki (1991) to explain why it was that Poles held this belief about reforming its society and thus its education structure: “The collapse of the communist regime had had three important moments before it happened: 1) systemic contradictions within socialism; 2) unique historical circumstances; and 3) the new circumstances within the emerging system” (p.7). With this in mind it is necessary to emphasize that both Polish and Western analysts of the communist system had not predicted the type of

breakdown of political governance that actually occurred in the late 1980's (Prizel 1998), thus a collapse in the regime was literally a sudden event as no one social institution had prepared for such colossal changes (Elsner 2000, Marga 2002, Scott 2002, Salitra 2003). Reforms in the last fifteen years have been relentless in terms of actual legislation and policy development (Levitas and Herczynski 2001, Scott 2002, Ducmal 2003, Salitra 2003, Cienski 2004). The increased interest in education by politicians has also been heightened to a new level (Levitas and Herczynski 2001, Gomez 2002, Duczmal 2003) as democracy plays out its role during the nebulous years of party-politics (Henderson and Robinson 1997, Prizel 1998). In addition, the former years of government secrecy, which was extended to all social agencies, was to be replaced by transparent government (Henderson and Robinson 1997, Levitas and Herczynski 2001, Gomez 2003, Salitra 2003). The move towards scrutiny of public services was transferred into education, which had moved from an administrative system controlled entirely by central government (Melsosik 1991, Zawodowska 1995), to one of autonomy instructed by central government but implemented by newly decentralised local governments who would report directly to central government (Elsner 2000, Scott 2002, Snoek et al 2003), and who would ensure that modern education reflected ideological shifts comparable with democratic political culture (Rhoten 2000, Gomez 2003, Adamus-Matuszynska 2004). Salitra (2003) links this type of government intervention as a tradition with a communist past and explains that

“ . . . The communist regime – was also characterised by an approach strongly oriented towards social coherence, based on imposed idealistic principles with which most of society did not identify . . . the [current] Polish educational system is based on idealistic values, which are to a large extent aimed at furthering social coherence . . . with equal opportunities at every level of education [exemplifying] an idealistic tendency.” (p. 107)

It is thus clear that the tradition of ideology in education is not a break from the past but merely a shift in focus (Scott 2002) and reforms and policies have invariably impacted on teacher education

(Zawodowska 1995, Kosiba 2004). Physical education has in addition to this been influenced by changes to the Physical Culture Act (1996) as it moves towards principles of social inclusion, equity and participation opportunity for all (Ust. 1996) hence, echoing the same language as the 1998 Education Reform Act (Salitra 2003). In addition to this when Physical Culture is examined through an historical frame in this thesis it emerges that ideology is something that has always been associated with its evolution (Krawczyk 1995, Riordan 1991) and dates back to the 1200's when physical culture was about protecting communities, thus carrying with it social responsibilities (Wroczyński 1985, Krawczyk 1996, Zilberman 1996, Gaj and Hądzelek 1997). It is clear that physical educationists in post-communist Poland have been charged with a complex set of instructions to affect educational and societal objectives with regard to political pledges to change the socio-cultural fabric of a nation (McKenzie et al 2002, Adamus-Matuszynska 2004). It became important to this study that any grounded theory on this phenomenon constructed a coherent explanation of physical education during a transitional period paying particular attention to the life world of the physical educator, using their words and common sense interpretations to evidence the construction of a grounded theory.

The following socio-cultural oriented study, therefore, investigates how teachers and student-teachers of physical education were conceptualizing the education reforms that assisted political transformation in post-communist Poland. The study spanned a time-frame of 1998-2004 in a region where one of Poland's six Physical Education universities<sup>8</sup> is situated. The University (AWF<sup>9</sup>) selected for this study and that is charged with educating the next generation of PE teachers had direct links with individuals and groups from the institutions and schools that employ

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<sup>8</sup> These universities are named – Akademia Wychowania Fizycznego with the location as its suffix; for example Akademia Wychowania Fizycznego Warszawa – it simplified by using the acronym AWF.

<sup>9</sup> AWF - as it will be referred to in the study to comply with the ethical decision to make it anonymous.

its graduates and provided a situational context for the observance of emergent issues. This is essential in a grounded theory because of its theoretical links with symbolic interactionism, which is underpinned by the condition that unique cultural and sub-cultural groups will interact between each other and the related context in a manner that is symbolic and specific to them (Cronk 1973). Reforms affecting physical education, which are reflected in this study, had come in several stages. However, there are seven that compound themselves on the life world of the PE teacher who has provided words for constructing the grounded theory in this study (a full chronology of reforms and strategies is available in Appendix A) and these are:

1) The Higher Education Act 1990 (Ministry of National Education 2001), which was the first phase initiated for the purpose of developing curricula and reforming teacher-training across higher education institutions.

2) The Physical Culture Act 1996 (Ust. 1996) that replaced the Physical Culture Act 1984 (implemented during communist governance) and detailed the new political structure that physical education, physical recreation, physical rehabilitation and sport would have in a modern-democratic Poland. The law was aligned closely with the legislature of the European Union as a prelude to associate membership (Elsner 2000, Levitas and Hercynski 2001) that eventually led to full membership on May 1<sup>st</sup> 2004 (Salitra 2003, National Ministry of Education and Sport 2004).

3) The 1997 Act of Higher Institutions of Vocational Instruction (National Ministry of Education and Sport 2004), which introduced a system that discerned between academic and vocational programmes of higher education. The years of 1945-89 for education were ideologically shaped by communist government, which had come to favour vocational training over higher education (Melosik 1991, Scott 2002, Duczmal 2003, Gomez 2003, Salitra 2003, Cienski 2004) because it

saw this as a way of minimising a cultural elite that would evolve from a tradition of higher education (Henderson and Robinson 1997, Prizel 1998). This study's antecedent context is, therefore, important to highlight as the impact of education reform after 1989 would no doubt impress itself on those directly involved in teaching (Zawodowska 1995) because it would require a complete change in values that teachers had on vocational and higher education routes (Scott 2002, Gomes 2003, Salitra 2003).

4) Compulsory education was now to be prolonged until the age of eighteen (18) due to a change in the Polish constitution (Constitution of Poland 2000). This extension of comprehensive State education would also include compulsory physical education for those who did not go off to vocational training colleges but remained in the newly introduced high-schools and because PE was protected under the 1996 Physical Culture Act (Ust. 1996), it meant that PE teachers were now required to adapt to a new student group, one that they had never had to teach before. This intricate link between Acts had an added impact on the educationists in this study, as it was to add to the changing environment of physical education.

5) A new system of teacher promotion was established in 2000, which included a mix of bureaucratic burden and specificity of qualifications to match the job-role (Zawodowska 1995, Salitra 2003) and becomes important to this grounded theory as it elicited new criteria for new teachers entering the profession and arrested the promotion capacity for existing teachers.

6) The Ministry of Education was renamed as the Ministry of Education and Sport in 2001, thus for the first time fracturing the concept of Physical Culture (to which sport belonged) and placing its constituent parts in separate ministries (Erdman 1989). This now meant that Physical Culture was

to be funded by a variety of government departments, whereas pre-democracy it had a ministry of its own.

7) In 2003 compulsory education was once again extended, this time to change the starting age from seven (7) to six (6) and this would again require new teaching methods in PE as it included a much younger age group than teacher training in the past had dealt with.

#### **1.4 PURPOSE OF THE STUDY**

The purpose of this grounded theory study, then, was to trace the changes of education reform by locating them within the life world of the PE teacher who is to be found at the micro level of transition and who is a proponent of education reform from an individual perspective. Grounded theory in this study is relevant because it shows how a process such as education reform can manifest through the experience of those faced with its reality. This is done through the relationship between researcher and the context under investigation and is an important facet of grounded theory, which requires evidence of understanding the world of its informants. It is the words of informants that have been used to construct a Grounded Theory of Physical Education in Transition. This study sought to understand the processes that made up transition as interpreted by the individual teacher of PE who is charged with actualizing reforms in physical education in post-communist Poland. The interpretations of key players were acquired and included their perceptions, views, agreements and disagreements as they formed perspectives of the physical education context in the wake of reform. The symbolism attached to new forms of expression and the use of language is particularly focused on as the freedoms of expression, which were to be inherent in political-redevelopment, would capture the construction of teacher dialogue in post-communist physical education.

It is critical to point out early on in this thesis that despite the study's attempt to capture education reform in physical education (as a process of re-structuring political governance and influencing political culture) transformations to all structures are nowhere near an end (National Human Development Report for Poland 2000, Levitas and Herczynski 2001). Poland's ascension to full membership of the EU coupled with government corruption allegations has again placed reform at the centre of political restructure (Salitra 2003, Cienski 2004). Physical education teachers will, therefore, continue to experience the instability that change has on the role of teaching (Mok 2000, Apple 2001). The fieldwork that was undertaken in this study spanned five years and visits to the AWF that permitted the researcher to have a base from which to explore the phenomena of this study were deliberately timed during the academic year in Poland; this was to maximise the potential for capturing the essence of transition as educationists grappled with change. The visit in 1999 was one month in length and served as a foundation for orienting the researcher in terms of selecting a geographical area for study, developing contacts and a system of networks that led to the unique character of this study (an important tenet of grounded theory) and observing emergence through the windows of opportunity created between researcher and the situational context. This visit also underscored the importance of developing language skills as they impacted on the ability to communicate with the informants in the study simultaneously with the ability to develop appropriate research instruments for collecting data and analysing them. In addition, the logistics of accessing people, places and information in a foreign country were highlighted during this visit and simple acquisitions such as train timetables, accommodation details, dictionaries and academic literature (impossible to acquire in standard book-shops) were determined during this phase and also showed the potential limits to time because of this, which enabled future planning of visits. In 2001, a two-week on-campus visit to the AWF involved in this research provided opportunity for experiencing the atmosphere of one of Poland's Institutions of

Physical Education. In terms of fieldwork, it provided access to academics, libraries, students and PE teachers in the context of this surrounding. In 2002 and 2003 bi-annual visits that lasted between 7-10 days were made. These visits focused on data collection that was both broad and specific; from informal conversations to dispatching and collecting questionnaires. It is probably useful to point out that these visits were funded by the researcher and that finance played a part in the frequency and length of each visit thus an economic rationalist approach to visits was imposed on the study. This is an undeniable factor that influenced the fieldwork as it exaggerated a sense of urgency in collecting data and carried both advantages and disadvantages; one of the advantages was that data collection happened when it was planned to happen; a disadvantage was that some participants identified as valuable to the study could not be accessed due to time constraints.

Finally it is important to introduce to this thesis the concept of transitory societies, which are complex in nature (Scott 2002, Gomez 2003, Snoek et al 2003, Adamus-Matuszynska 2004). The scale of political redevelopment in Poland means that education reform will require adaptations to its macro and micro structures (Zawadowska 1995, Levitas and Herczynski 2001) and thus be linked to individual and institutional changes in PE. Gomez (2003) explains that “during any transition, it will take some time for the ‘new changes’ introduced to re-arrange themselves in patterns that seem appropriate to their changed environment” (p.2) . So, any large-scale transition means that the context for this study was unpredictable as the reality of time inevitably existed within it and thus changes occurred during the study itself. Grounded theory studies are particularly congruent with this type of unpredictable context as the uniqueness of such experiences, as told by informants who inhabit those realities, are central to providing evidence for grounding a study in data. The individuals and groups that made up the informants of this study made it possible to address the complexity of transition and the phenomenon that arises out of it by providing access

to personal and institutional views and a critical path that led to the discovery of processes associated with the construction of this Grounded Theory of Physical Education in Transition.

### 1.5 ESSENTIAL DEFINITIONS

During the early stages of this study, two interrelated categories surfaced as essential to the understanding of the central phenomenon. At the time, when early literature reviews had commenced, it became apparent that in Poland, PE was embedded in two separate, yet overlapping contexts. This situation required two important considerations to be made, which have influenced the structure of this thesis: 1) to understand both contexts separately; and 2) to understand the interrelated conditions well enough to be able to conduct research within the area of physical education. The two concepts are Physical Culture (PC) and Physical Education (PE) and the two contexts are: 1) the existence of PC in all forms within society (including education); and 2) the experience of PC within the deliberate context of Education. For further understanding of this statement, the following definitions have been developed to introduce this complex condition within this study.

#### PHYSICAL CULTURE

Grabowski (2001), one of Poland's leading physical educationists, was asked during this study to define PC. His response is included *verbatim*:

“I’ll try to explain precisely. In my own book it is the overall values of education and results from that education relating to the human body. Some think that the general category is about movement, but others and I believe in this: that the central component is the body. You cannot imagine physical culture without movement such as yoga. Culture is the formation of everything that the human has created and done and it can apply to all human beings or to the individual himself. The culture that applies to the individual is one of a psychological nature and the elements related to the body are invariably the elements of physical culture.”  
(Personal communication with Grabowski, 2001)

This definition is supported by Żukowska (1993) who also places the concept at the centre of PE.

She writes

“ . . . The pedagogic of physical culture is a scientific field stemming from general pedagogies and [is] strongly associated with the science of physical culture. This [is] a new term for a field which until recently was called the pedagogy of sport or pedagogy of physical education and sports, in literature and the vernacular.” (p.161)

Physical Culture is, then, delivered through PE as a ‘first cultural experience’ with all Poles. Demel (1998) raises a significant problem with the concept of PC and its current model for developing it as a cultural condition, which is, that ‘sport’ is frequently used as a method of teaching and thus can lead to confusions about its definitional frame and the purpose of PE. The definitional frame for PC in Poland includes four separate yet related categories: 1) Physical Education; 2) Physical Recreation; 3) Physical Rehabilitation; and 4) Sport (Ust. 1996, Gaj and Hądzelek 1997, Skoczylas 1999,). These categories are supposed to be reflected in the PE curriculum.

#### **PHYSICAL EDUCATION**

Physical education, in that case, is PC delivered through the curriculum of primary and secondary education. It has a pedagogical dimension that requires PE teachers, in Poland, to achieve legislative (Ust.1996), policy (Ministry of Education and Sport 2004) and socio-cultural (Demel 1998) expectations.

Physical education has, consequently, been affected by reforms to the legal system, education reforms and a transitional society. As a result, this complex set of circumstances has influenced PE on a number of fronts and this study attempts to capture changes since pre-democracy by reviewing separately the historical development of PC in Poland and reform in an educational context (see Chapter 2A and 2B).

## 1.6 LINGUISTIC CONSIDERATIONS

In order for this thesis to be fully understood it is important to discuss an essential influencing factor. This study has been carried out using two languages and cultures by one researcher, which presents a unique problem to this grounded theory because the challenge of conducting research using two languages is problematic on a number of levels (Lewin 1990, Ercikan 1998, James 2002). This problem has increasingly become relevant in research explains Birbili (2004) who indicates a growing need for recognising its attendant problems because “. . . as the need for mutual understanding on an international scale increases, more and more organisations and individuals are seeking comparable information across national and cultural boundaries using research instruments prepared in one language and culture for use in others” (p.2). This is an important facet to this study as Poland’s reforming education system has used techniques that are common in Western models of education (Scott 2002, Gomez 2003, Salitra 2003) and thus its interpretations are culturally bound and anyone researching education reforms should have an understanding of both languages and cultures (Birbili 2004) if relevant meanings are to be identified. Understanding the reality of informants in a grounded theory is theoretically essential because of its links with symbolic interactionism (Goulding 1999b). One of the problems arising in this study, as a result, is that two or more languages and cultures required understanding, which means that a comparable conceptual equivalence of meaning became an important aim of this study and as James (2002) argues is central to conveying the realities of other cultures. To a certain degree Phillips (1960) believes that some of the problems associated with translation<sup>10</sup> cannot be overcome and are consequently unsolvable. For example, when designing a questionnaire, interview schedule, consent form or test that may seem to be simple, (as there are seemingly lexical equivalents in the

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<sup>10</sup> Translation can be carried out in two ways: 1) translator and researcher is the same person; 2) translator and researcher is not the same person.

'other' language), it may be that some expressions carrying emotional connotations in one language may not transcend translation (Birbili 2004). This problem can, however, be addressed by directing the translation towards conceptual equivalence without concern for lexical comparability and is described by Newmark (1988) as aiming for "functionally relevant meaning" (p.12). Oro (2004) on the other-hand emphasises Phillips' view by seeing complications with this approach because of entrenched cultural identities that are fixed within the systems of linguistic realities explaining that:

"The transposition of meaning into lexical items with the same conceptual apprehension is not an easy concept to deal with, partly because we are dealing with distinctive features essential in one language but not in the other and partly because we are also interpreting definite features of socio-cultural distinctions in different linguistic scopes." (p.4)

Birbili (2004), although taking the view that translation for conceptual meaning is an appropriate approach, problematized it by isolating three factors that exaggerate difficulties in translation and these are listed as:

1. Researchers taking translation-related decisions that have a direct impact on the validity of the research and its report.
2. Quality of translation in social research: the linguistic competence of the translator/s; the translator's knowledge of the culture of the people under study; the autobiography of those involved in the translation; and the circumstances in which the translation takes place.
3. Choices and decisions, translation procedures and resources used.

These factors should be made clear in research so that those reading it can make judgements based on translation issues. In addition to the problems associated with translation, when reporting research to mono-linguists, who can experience blindness to words that name places, individuals, theories, inventions and meanings from other cultures, there are decisions that need to be made about the scope of using foreign terms (Davies 2003). Some of the cultural symbolism of word-use

and language is, therefore, lost on mono-linguists as their experience of vocabulary compounds them to static and familiar cultural boundaries (James 2002, Birbili 2004) without being aware that there could be alternative meanings to literal and personal narration. Grounded theory is particularly sensitive to the words of informants because it adapts to this type of unstable condition in a research situation. Establishing a reliable resource for translation and cultural transposition in this study was an important decision that needed to be made as depth of understanding in terms of informants' use of words in a culturally specific situation was vital to any grounded theory. This problem was managed by the decision to make frequent visits to Poland and to deliberately interact with its culture and people; and specifically with those associated with physical education as suggested by Newmark (1988) as a way of ensuring a strong conceptual meaning. Although the easiest event by far was the translation of the study's questionnaire from English to Polish (because of the grammatical, lexical and cultural meaning having been reviewed by the English speaking members from the PE department at the AWF, although this was also a limitation as their own autobiographies imposed themselves on understandings of concepts in both languages), its analysis was more complex as written statements by respondents required the deciphering of cultural idiosyncrasy embedded in written language such as the common style of calligraphy – taught in all schools – that has developed common appearances of some words that were difficult to untangle from a pragmatic point of view and which sometimes had potential double meaning<sup>11</sup>. In addition, as anyone who has learned to speak, read and write in a language other than their native tongue will understand the frustrations of timing as it takes longer to assimilate the spoken word; this is because of the frequent search to translate the occasional word heard in conversation in order to compound the meaning of that conversation (James 2002). They will also understand the

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<sup>11</sup> These situations were addressed by discussing the response with an English-speaking PE academic and agreeing upon a shared understanding.

frustration that uncertainty of meaning, when translating, creates when attempting to make precise judgements about other cultures, which is one of the factors that Birbili (2004) raises and is discussed earlier on.

Understanding research conducted across two cultures and employing two languages, hence, calls for a number of issues to be addressed. In this thesis, *place names* that do not pertain to the anonymised case study, are presented as they are in Polish for two reasons: 1) they do not have English alternatives; and 2) they convey an authentic resonance of the research situation. Some *literature excerpts* from Polish sources have been embedded into the prose of this thesis and translation occurs as a footnote. Davies (1992) recommends that this technique be used to retain a certain amount of cultural embedding and from a grounded theory point of view also establishes a cultural reality when conveying others' understandings. *Questionnaire* items in the appendix are written in Polish and translated alongside each other. *Names of Organisations and Associations* are also translated in a footnote. Despite the fact that this approach may cause some difficulty for the reader, in terms of ethical and cultural reasoning it embeds Polish culture, its nation and people firmly in the prose of this research; the value of doing this means that it contributes to the reliability and validity of this study by presenting the world of informants as closely as it was understood at the time thus adhering to the conditions of a grounded theory. The following strategies were also followed to address the three factors that Birbili (2004) recommends should be made explicit in research containing two or more languages and cultures.

1. Translation-related decisions – Newmark (1988) suggests that conceptual equivalence is a pragmatic strategy for translation as attempting grammatical and or syntactical equivalence as Ervin and Bower (1952) emphasise can introduce a loss of information. This strategy of attaining conceptual equivalence was employed during translation events in this study. In

addition to this participants' quotations are provided within the thesis as footnotes and or in brackets following the quotation so that any bilingual readers can make judgements based on the actual words and translation. The technique adopted for translating events is termed as free translation as opposed to literal so as to convey meaning as understood by the author (Newmark 1988). The researcher and no outside party were responsible for translation decisions pertaining to the words of informants.

2. The quality of translation – interview schedules, questionnaires and correspondence were initially written in English and then translated into Polish. These were then checked for grammatical and syntactical fluency by a native Pole who was bilingual<sup>12</sup>. These items were then shown to English speaking academics of PE (in Poland) who suggested amendments on the basis of cultural meaning; a small pilot study was conducted amongst the Physical Culture Department at the AWF to ensure that intended meaning was conveyed. Birbili (2004) endorses this approach as they are “important techniques for eliminating translation-related problems” (p.4). This strategy also ensured that the cultural context was approached in a way that was understood by its associated informants.
3. Procedures for translating were carried out in two ways: 1) semi-structured interviews where responses were written down at the time of the interview and which were written straight into the English language, and hence, attaining conceptual equivalence as an immediate process; and 2) all other interviews (recorded and then transcribed) and questionnaires were translated back in the UK. Unknown words were looked-up in a

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<sup>12</sup> This was done by Henryka Pawlaczek

Polish-English dictionary<sup>13</sup> and then assessed on the basis of meaning. One of the academics<sup>14</sup> at the AWF maintained contact throughout this process and some decisions were jointly made as a way of maintaining accuracy of cultural meaning.

4. The autobiography of the researcher – the researcher although born in the UK (first generation British) and was exposed to the Polish language from birth. In fact, the English language was not learned until commencement of primary education. The researcher has both an 'O'-level and 'A'-level in Polish Language and has also studied a number of undergraduate modules in Polish language, Literature and History at the School of Slavonic and Eastern European Studies, at the University of London, UK. There has, however, been a reduction in the use of Polish language throughout the researcher's lifetime as British culture became a more fixed condition because of the reality of work, education, social and family experiences adapting to the assimilation process. The researcher has spent time in Poland during communism as a child but had no contact with its people and culture between the years of 1979-1989. Since 1990 many visits have contributed to the autobiography of the researcher and greater colloquial understanding was gained through these visits, which inevitably permitted the understanding of Poland's culture and language more specifically to the context of this study. The researcher's language skills are not without fault, however, the decision to explore a phenomenon within education became relevant as the researcher is an educationist and, thus had an experiential pool that could support the understanding of a similar context in another culture and language.

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<sup>13</sup> Purchased during 1999 research trip – Collins English-Polish/Polish-English Dictionary, third edition (1999), Graf-Punkt, Warszawa.

<sup>14</sup> Name kept anonymous.

Translation strategies do not entirely omit error and misinterpretation (Birbili 2004). They do, however, build in contingencies within the research context that permit a conveyance of cultural meaning that has considered the scope of reliability (Newmark 1988).

### 1.7 ASSEMBLING THE THESIS

This study exists within an interpretive paradigm<sup>15</sup> dominated by the central process of emergence. Grounded theory, the method selected within this paradigm, has come to be an accepted and valid research process for understanding emergent phenomena within the social sciences and can be located within the interpretive paradigm (Goulding 1998, Goulding 1999a, Cohen, Manion and Morrison 2000, Harris 2003, Chiovatti and Piran 2003, Dick 2003). Despite a growing use of the methodology, particularly in education contexts, a standard format for presenting findings in either a thesis or research paper has not been established for legitimate reasons (Strauss 1987, Strauss and Corbin 1998). Grounded theory as a framework in qualitative studies is in the post-positivist tradition (Harris 2003) whereby presenting findings and/or describing the process do not necessarily conform to the obvious logico-deductive investigative and reporting formats. The form of this thesis, then, is that a review of literature occurs for two reasons: 1) for establishing a context for physical culture and contemporary education in Poland, which is included in chapter 2 part A and B; and 2) for linking the grounded theory with extant literature, which occurs in chapter 5 and forms part of the discussion and critique of the grounded theory. The reason for this is that grounded theory methodology starts from a position that rejects the notion of verifying a *grand theory* as the discovery of theory rests in the categories that emerge from data; hence, verification of it requires that it is compared with existing literature. Thus the discussion in chapter 5 links categories that have established meanings with those that have emerged and the theory is critiqued

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<sup>15</sup> See chapter three for discussion on paradigms

as a way of its further development. It is, then, important to provide a brief overview of the content in the chapters of this thesis.

## 1.8 STRUCTURE OF THESIS

This thesis is broadly set out between six chapters attempting to reflect the transitory journey of physical education in post-communist Poland through a grounded theory study. **Chapter 1** provides an overview of the research process and introduces the central phenomenon, the aims and purpose of the study (whilst naming the paradigm in which it has been explored<sup>16</sup>). A discussion on the research context is provided, as a way of compounding the research question to its problem. From there a brief statement on the definition of Physical Culture and Physical Education is made. An explanation of how the use of two languages and cultures, that underpin this study, impacted on process and the study's character is discussed and is followed by an account of the strategies that were employed to address issues arising. The chapter ends with iteration on the rationale behind the structure of the thesis<sup>17</sup>, and is closed by a summary statement.

**Chapter 2** provides the context for the research and constructs this by reviewing pertinent literature. **Part A, Physical Culture**, employs an historical framework for setting an important context in this research as physical education is embedded within this definitional and socio-legal structure. The historical framework was selected because of its potential to use sequential logic; it also provided a relevant context for discussing physical education in transition as the continued re-conceptualisation of physical culture through time is intricately linked to its present day character. **Part B, Contemporary Education in Poland**, addresses the context that

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<sup>16</sup> A full debate on the paradigm is presented in chapter 3.

<sup>17</sup> It will explain as to why the process of grounded theory influences the style and structure of the thesis.

intersects with physical culture and thus leads to an explanation of how education, and thus physical education, is currently affected by common forces associated with education reform in the rest of the world. Education reform as a proponent of political redevelopment is explored as is the common reforming agent known as decentralization (Rhoten 2000), which has affected most nations' education structure because of globalization, internationalization and or Europeanization (Elsner 2000, Apple 2001, Gorostiaga-Derqui 2001, Adnett and Davies 2002, Gomez 2003, Salitra 2003). The chapter concludes by emphasising the impact of democracy and Poland's strategies for reintegrating itself into the European tradition of political culture.

**Chapter 3**, Findings Resulting from the Study, is a discussion on the methodology that was employed. An explanation and justification on how it was located within an interpretivist paradigm is discussed and provides reasoning for the selection of grounded theory. The chapter then continues to explain the method of grounded theory by providing a background to its creation and linking it to the theoretical frame of symbolic interactionism. The methods and procedures of grounded theory are then detailed as they are specific to the process. Examples from this study have been used to emphasise the techniques of grounded theory and show how data were acquired and then analysed using its canons. In grounded theory it is important to show how theory has been constructed and also how its emergence makes a contribution to knowledge through substantive or formal theory. One of the complexities of grounded theory is that it has evolved into two separate approaches, which has occurred because of divergent views between its two original authors Barney Glaser and Anselm Strauss. A discussion on this situation is conducted and leads to a declaration of which of the two approaches has informed this study, which scholars have commonly termed as Glaserian or Straussian Grounded Theory. The discussion then turns to a reflection on the use of grounded theory methodology and some of the practicalities of the process that are considered to

be limitations as presented by current scholars. The chapter then turns to the detailing of the study and how it was carried out and begins with a short discussion on the ethical decisions that were taken in the course of the study. The modes of data collection are then explained and cover the type of interviews and questionnaire that were used and provides a schedule of dates when data was collected and a description of related informants. This is followed by an explanation of how data were managed and analysed using two software packages (SPSS and NVivo). The chapter is concluded with some reflections on the methodology within the context of the study.

**Chapter 4** examines the results of the research by presenting emergent categories that had been constructed during the integrative stage of analysis and thus show how the research process has led to a grounded theory on *physical education in transition*. The conceptual framework for this theory is assembled through a presentation of the core category and the related sub-categories. These are then verified through the presentation of supporting data that include thick descriptions that use the words of informants and demographic descriptions with relevant descriptive statistics forming the architecture of the concepts that have built the grounded theory. A *globosity of change* concept is presented as a new concept in education reform - as it explains the grounded theory at the individual layer of PE in transition and thus forms the life world of the PE teacher. As an explanation of the theory progresses, an analytic story is told as part of integrating concepts and categories into an emergence of a Four Scenarios Model, which subsumes the words of informants to show the diverse group of individuals that, make up the profession of physical education in Poland; as it transits towards the achieving of education reform goals. The chapter concludes by summarising the grounded theory and reiterates the newly identified process of Physical Education in Transition with its related *globosity of change* concept and the analytic story as told through the Four Scenarios Model.

**Chapter 5** summarises the grounded theory of physical education in transition and then discusses it by relating it to extant literature. This discussion forms a critique of the theory and provides a clarification of how the grounded theory provides new explanations in education reform. The findings from the study are examined through this process of analysis and the chapter attempts to capture the complexity of existing knowledge in relation to new discovery.

**Chapter 6** presents a concluding discussion by reviewing the overall purpose of the study including; its aims, methods employed, findings, any limitations and implications for future directions of study.

#### **1.9 SUMMARY STATEMENT**

The study of physical education in transition is important for the future of its profession and for policy developers of education in Poland. Since 1989, when the fall of communism initiated far reaching reforms to Poland's entire socio-cultural structure, PE and PE have undergone changes that have been both deliberate (policy) and consequential (adapting society). This study aims to inquire about a phenomenon that has arisen out of temporal conditions, and as a result becomes an important exploration of PE teachers within a transitional society. The research has been conducted with the use of two languages, which have influenced the character of the study, and because of this may carry limitations. Some of these limitations have been minimized by the selection of the grounded theory methodology (see Chapter 3) and other techniques common in studies requiring more than one language and culture. Finally, a brief statement of definitions for PE and PE were an important inclusion in the introductory chapter as these two categories formed an important part of the research journey. The literature review, which follows, deepens the

definitions by initially exploring the historical development of Physical Culture (Chapter 2: Part A) and then examining the context of Education in Poland (Chapter 2: part B).

## CHAPTER 2

### A CONTEXT ANALYSIS PART A: PHYSICAL CULTURE

#### 2.1 INTRODUCTION

Part A in this chapter has been written for the purpose of capturing one of the overlapping contexts of the research; and part B examines the context of contemporary education in Poland. Both these contexts are important to this grounded theory approach as physical education belongs to a much larger category of physical culture (PC) and thus any attempts to reform education will impact on both physical culture and PE. The context of education and physical activity (PA) overlap in a unique way and have important synergies between them that lead to discoveries about the phenomenon in this study. Sparkes (1992) explains that this synergy between pedagogical contexts and the experiences of physical activity, which encompass the *sub-world* of physical education, needs to be understood for both separate and interconnected perspectives in capturing experiential complexity, and this is because the contexts are both related and separate at the same time. In this study the complexities pertaining to definitional frameworks were highlighted by Riordan (personal communication, 1999) who explained that using British definitions and or understandings of sport and physical activity would lead to a muddling of cultural understanding. This is because in Eastern European countries *Physical Culture* has a precise definition and becomes an umbrella term for sport, PE, physical recreation and physical rehabilitation. (Wroczyński 1985, Demel 1989, Erdmann 1989, Ust. 1996); whereas British definitions are looser and can include terms such as sport and/or exercise to mean physical activity (Riordan, personal communication 1999, Green and Thurston 2002). This important point was reinforced by Grabowski (2001c) in correspondence who advised that "I'm afraid that [the] meaning of *sport* in English is a bit different than in Polish". Because of this

cultural difference it became an aim of the study to ensure that the definitional framework for physical culture was made clear and is thus explained in part A of this chapter.

Post-communist Poland is a transitory society and it is important to consider how physical culture and hence, PE will alter during this journey (Zawodowska 1995, Prizel 1998). The decision to examine PC through an historical frame for the purpose of elucidating this journey is justified on the basis that through understanding the past, the present becomes clearer and the future less trepidatious (Sparkes 1992). Kirk (2003) supports this view by emphasising the need for locating physical education within the context of a genealogical frame because it can approximate the practical, strategic and political reasoning for locating curriculum history. With this in mind, and how “the powerful might retain their power through curricula and how knowledge and power are legitimated in curricula” (Cohen, Manion and Morrison, 2000, p. 33) ascertaining the past would provide a basis for understanding the present and establishing some confidence when making predications for the future of physical education in Poland especially as education reform was meant to shift Poland’s society from authoritarian communism to a decentralized democracy (Levitas and Herczynski 2001, Gomez 2003, Salitra 2003).

From this position the study appeared to have a simple route for progression: an historical review of physical culture. Physical Culture is not just a concept embedded in the shared consciousness of the nation (Demel 1969), it is a cultural phenomenon protected by law (Erdman 1989, Ust. 1996). Further to that, the law is now written to closely resemble European Union legality and a shift towards Europeanization becomes part of a transitory journey (Elsner 2000, Adamus-Matuszynski 2004). The history of physical culture contextualizes physical education within a complex and constantly changing environment, which makes it necessary to understand as it becomes clear within this grounded theory that education reforms, social change and transitory

problems such as instability have always been present in the evolution of PE as told through an historical story. The adoption of an historical framework to explore the development of physical culture will show the interrelatedness of physical education and explain how it became an over-arching definition thus providing this study with an explanation of the past and its influence on the present day standing of both PE and PC.

## 2.2 CONSTRUCTING CONTEXTS

The use of the historical framework is advantageous when exploring meanings of education in a society. Kirk (1992) presents the view that “through struggle, conflict and contestation, historical material provides one means (among several) of generating critical and reflective self- and collective – awareness among physical educators” (p.23). In view of the complex political vista that has made Poland a modern nation, Kirk’s assertion for understanding curriculum history in physical education, strikes a powerful resonance. Borg (1963) explains that historical research as a method of organized objectivity establishes a location for the researcher in which to substantiate fact and conclude an agreed past. This past will, therefore, enable the researcher to work within a context that provides a degree of stability during a critical inquiry, where a previous era is essential for standardising a present. Historical accounts “inevitably form part of [an historian’s] own history” (Davies, 2003, p.x) and the style of writing that is adopted during that account will shape meaning. In addition to style it is necessary to position the discussion within a linear journey through the construction of physical culture as a major category in this research and an integral part of Poland’s social fabric. Although the linear model is not the only design for historical accounting (Davies 2003), in this study it follows this conventional approach so that readers unfamiliar with historical narratives can easily assimilate the explanation of a core category within the general scope of the research. This chapter is intended to be an over-arching context that creates a back-drop. As a

context, it can establish the changes that have occurred in physical education, in post-communist Poland, through two means: 1) belonging to physical culture and 2) how physical culture has adapted to the forces of change. Curriculum history is, therefore, best understood through the acknowledgement of three meta-questions, that is, where were we before, where are we now and where are we going (Sparkes, 1992). In the case of Poland, an historical account becomes a justified means of explaining the complex relationship between State and teacher education, particularly as teachers in a modern system of democracy are still uneasy about expressing views on their government's leadership of education (Kosiba, 2004). So, it is necessary to read this chapter as the context for understanding change in modern-Poland and as a signifier of the 'protagonist' as part of a physical education in transition in Poland.

### 2.3 THE MIDDLE AGES

Physical activity has existed in Poland for centuries, playing a significant role in the cultivation of young people, lifestyles, religious festivals, public holidays and family celebrations (Wroczyński 1985, Demel 1989). During the era of the Slavonic clans<sup>18</sup> and the reign of Mieszko I<sup>19</sup> physical feats were performed for the purpose of developing physical advantage as a way of preparing young men for battle (Shimoniak 1970). These activities also carried an element of game playing and recreation, which included running races, horse racing and riding, archery, strength competitions, fist fighting, bow fighting, swimming, ice-skating using wooden ice-skates and dance (Gaj and Hądzelek 1997). During the middle Ages there were two distinct developments to PC. The first development was the creation of a military: from a young age boys would be educated in a militaristic life where physical fitness became the basic requirement. The second development was

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<sup>18</sup> 800 AD

<sup>19</sup> 966 AD, the year that Pagan Poland converted to Christianity

amongst town-dwellers and the rural population who became responsible for defending a town, an activity that was shared with the military (Wroczyński 1985, Kosiewicz 1993, Gaj and Hądzelek 1997, Grabowski 2001b). Physical prowess was, as a result, necessary for the carrying out of defence techniques in the event of an attack on a town or dwelling. This led to the creation of *Bractwa*<sup>20</sup> the first of which can be traced back as far as 1253, when the brotherhood *kurkowe* was formed in the city of Poznań. This tradition carried on for many centuries with the greatest number of brotherhoods established during the fifteenth century. Cities such as Kraków, Toruń, Lwów and Warszawa all had their own brotherhoods. It was here that the camaraderie amongst members instilled an appreciation of discipline and a unified feeling of community (Gaj and Hądzelek 1997). As the towns grew in size so did responsibilities of those members of the brotherhoods. Responsibilities linked to the upholding of community life appear to be paramount and it is here that the activities of defence, sport and social responsibility are first identified. Overall physical activity in the Middle Ages was characteristic of utilitarianism and if not linked to the defence of a community it was carried out spontaneously as a way of playing and resting from work (Gaj and Hądzelek 1997).

#### 2.4 THE RENNAISANCE

It was not until the Renaissance that physical education gained importance in line with social transformations in education and culture (Wroczyński 1985, Gaj and Hądzelek 1997). Educators of this era sought to include a material component within PE by emphasizing an aesthetic dimension in any physical activity that was intended for education (Gaj and Hądzelek 1997). This philosophical adjunct coincided with the more general developments within medicine where the

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<sup>20</sup> Brotherhoods

“secrets of science” (Gaj and Hądzek 1997, p.16), which examined the functions of the human organism, were being researched. Key characteristics of the concept of physical education at this time were: “care for the physical body, shapely figure (sic) and graceful physical movement” (Gaj and Hądzek 1997, p. 16). Sebastian Petrycy (1554-1626)<sup>21</sup> whose work included ideas and thoughts on the carrying out of physical activity as purposeful exercise emphasizes this view. He believed that physical exercise would lead to a healthy disposition in both the body and mind, further arguing that physical exercise should form part of the education process for the young. He went as far as to suggest that activities such as ball games, swimming, and running, jumping, throwing, wrestling and fencing should be adapted into an educational context. As a medician his ideas on physical education were linked to physical health and the development of the body. This view is still resonant within many of the philosophies, theories and concepts on physical education in contemporary Poland (Demel 1989, Erdmann 1989, Kosiewicz 1993, Żukowska 1993, Ust. 1996, Skoczylas 1999a, Grabowski 2001a, Kosiba 2001) and becomes increasingly valid in the 21<sup>st</sup> Century (Makuła 1995, Makuła 2001, Przewęda 1995) when health issues are linked to inactivity. In Petrycy’s view only a “teacher could carry out the fundamental objectives of physical education and should be someone who could identify appropriate activities for specific age groups, apply relevant types of activity (for the student), understand diet, and define aims, all of which should be part of the educators life” (Gaj and Hądzek 1997, p.17). This sentiment is clearly evident in the modern education of PE teachers where the curriculum exposes trainee teachers to the necessary skills and techniques for delivering this (Jaworski 1998).

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<sup>21</sup> Doctor and Professor of Philosophy at the Uniwersytat Jagielloński. His work consisted of translating the works of Aristotle into the Polish language.

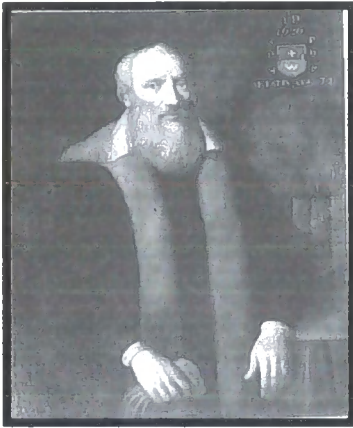


Figure 2.A Sebastian Petrycy

Medicine was a feature in the principal views of Wojciech Oczko (1537-1599)<sup>22</sup> who in his debate of 1581 *O różnych przypadłościach ciałach ludzkiego*<sup>23</sup> (Gaj and Hądzelek, 1997) stressed the importance of diet and exercise in therapy and rehabilitation. His work pioneered the use of physical exercise as a technique for curing certain human illnesses. This view continues to be held in PC and the roots of physical activity, as rehabilitation is a feature in all physical education programmes in Poland (Demel 1969, Erdmann 1989, Ust. 1996, Grabowski 2001b). The transformation of society and establishing of an epoch for pedagogy during the Renaissance was influenced by many individuals and in the case of physical education included: Andrzej Frycz Modrzewski<sup>24</sup>, Mikołaj Kopernik<sup>25</sup>, Jan Kochanowski<sup>26</sup>, Łukasz Górnicki<sup>27</sup>, Mikołaj Rej<sup>28</sup>, Krzysztof

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<sup>22</sup> Famous humanist and doctor to Stefan Batory (first democratically elected King of Poland)

<sup>23</sup> The varied ailments of the human body (1581)

<sup>24</sup> (1503-1572) Famous political writer and reformer, outlined his ideas on the restructuring of schools, which included acknowledging the importance of physical education - in *O Poprawie Rzeczypospolitej* (1551)

<sup>25</sup> Student of the Jagiellon University and also; poet, priest, lawyer, engineer, soldier and astronomer. Better known as Copernicus discoverer of Heliocentricism

<sup>26</sup> Writer famous for *Treny*: a verse lamenting the death of his infant daughter, thus deviating from Classicism

<sup>27</sup> Author of *w Dworzninie polskim* (1566), a book supporting the Italian humanist Balthazaar Castiglione *Il Cortegiano* (1528), describing the meaning of PC in the Courts (Hądzelek 1997)

<sup>28</sup> (1505-69) Poet, 'not a great witer' notes Zamoyski (1987) who was 'more of a literary dabbler', yet nevertheless published influential works on Polish society.

Dorohostajski<sup>29</sup> and Aron Aleksander Olizarowski<sup>30</sup> (Wroczyński 1985, Zamoyski 1987, Gaj and Hądzelek 1997). The period of the Renaissance was instrumental in emphasizing education, material existence, scientific discovery and culture. It is here that a sketch of the PC framework begins to etch itself on to the organs of Polish society.



Figure 2.B Mikołaj Kopernik

## 2.5 THE ENLIGHTENMENT

It was during the Enlightenment (a period rich in literature) that a significant development in the theories of physical culture, namely physical education and rehabilitation became evident.

Discussions and debates that dominated literature tended to focus on children and young people.

The importance of physical movement for the development of health was beginning to take precedence in theories. These theories were simultaneously claiming that physical play induced

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<sup>29</sup> (1562-1615) published *Hippię to jest o koniach księgi* the first ever handbook for horse riding and riding skills

<sup>30</sup> (1618-1658) Professor of Law at the Akademia Wileńska, in his discourse *O Politycznej Społeczności* outlines the role of physical education and the meaning of certain physical activities

opposite behaviours for healthy interaction with a community. So again, the indications are that physical recreation could influence the social conditioning of individuals and groups, thus steadily being accepted as an intervention for the development of people and identities. Even at the time, 1657, Komeński<sup>31</sup> wrote that physical activity, “would result in a conditioning in the individual that instilled the fundamental requirements for a responsible society” (Gaj and Hądzek 1997, p.17). By 1740 Konarski<sup>32</sup> introduced reforms to the education system by Royal instruction<sup>33</sup>. This saw the creation of a *Collegium Nobilium*<sup>34</sup>, which was to be a school for the younger members of the *Szlachta*<sup>35</sup> (Wroczyński 1985, Gaj and Hądzek 1997, Jędruch 1999). By 1765, as part of the enlargement of this college, a school for Knights was established based on similar models in the developed countries of Europe. Both the college and the school had a series of physical exercises and procedures for hygiene<sup>36</sup> introduced into the educational process (horse-riding, fencing, sports games and runs). These actions were to have a lasting influence in the Polish military and lay the foundations for the training and preparing of future Polish army officers (Gaj and Hądzek 1997, Muzeum Sportu i Turystyki 2003).

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<sup>31</sup> Amos Komeński (1592-1670) Swiss pedagogue who published *Wielkiej Dydaktyki* (1657)

<sup>32</sup> Stanisław Konarski (1700-1773)

<sup>33</sup> This Royal instruction was made by Stanisław August Poniatowski (1732-1798) who was the last king of Poland. Poniatowski had travelled extensively in Europe as a young man and been influenced by French culture and English intellectualism. His desire to recreate a ‘great’ Poland influenced him in his decision to set up the college for Knights. It can also be argued that this decision was borne out of necessity as Poniatowski was mistrusted by the *Szlachta* who saw him as Catharine the Great’s former lover, thus being a puppet of the Russian Court. The College of Knights, may have been a way of instilling loyalty in the younger members of the *Szlachta* and fostering a camaraderie between the Knights (Zamoyski 1992)

<sup>34</sup> College for the Nobility

<sup>35</sup> Nobility

<sup>36</sup> Although the word *higiena* translates literally as hygiene and is the closest available word in the English language, its meaning should be understood as; physical care of and for the body resulting in good personal hygiene and health. Culturally, it is understood to be an encapsulation of the responsibility required to maintain an aesthetically hygienic body.

In 1773 the *Komisja Edukacji Narodowej*<sup>37</sup> (KEN) took responsibility for the overall design, planning and renewal of programmes in schools, making it the first country in Europe to do so (Wroczyński 1985). Schooling was a privilege accorded to the children of the *Szlachta* and the many religious schools that were permitted to form in Poland splintered the infrastructure of schools. This caused some problems for the designers in KEN; consequently, during that same year they extended control of Uniate, Orthodox, Protestant and Jewish schools, with the aim of standardising education, and adopted a more vigorous approach at the lower levels of society (Zamoyski 1992). Their aims for physical education were separated into three categories: health, education and social functioning (Wroczyński 1985). The most influential designers of physical education programmes within the KEN were Kamieński<sup>38</sup>, Popławski<sup>39</sup> and Piramowicz<sup>40</sup>. Their work further developed the view that the mind and body were inseparable and more acutely, these individuals studied the relation between physical exercise and the improvement of mind and morality. Their arguments focused on the individual, and their ability to be upstanding citizens who understood their responsibilities towards social integration, readiness for work and service in the military (Gaj and Hądzelek 1997). Piramowicz, however, introduced concepts such as *higiena*<sup>41</sup>, physical education for women and *wiedomość o człowieku względem zachowania zdrowia*<sup>42</sup> into the school curriculum and is seen as the founding architect of such interventions, which continue to

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<sup>37</sup> National Commission for Education

<sup>38</sup> Adolf Kamieński (1737-1784) author of *w Edukacji obywatelskiej* (1774)

<sup>39</sup> Antoni Popławski (1739-1786) supervisor of the project titles *O rozporządzeniu i wydoskonaleniu edukacji obywatelskiej* (1774)

<sup>40</sup> Grzegorz Piramowicz (1735-1801) author of *w Powinnościach nauczyciela* (1787)

<sup>41</sup> Hygiene

<sup>42</sup> Health education knowledge for the human body – a handbook that included translations from Ballexerda (1772), Tissota (1773) and Kurcjusza (1785)

be included in the school curriculum (Gaj and Hądzelek 1997). Wroczyński (1985) describes the work of Piramowicz as one of the most interesting pedagogical views of the period, particularly as physical education lessons had not yet been integrated into the school programme. An example of his views is presented in Gaj and Hądzelek (1997, p.20) who quote from Piramowicz's 1788 text *Powinnościach Nauczyciela*<sup>43</sup> ". . . continuous efforts should be undertaken, particularly in the first year of a child's life to ensure health, heartiness and individual strength. . . directing the individual into personal aims that will enable skills and overall happiness, these should be the efforts reflected within physical education".

These views were echoed in other civilising cultures in Europe during this period (Wroczyński 1985) and it is evident that Poland was modelling itself on the social structures of other nations (Zamoyski 1992). This progress in education became the first step towards categorisation of what would later become PC. This provides evidence that the cultural processes of physical activity were in fact organised and embedded in social structures, hence, moving away from scant descriptions to actual policies and processes being established for the purpose of delivering PC. Although PC was initially contained within education, its ordinance was established as significant to national development. Ultimately, this put Poland at the forefront of education in Europe and the intention was to create the "new Pole, with a character and set of values suited to the new state" (Zamoyski 1992, p.229). This was a particular driving force of Poland's last King, Stanisław-August Poniatowski, whose strategic vision for Poland included deep cultural change that would mirror his admiration for Britain. Several innovative interventions were introduced to cultural life, activities that could be broadly described as physical recreation: "national festivities, public exercises, trials of

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<sup>43</sup> A Teacher's Duty

skill, games and the multifarious activities of social life, adapted to a conscientious sense of duty” (Zamoyski 1992, p. 352). Retrospectively, it can be seen that this period of cultural change was a principal reason in initiating formal structures for PE, whereby the elements of physical education, physical recreation and physical activity for health were to be central to its mechanics for the future. This period was also essential to Poland’s overall developments of PE as the 19<sup>th</sup> century was a time of immense political complexity, which would leave Polish society without a sovereign state, thus making it impossible at the time to quantify the incremental move toward the 20<sup>th</sup> century.

## **2.6 THE 19<sup>TH</sup> CENTURY**

In the first half of the 19<sup>th</sup> Century, the manifestations of political complexity in Poland (see Appendix B – The Partitions) created a situation that was not conducive to the continuing development of physical education (Gaj and Hądzulek 1997). Although this period was the time when other European countries, namely England, France and Germany, were continuing to build on the philosophies formed during the Enlightenment (Czański and Makutynowicz, 1996), Poland was devastated by the invasions of its neighbouring countries (Davies 1984, Zamoyski 1992, Hądzulek and Gaj 1997) who were Austria, Prussia and Russia. The detriment was the division of a European society that had a distinct culture, history and peoples. The impact from these divisions led to the weakening of a national identity as no sovereign state was in existence (Zamoyski 1990). This led to thousands of young Polish men forming military battalions, which were dispersed across the globe to fight in the Napoleonic wars. The situation was an advantage to Napoleon as all he had to do was to falsely promise that he would eventually turn his armies on Poland’s captors and the result was a fresh injection of military battalions fighting the causes of his wars (Davies 1981). The impact on Polish society was, however, less advantageous as the draining off of talent impeded the

natural progression of many institutions that were only just being established (Gaj and Hądzelek 1997). The progress of PE therefore, experienced a significant deficit in the area of theory and practice, and the reliance on prominent theorists from neighbouring European countries fills the gap for this period (Grabowski 2001b). Poland does, nevertheless, have one major theorist of this period. In 1805 the pedagogue Śniadecki<sup>44</sup> published his paper *O fizycznym wychowaniu dzieci*<sup>45</sup>, which examined the meaning of physical education in the development of children and young people. His main perspective was to examine pedagogical approaches in the delivery of such a subject (Demel 1989). Otherwise theorists such as Pestalozzi<sup>46</sup>, whose pedagogical work concentrated on the concept of developing psychological functioning in children, influenced the teaching methods that were eventually developed in Poland (Wroczyński 1985). The influence of this period has ensured that the “Polish education system and methods share commonalities with those of Western Europe, particularly Germany, Sweden and Great Britain” (Grabowski 2001c). In the former Polish territories occupied by the Prussians, Gaj et al (1997, p.24) note that society “echoed the structures of the Germans”. Cities such as Wrocław, Tczew, Elbląg and Gdańsk were some of the first places to have set up gymnastics clubs. The details of this period are not known specifically to Polish historians of PE; still, strong assumptions within the academic community indicate that Polish youth would have engaged in these activities alongside native Germans (Gaj and Hądzelek 1997). In 1830 Karol Teodor Matthes moved from Germany to Warsaw to set up a school of fencing for the local aristocrats. During this period he experimented with the activities

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<sup>44</sup> Jędrej Śniadecki

<sup>45</sup> The Physical Education of Children

<sup>46</sup> Johann Heinrich Pestalozzi (1746-1827) – Swiss pedagogue was the author of *Wie Gertrud ihre Kinder lehrt. Ein Versuch den Müttern Anleitung zu geben ihre Kinder selbst zu unterrichten, in Briefen* Zurich 1801. Pestalozzi was a theorist and not an educational practitioner and it was Heinrich Clias (1782-1854) who propagated and realised his work. In 1815 Clias established educational centres in Berne, where the teaching of gymnastics was undertaken. He wrote and published the gymnastics handbook *Anfangsgründe der Gymnastik oder Turnkunst* Zürich 1815. The work itself was not considered original and it leaned heavily on the writings of Johann GutsMuths (1759-1839) (Wroczyński 1985).

that were taking place in the school by introducing a swimming school, which was located next to the river Vistula. The school was very popular with the locals and its membership extended itself to include a wider representation of the community, namely the residents and intellectuals of Warsaw. After the death of Matthes in 1866, the direction of the school was passed on to Stanisław Majewski (a Pole) a former student of the school. These initiatives were mirrored in other regions of former Poland (Gaj and Hądzerek 1997) and individuals such as Ludwik Bierkowski<sup>47</sup> contributed to the structure of organised sports clubs and expanded theories on physical education. Bierkowski's ambition was to establish a school of physical education in Kraków. As cited in Gaj et al (1997, p.28) Bierkowski wrote a framework for his plans that included

“ . . . seven teachers and one instructor to disseminate on the theory and practice of gymnastics, three teachers to teach practical lessons, where one teacher would focus on athletic training, the second to focus on agility and the third to focus on bare-back horse-riding; one teacher to teach dance, one to teach singing and one to teach swimming. In addition to the teachers, the school would also have its own physician, who would be present during all physical training.”

Although his ambitions were never fully realised, in 1838 he established his first school with forty (40) pupils. Despite the inclusion of a programme for girls and a section for orthopaedic rehabilitation, the school's popularity never grew (Gaj and Hądzerek 1997). Bierkowski's ideas and practices during this period, affirm the growing acceptance amongst pedagogues and theorists that PE was to contain the key elements of sport, physical rehabilitation, recreation and most dominantly, physical education (Wroczyński 1985, Ust 1997).

In 1860 physical education was introduced into state schools, which had been established in 1825 by Prussian authorities (Wroczyński 1985). Attendance at lessons was poor from Polish

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<sup>47</sup> 1801-1860. He was a doctor and professor of surgery at the Uniwersytat Jagielloński and a 'ferocious propagator' of physical education (Gaj and Hądzerek 1997).

peasantry, and as this was a large section of society it did much to damage a generation of young people. Peasants believed that working in the fields was more vital for sustaining life and the community, it was such a mind-set that had contributed to the survival of the indigenous Pole on many an occasion (Davies 1981). At the time the situation was exacerbated by the fact that teaching methods were used for the systematic Prussianisation (Wroczyński 1985) of secondary level school children. Poles were, as a result, reluctant to send their children to such an educational system. To do so meant that direct cooperation and compliance with Prussian authority would lead to the destruction of Polish society (Wroczyński 1985, Gaj and Hądzelek 1997). A similar system was in operation in Austria during this period and activities relating to education and PE, particularly those akin to physical education were enveloped into the histories and culture of Prussia and Austria (Wroczyński 1985). Conversely, in Polish-Russia, the education of Polish children thrived in a system where Polish culture, such as language and physical recreation, continued to be taught on the basic principles established by the KEN (Wroczyński 1985). These principles were further preserved through the organisation of sporting activity out of school hours (Gaj and Hądzelek 1997). This period is complex and to outline accurately the historical sequencing of the involvement of physical education in relation to PE is problematic. It, nevertheless, runs parallel to any other advancement in Polish society at that time for that matter<sup>48</sup> (Zamoyski 1990). The consequence is that some events may not be recognised as contributing developments and that the analysis of historical texts, at times is problematic due to unintentional inconsistencies (Muzeum Sportu i Turystyki - Łódź 1999). Nevertheless, physical education historians have documented the period with the inclusion of the most significant events, mostly ensuring that wherever an event has

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<sup>48</sup> Polish contribution to scientific advancements during the nineteenth century can be summarised by the following: Ignacy Łukasiewicz succeeded in distilling crude oil in Galicia. He also built the first kerosene lamp in 1853. Zygmunt Wróbelki and Karol Olszewski (University of Jagiellon) achieved the liquefaction of oxygen in 1898. Maria Skłodowska-Curie discovered Polonium and pioneered research in radiation (Zamoyski 1990).

occurred, the Polish contribution is illuminated (Grabowski 2001b). For example, in Galicja, which became a province of the Austro-Hungarian Empire (see appendix B, The Partitions), developments in orthopedic exercise, health-related exercise therapies, gymnastic and hygiene clubs are documented. There is strong evidence that the foci of these advancements were in health and health-related matters (Wroczyński 1985, Gaj and Hądzerek 1997). The patterns in the conceptual developments of PC are, as a result, inextricably linked with health, rehabilitation, recreation, sport and physical education during this period (Grabowski 2001b). Gaj et al (1997) go further in their arguments by implying that these events, by the nature of their construction and delivery, established the perception in Poles that the organisation of PC was elitist in character.

Towards the end of the nineteenth century, the Instytut Leczniczo-Gimnastyczny<sup>49</sup>, Instytut Gimnastyczny I Szkoła Fechtunku<sup>50</sup> and the Zakład Gimnastyki Szwedzkiej I Masażu<sup>51</sup> were instrumental in their role for founding principles in physical education through the determination to establish formal organisations for Poles (Wroczyński 1985, Gaj and Hądzerek 1997). Helena Kuczalska<sup>52</sup> was also responsible for the introduction of Swedish methods in physical education (and massage) into her Institute in Warsaw. She was a pioneer in the area of physical education for women, and by 1906 had in a private school established a two-year training course for physical education teachers for both men and women (Gaj and Hądzerek 1997). As it was, physical education and sport played an important role in the emancipation of women in Polish society towards the end of the nineteenth century, through popularisation of many physical activities as a

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<sup>49</sup> Institute of rehabilitative-movement established by Stanisław Majewski

<sup>50</sup> Institute of Gymnastics and Fencing founded in 1873 by Marian Olszewski

<sup>51</sup> Institute of Swedish Gymnastics and Massage founded in 1892 by Helena Kuczalska

<sup>52</sup> Founder of Instytut Gimnastyki Szwedzkiej I Masażu (Institute of Swedish Gymnastics and Massage), 1892

way of socializing. This ensured that women could redefine the boundaries of their behaviour in view of social expectations (Gaj and Hądzerek 1997). Influential writers such as Prus<sup>53</sup>, were also successful in promoting the cause of sport as recreation. Through his articles in the fortnightly periodical *Kronikach*, which was widely read by Warsaw Poles, Prus aired his views that running, swimming and gymnastics not only shaped the individual physically but also educated him or her. Prus's popularity as a writer and novelist contributed to the wider redefining of lifestyles and behaviours of the physical in social contexts (Gaj and Hądzerek 1997). He also encouraged Poles to embrace the philosophies of Olszewski and Majewski, made a case for creating opportunities for physical recreation through the development of facilities, supported initiatives for sporting competition and encouraged women to take up swimming and other physical recreation. In addition Henryk Jordan<sup>54</sup>, who had dedicated his life to physical education and sport, was using his influence to press upon the *Rada Miejska w Krakowie*<sup>55</sup> to develop and utilize a number of open spaces as outdoor recreation parks. These parks would be used for sport and games for children and young people. By 1889 the local administration granted eight spaces for the purpose of physical games (Gaj and Hądzerek 1997). These eight outdoor spaces consisted of twelve playing fields each with a specific aim. The first field was for boys and girls and the activities that were planned were walking on stilts, high jump and exercises performed on parallel bars. Fields two, three and four

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<sup>53</sup> Bolesław Prus was the pseudonym for Aleksander Głowacki (1847-1912), Polish novelist of the nineteenth century. Prus was a member of the minor *Szlachta* his father however was penniless. He fought and was wounded in the Insurrection of 1863 and was imprisoned for his involvement. Originally fascinated by mathematics and the natural sciences his education was cut short due to financial reasons. He eventually wrote for a humorous periodical. His first ventures into writing novels displayed an analytical ability to dissect 'cause and effect' (Zamoyski 1990). His literature was of a positivist style and his strong convictions that progress could eventually resolve and cure progressed through time to become more sceptical of this ideology. His literary work can provide a detailed account of Polish society during the period of the partitions.

<sup>54</sup> 1842-1907: Professor of medicine at the Uniwersytet Jagielloński. He had travelled extensively out side of Poland and his visits to Great Britain, the United States (New York), Germany (Berlin) and Austria (Vienna) influenced his ideas on pedagogy.

<sup>55</sup> Local administration.

were for girls only and the activities in these areas were: hoop games, climbing frames, walking across narrow piers over water, and an array of climbing obstacles. Fields five, six, seven and eight were for young men. The activities in field five and six were similar to that of the girls. Field seven was designated without description so that any activity could be performed on it and field eight was specifically for football. Field number nine was for the use of games of all description for both genders. Field ten was for older school youths and youths who were enlisted into the craft industries. Field eleven was for very young male children and field twelve were for games and activities for group participation. This was the largest of all the fields and populated with trees thus enhancing its physical appearance as that of a park. All of the fields had additional areas with tennis courts, croquet lawns shooting ranges to name but a few (Gaj and Hądzelek 1997). The parks were named *Parki Jordana* (Jordans Parks) and were a physical representation of Jordan's travels to New York and Great Britain where he had noted the use of out-door spaces for games and sports (Wroczyński 1985).

It is evident that the political situation of the nineteenth century trammelled the expansion of theoretical developments in physical education. Despite such a setback, PE itself proceeded with its evolution. The entrance of physical recreation into the context of society provided Poles with a repertoire of activities for social intercourse all of which led to the widespread understanding and practice of physical education and sport in culture (Gaj and Hądzelek 1997, Skoczylas 1999b, Grabowski 2001b).

It is this moment that the concept of sport was beginning to acquire the characteristics that would embed it into the enduring standpoint of PE (Wroczyński 1985). The term sport had been used less frequently during this period. The preferred term *Gimnastyka*<sup>56</sup>, this literally translates,

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<sup>56</sup> Gymnastics

as gymnastics and to this day is interchangeable with the terms sport and exercise. Sport did itself make an entry into the practices of PE, and the founding of *Sokół*<sup>57</sup> augments its quasi separateness from physical education. Although its focus was primarily physical education and the teaching of physical exercises, the exercises were predominantly sporting activities.

## 2.7 Sokół (Falcons)

In 1867 the Towarzystwo Gimnastyki (Gymnastics Association) was founded in Lwów basing its practice on those that were similar to the Czech's (Wroczyński 1985, Czabański 1996, Gaj and Hądzulek 1997, Muzeum Sportu i Turystyki 2003). Lwów was a major city in the former territories of Poland, which were swallowed up into the Austro-Hungarian Empire (Davies 1984). The mid 1850's saw the relaxing of social restrictions on the communities that were formerly that of Poland, which prior to this period had experienced a programme of "intense extermination of the Polish culture" (Wroczyński 1985). Progress in community life, education and health occurred for young and old in equal ways (Wroczyński 1985, p.347). The organisation *Sokół* (Falcons), Poland's first sports organisation, exploited the situation of greater autonomy and the movement became a weapon in the fight for Poles' national identity. Prominent Polish individuals lent their full support to the organisation in an attempt to promote patriotism and instil the belief that a nationalistic objective was at the centre of its dogma (Wroczyński 1985, Muzeum Sportu i Turystyki 2003). Dobrzański, the editor of *Gazety Narodowej*, published frequent articles on the organisation and the promotion of mental and physical education, and the interdependent relationship of those two variables. The images of sport and classroom activity were published

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<sup>57</sup> Falcon is the translation and it is Poland's first sports organisation that adopted the symbol of the falcon as it had endurance and physical prowess. The organisation had its roots in the military and was a default organisation for recruiting young Polish men for the purpose of creating an army.

alongside articles on the importance of physical exercise. *Sokol* grew quickly and orderly with projects and schools growing rapidly across the Galician territories (Wroczyński 1985).



**Figure 2.C - Images from the zbiorów Muzeum Sportu i Turystyki, Warsaw, Poland** - The images portrayed above are overtly militaristic, masculine, nationalistic and triumphant. This was the reaction to a geo-political past that rendered Poland non-existent. Physical Culture was becoming associated with the military and sport and nationalism were being closely linked.

In 1881 it set up a team of physical education teachers and this was the moment when all prominent, experienced and successful instructors, teachers and trainers<sup>58</sup> were drawn into a fraternity, which was to be organised and managed by an organisation whose sole objective was education of the physical (Muzeum Sportu I Turystyki – Lodz 1999). The growth of the organisation was rapid for its period and table 2.1 outlines this rapidity. Physical education was experiencing a *surge* in growth all of which was fuelled by the Poles' determination to move strategically towards the recreation of its nation (Wroczyński 1985)

**Table 2.1 Number of Clubs and Participants (*Sokół*)**

Year	No. Of institutions	No. Of members	Sports Participants				No. Of Sports Halls	% Of active members
			Adults		Youth			
			Men	Women	Boys	Girls		
1880	1	214	56					26.1
1885	7	898	197		106		1	22
1890	18	2554	475	75	375	136	4	21.6
1895	65	8523	1436	486	772	364	14	22.5
1900	73	8580	964	114	588	444	27	13.5
1905	144	17723	2097	295	1047	1050	54	13.5

Adapted Wroczyński 1985

The most important goal of physical education in the schools established by *Sokół* was to emphasize the value of gymnastics as integral to the development of physical prowess. It was not

<sup>58</sup> Edmundem Cenarem (1856-1913) and Antonim Durskim (1854-1908) who worked on the development of teaching systems and methods in exercise and sport.

the only exercise to be instructed as physical games, outdoor recreation and various sports<sup>59</sup> were also taught and conducted, it is just that gymnastics was singled out as a superior activity (Wroczyński 1985). The idea of specialist schools for physical activity had established themselves in the general developments of physical education. Towards the end of the nineteenth century and beginning of the twentieth century, physical education was to undergo radical reform. The most significant event that encapsulates the changes that took place is the *IX Zjazd Lekarzy I Przyrodników Polskich* in Kraków<sup>60</sup> in 1900 (Gaj and Hądzelek 1997). The event brought together pre-eminent authors in the disciplines of *higiena* and physical education<sup>61</sup>. The conference presented a new direction for physical education, which was unanimously accepted by the delegates. The focal point of the reforms was based on the knowledge of health, physiology, pedagogy and physical education of that time (Wroczyński 1985, Gaj and Hądzelek 1997). The former aims of physical education had roughly been health and the development of characteristics pertaining to courage, all of which were aimed at youths. This had been usurped with the sharper focus of “development of health and effect of education on children and young people” (Gaj and Hądzelek, 1997, p.26). This led to the first attempts to scrutinize the quality of teaching and instill practices that would be comparable across all schools, by the appointment of an inspector for physical education in 1902.

## 2.8 PHYSICAL EDUCATION AND SPORT IN THE 20<sup>TH</sup> CENTURY

Physical education was by far the most essential component of PC for instilling the behaviour of physical activity (Muzeum Sportu I Turystyki – Warsaw 2003). Outdoor recreation, which is

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<sup>59</sup> Other associations formed by *Sokol* were Towarzystwo Gimnastyczne (Gymnastics) Krakowskie ‘Orzeł Biały’ (1868), Lwowskie and Krakowskie Towarzystwa Łyżwiarzy (Ice-Skating) (1869), Krakowskie and Lwowskie Klub Cyklistów (Cyclists) (1886), Towarzystwo Szczermy (Fencing) (1886) to name but a few.

<sup>60</sup> Conference of Doctors and Naturalists

<sup>61</sup> Henryk Jordan, Napoleon Cybulski, Odo Bujwida, Bolesław Błażka, Teofil Tyszecki and Eugeniusz Piasecki.

termed as *turystyka*<sup>62</sup>, was also being conceptualised as a cultural practice belonging to the PC framework (Gaj and Hądzelek 1997). Outdoor recreation has through its history developed into a phenomenon that is inextricably linked with mass participation in physical recreation (Grabowski 2000). In 1873 the *Polskie Towarzystwo Tatrzańskie*<sup>63</sup> played an important role in establishing outdoor recreation patterns. By 1907 this organisation had split into two sections: the *Sekcja Turystyczna*<sup>64</sup> responsible for climbing and mountaineering; and the *Sekcja Narciarska*<sup>65</sup> responsible for skiing and sledging. Simultaneously with these developments in 1906, the *Polskie Towarzystwo Krajoznawcze*<sup>66</sup> was formed whose highly patriotic slogan of '*Poznaj swój kraj, Ojczyźnie służ*'<sup>67</sup> played a strong role in the endorsement of patriotism (Gaj and Hądzelek 1997). These organisations were influential in the developing structures of physical recreation. During this time the Polish scouting movement, *Harcerstwo*<sup>68</sup>, which was a direct emulation of Baden Powell's organisation, was established in 1911. It was successful in enhancing the role of physical recreation and took a moral, religious and nationalistic view to its activities. The dominant organisation *Sokół* carefully guided this new body and it is no coincidence that the scouting movement was perceived as a militaristic association for the young (Shimoniak 1970). Physical recreation and education had been developing for several centuries (Wroczyński 1985) yet sport is viewed as having been introduced into Polish culture a lot later than in most other European countries (Gaj and Hądzelek 1997).

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<sup>62</sup> Tourism

<sup>63</sup> Polish Association of Mountaineering. The word *Tatrzańskie* means of the Polish Tatra Mountains and as Poland only has one set of mountains it is safe to assume that the translation means *mountaineering*.

<sup>64</sup> Section for Tourism

<sup>65</sup> Section for Skiing

<sup>66</sup> Polish Association of Sight Seeing

<sup>67</sup> Familiarise yourself with your country and you will serve the Fatherland

<sup>68</sup> Founded by Eugeniusz Piasecki

Jordan's outdoor parks had successfully introduced the concept of sport and its subsequent participation into the imagination of youth. As a consequence of this the *Towarzystwo Zabaw Ruchowych*<sup>69</sup> was founded and its organisational structures were similar to that of clubs found in Austria and Great Britain (Gaj and Hądzelek 1997). This meant that clubs developed independently and were less institutionalised than activities formed under the physical education banner. Gaj et al (1997, p.48) maintain that this had a "crystallization effect on sports clubs many of which had sections and layers within its organisational framework". Many sports clubs were initiated at the start of the twentieth century representing as many sports. *Lechia* (1904), *Czarni* (1903), *Pogoń* (1904), *Wisła* (1906), *Cracovia* (1906) and *Łódzki Klub Sportowy* (1908) were very similar to the way in which today's football clubs operate, with the sole purpose of establishing a focused aim with one sport being played. In 1908 the *Akademicki Związek Sportowy*<sup>70</sup> was founded thus initiating the relationship between sport and higher education in Poland (Gaj and Hądzelek 1997). Between the years 1915-16 football (soccer) was also gaining popularity amongst the working classes and clubs such as *Legia*, *Korona* and *Polonia* were established.

The progress of development was considered rapid between the years 1906-1914 and the reason for this was the political situation of the country (Davies 1984). It had encouraged and influenced greater social activity amongst indigenous Poles. Socialistic principles were beginning to penetrate Polish society and workers' sports clubs and women's sports clubs were reflecting the changing political mood that was present in Russia and surrounding regions (Gaj and Hądzelek 1997). Simultaneously with political change, socio-economic conditions, which were auspicious, compounded the growth of leisure, recreation and sport (Olszewska 1989). This relationship with

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<sup>69</sup> Association of Physical Games

<sup>70</sup> University Sports Association of Poland

politics and socio-economic factors as influencing structural changes in sport is viewed by Krawczyk (1995) as

“ . . . The methodological principles, which are widely taken into account by learned circles, and which state that social and cultural phenomena, to which sport belongs, should be regarded in dynamic categories; in the process of becoming, development, stagnation or regression. And since in different historical times, different system entanglements and various cultural contexts, and that the transformations taking place in sports possess varied shapes and directions makes the conception of sociological changes...extremely useful”. (p.6)

The twentieth century could, therefore, be seen as a time of ‘becoming’ for sport, unlike physical education that had been through a process of development and then entered the phase of stagnation because of its political situation (Wroczyński 1985, Riordan 1986, Gaj and Hądzelek 1997).

## 2.9 THE DEVELOPMENT OF PHYSICAL CULTURE DURING POLISH INDEPENDENCE 1918 - 1939

Even before 1918 Poland had aspirations to participate in the Modern Olympic Games (Gaj and Hądzelek 1997, Grabowski 2001b). So with the end of World War I and the creation of an independent Poland, as one of the conditions of the 1919 Treaty of Versailles (Davies 1981, Prizel 1998), Poland could finally participate in sporting competition in its own right. During 1918 the first meeting of the *Zjazd Polskich Stowarzyszeń Sportowych i Gimnastycznych*<sup>71</sup> met to discuss the future of participating in the Olympics. For the Poles, it was a necessity to engage in the activities of internationalism (Prizel 1997). Sport was identified as a vehicle for promoting geo-political presence in the world, and after centuries of obscurity from the European community, it was perhaps seen as vital to long-term survival to establish a national image (Riordan 1990). The use of sport as a platform for politics is not a new concept (Riordan and Krúger 1999) and for Poland (and

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<sup>71</sup> Association of Polish Sport and Gymnastics

all other post-war nations) the urgency to use sport as a means of reinstating perceptions of greatness, in the context of international events, may have been the antecedent for investing in the development of elite sporting structures that are evident later on.



Figure 2.D - Image from the zbiorów Muzeum Sportu i Turystyki, Warsaw, Poland – This image, painted in watercolours, depicts as its central theme a white horse, which is symbolising beauty, perfection and dignity. The rider is carrying the winners' palm (Muzeum Sportu i Turystyki 2003).

Education, or more poignantly PE, was also going through the transitional phase of having been a covert organ of society, to that of a fully functioning organisation of society. In 1919 the *Sejm Nauczycielski*<sup>72</sup> met to discuss the future of education in Poland. Its key concerns were the high levels of illiteracy amongst the population particularly amongst those who had been residing in Russian-Poland (Zamoyski 1990, Gaj and Hądzulek, 1997). Nevertheless, PE was formally

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<sup>72</sup> Parliament of Teachers

denoted in the *Sejm* as the *Sekcja Higieny Szkolnej I Wychowania Fizycznego*<sup>73</sup> (SHSWF). In the traditions of KEN, physicians and physical educationists took part in the discussions that would influence the future of PE in schools. The importance of physical activity for the development of psychological, intellectual and physical development embodied the discussions and it was deemed relevant to engage in a building programme at schools that would lead to high levels of sporting provision (Warsicki 1966, Gaj and Hądzerek, 1997). The minimum requirements for each school were to be a sports hall, swimming pool, outdoors playing field and gardens. The influence from Jordan's experiment in Kraków, whereby the use of a garden for recreation was incorporated on to the physical recreation space, entered the rhetoric of the SHSWF.

Although in 1919 it was seen as essential for the teaching and practice of PE to be included in the curriculum, for teachers in training, it was not realised due to the pressures caused by high levels of illiteracy, few teacher training schools and the time it took to plan curricula (Wroczyński 1985). The issue of PE however, was the concern of the Polish military and in 1921-22 it was outlined in a report (as part of two projects), that preparing the young to be physically responsive for the defence of the Republic was a priority. This relationship with physical fitness and the military for nationalistic defence exemplifies the complex web, that is, sport and nationalism (Lee 2004), further illustrating the point that for the Poles, sport continued to be linked overtly to nationalism (Riordan and Krüger 1999, Nowakowski 2001). Physical education's political home was initially through the *Państwowa Rada Wychowania Fizycznego i Kultury Cieleśnej*<sup>74</sup> whereby its role was to inform and advise the ministries of *Zdrowia*<sup>75</sup> and *Wyznań Relegijnych i Oświecenia Publicznego*<sup>76</sup>.

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<sup>73</sup> Section of School Hygiene and Physical Education

<sup>74</sup> State Council of Physical Education and Culture of the Body

<sup>75</sup> Health

The May revolt of 1926<sup>77</sup> influenced the political decision to place control of physical education with the military. Other influences such as the growth of illiberal politics, initially in Italy and then in Germany, meant that the newly formed Polish Republic needed to establish a credible military very quickly (Warsicki 1966, Wroczyński 1985, Gaj and Hądzelek, 1997). In 1927 PE was administered from the *Państwowy Urząd Wychowania Fizycznego I Przystosowania Wojskowego*<sup>78</sup> (PUWFiPW), which was an organ of the *Ministerstwa Spraw Wojskowych*<sup>79</sup> (Wroczyński 1985, Gaj and Hądzelek 1997). This move was important in terms of how the concept of physical education was to be articulated in society thus strengthening the association of PE with nationalism and politics. This particular development parallels the middle Ages, when Polish society was anxious about protecting its communities and as a result shows a strong link with the past in terms of how PE was evolving. There were some difficulties with implementing physical education curricula, despite the many ideologues such as Czerwiński and Jędrzejewicz, both ministers from the aforementioned government departments. This was because the physical infrastructure for delivering education was weak, disestablished and fractured due to years of under-investment and in particular the destruction left behind from the First World War<sup>80</sup>. Wroczyński (1985) highlights the frustration this caused to the underpinning of PE because “even though lessons were programmed for 1-2 hours a week, this could not be implemented everywhere due to the shortage of teachers and essential facilities” (p.121). In those secondary schools that could deliver PE, it was taught at the

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<sup>76</sup> Public Spiritual and Religious Enlightenment

<sup>77</sup> USSR communist invasion

<sup>78</sup> State Organisation of Physical Education and Military Preparation

<sup>79</sup> Ministry of Defence

<sup>80</sup> 1914-18

end formal lessons and comprised of two hours per week<sup>81</sup>. During this period the aim of physical education was the continuing development of fitness in youth for military preparation (The Central Institute for Physical Education 1934, Wroczyński 1985, Gaj and Hądzelek 1997). The Polish president, Piłsudski, declared that „dzieci muszą mieć czas na rozprostowanie nóg”<sup>82</sup> and that this should be achieved through the *„ruch wychowania fizycznego będzie miał swego sprzymierzeńca w sporcie, lecz gdy sport dąży do wyczynów, do rekordów, wychowanie fizyczne ma dać przeciwną, a dla jego poszczególnych działów muszą być znalezione mierniki”*<sup>83</sup> (Gaj and Hądzelek 1997, p.87). A literal interpretation of this would mean that physical education was to deliver pre-identified sports; this selection of sports however, was influenced by military aims. The introduction of the *Państwowej Odznaki Sportowej (POS)*<sup>84</sup> in 1931, which was a cultural award, emphasized in its regulations the prizing of activities with a militaristic tendency; shooting, weighted marches and walking expeditions were listed as sporting achievements worthy of the award (Gaj and Hądzelek 1997). This emphasis of military preparation was no accident and deeply reflected a nation paranoid of its neighbour’s political activities and how those activities had influenced the fate of Poland’s sovereignty in the past (Davies 1981, Zamoyski 1990, Prizel 1998). For example this can be seen through the membership of sports associations that had established themselves since 1929, whereby the Polish Association of Shooting had a disproportionate amount of sections and competitors compared with other sports of that time (Muzeum Sportu i Turystyki 2003).

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<sup>81</sup> For a short period of time, from 1929-32, this was raised to three hours per week.

<sup>82</sup> *Children should have time for stretching their legs*

<sup>83</sup> *‘The motion of physical education should ally itself with sport, therefore when sport aspires towards performance and records, physical education must select a number of activities to reflect this measure.’*

<sup>84</sup> National Sports Distinction

## 2.10 YOUTH ORGANISATIONS

Another organisation that was underpinned by military structure was the *Związek Harcerstwa Polskiego (ZHP)*<sup>85</sup>. Based on Baden Powell's Scouting organisation in Great Britain, its structure mirrored military life. It was initially ordered into male and female sections and was seen as an organisation concerned with moral, patriotic and cultural aims. Physical education and sport became key features in planned activities between the years of 1926 until the start of the Second World War due to the ZHP experiencing an *identity crisis* (Warsicki 1966, Gaj and Hądzelek 1997). The membership of the ZHP was predominantly from the upper classes, which meant that its original aims closely emulated those of the military. The drive to recruit young members from the working and peasant classes enabled the movement to grow and in particular to redefine itself as an organisation whose primary focus was sport and physical education. This recruitment drive proved successful and in just over ten years ZHP increased its membership by 450%+.

Year	Total Members	Harcerki (Female)	Harcerze (Male)
1926	42,602	15,262	27,340
1929	62,151	20,671	41,480
1932	92,933	37,052	55,881
1935	165,900	62,429	103,471
1937	190,710	69,785	120,935

**Table 2.2 Number of Members in the ZHP between the years 1926-1937**

(In Gaj and Hądzelek 1997, p. 133)

<sup>85</sup> Polish Scouting Movement

By 1937, ZHP had formed its own sports clubs under the name of *Harcerskie Kluby Sportowe*<sup>86</sup> (HKS), which apart from running sporting activities for its own members, co-ordinated formal contact with other youth organisations for the purpose of inter-organisation sports competitions.



Figure 2.E Image from the Zbiórów Muzeum Sportu I Turystyki in Warsaw, Poland – This image depicts male and female participants of the Pomorskie ZHP, which was part of Sokół.

One of these organisations was the *Katolickie Stowarzyszenie Młodzieży Męskiej I Żeńskiej* (KSMM and KSMŻ)<sup>87</sup>, which had been formed in 1919. The bulk of its members were peasants and the central aim of the organisation was to instil religious awareness in cultural life through abstention and upholding rural life. By the end of the 1930's KSMM (Ż) had developed international links with other Catholic youth groups and had even participated in the Catholic Olympics. Other religious groups in Poland included the *Związek Młodzieży Chrześcijańskiej w Polsce*<sup>88</sup> (Polska YMCA), originally

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<sup>86</sup> Scouts Sports Clubs

<sup>87</sup> Catholic Society of Male and Female Youth

<sup>88</sup> Polish YMCA

formed in Great Britain (London) in 1844. The aim of the YMCA was to propagate Christian ideology through an ethos of work and Christian citizenship. In 1923, its statutes declared that it was responsible for physically educating its members mentally and spiritually so that individuals could be dutiful towards their nation (Gaj and Hądzerek 1997). Ultimately, the YMCA had a minimal impact on Polish youth compared with the organisations of ZHP and TG Sokół<sup>89</sup>.

#### 2.11 PHYSICAL CULTURE DURING NAZI OCCUPATION 1939-45

In September 1939 Germany invaded Poland (Davies 1981, Zamoyski 1990). Its occupation of western Poland was swift and on the 8th October 1939, Hitler decreed that the occupied lands were from that point onwards part of the Third Reich<sup>90</sup> (Davies 1981). The *germenizacja*<sup>91</sup> of Poland initially saw the restructuring of regions with the creation of four districts (five by 1941). This was followed by the exploitation of resources, land and people to aid in the creation of a German colony, which was its absolute intention. The occupation of these Polish regions was also seen as advantageous in terms of the future plans of aggression aimed at the USSR (Gaj and Hądzerek 1997), which were covertly harboured by Hitler (Davies 1981). In the first weeks of occupation the Third Reich carried out mass arrests and executions of individuals and groups who would get in the way of occupation. This act was termed as the politics of cleansing the land of enemy elements (Wroczyński 1985) and although the bulk of executions were aimed at the *intelligentsia*<sup>92</sup> it also included members of TG Sokół and the ZHP. Among those who were sent to concentration

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<sup>89</sup> Towarzystwo Gimnastyczne Sokół

<sup>90</sup> This included the województwa: poznańskie, krakowskie, warszawskie and Suwalszczyzna.

<sup>91</sup> Germanification

<sup>92</sup> The educated or intellectual people in a society or community

camps<sup>93</sup> were members from the Klub Sportowy (KS) 'Gedania' and it was also seen by the German administration that those involved in community life, such as sport (Gaj and Hądzelek 1997), should be eliminated as individuals and groups (Davies 1981). The human loss in the first few months devastated Poland and brought to an end the existence of sport and physical education. Associations of sport, and related organisations were disbanded and made illegal; Poles were no longer permitted to congregate in groups of any kind, as this was perceived as dangerous to the 'Nazi's' (Davies 1981). All assets belonging to the Polish state, formal and informal organisations and individuals were confiscated on the 29<sup>th</sup> September 1939. From this day Poland ceased to exist. As an example of this destruction of Polish society, the following excerpt has been translated from Gaj and Hądzelek (1997) to typify the point:

"Within the first few days of the war, Poland's oldest rowing club –04- in Poznań was shut. Its standard and trophies were destroyed and the marina itself was given to German nationals who were brought along for the purpose of Germanising Poznań...some attempts were made to hide away documents and trophies, however the whole intention was to raze the evidence of Polish society ever having existed." (p.171)

Polish education was also dismantled and schools with associated gymnasia and sports halls were used for altogether other purposes, which also meant that sports equipment was confiscated. The AWF in Poznań was dismembered and it took immense courage and audacity of individuals such as Michał Wojtkowiak (who hid away) to save many academic works and books. The AWF Kraków was used for German military purposes (Chemicz 1983) and the AWF Warszawa suffered the greatest loss by having all its building dismantled for other use, most notably a margarine factory, 100% of its sports equipment destroyed and 75% of its sports fields reassigned for other purposes. It was not until 1946 that AWF Warszawa re-built itself (Gaj and Hądzelek 1997). Life

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<sup>93</sup> Stutthof, Sachsenhausen and Dachau amongst a few

during this period was disturbingly terrifying with the “methodical registering and control of human movement” (Gaj and Hądzelek 1997, p.172) being carried out to its extreme by the Third Reich. Public executions were frequently held as a measure of controlling the life of Poles (Davies 1981). These measures were deliberate in oppressing cultural behaviour and any thoughts of overthrowing the new regime (Deptuła 1997). The intelligentsia and any member of society deemed as capable of influencing others such as teachers, doctors, lawyers, and industrialists were singled out for execution, hard labour or concentration camps (Chemicz 1983). Forced labour was imposed on two and a half million Poles, most of whom were young people; it meant that PE and sport was to be a thing of the past (Gaj and Hądzelek 1997). Wroczyński (1971) notes that: 42% girls and 46% of boys between the ages of 7-13 and 92% of women and 96% of men between the ages of 14-22 were forced into labour for the cause of the Third Reich. Out of the remaining children between the ages of 7-13 some physical recreation did occur. These activities were conducted in the German language as a way of *fooling* Nazi soldiers and were done so because many of the activities were purposeful gatherings of the ZHP, which was covertly re-grouping itself (Gaj and Hądzelek 1997).

The physical loss experienced by PE and Sport was in practicable terms replaceable, the more devastating consequences of ‘Nazi’ occupation and the destruction left behind from the Second World War was the human loss. By the end of the war one fifth of the population had died (Davies 1996). The youth that did survive had high levels of illiteracy and were physically uneducated, which would leave its legacy on a generation of Poles.

## 2.12 PHYSICAL CULTURE AND COMMUNIST POLAND 1946-89

So it came to be that the actual horrors of German Occupation were supplanted by the ambiguity of what history has termed as the *Soviet Liberation*. There were three distinct phases that marked the rule of The People's Republic after 1944, that is, "1944-1948, witnessed the gradual construction of the communist People's Democracy; the second, from 1948-1956, saw the imposition of Stalinism; the third, since 1956 (*to 1989*), has seen Poland ruled by a native, *national Communist regime*" (Davies 1981, p. 556). This communist system was characterized by totalitarianism meaning that no social structure was to function independently of the State (Krawczyk 1996). The newly formed society would be dependent on a shared general goal culminating in the "new man who would render to the new system an opportunity to grow roots and fully solidify" (Krawczyk 1996, p. 77). Although the politics of communism defined a post-war Poland, its real triumphs, however, were "the advances in social and cultural life and the real achievements of reconstruction from the ruins of the War" (Davies 1981, p. 556). In terms of PC, reconstructions were obliged to echo expressions of politics and ideology (Sport in Poland 1956, Skrzypek 1960 Demel 1969, Demel 1989, Deptuła 1997). Krawczyk (1996), citing Hegel, notes that this attitude was "assumed to be a historical necessity based on rationalism [in that] what is rational... is real... and that which is real determines and specifies all of human existence" (p.2); in short that PC would be confronted by the pragmatic demands of a communist regime, which would become the underlying current for restarting its existence in society (Gaj and Hądzelek 1997). Furthermore, Stalinism "has been variously described as a doctrine, a system, and an attitude of mind" (Davies 1981, p. 577) and it was bluntly obvious that this *attitude of mind* would be required in cultural expressions.

Despite this reality, Gaj and Hądzelek (1997) cite Szymański (1990) as arguing that in 1946 when the organisational structure of PC in Poland was officially formed its systems were not

socialist, disputing that the name *Physical Culture* did not include a socialist theme. This attitude is at variance with reality and Wentel (personal communication 1999) describes it as a literal approach in avoiding dissection of an incongruent past. In 1948 the first PC Act was passed in the *Sejm* together with the formation of the Główny Urząd Kultury Fizycznej (GUKF)<sup>94</sup> (later replaced by the Główny Komitet Kultury Fizycznej –GKKF- in 1949). The organisation was an official administration of the state and amongst its tasks of developing PC it became a platform for disseminating political ideology (Deptuła 1997). Gutowski (1964) is critical of this move and argues that at this point in time the concept of PC was developing erroneously. This view is valid only when applied to the overt relationships evident in PC's history; it is, nonetheless, less valid when considering that PC has, is and will mirror its society. At this point in its development, it was analogous with socialism.

In the period 1956-87 a number of modifications were to be made to the GKKF that would see PC as a formally administrated department that included physical education, physical recreation, physical rehabilitation and sport (Gaj and Hądzulek 1997). In 1956, sport was brought into the GKKF structures. By 1960, the PC Act was extended to include *turystyka* and was now responsible for physical education, sport and outdoor recreation, thus a name change to Główny Komitet Kultury Fizycznej I Turystyki (GKKFiT). By 1980 the political and economic situation in Poland was in deep crisis and 1981-1985 a number of amendments to the PC Act were made to establish its role in the nation, the main body of the Act being re-worked during 1984. This period for PC will be remembered in the way that all communist countries will remember the epoch, that is,

“... Sport *had* been raised into a major state industry, from which authorities *hoped* to win popularity and prestige. Special emphasis was

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<sup>94</sup> Central Council for Physical Culture

placed on physical fitness and hence, on gymnastics, athletics and team sports; with stadiums, coaching and equipment all *receiving* generous support" (Davies 1981 p. 607).

This *special emphasis* did much to damage the quasi-equality that was supposed to be socialism. Athletes and those associated with their successes were considered as elite and the philosophies of mass participation in PC were a distant reality from the over-emphasis placed on competitive sport (Szymanski 1990, Zilberman 1996). Sport's function was also as a "mythological function: It provided punitive evidence for the superiority of communism over capitalism" (Krawczyk 1996 p.82). In fact, this period did much to instil perceptions in the ordinary Pole that sport was PC and that it was inaccessible to the participant of active leisure. It was not until September 1999 that sports clubs were obliged to make facilities accessible to the general population, and this was only achieved by the freezing of government grants, hence, pressuring clubs to generate additional income for themselves (Zilberman 1996, Ryba 2000). Conversely, this period also did much to influence Poles to become engaged in outdoor recreation with many factories laying on *compulsory* day-trips to national parks, museums and tourist attractions. Despite the underlying intentions of controlling communities and the way in which they recreated, it did much in developing habits for the future (Krawczyk 1996). When Poland finally dismantled the political governance of communism and opted for the *unchallenged* Western model of economic capitalism and political democracy (Henderson and Robinson 1997) (leading the *revolution*<sup>95</sup> of dismantlement), it was unprepared for the impact that this would have on its expectant population. Even though there was great excitement at the prospect of Western democratic *freedoms*, the associated levels of personal

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<sup>95</sup> Although the Poles never termed the fall of communism as a 'revolution', the Czech's in fact did so, naming it the 'Velvet Revolution' (Henderson and Robinson 1997). This term has often been attributed to describe a complex set of circumstances that were the myriad reasons for the final drawing of the *iron curtain*, which ended communism in Eastern Europe (Prizel 1998).

responsibility in managing this freedom was to elude an entire generation. Once again, therefore, PC found itself having to restructure and redefine itself for yet another epoch.

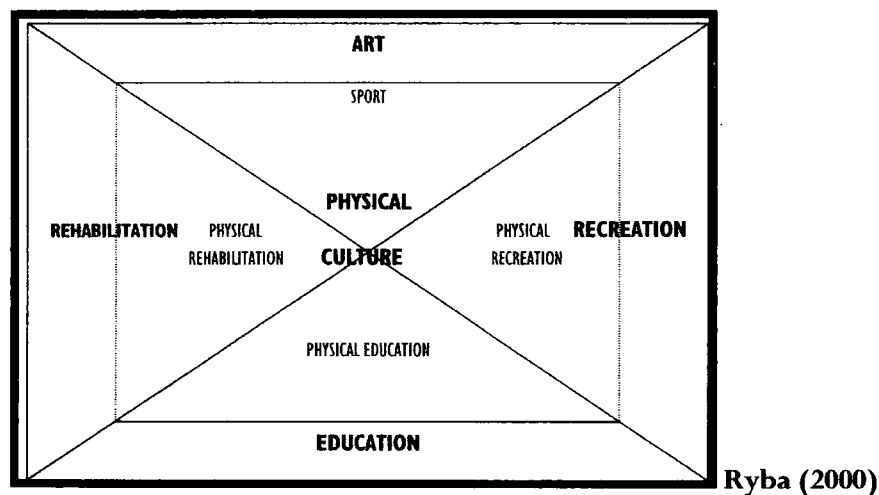
## **2. 13 Post-Communism 1989-**

Communism was meant to be omnipotent and all the committees, associations, federations and agents that were the administrative structure of PC were left weak in the wake of post-communism (Riordan 1992). Autonomy was either limited or non-existent; therefore, its creditability was in question particularly as all stadiums, sports clubs, parks and playing fields belonged to the state (Davies 1981, Melosik 1991, Krawczyk 1996). Most importantly, PC was funded entirely by the state with only a small part of funds coming from local authorities, thus, jeopardising PC during a time of transition. It was not until 1997 when democratic processes replaced the 1984 PC Act (Ust. 1996), which meant that it had taken eight years to remove the former communist concept of PC. It had also become a detailed framework that ensured compliance with law (Ust. 1996, Demel 1998), outlined the extent of responsibilities that certain departments have (Ust. 1996) and was written to be highly congruent with EU legislation. The Act is an overt endorsement of the cultural activity and evidence that it is part of wider social responsibilities of government. Although this is not new in its history (Erdmann 1989), the *democratic dimension* ensures its palatability with the voting public, particularly because democracy was anticipated and expected (Melosik 1991, Adamus-Matuszynski 2004).

Even though PC has changed, it remains a permanent fixture in the cultural lives of Poles (Szymanski 1990, Żukowska 1993, Krawczyk 1995, Czabański et al 1996, Grabowski 2000) and when diagrammatically explained by Ryba (2000) in Figure 2.F illustrates a broader connection with culture. The challenge for the future, then, is much the same as other developed and

developing nations of Europe (Przeweda 1995, Bishop and Mickiewicz 2001) and that is to design interventions that will increase physical activity levels sufficiently to promote healthy lifestyles (Przewęda 1995, Grabowski 2001a).

**Figure 2.F Physical Culture as a Diagrammatic Definition**



The transition to a capitalistic model has influenced lifestyles significantly (Bishop and Mickiewicz 2001); there may be greater opportunities for the young to become involved in sports while the lack of sponsorship in many sports will see their demise as finance is inextricably linked with success (personal communication Wentel 1999). Physical education will also see a decline as the promised four hours per week have failed to come into fruition because of a lack of finances, especially if IT and foreign languages continue to be deemed essential as part of the globalization challenge (Rhoten 2000). There is also talk of bringing PE teachers in line with European practice and introducing an additional teaching subject to the PE teacher's timetable, which was unheard of in the previous structure (Zawodowska 1995). This will undoubtedly play a role in the redefining of what was formerly considered a specialist subject. Physical recreation may not initially appear to be damaged; however, the last twelve years have seen the urban Pole emulate the leisure lifestyles

of their European counterparts. It is, thus, easy to calculate that physical recreation will experience direct competition from other leisure activities, particularly those that do not require physical exertion. It may be, therefore, that physical rehabilitation will become more important as Poland's population becomes less active, lives longer and experiences greater levels of stress from modern living. Already health promotion campaigns are targeting smoking cessation, education on nutrition and the benefits of exercise. This refocusing of emphasis in PC will continue and where its beginnings were linked to the defence of the nation, patriotism and sport as a political expression, it will undoubtedly transmute into sport as entertainment, activity for the prevention of ill-health and physical therapy.

#### **2.14 SUMMARY STATEMENT**

Chapter 2, Part A, has outlined the historical development of PC. Its roots, as identified by Polish historians, have been traced back to the middle Ages, where the defense of a community was seen as a central condition. As Poland underwent adaptations due to geo-political influences, then so did the development of PC. PE features strongly, within the intellectual intent, of all those individuals who have contributed to PC's development, as traced through this historical review. As Poland became a modern Nation, in 1918, then so did its conceptualization of PC. Although there still were strong links to militarism (1919-39), a developing rhetoric on the necessity of compulsory PE had begun. By 1946, when Poland became a Socialist nation, and commonly termed as communist, PE had been subsumed into a definitional framework of PC, which had a legal framework and Ministerial portfolio in Government. PE had also become a fixture of schooling and was part of a Primary and Secondary education curriculum thus, introducing a new generation to PC through PE.

The following section (Part B) in this literature review will examine the context of education in Poland, as this is inevitably where PE is located. As a cultural experience PC is introduced into the life of a Pole through compulsory PE lessons in the school system. Education, is a proponent of political culture, and as such is a powerful agent for achieving wider socio-cultural change. To fully understand how this 'agent' has influenced PE and, therefore PC, it is necessary to detail the most significant events and circumstances related to its context. This is because the reforms of a post-communist Government have been influenced by issues related to economic frames, European Union membership, Globalization and Democracy.

## **A CONTEXT ANALYSIS PART B: CONTEMPORARY EDUCATION IN POLAND**

### **2.15 INTRODUCTION**

The purpose of Part B in this chapter is to outline and explain the system and structure of education in Poland by reviewing the current literature on education reform, decentralization and the contemporary reasons that have influenced these events. Education reform, which includes PE, has come from over-arching reforms imposed on Poland's entire social system (Adamus-Matuszynska 2004) and it is precisely this coeval context that requires discussion so as to delineate the context of physical education in a post-communist political culture. Conceptualizing the system of education as it adapts to modern forces of political economies will exemplify the complexities and challenges that make up physical education's transitory journey as presented in a grounded theory. Part B, then, starts with a discussion on Polish culture as a way of locating its cultural traditions within a context of change. This is an important explanation in this thesis as the transitory journey of PE is underscored by Poland's complete societal shift towards a reformed socio-cultural existence (Melosik 1991, Zawadowska 1995, Adamus-Matuszynska 2004) thus necessitating an explanation of its culture and people. The changes affecting Poland's society and culture are partly influenced by what Biesta and Miedema (1997) explain as having been inescapable and not only because of political transformation but because education reform in the 20<sup>th</sup> (and now the 21<sup>st</sup>) Century was an international phenomenon. Embedding physical education within this reforming context provides this study with a unique situational context for exploring key events from the perspective of the physical educator. Poland's reforming education system requires it to take on the challenges of altering a former political culture and through its delivery consolidate changes within society so that greater congruence between new ideologies, pertaining to western-democratic models, and the individuals and institutions that will inherently carry them in social actions, is made (Elsner 2000).

The redevelopment of political culture and construction of a new cultural autonomy (Zawadowska 1995, Gomez 2003) are just two of the challenges facing educationists through reforms and these have initially been affected on a structural level through decentralization policies (Levitas and Herczynski 2001, Duczmal 2003, Cienski 2004). It is estimated that despite the reforms of the last fifteen years, there are more changes on the horizon and these are because of EU membership (Salitra 2003, Ministry of Education and Sport 2004). It is exactly this direction that dominates the future of education in tandem with the forces of globalization (Elsner 2000) and its consequent movement of the internationalization of education (Green 1999, Rhoten 2000, Gorostiaga-Derqui 2001), which provided this study with understanding of the transitory journey and this chapter, thus, locates several of the concepts that influenced the construction of categories in this grounded theory.

## 2.16 POLISH CULTURE

Poland, in the 21<sup>st</sup> Century is located between seven countries<sup>96</sup> (see Figure 2.G<sup>97</sup>). It covers 312,685 sq km in central Europe and is populated by over thirty-eight million people, 69% aged 15-64. Before World War II there were 13 million non-Poles (Shimoniak 1970, Davies 1981) living in Polish territories, the largest ethnic group amongst that figure being the Polish Jewry (Davies 1981). This facet however, was greatly altered due to Nazi policies, which annihilated its multi-cultural and ethnic situation between the years of 1940-45. Poland is now one of the most homogenous<sup>98</sup> nations in Europe (Davies 1996, Prizel 1998) with 97.6% of its population being ethnically Polish, which is unusual in the context of its history, as it was always recognised for its

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<sup>96</sup> Clockwise – Russia, Lithuania, Belarus, Ukraine, Slovakia, Czech Republic and Germany

<sup>97</sup> Figure 2.G also illustrates the location of the six AWF's in Poland

<sup>98</sup> Polish 97.6%, German 1.3%, Ukrainian 0.6%, Byelorussian 0.5% (CIA, 2001)

ethnic and cultural diversity (Shimoniak 1970, Davies 1981, Zamoyski 1990, Prizel 1998). This diversity emanated not only from the make-up of its populace, but also because of its geographical placing, whereby cultural influences came from the West and the East (Shimoniak 1970, Davies 1981, Zamoyski 1990, Riordan 1990); Shimoniak (1970) talks of Poland as 'the cultural bridge between the East and West and between Roman Catholicism and Greek Orthodoxy. This reality of being a centrally located geo-political entity impacted on Poland's historical *geography* by experiencing many years of conflict from invaders. The reasons that make up Poland's complicated socio-history are: 1) that its country exists on a geographically flat terrain, devoid of natural barriers; 2) that it is placed in the middle of two powerful countries whose cultures are polarized between eastern (Russia) and Western (Germany) traditions (Shimoniak 1970, Davies 1981, Zamoyski 1990); and 3) there are a lack of natural barriers on the North European Plain (Davies 1984). Reddaway, Penson, Halecki and Dyboski (1950) explain that

“ . . . The history of Poland has been profoundly influenced by geographical features which have not only caused many of the dramatic events of her annals, but have contributed important factors in the evolution of her social and cultural development.” (p.149)

This juxtaposition has impacted not just on Poland's history, but has influenced Europe itself (Davies 1996) for example when its sovereignty was threatened, such as it was in 1939, it was seen as a challenge on the intellectual righteousness of Europe's political community (Davies 1984) and thus led the world into World War II, which changed world politics forever (Prizel 1998). This can also be seen in the latter stages of communism in Europe, when Poland finally dismantled the political governance of communism and opted for the *unchallenged* Western model of capitalism and democracy (Henderson and Robinson 1997, Prizel 1998, Gomez 2003); it influenced the rest of Eastern Europe into an historical chain reaction that relegated Soviet communism to the past

(Henderson and Robinson 1997). It is no coincidence that Poland led the *revolution*<sup>99</sup> of dismantlement, as throughout history “Poland has served as a block between the East and West” and although “belongs to the Slavic world, her culture is of Western origin” (Shimoniak, 1970, p.87).

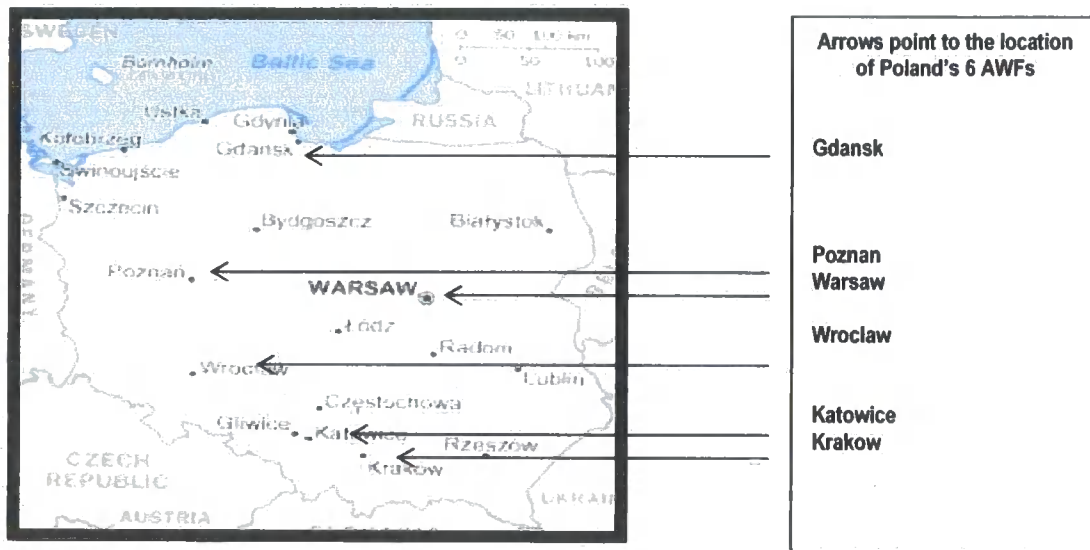


Figure 2.G Map of Poland and Location of its 6 AWF's

The most important epoch in Poland's history was between the 14<sup>th</sup> and 16<sup>th</sup> century, when the Jagiello dynasty ruled its land (Zamoyski 1990). Kazimierz Wielki was an inspired and visionary leader who foresaw the importance of culture as a determining feature of European existence (Zamoyski 1990) and who established the University of Krakow in 1364, making it only the second University in the World at that time (Davies 1981). This event led to a cultural enlightenment that was mirrored throughout other Slavonic States (Shimoniak 1970). During the partitions of 1795-1918 (see appendix B), Poland was subject to three separate educational policies,

<sup>99</sup> Although the Poles have never termed the fall of communism as a 'revolution', the Czech's in fact did so, naming it the 'Velvet Revolution' (Henderson and Robinson 1997). This term has oft been attributed to describe a complex set of circumstances that are the myriad reasons for the final drawing of the *iron curtain*, which ended the somewhat staged performance of communism in Eastern Europe.

that of the Russian, Prussian and Austrian authorities (Davies 1981, Gaj and Hądzelek 1997). As Austrian policies permitted the teaching of the Polish language and the city of Kraków was situated in this geographical region, its Univeristy<sup>100</sup> remained the centre of Polish culture (Wroczyński 1985, Zamoyski 1990). By 1919, education was compulsory for those aged between seven and fourteen. The Ministry of Education in Warsaw undertook a centralised approach to the realisation of this policy and by 1932 the National Education Act enforced by law a cultural ethos for compulsory education (Gaj and Hądzelek 1997, Małolepszy 2001). The educational system was stratified and had a dual purpose in that it catered either for *lowly* or *high society* (Shimoniak 1970). Poland's society has always been preoccupied with a class system (Shimoniak 1970, Zamoyski 1990, Davies 1981, Zawodowska 1995) and this stratification in education was not intended for the purpose of creating social mobility, rather it was used as a method of ensuring a status quo (Shimoniak 1970). This situation exacerbated high levels of illiteracy amongst peasants<sup>101</sup> and the poor. Shimoniak (1970) claims that

“ . . . For economic, political and social reasons it was difficult for working class and peasant children to obtain admittance to secondary and higher schools. They constituted fewer than 14 per cent (sic) of all secondary school pupils, and the percentage was even lower in institutions of higher education.” (p. 307)

It is important to emphasize this point for two reasons: 1) education was seen as a privilege for an elite group in society, hence, instilling a cultural meaning synonymous with power; and 2) when a communist government was established after World War II, education and in particular, higher education, continued to be seen as a preserve of a cultural elite, with the deliberate inclusion of political ideology into curricula thus ensuring that this elite group would be educated into

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<sup>100</sup> Jagiellon Univeristy

<sup>101</sup> Peasantry is a term that continues to be used in Poland and is not a derogatory term rather it is a cultural term that pertains to the identity of Poland's rural Population (Zamoyski 1990).

supporting the politics of communism and thus perpetuate a dual system of *class* (Shimoniak 1970, Staniszkis 1991, Zawodowska 1995). Ironically, communism was supposed to establish all individuals as equals and instil an awareness and responsibility that reflected the individual within the larger community as a way of creating social coherence (Melosik 1991, Zawodowska 1995, Krawczyk 1996). The system however, continued to support ingrained beliefs of social division based on *class, privilege and superiority*, where communism was like a *new-intelligentsia*, but now known as the *nomenklatura*, thus becoming the new political elite (Zawodowska 1995, Prizel 1998).

## 2.17 THE EDUCATION SYSTEM IN POLAND

Since 1773, through the work of the Komisja Edukacji Narodowej (KEN)<sup>102</sup> Poland had been the first country in Europe to start a debate on making education accessible to children from all social backgrounds (Zamoyski 1990, Gaj and Hądzelek 1997). The power that the Church had yielded over education had been lessened and pioneering education reforms had been instigated (Shimoniak 1970); which were to be replicated in the rest of Europe (Wroczyński 1985). After the partitioning of Poland (see appendix B, The Partitions) the development of education became inconsistent and uncoordinated (Zamoyski 1990); education for Poles was also subsumed into the socio-political structures of the occupying country (Davies 1984). This amounted to the subjugation of Polish culture and in particular, the intent of Russia and Prussia was to eradicate the identity of Polish society (Davies 1981, Zamoyski 1990, Gaj and Hądzelek 1997); cultural conditions in Austria, however, were slightly different as Polish society was permitted to converse in its own language and in fact some cultural activity, such as the creation of Sokół, occurred on Austro-Hungarian territories (Wroczyński 1985). Poland was reinstated as a nation in 1919 (Davies 1981, Davies 1984, Zamoyski 1990, Henderson and Robinson 1997, Prizel 1998) and at

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<sup>102</sup> National Education Board

the time had no standardised education system (Gaj and Hądzelek 1997). This was complicated by the former education systems of its oppressors, which meant that Poland had language issues, particularly in the former territories of Russia and Prussia (as speaking Polish was illegal in those partitioned lands), a lack of qualified teachers, a low number of schools, a low level of education amongst its populace, poor access to schools, and the devastations from World War I (Shimoniak 1970, Wroczyński 1971). The overwhelming task of redeveloping Poland's education system was then glaringly obvious: the education of teachers, curriculum redevelopment, building of schools and political advance through education were initiated (Gaj and Hądzelek 1997). It was a devastating set back that saw this work undermined and destroyed by the events of World War II, which commenced with Hitler's Germany invading Poland on 1<sup>st</sup> September 1931 (Skrzypek 1960). During this period many educationists were murdered as part of the 'Germanization' of Poland (Wroczyński 1985, Gaj and Hądzelek 1997). Despite the horrors of occupation and war, an underground education system did function, which included universities and was associated with the resistance (Zamoyski 1990). After the war the re-creation of Poland was soured by Soviet intervention that led to the establishing of a communist government (Satniszki 1991, Henderson and Robinson 1997, Prizel 1998). Polish education was dominated by political factors (Scott 2002, Salitra 2003, Ministry of National Education and Sport 2004) and the authoritarian control of its development led to a system of education that despite increasing access to education to large social groups was used to develop a socialist political culture (Krawczyk 1995, Zawodowska 1995, Gomez 2003). The socialist system of education had been subordinated to a communist economic framework, which led to the development of negative characteristics, such as the favouring of vocational training of higher education, as this produced a competent workforce (Zawodowska 1995, Duczmal 2003).

The Polish United Workers' Party (PZPR<sup>103</sup>) was responsible for planning the entire economy (Shimoniak 1970). The work of this organisation in the 1950's included restructuring schooling opportunities and, as a result, led to successful improvements in working-class and peasants' children attending primary schools (Skrzypek 1960). This led to some improvements in levels of literacy. The aims of the PZPR were to reduce dependency on the *bourgeoisie*, which incidentally was also weakened by the events of World War II (Shimoniak 1970). The development of a Marxist political culture, which included propagation of ideology through education, was central to the PZPR's plan (Shimoniak 1970, Massialas 1977, Melosik 1991). During the 1960's, in stark contrast to the goals of educating children, the government restricted university enrolment because it felt that the country did not need to educate the masses for a few positions at the *commanding heights* of the economy (Zawodowska 1995, Levitas and Herczynski 2001, Scott 2002). This policy [sic] resulted in wide differences of participation in education between rural and urban regions, with rural populations being under-represented in education achievement<sup>104</sup> (Zawodowski 1995, Salitra 2003). This situation was compounded by the unaccountable system of finance expenditure on schooling, which was devoid of a presiding policy leading to equitable distribution of funds (Levitas and Herczynski 2001). The reality was that -

“ . . . Every once in a while however, a new reform initiative, or the changing fortunes of particular players would generate a more radical shift in the allocation of resources. As a result, per pupil expenditure came to vary dramatically across schools of different types and schools of the same types in different areas of the country.”(Levitas and Herczynski 2001, p.3)

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<sup>103</sup> Polski Związek Partii Robotniczej

<sup>104</sup> 5% of University degrees were awarded to individuals from a rural background (Levitas and Herczynski 2001)

In the 1980's Solidarity<sup>105</sup> initiated dialogue that criticised education policy and demanded a set of conditions that insisted on increased public expenditure and assertion that low-wages had led to *negative selection* in the profession of teaching (Zawodowska 1995, Levitas and Herczynski 2001, Cieski 2004). Political ideology as a strong theme running through curricula was inextricably linked to this decline in teaching standards (Krawczyk 1995). Solidarity demanded that curricula and school-governance be taken away from a centralised administration. Although this instigated a dialogue within Polish society necessary for the slow move towards democracy, it failed to convince the authorities at the time (Zawodowska 1995). While this relative failure was temporarily fixed, it was the antecedent rhetoric that led to Solidarity affecting these principles after the fall of communism (Zawodowska 1995, Prizel 1998, Levitas and Herczynski 2001, Duczmal 2003). The rationale for local government being responsible for the schooling system was a method of breaking up the authoritarian controls of a former communist government. This reasoning hence, underpins reform and cannot be understated in terms of the impact it would have on the overall transitory period in education (Scott 2002, Gomez 2003).

The challenge of education since the early 1990's has, therefore, been to restructure<sup>106</sup> (Zawodowska 1995, Gomez Marga 2002, 2003, Adamus-Matuszynska 2004). Zawadowska (1995) describes this restructuring in Poland as being connected to the overall changes in society and education was part of this all-embracing societal shift. She goes on to note that

“ . . . Educational systems are always the most immune to change and the most conservative. And so is ours [Poland's]. Some changes were made right away, *e.g.*, a new approach to history based on facts and sources rather than on ideology. Other *ad hoc* changes were rather superficial and cosmetic. At the same time, intensive work was undertaken for planning

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<sup>105</sup> Solidarność - Workers Union that challenged the political systems of communism

<sup>106</sup> See Appendic C for a diagram of the structure of education in Poland's reformed system

general reform of the whole educational system. This reflected sweeping change of new pedagogical ideas, and a new educational philosophy.”  
(Zawodowska 1995, p.39)

The reasons for this were that it was a response to economic realities in that a new generation was to live in a new society and a new economy and so required a new set of conditions that education was charged with achieving (Zawodowska 1995, Green 1999, Rhoten 2000). The introduction of a market economy affected education in complicated ways such as greater competition between Higher Education Institutions and at the school level, devolved and accountable budgets (Levitas and Herczynski 2001, Scott 2002, Ducmal 2003, Adamus-Matuszynska 2004); also decentralisation and democracy recalibrated the external forces that influenced public and private systems in Poland (McGinn and Street 1986, Rhoten 2000). The consequences of this are that job competitiveness and the threat of unemployment have amplified the belief that a strong education system and access to higher education is now a pre-requisite for the new generation to ensure access to good employment (Salitra 2003, Sedgwick et al 2003). It has placed increased demand on universities and the number of places offered for study (Levitas and Herczynski 2001); this is also exacerbated by the constitution that state education will be free from cost (Constitution of Poland 2000). This increased demand has impacted on curricula development in association with the structural changes affected by reform; the same has occurred in primary and secondary education (Levitas and Herczynski 2001, Duczmal 2003). Curricula and redeveloped systems and structures are seen as the strategies for political, cultural and economic redevelopment in all areas of education: primary, secondary, higher education and vocational training (Levitas and Herczynski 2001, Scott 2002, Duczmal 2003, Gomez 2003). Additionally, the ascension to full membership of the European Union has led to vocational training and higher education being placed on an equal footing with each other (Zawodowska 1995, Elsner 2000, Adamus-Matuszynska 2004).

Decentralisation has seen the micro-management of education pass from Central Government to democratically elected local governments (McGinn and Street 1986, Gorostiaga-Derqui 2002, Gomez 2003). This means that financial models assisting management of schools and Higher Education Institutions (HEI's) have exaggerated the transitional gap that is to be made (Zawodowska 1995, Adamus-Matuszynska 2004). Local governance of education is an unknown quantity in the Polish education system and it is this over-laying structure that may compound the views of educators (Rhoten 2000) as curricula, funding, pedagogical autonomy, political redevelopment and education management lead to a transitional context (Melosik 1991, Zawodowska 1995, Levitas and Herczynski 2001). The responsibility and simultaneous accountability for education development will ultimately lay with local governments (The Institute of Public Affairs 2004) and the setting of a teacher's pay and contract, apportioning of funds to schools, monitoring of performance and structure of management are yet unclear (Salitra 2003). As continued redevelopment has been forecasted as being necessary for socio-economic success, the changes to teacher roles and education are unfinished (Levitas and Herczynski 2001, Adamus-Matuszynska 2004, Cienski 2004). This uncertainty is then a backdrop for the current system of education. To summarise the events of education reforms and explain how they affect the education environment, Table 2.4, presents a taxonomy of factors and outcomes of education reform since 1989. By doing so it captures the outcomes of reforms and the impact that they have had in the educational context. Education reforms were intended to shift Poland's society from one political culture to another and hence, the decentralization of political structure has transferred itself to all public services.

**Table 2.3 Taxonomy of Factors and Outcomes of Education Reform Since 1989**

<b>Factors Influencing Decisions for Reforms</b>	Low % of people having completed secondary education (30%)	Low % completing University education (10%)	Low level of teacher qualifications	Cuts to the education budget (relative to the levels of 1989)
<b>Outcome in Reforms</b>	<p>Re-structure schooling system. Primary education to start at six years of age (previously 7) and enlarge the school system by creating high-schools.</p> <p>Redevelop outdated curriculum so that it deals with practical skills as opposed to the tradition of teaching children by rote and highly abstract knowledge.</p> <p>Address low education participation from lower socio-economic groups (at all levels of education) by raising mandatory schooling to age 18.</p>	<p>Devolve curriculum powers to Universities.</p> <p>Redevelop vocational education to place it on a par with higher education.</p> <p>Encourage creation of private Universities and colleges to deal with public demand.</p> <p>Free education from kindergarten to University level (built into constitution).</p>	<p>Introduce merit system for rewarding teachers according to rank and level of experience.</p> <p>Audit Universities providing teacher training.</p> <p>Introduce the concept of life-long learning into Polish culture.</p>	<p>Political drive to alter Poland's economic framework towards a market economy and support education budget as situation improves.</p> <p>Full commitment to EU membership as a way of developing better economic standards.</p>

It is, as a result, clear that the last fifteen years of reform are moving education towards a more open system with -

“A national core curriculum [being] developed, focusing on Christian and humanitarian values such as responsibility, respect for the cultural heritage, etc. . . . Recent changes, however, also put emphasis on the need for economic development, focusing on participation in the European market economy.” (Salitra, 2003, p.101)

These new challenges of open-government and financial accountability emphasize the development of a renewed profession within education, one that should be able to support the sweeping change of new pedagogical ideas and educational philosophy (Melosik 1991, Zawadowska 1995, Scott 2002). New pedagogies, consequently, will prove themselves to be the drivers of change necessary for a transiting society, which would require a general education of the younger generation to prepare them for the new challenges of post-communism (Gomez 2003) that include a more globalized culture (Elsner 2000, Rhoten 2000).

## **2.18 EDUCATION REFORM AND POLITICAL REDEVELOPMENT**

Poland's challenges are understood to be vast (Zawadowska 1995, Henderson and Roberston 1997, Prizel 1998, McKenzie et al 2002) and when social structures undergo transformation as a consequence of political redevelopment then change is likely to be widespread (Shimoniak 1970, Melosik 1991, Krawczyk 1996, Mebrahtu et al 2000, and Grabowski 2001a). Woodbury and Gess-Newsome (2002, p.766) as a way of explaining this suggest that "clearly, national reform agendas for curriculum, instruction and school improvement are influenced by issues of structure and culture". As physical education is a division of compulsory education, reforms to it would be inevitable because of the transfer of political ideology from authoritarian to democratic structures and practices occurring throughout Poland (Henderson and Robinson 1997). Reviewing the area of literature in educational reform (as a proponent of political re-development) would provide significant scope for ascertaining problems of enquiry and establish some certainty about the challenges ahead. Coleman (1965) explains that compulsory State education performs the integral functions of political systems and Massialas (1977) furthers this view by isolating its three constituents. "(a) The socialization of children and youth into the political culture, (b) the selection, recruitment, and training of political elites, and (c) the political integration or nation building of groups of people" (p.274).

In the case of Poland's past, this assertion can be seen to take on greater resonance particularly as Krawczyk (1996) describes the socialist government of Poland as having had direct control of its entire *intrasocietal environment*<sup>107</sup>; and if that was so then education would have been explicitly controlled through political structure. In its most palpable manifestation, Marxist-communist Poland was accustomed to socialist-citizenship being instilled through the processes of education; as this was the system of its politics; where values were dictatorially allocated to the social environment (Shimoniak 1970). "Domination of communist authorities leading to the lack of a civil society" is how Adamus-Matuszynska (2004, p.2) sees its consequences.

Massialas (1977) explains that a civil society is vital for political systems to survive as the political and intellectual classes make legitimate challenges on any existing political culture. The landscape of Poland's civil society was altered after one-sixth of its population was killed (Davies 1984). Its political and intellectual elite were either murdered or exiled to foreign territories, so, legitimate challenges to communism were not as vociferous as they could have been. This provides a backdrop for understanding the communist years in Poland's education system. For example, this had a direct impact on the power that communist governance wielded over Polish society, in that divisions among different ethnic, regional and parochial groups, which are necessary for resisting political change (Massialas 1977) could not inhibit the new nation-building strategy as Poland now had one of the most homogenous populations in the World (Prizel 1998). This was perhaps a contributing factor to Polish society's inability to thwart the advances of communism (Davies 2003) as the allocation of values and resources could not be resisted successfully; and it was only a matter of time before legitimization of the communist political system was established as the order-maintaining system. This phase in

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<sup>107</sup> This includes the ecological, biological, personality, social, cultural, economic, demographic, and other systems or sub-systems (and or sub-worlds).

Poland's educational history is then the system that precedes the 1989 events that led to the commencement of transition. Education as a proponent of political re-development, therefore, would once again become a framework for launching cultural reforms this time emulating western-models of democracy. Some problems associated with this particular context, however, were that cultural autonomy had been weakened during fifty years of Marxist political structure and culture (Krawczyk 1996, Wentel 1999, Duczmal 2003). In understanding why this is important a quotation from Silva (1980) describes how cultural autonomy in society should manifest itself:

"It fully and authentically expresses the past, present, and future aspirations of its participants. The means of modern cultural autonomy are many. They include all the media forms that circulate ideas: books, movies, newspapers, periodicals, paintings, and so forth. Education generally plays a central role in the processes of cultural autonomy since it influences its students' attitudes toward all modes of idea dissemination." (p.63)

The complications that may arise out of this situation for educationists in post-communist Poland meant that as cultural gate-keepers, (that is, in reference to the current teachers and students in higher education institutions) they would be charged with the new political systems' strategy for cultural change. It is precisely here that some problems arise; for example, the area of PC pertaining to physical education and those charged with the cultural responsibility to affect change may not be equipped with pedagogical strategies and or educational philosophies to undertake the challenge (Zawadowska 1995). The critical interaction would then occur between the old and new teachers as one generation (the former communist educated teachers) work along-side the other (the post-communist educated teachers). Gomez (2003) expands on this problem by describing that the ambiguity of transition in education in that

“ . . . Unlike political transition, educational transition is not easy to delimit. It may be relatively straightforward to identify the process of political transition as the primary catalyst, but to determine a finite start and end to the educational transition process is somewhat more difficult.” (p.7)

Within this context education reforms are sometimes resisted by teachers (even at the best of times) because of the time-investment necessary to implement them accurately (Gitlin and Margonis 1995); in this instance however, conflicting professional and educational experiences from pre-democracy and post-communist generations would produce conflict between teachers as identified in this study. Some of this conflict may manifest itself through cultural identity in teaching practice and its associated dissemination of ideas and thus, problematize the role of the teacher within this new climate of perceived autonomy; it is supposed because education reform that outlines compulsory change and then includes the term *autonomy* (particularly in curricula planning as has occurred in the case of PE in Poland) is somewhat paradoxical (Giles 1998), for example, the sheer scale of change meant that adaptations would require good-will and commitment, as they were in fact unequivocally compulsory (Zawodowska 1995, Tucker 2000, Gomez 2003). A bit of the process of adaptation was linked to the deconstruction of central government in order to create clearer pathways for the realization of accountability. This process of decentralization is the structural mechanism that has affected Polish society and to understand its magnitude, it requires an explanation.

## **2.19 DECENTRALIZATION**

Decentralization is the process of shifting the power relationship between the State and the individual from one where central government holds all the power to one of “devolving power and authority from large to small units of governance” (McGinn and Street, 1986, p.471). It is a

concept that assumes that democratization is the central process within this event (Grenn 1999, Gorostiaga-Derqui 2001, Linde 2003) and that can be evidenced in a given social structure such as education (Harris-Monchar 1981). It is also a political technique akin with making individualism explicit and hence, one of its defining features is to place greater personal responsibility on to citizens (Linde 2003). This perspective, however, means that it would be complicated to review the affects of decentralization on a major structure such as education (Scott 2002), as it would lead to assumptions that central governments are colossal entities with the relationship between State and individuals requiring simplistic monographs (McGinn and Street 1986). Poland's past, nonetheless, literally functioned in a simple but oppressive system between State and the Individual (Krawczyk 1996, Henderson and Robinson, Prizel, 1998, Ministry of Education and Sport 2004); Salitra (2003) explains that Poland's former education system was easy to understand by all those who were involved in it because it was

\*a centralised state-run monopoly; [that had] insufficient permeability of the system; a rigidly ideological approach to instruction and upbringing; standardisation of both the curriculum and teaching goals; a preference for authoritarian methods; a disjunction between the world of school and its social context; and an encyclopaedic approach." (p.102)

This centralized system that led to a simple relationship between State and education providers was, therefore, a strong reality of the Polish education system; reforms to it are, hence, complicated because they are creating a system of units for the purpose of decentralization with all its affiliations, such as democracy, accountability, compliance with economic cadences and public expectations of a reformed system (Levitas and Herczynski 2001, Adamus-Matuszynska 2004), which will require new ways of exploring Poland's educational context. Rhoten (2000, p. 602-603) describes this as the new democratic paradigm of the 1990's that occurred because of a ". . . New wave of decentralization . . . With the first [as] administrative and fiscal decentralization, the rationale for

decentralization was primarily one of cost efficiency. By contrast, with the second wave of social and political decentralization, the rationale became more about the redistribution of political power.”

Both of these *waves* were requisite if Poland was to aspire towards EU membership; Marga (2002), a Romanian academic and politician central to education reforms in his own country, was of the view that without decentralization and, consequently, substantive and costly reforms in all central and eastern European countries would bring upon them “indefinite delay . . . to join in and benefit from the economic and social developments of the European community” (p.135). This was a situation that Poland’s new government would not want to be faced with (Melosik 1991) as its ambitions were to become a functional member of Europe (Prizel 1998) capable of running a relevant economy (Levitas and Herczynski 2001). Where governments have used centralization as a method of reinforcing positions of power, the natural response is to formulate policies that benefit society accordingly with the vision of that society; this requires a systematic engagement with the development of structures through decentralization (Rhoten 2000, Levitas and Herczynski 2001). Despite the paradox – that it requires central government intervention to affect decentralization (Giles 1998, Apple 2001) – it is still a deliberate move towards instilling degrees of autonomy amongst the systems that organise society (Chapman 2000). This invariably leads to cultural autonomy whereby institutions responsible for large chunks of society’s cultural reproductions are charged with providing and responding to the needs of local and regional communities (Silva 1980). The hegemonic power during the process of decentralization does not make shifts in leaps and bounds as McGinn and Street (1986) note in their research, in which they suggest, “the real reason for decentralization is not to distribute power but to maintain central effectiveness” (p.472). Given this view, the effects of decentralization may not be about reforming systems for devolvement of power but for the purpose of introducing a new level of governance to

manage local problems on a needs basis, which reports back to a central government and adheres to strict economic and political frameworks, which was a necessary goal for Poland (Zawodowska 1995, Levitas and Herczynski 2001). In terms of this thesis the research questions that emanate from decentralization are ones that pertain to new levels of autonomy that devolvement of power have created (Salitra 2003). Teachers that have been educated and gained professional experience during a system of no cultural autonomy may struggle with the concepts of independence.

Freedom of speech, independence of central government to make decisions on a micro-level in schools and Universities and the new restricting force of individual accountability would be clear problems originating from decentralisation; particularly as in the past schools and, by association, teachers “emphasised pupils’ collective identity [and] neglected the task of cultivating students’ individuality” (Salitra, 2003, p.102). The new management of schools would thus be subject to government audit (both locally and nationally), with the additional complications of needing to respond to the local dignitaries associated with a system of school governing and recent personal freedoms of parents who in the past saw schools and teachers as associates of authority (Zawodowska 1995) and who in a society that functions within a free-market economy would make stronger demands on local and national educators (Levitas and Herczynski 2001); all of which exaggerates the prospect of individuality as a proponent of decentralisation. This is inevitably the outcome of moving from a pluralistic to an individualistic society (Giddens 2002), in that individuals will expect that the opportunity for nationally funded resources (from taxation) are accessible at the point of need, with little regard for overall funding realities (Zawodowska 1995). The quality of public services through choice of services and related standards will, then, create a demanding clientele (Levitas and Herczynski 2001, Duczmal 2003) and the ideology of capitalism and the pervasive customer-provider relationship will present itself in education (Corrales 1998). Teacher involvement in the change process is, for that reason, vital for education reform to transit

from one political spectrum to another. Understanding the force of political culture on education reform requires some clarification and for apposite contextualization should be aligned with teacher involvement in the process.

## **2.20 EDUCATION REFORM AS A PROPONENT OF CHANGE AND TEACHER INVOLVEMENT IN CHANGE**

It has been established that education reform serves to address the macro aims of societies through cultural, demographic, political (and ideological) and economic frameworks (Paulston 1977, Apple 1978, Harris-Monchar 1981, Muncey and McQuillan 1993, Gitlin and Margonis 1995, Rhoten 2000, Gomez 2003). Merrit and Coombs (1977) encapsulate this idea by locating it within a demographic structure and relating child population growth and decline with education reform. Contained within this reality of child numbers affecting education they go on to explain that economic cycles are linked with reforming cycles and that government revenue is particularly sensitised by such pressures and education reform is, therefore, subsumed into the forces that economic frames impose on delivering education. This is complicated further because

“ . . . Shifts in social values are reflected in the attitudes of teachers and parents toward educational issues. The enthusiasms and deportment of pupils may change from one historical period to the next, reflecting changes in childrearing patterns within the family . . . it is no less surprising that demands for change and institutional efforts to meet those demands have generated a host of reforms in the educational establishment of virtually every nation” (Merrit and Coombs, 1977, p.248)

From this argument it means that Poland's reforming context is not just an event linked to reforming a political past but one that requires it to adjust its system so that it corresponds with demographic realities (Ciensji 2004). It is no longer necessary to pretend that education reform has nothing to do with politics with regular government reforms being implemented as a way of

redeveloping political frameworks in a given society (Shimoniak 1970, Massialas, 1977, Merritt and Coombs 1977, McGinn and Street 1986, Rhoten 2000), particularly as modern politics are inextricably linked to economic frames (Gomez 2003). Tucker (2000), referring to post-communist education, asserts this by emphasizing that “education plays an important role in the emergence and consolidation of any political and social systems” (p.88). So the politicization of education will invariably filter down to the micro-level where schools and teachers will be the proponents of political reforms by creating a participatory society with the conditions of democracy (Melosik 1991). Teacher involvement during the change phase of political reforms, however, can frequently be overlooked as interest in curricula implementation from this group is often at the micro level and for that reason, when characterizing teachers in the throes of reform, can emphasize a teacher’s *presentist, conservative and individualistic* centred approach to engaging with reform. Gitlin and Margonis (1977) go on to explain this argument

“ . . . Concentrating on short term planning in their classrooms where their energies are more likely to make a difference (presentism); they avoid discussing, thinking about or committing themselves to more fundamental changes that might affect the context of what they do or raise substantial questions about how they teach (conservatism); and they shy away from collaboration with colleagues and from the feared judgements and criticism that may come with that (individualism). Like caged birds, teachers within the culture of individualism, it seems, stick with what they know. They are reluctant to fly free, even when given the opportunity.” (p.220-221)

This absence of engaging teachers in reforms has led to a history of resistance from them (Sarason 1971, Lingard et al 2003). Politically motivated reforms, despite being well-intentioned, overlook the issues connected with implementation (Salitra 2003) and hence, commitment from teachers is often complicated by their inability to understand why it is that change must occur (Gitlin and Margonis 1995). This is a common problem not only in education, but across the spectrum of industries. Brackenridge et al (2002, p.24) explain that “change is the subject of intensive

theorisation and writing in academe [and is] described as something that someone else thinks would be good for you: in reality this is often an employer or government attempting to realise strategic goals". The change agenda in education reform can be easily hampered through either resistance or the refusal of teachers to engage with it (Dondero 1997). The need to understand reforms and, so, political influence on them, and adopt new roles and attitudes before discarding old ones through an external support system is a distinct orientation identified by education researchers such as Huberman and Miles (1984). An alternative orientation, as postulated by Sarason (1971), is that the teaching environment is precipitated by an organisational culture that will either facilitate or inhibit the change agenda central to reform and Dondero (1997) argues that this is essential to understanding teacher autonomy in the context of reform. Gitlin and Margonis (1995) embrace both these orientations to explain that "reformers mistakenly believe they could change the curriculum while leaving the school culture intact" (p.379). This invariably leads to the isolation of teachers who would struggle with the incongruence of applying new directions simultaneously to rejecting the skills gained through former processes, which had led to the construction of a large professional experiential pool (Sarason, 1971). The challenge in research, then, is to understand the complex system that education operates within that includes societal subsystems, political intervention (with associated ideologies and cultures) and the sub-world systems of the one-case scenario school (Merritt and Coombs 1977). Johnson and Scholes (1999) identify a paradigm that explains the nature of change and its relative outcomes (see Figure 2.H) that introduces the macro force of government with its affiliated components of politics by distinguishing between proactive and reactive approaches to reform; which place Poland's attempts in the reactive section. A parallel can be seen within the model, in that, it depicts resistance and transformational change, given the manner that educational policy and curriculum change normally take; through a top-down approach and made at the highest level through "educational planners, policy makers, administrators, and the

like, who constantly make assumptions about reforms [and] may be most concerned with political and technical considerations” (Paulston, 1977, p.370).

### Nature of Change

Government Role	Incremental Change	Transformational Change
Proactive	Tuning	Planned Transformational
Reactive	Adaptation	Forced Transformational

Figure 2.H Nature of Change

Adapted Johnson and Scholes, 1999

In Sparkes’ Branstown Study (1987), he identified “competing definitions of both subject paradigm and pedagogy” (p.i) resultant from a change agenda as part of a *teacher initiated curriculum innovation*. This he describes as leading to “several micro-political strategies [being] constructed to cope with the pressure of change, which legitimised a dislocation between the classroom and educational contexts of the school” (Sparkes 1987, p.i). Non-engagement in the change agenda as a micro-political reaction is common when it fails to address the “multiple realities of people, who are the main participants in implementing change” (Fullan 1991, p.95). Transitional periods are considered to contain pockets of forces opposed to change. These restraining forces are not necessarily intentional and because of a lack of communication between policy makers and those charged with implementing it, may even be an inbuilt reaction to stem the chaos of reform in order to create a stable environment for teaching (Levin 1978).

In the review of literature on teachers’ views regarding educational reform, it has also been put forward that from a teacher perspective: “. . . Engagement of teachers and others is limited, in part, because reforms do not consider how these participants understand their role, relations with others, and even the meaning of change itself”(Gitlin and Margonis, 1995, p.377). This is

supported by Košiba's (2004) study of teachers (including physical educators) (n=350) to examine their identification with job role in the context of sweeping educational reforms in Poland. Over 70% of the teachers she surveyed saw educational reforms as having a negative (43.9%) or no change (30.6%) influence on attitudes towards the role of teaching and the more general aspects on teacher expectations. It also identified *relations with others* as a problematic facet within the overall culture of change in addition citing school leadership as an exacerbating factor during implementation of reforms. This leadership aspect is a pertinent theme that runs through theories on change in culture due to transformations or reforms where the communication abilities and the prior engagement of staff before change are seen as relative variables for smooth transitional periods (Pettigrew 1979, Kotter 1980, Watson 1994, Johnson and Scholes 1999, Hayes 2002). Huberman and Miles (1984), however, take issue with teachers' motivation as an inhibitor of change and use this concept as a lens for interpreting teacher resistance as being inextricably linked to teacher culture whereby engagement is problematic due to institutional declines in motivation. Gitlin and Margonis (1995) support this view by describing teachers as being

“ . . . Unwilling to expend consistently high effort to further the reform [and who] focus instead on reducing their workload within the current school context . . . they are reluctant to support fundamental change or raise substantive questions about what they do in the classroom.” (p.386)

Reforming any subsystem within society's structure, “denotes simply an attempt to change things for the better” (Merritt and Coombs 1977, p.251); this raises questions about teachers' inability to engage with the processes of reform. In particular when reforms are about correcting the abuses of a political culture it is difficult to understand why teachers resist. Teacher motivation, which is often perceived to be “a given or constant” (Moreira et al 2002, p.849) is cited as the reason for exacerbating commitment with reforms and Košiba (2004) concurs with this view in her study of

Poland's teachers. In a study by Menon and Christou (2002) a difference in attitude between future teachers and in-service teachers was detected and it was concluded that experience in teaching led to disengagement with higher levels of commitment to the job. This factor is seen as causing "concern for educational policy-makers (Menon and Christou, 2002, p.97) as it raises questions about teachers' intensity of involvement without reforms let alone the added demands emanating from a change agenda. In the case of Poland's education reform and despite dissatisfaction and or feelings of disengagement from the changes occurring at the micro-level of education, Košiba (2004) asked these teachers<sup>108</sup> if they would select the same profession (teaching) again if they were given the choice - over half (59%) said they would. Some problems that may arise for teachers in Poland is that the majority of them are specialized by their initial education in teaching of only one subject; for example teachers of physical education undergo study of that subject for 4-5 years (Jaworski 1998). This situation emerged because in the past academic institutions, mostly universities, which were unable to provide diversified teacher education refused to work with other departments or institutions and this has resulted in a situation where teachers are not able to teach more than one school subject such as geography and physical education or mathematics and physics (Zawodowska 1995). The problem arose during the communist system when cooperation between two departments at the same university was deemed as too difficult and time-consuming as they were usually located a long way apart and would also give rise to scrutiny from academics in other disciplines (Zawodowska 1995). The separation of subjects and single-subject teachers is not, however, what the new economic framework allows for (Salitra 2003). It is clear that reforms to teacher education will eventually lead to rationalizations within higher education (Scott 2002) and that changes to the structure of education will continue

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<sup>108</sup> A comparative study between teachers of physical education and 'other' subjects (Košiba 2004)

for some time still (Levitas and Herczynski 2001) thus affecting the involvement of teachers for a long time yet (Zawodowska 1995).

## 2.21 GLOBALIZATION AND THE EUROPEAN UNION

In addition to political change, associated reforms of public services and the introduction of free markets in Poland, globalization became an extra dimension that formed part of its transition (Elsner 2000, Levitas and Herczynski 2001, Gomez 2003). Education systems are in a constant state of change all around the globe, particularly in the socio-economic context, which has been caused by the impact of globalization (Giddens 1994, Mok 2000, Gorostiaga-Derqui 2001).

Rhoten (2000) cites an unofficial paper written by the World Bank, which in 1989 revealed the organization's 'unofficial official' position on education policy in light of changing economic frames.

“The World Bank is generally sympathetic to [education] decentralization efforts [undertaken by countries because] central governments now find themselves facing severe fiscal constraints to continued expansion of educational opportunities, . . . shifting part of the burden for support of primary and secondary education to sub-national units of government, to community and voluntary organizations, and to parents has become the increasingly attractive alternative in the education sector.” (p.602)

The sheer force of the global economy played an important role in the deconstruction of communist nations in Eastern Europe (Marga 2002, Scott 2002). Capitalism had evolved over the last twenty years and new global infrastructures have been created with the added facet of information technology playing an increasingly important role in a global economy (Giddens 2002), thus becoming instrumental in the decentralization of governments across the world as they adopted neo-liberal policies (Giddens 1994, Green 1999, Rhoten 2000). Globalization is a complex process of economic transactions and worldwide telecommunications (Hallak 2000, Mebrahtu et al 2000) and Giddens (2002) believes that its force is reorganizing the way societies and communities

live thus leading to hybridist cultural styles. Mok (2000, p.638) supports this argument by saying “that the impact of globalization is related not only to economic restructuring but also to cultural and ideological spheres”, all of which will have a particular influence on education because of its inherent link to culture (Mebrahtu et al 2000). Green (1999) supposes that in light of this

“ . . . National education systems could no longer perform their historic functions of promoting national cultures and identities and generating the human capital for national economies; governments would lose control over their education systems and these would increasingly converge on global or regional norms.” (p.55)

Globalization is essentially an economic phenomenon and Poland’s move to a free-market economy meant that it had little choice but to respond to this force (Levitas and Herczynski 2001). In addition to this, Reichter and Wachter (2000) in a study that examined the cultural impact of globalization on education reported that “. . . International student flows are being marketed, knowledge, in the form of skilled human resources, science, technology, research products, has become a vital resource for industrialized countries” (p.32). National and global considerations then became a central aim of Poland’s reforming political system and this was evident with its preoccupation to ensure that emergent education policy was aligned with European Union (EU) legality, as a demonstration of future eligibility for EU membership (The Committee for European Integration 1997, Levitas and Herczynski 2001, Elsner 2000), which it gained in May 2004. Green (1999) argues that although the impact on education from globalization is yet unknown, its most possible outcome is that educational policies across the globe will allude to greater comparability, thus a convergence of education and curricula. Reichter and Watcher (2000) agree with this and say that the curriculum in Europe is heading towards *internationalisation*; and in the case of Poland and its allusion to EU legality this has been true (Elsner 2000, Scott 2002). Neo-liberal economic frameworks will, as a result, have a multi-dimensional effect and Hallak (2000) explains that these

can be narrowed down to three dimensions of globalization in terms of impact on education. These dimensions are: 1) the economic and financial dimension; 2) the scientific and technological dimension; and 3) the interdependence of the dimensions of globalization. This means that the outcome from globalization on governments is that they will cede control of their economies (Rhoten 2000). For example, within this context, education will become costly due to the changing demands of work skills that requires technological literacy in its work-force, the soaring cost of capital projects, which increasingly rely on public-private partnerships, and the narrowing of financial powers as financial institutions start to have access to a world economy 24 hours a day (Green 1999, Hallak 2000). Rokowski (2002) deliberately links the World Trade Organisation's (WTO) General Agreement on Trade in Services (GATS) with this potential impact.

"Education services will be progressively commercialised, privatised and capitalised. This is what globalisation means for education, and this is the WTO's education agenda as pursued through the GATS, aided and abetted by Governments and promoted by corporate lobbying machines." (p.2)

In the case of Poland, Cienski (2004) reports that 827 private Universities have opened since 1989 explaining that this is because "in communist times most of the country's 128 universities and colleges were public and free, but [nowadays] demand far outstrips the number of places" (p.12). This has been one of the outcomes of the new economic framework, where an undergraduate degree has become requisite for the new generation (Zawodowska 1995, Levitas and Herczynski 2001, Gomez 2003). In the past the communist government was reluctant to spend money on universities as it was at odds with socialist ideology (Krawczyk 1995) and mainly because it benefited the urban elite (Cienski 2004), which again conflicted with Marxist principles (Zawodowska 1995) thus concentrating heavily on vocational education (Salitra 2003). The new economic framework however has permitted growth in private education (Duczmal 2003) and nearly half of Poland's 500,000 students of higher education now attend private universities



(Cienski 2004). This situation has a temporary advantage in Poland which had a low participatory rate in higher education (Zawodowska 1995), and which was not prepared for the challenges of European integration (Levitas and Herczynski 2001). By 2004 Poland had a population of over 10% that had a University diploma, equal to that of Spain (Cienski 2004), thus creating a workforce that was skilled in areas such as technology, that Western European nations value so much (Elsner 2000, Duczmal 2003). This unlegislated growth in education temporarily narrowed a gap in low levels of qualified workers for a new and globalized economy (Cienski 2004). The future of education in Poland in light of the demands of globalization are yet unknown as auditing procedures for all education providers will commence within the next few years (Ministry of Sport and Education 2004) and there is a prediction that many private universities will fold (Duczmal 2003). The demands for education will, however, not recede in the foreseeable future (Levitas and Herczynski 2001), and constitutional rights for a free education (Constitution of Poland 2000) will cause conflict for future governments, which may not be entirely in control of their economies (Green 1999).

Despite the difficulties in trying to achieve a general consensus for the definition of globalization (Mok 2000), its discourse is an attempt to theorize the phenomenon and it is generally agreed that it relates to a time-space compression of human activities in terms of the interconnectivity and interdependence between economies, politics, societies and cultures of the world's nations (Fukuyama 1992, Giddens 2002). Poland is one of those nations and its adherence with neo-liberal economic frames has ensured that its transition to a free-market economy will move in the direction of greater alignment with the EU (of which it is a member) (Levitas and Herczynski 2001) and a greater responsiveness to global economic trends (Gomez 2003). Decentralization of governments and thus education, has happened to, and continues to happen to

those nations which are adopting new economic philosophies (Green 1999, Rhoten 2000, Mok 2000, Gorostiaga-Derqui 2001). Poland's journey of transition has greater complexities as it attempts to change the cultural values of its populace through this shift in economic paradigms (McCarthy et al 2003). Nevertheless, it is a journey that it has embarked on and, in the case of education, it will alter its structure so that it can adapt to global changes and thus meet future challenges in a coherent way (Zawodowska 1995, Marga 2002, Scott 2002, Gomez 2003, Adamus-Matuszynska 2004).

## 2.22 SUMMARY STATEMENT

The current literature on education reform in countries that are undergoing decentralization as part of political reforms captures the macro-level and associated drivers of change. The limitation in literature in this area is linked to the context of teaching, which happens at the devolved and micro level. This limitation is related to all post-communist countries, and in terms of this study, particularly in Poland. Narrowing this limitation even further to consider teachers of physical education leads to a more urgent need for research especially as Kosiba's (2004) unpublished study on attitudes to teaching in the post-communist tradition is the only one to date to capture voices at the micro level.

Physical culture and education have an interrelatedness that requires that they are both understood from a cultural point of view (Żukowska 1993). Decentralization and education reform in Poland are part of political change and adaptations to a global economy. Its impact on society and its structures may elicit a unique transitory journey that will be important in understanding how physical education will change. Current literature is insufficient in explaining the transitory journey that teachers must take and the responsibility placed on their shoulders in terms of being part of the structure that shifts Poland's culture. Issues related to EU membership, Globalization, transitional societies and new political cultures are issues emerging from the

literature review. Research in this area is, then, necessary so as to better understand the complexity of transition and aid individual teachers and schools in making sense of the colossal changes affected upon them so that they can move forward by creating a support system for overcoming the turbulent years. Qualitative methods continue to offer a means of learning about transitory journeys as symbolic interactionism, which is a phenomenon of temporality, (Cronk 1973) can be captured. Grounded theory is especially appropriate since its goal is to generate explanatory and predictive theory about social processes that account for patterns of behaviour described as being relevant by those who are part of its context and who have substantively problematized the phenomenon (Strauss 1987).

## CHAPTER 3

### METHODOLOGY

#### 3.1 INTRODUCTION

The aim of this chapter is to explain the research methodology of the study, and to discuss the process leading to the research design. Grounded theory, the method of investigation for this study, is particularly appropriate because, unlike other research methodologies grounded theory discovers theoretically complete explanations about particular phenomena (Glaser and Strauss 1967). Selecting a framework for any inquiry necessitates a justification of the paradigmatic choice (Curtner-Smith 2002); this is because the conditions contained within a paradigm will provide ways of looking at the world through a particular conceptual and philosophical framework (Weber 2004). Grounded theory can be located within the interpretivist paradigm (Goulding 1999b) and justifications for the selection and use of this paradigm have been made as part of the discussion. To understand it fully, the origins of grounded theory have been explained so as to reveal why it was created and has come to belong to the post-modern tradition of social inquiry and thus, theoretically being linked to symbolic interactionism. The techniques and procedures for developing a grounded theory have been detailed and examples from the study are subsumed into the explanations as a way of contextualizing the use of them. The nature of theory and how it is developed within this methodology are discussed as substantive and formal theory is distinguished. Thereafter the evolution of grounded theory, as a process originally conceived by two academics, Glaser and Strauss (1967), is explored in terms of divergence. The discussions that follow detail and justify the modes of data collection and analysis employed in this research and in the context of grounded theory including considerations on the ethical dimensions that are covered in this study.

The chapter concludes with reflections on the methodology by considering the limitations of the methodological process in the study.

### 3.2 PARADIGMATIC POSITIONING AND JUSTIFICATION

Paradigms in research are necessary in aiding the understanding of not the products of scientific inquiry but the process itself (Cohen, Manion and Morrison, 2000). Kuhn (1970) describes it as a discipline's method of deciphering a problem, of viewing human experience and of structuring reality; paradigms, thus, present a global view. In the tradition of philosophy, intense debates about the way that the world is conceptualized have always been made, "paradigm wars," as Gage (1989) calls them, and in terms of a history of ideas can be categorized between two traditions, *Aristotelian*<sup>109</sup> and *Galilean*<sup>110</sup> (von Wright 1971). Given that philosophy is intended to consider problems that affect us all, directly or indirectly, then the processes involved during these considerations will be a reflection of the epoch in which they occurred as "paradigms are eventually torn down and replaced with new forms of understanding the world" (Weber, 2004, p. xii). Lincoln and Guba (1985) delineate these philosophical movements by categorizing the epochs into three distinct phases: 1) pre-positivist; 2) positivist<sup>111</sup>; and 3) post-positivist.

Qualitative research methods were developed in the post-positivist era, which can also be referred to as *postmodernism and naturalism* (Lincoln and Guba 1985, Creswell 1998, Vrasidas 2001). Because grounded theory is generally considered to belong to the field of qualitative methods it is important to understand the distinguishing features of the post-positivist method of inquiry.

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<sup>109</sup> Aristotelian approaches have ancient roots in the intellectual history of man.

<sup>110</sup> "Galilean approaches run parallel with the advance of the causal-mechanistic point of view in man's efforts to explain and predict phenomena" (von Wright, 1971, p.1)

<sup>111</sup> "The term *positive philosophy* was coined by Auguste Comte, and it lasted down to the present time in the shorter form of *positivism*" (Kolakowski, 1972, p.9).

Lincoln and Guba (1985) proposed the following guidelines as a way of understanding the post-positivist movement –

- Seeing multiplicity of layers and complexity in the *whole* when observing constructed realities; this will lead to varying interpretations of phenomena amongst researchers because of significant divergence amongst them; therefore, understanding is more likely an outcome than prediction and control.
- The subject (researcher) and object (the phenomena in the world that are their focus) interact to influence one another; “reality and the individual who observe it (sic) cannot be separated” (Weber, 2004, p.v).
- The aim of inquiry is to develop a body of knowledge in the form of working hypotheses.
- Cause and effect cannot be determined because all those involved are in a constant state of mutual and simultaneous gestalt.
- Values are inextricably bound to qualitative inquiry in terms of choice of problem to be studied, choice of theory and paradigm that guides the investigation, values inherent in the context, and value-resonance or value dissonance of the previously listed values.

A number of conditions, then, must be present in the post-positivist’s research context; whenever possible, research should be carried out in the natural situation because persons cannot be understood when isolated from their context (Robson 2002, Marvasti 2004, Weber 2004). This is because relationships are complex rather than linear, and because contextual value structures partly determine findings (Lincoln and Guba 1985). In addition, humans are the primary data-gathering instruments because it is impossible to create *a priori* instrument capable of adjusting to multiple realities and, consequently, meanings (Creswell 1998). Grounded theory is, for that reason, a

qualitative method. One of its techniques, theoretical sampling<sup>112</sup>, increases the scope of data by allowing multiple realities to be exposed through it thus, allowing a grounded theory to emerge through the legitimization of local conditions, mutual gestalts, and values (Glaser and Strauss 1967, Strauss 1987, Strauss and Corbin 1998) making it an important method within the qualitative research tradition (Goulding 1999a). In this study language translation issues, socio-cultural transition and education reform presented a unique and complex situation for research that emphasized a need for a congruent selection of paradigm and method of investigation. Grounded theory became a natural choice because it could deal with such complexity, unpredictability and instability (Goulding 1999a, Douglas 2003, Wilson-Scott 2004). In addition, grounded theory leads to the construction of a substantive or formal theory (Glaser and Strauss 1967, Strauss 1987, Strauss and Corbin 1998) and this becomes an important reason for its use as no *a priori* theory could capture multiple realities (Goulding 1999b, Douglas 2003b) likely to be encountered in a situation such as physical education in transition. This is because the researcher enters inquiry as neutrally as possible, and because grounded theory is responsive to situational values (Glaser and Strauss 1967). The reasoning within a grounded theory study is that it is impossible ahead of time to know enough about multiple realities to devise a design adequately (Robson 2002, Goulding 1999b, Dick 2002). Meanings and interpretations are corroborated with informants because it is their constructions of reality that the inquirer seeks to understand and they can best interpret the influence of local value patterns. The generalizations of the findings in a grounded theory are tentative because realities are multiple and varied and because the particular combination of influences and value systems may differ markedly from setting to setting. Conventional trustworthiness criteria, such as internal and external validity, reliability, and objectivity, can be

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<sup>112</sup> This includes purposive sampling when considering methods outside of grounded theory.

inconsistent with qualitative inquiry; hence, new criteria are used to affirm the trustworthiness of qualitative approaches. Grounded theory method has been constructed to deal with trustworthiness (Strauss 1987, Strauss and Corbin 1998, Goulding 1999a, Goulding 1999b) and will be fully explained later in this chapter. The paradigm of interpretivism is uniquely applicable to the problem of physical education in the context of a politically reforming system as it delineates the approaches to examining phenomena linked to human relationships and their environment thus, belonging to post-modernity (Weber 2004). Consistent with Lincoln and Guba (1985), Creswell (1998) proposed that post-modern thinking is based upon the belief that inquiry must be set within the conditions of the world such as the multiple perspectives of class, gender, and other group affiliations; conditions which are apparent in the presence of hierarchies, power and control, concealed dominations, oppositions, inconsistencies, and contradictions; and multiple meanings. Qualitative research is based upon assumptions that individuals and groups have varying histories and varying perceptions of present reality (Cohen, Manion and Morrison 2000, Robson 2002, Marvasti 2004, Weber 2004); reality is dynamic (Cohen, Manion and Morrison 2000); *truth* consists of temporal and cultural interpretation (Weber 2004); meaning is personal (Olszewski-Walker et al 1988); and experience is filled with meaning and with social and cultural derivation (James 2002). Furthermore, qualitative inquiry is the most appropriate method when research cannot be done experimentally for practical or ethical reasons, when it delves in depth into complexities and processes, when it focuses on informal and unstructured relationships (Cohen, Manion and Morrison 2000, Robson 2002, Marvasti 2004, Weber 2004).

In the social sciences both normative (positivist)<sup>113</sup> and interpretive (post-positivist) perspectives are used in the development of a science of behaviour (Cohen, Manion and Morrison, 2000). From this position some distinctions between paradigms can be made clear. Paradigmatic choice in modern research of the social sciences, however, is complicated due to the many choices available to the researcher (Weber 2004). Selection of any research method is based on the nature of the research question and the preferences of the researchers (Gerdes and Conn 2001, Cairns and Plunkett 2004). It is, then, a view that the researcher will adopt the general principles within a field of study thus adhering to the paradigmatic traditions contained within that discipline's approaches to examining phenomenon. The field of sociology of physical education and sport is dominated by the use of two paradigms; the normative and interpretivist paradigm (Gerdes and Conn 2001, Curtner-Smith 2002). Both provide the researcher with an alternate visualization of the research situation. The necessary judgement in selecting a framework, therefore, is reliant on the research question(s) leading to a narrowing of choice of methodologies, which means that the assumptions made at the commencement of a study influence the positioning of paradigm and hence, a choice from the related processes (Cairns and Plunkett 2004). The difference between the two paradigms is the style of focus and what kinds of questions can be addressed (Cohen, Manion and Morrison 2000, Weber 2004). Erickson (1986, p.120) emphasises that "a research technique does not constitute a research method" and thus commonalities in techniques between normative and interpretivist paradigms can exist without ever compromising a quantitative or qualitative methodology (Cohen, Manion and Morrison 2000). Vrasidas (2001) makes distinctions between qualitative and quantitative methods (which use numerical data and advanced statistical techniques

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<sup>113</sup> Blumer (1969, p.2) explains that, in traditional research approaches, which are contained within the normative paradigm, "meaning is either taken for granted and thus pushed aside as unimportant or it is regarded as a mere neutral link between the factors responsible for human behaviour and this behaviour as the product of such factors".

for analyzing it) but gives emphasis by saying that “interpretive approaches to educational research do not necessarily exclude the use of similar techniques; the key issue is deciding what makes sense to count and how it can strengthen the plausibility of the researcher's assertions” (p.83). Cohen et al (2000) have constructed a table (see Figure 3.A) that shows some of the defining characteristics that are assigned to differing approaches. This can aid the researcher in understanding paradigmatic choice as it groups together the core attributes present within a given paradigm.

**Figure 3.A Differing approaches to the study of behaviour**

<b>Normative</b>	<b>Interpretive</b>	<b>Critical</b>
Society and the social system	The individual	Societies, groups and individuals
Medium/large-scale research	Small-scale research	Small-scale research
Impersonal, anonymous forces regulating behaviour	Human actions continuously recreating social life	Political, ideological factors, power and interests shaping behaviour
Model of natural sciences	Non-statistical subjectivity	Ideology critique and action research
Objectivity	Personal involvement of the researcher	Collectivity
Research conducted from the outside	Interpreting the specific	Participant researchers, researchers and facilitators
Generalizing behaviour/seeking causes	Understanding actions/meanings rather than causes	Critiquing the specific
Assuming the taken-for-granted	Investigating the taken-for-granted	Understanding, interrogating, critiquing, transforming actions and interests
Macro-concepts: society, institutions, norms, positions, roles, expectations	Micro-concepts: individual perspective, personal constructs, negotiated meanings, definitions of situations	Interrogating and critiquing the taken-for-granted
Structuralists	Phenomenologist, symbolic interactionist, ethno-methodologists	Macro- and micro-concepts: political and ideological interests, operations of power
Technical interest	Practical interest	Critical theorists, action researchers, practitioner researchers
		Emancipatory interest

From Cohen, Manion and Morrison (2000, p.35)

Paradigms, thus, serve the researcher as a given preconception of the world with *taken-for-granted* boundaries, which are designed to answer three questions: what is the nature of reality? What is the relationship between the researcher and knowledge? And how does the inquirer go about finding out knowledge? (Lincoln and Guba 1985). Cohen et al (2000) explain that these three fundamental questions that are asked should make up the reasoning for selecting a paradigm and with this construct a tripartite foundation for inquiry, which is: 1) ontological – what is the form and nature of reality?; and what is known about it? 2) Epistemological – what is the basis of knowledge? What is its nature and form? How can it be acquired? How can it be communicated to others? 3) Methodological – how will the inquirer go about finding out about phenomena? How will phenomena be identified and measured? The use of paradigms in research become important foundations and as Sparkes (1987) states allows for:

“A distillation of what we think about the world and the way in which we think. Hence, actions, including those of the researcher, take place with reference to some paradigm, which has the ability to expand the vision of the individual working within it whilst at the same time inhibiting efforts to move beyond its framework.” (Sparkes, 1987, p.33)

It is precisely this *inhibition of effort to move beyond* the boundaries of a framework that support a researcher during attempts to understand the social world, as it instils an adherence to conventional forms when examining it (Weber 2004). So movement within this framework entitles the researcher to make statements about the *truth* and or *reality* setting out to achieve what Mouly (1978) classifies as *experience, reasoning and research*. Kuhn (1970) explains that paradigms are not necessarily truthful, one-to-one descriptions of some objective reality but are useful foundations for discourse that are taken on for a time to try to expand our understanding of the world and thus the features of a paradigm provide rules and a demarcated place for reasoning. In the words of Kuhn (1970)

"... [Researchers] practice their trades in different worlds. One contains constrained bodies that fall slowly, the other pendulums that repeat their motions again and again. One is embedded in a flat, the other in a curved, matrix of space.... That is why a law that cannot even be demonstrated to one group of scientists may... seem intuitively obvious to the other.... it is why, before they can hope to communicate fully, one group or the other must experience the conversion that we have been calling a paradigm shift. Just because it is a transition between incommensurables, the transition... cannot be made a step at a time, forced by logic and neutral experience. Like the gestalt switch, it must occur all at once... or not at all." (p.50)

This study is located within an interpretive paradigm, which belongs to the post-positivist tradition and selection of method is made within these parameters. Grounded theory method has been chosen for reasons identified during the research question generating phase, where the instability of the research context because of political transition, transforming cultural meanings, the unpredictability of events (such as travel), the rapidity of change occurring in Poland and language translation issues all provided strong reasoning or goodness of fit (Cairns and Plunkett 2004) between events and the researcher.

### 3.3 GROUNDED THEORY

In 1967, Glaser and Strauss developed their grounded theory method in an attempt to avoid highly abstract sociology. This provided a rigorous intellectual rationale for qualitative research and any subsequent theoretical analysis (Goulding, 1998, Goulding 1999a, Douglas 2003b). In so doing Glaser and Strauss protested against the complacency they believed to be prominent at the time; that all 'great' theories had been discovered, thus rendering the role of research to the subordinate activity of testing theory within scientific paradigms (Glaser and Strauss, 1967). Its pioneering emphasis was to encourage researchers to introduce new theories into the field of sociology (Olszewski-Walker et al 1988). Its basic premise, then, is that research will be grounded in data as

opposed to some *grand theory* (Goulding 1999b), thus deviating from the logico-deductive processes commonly used at the time in the social sciences (Goulding 1999a, Douglas 2003b). The belief that theory should follow data also opens up the possibility for a researcher to get close to a research setting and enjoy the excitement (and sometimes fear) that autonomy elicits during research (Dick 2003). Its underlying principle is that it is an emergent methodology (Glaser and Strauss, 1967, Strauss 1987, Strauss and Corbin 1997, Strauss and Corbin 1998, Goulding, 1998, Cohen, Manion and Morrison, 2000, Robson, 2002, Dick, 2003, Douglas 2003b), whereby theory evolves during the research process itself (Strauss and Corbin, 1998). Strauss and Corbin (1998) make it clear when they encourage researchers that the techniques in grounded theory methodology offer “a cluster of very useful procedures – essentially guidelines, suggested techniques, *but not* commandments” (p.14) that are to be followed by rote. The underlying idea is that the research situation will bring about any related theory by building it rather than testing it, although Miles and Huberman (1994) argue that the conditional matrix that can be used as part of its techniques can lead to the formulation of mini-hypotheses. Grounded theory “allows for multiple data sources, which may include interviews, observation of behaviour and published reports” (Goulding, 1998, p.51) and other data such as photographs, emails, conversations, and even questionnaires, if the researcher can also adopt a mixed methods approach<sup>114</sup> (Strauss and Corbin, 1998) because its procedures provide researchers with analytic tools for handling masses of raw data (Douglas 2003b). In fact, in grounded theory, literature is also data and when it comes to a literature review, grounded theorists are advised to read generally and widely to avoid over-specificity, particularly in the early stages of the research (Glaser and Strauss, 1967, Strauss and Corbin, 1998, Goulding 1999b, Cohen, Manion and Morrison 2000, Dick, 2002, Douglas 2003b). The literature that has

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<sup>114</sup> Mixed methods mean the use of both qualitative and quantitative data collection and analysis techniques.

informed the developing theory, hence, plays a vital role as it contributes towards the grounding of theory in data. In this study the ability to transform data so that it could be represented numerically (from questionnaires), meant that a good measure of what is normally described as quantitative data informed the emergence of theory as it enabled the construction of categories using descriptive statistics. The practices within grounded theory permit a mixed methods approach as it is meant to assist analysts by providing alternative approaches to understanding the meaning of phenomena, through systematic and creative techniques (Strauss and Corbin 1998). This should not, however, be confused with the extreme end of positivistic practices, as all research be it qualitative or quantitative requires the process to undertake techniques that will lead to conventional understandings within the research community (Cohen, Manion and Morrison, 2000). The difference is in terms of content rather than procedure. Behrens and Smith (1996) have argued that "all quantities are measures of qualities, and the understanding of qualities is not simpler matter" (p.947).

Strauss and Corbin (1998) support the individual interpretation by researchers of grounded theory, and do not suggest that entirely qualitative techniques of data collection and analysis should be used under its auspices; in fact grounded theory is particularly appropriate in this study because, unlike other methodologies, it discovers theoretically complete explanations about particular phenomena by identifying, developing and relating its concepts towards the building of theory (Strauss and Corbin 1998, Goulding 1999b, Douglas 2003b). Chiovitti and Piran (2003) explain that "it is the incoming information from participants that sharpens the focus of the research question and related general questions" (p.429) and thus grounded theory's applicability is congruent, as it relies on the words of the informants to actualize the meaning of phenomena

(Goulding 199b). Combining methods is not a new idea; Lazarsfeld<sup>115</sup> and Barton (1951) took the view that interviews and conversations should underline the journey towards questionnaire development, although this would also be seen as a traditional approach in sociology (Cohen, Manion and Morrison 2000). Grounded theory, then, is valuable in the architecting of theories, rather than the testing of them; however, longitudinal studies that employ the process would naturally undergo a system of self-test as a way of verifying concept and theory development. As a process, grounded theory becomes congruent in research situations that are very complex, new or under-researched, in the social sciences (Glaser and Strauss 1967, Strauss and Corbin 1998, Goulding 1998, Dick, 2002). A research situation that contains overlapping contexts such as culture, education, politics and society - in the throes of transformation and rapid adaptation- will, then, be prone to unpredictable and severe changes. It is, for that reason, easier to justify the use of grounded theory in such a situation as the analytic tools associated with its procedures are capable of handling masses of raw data (Strauss and Corbin 1997, Strauss and Corbin, 1998, Goulding 1998, Dick 2002, Douglas 2003b).

### 3.4 SYMBOLIC INTERACTIONISM

Grounded theory is theoretically linked to symbolic interactionism<sup>116</sup> where its use is concerned with the idea that words, gestures and objects amongst a pre-determined group of people and the way that they interact will elicit specific symbolic meaning to them. Its origins lie in the work of George Herbert Mead but also belong to the work of other researchers: Blumer<sup>117</sup>, Hughes, Becker, Cooley and Goffman who are all associated with its development (Cohen, Manion and

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<sup>115</sup> Glaser studied quantitative and qualitative maths at Columbia University under Lazarfeld and it is largely believed that his (divergent) development of grounded theory was influenced by this (Babchuk 1997).

<sup>116</sup> Strauss studied symbolic interactionism under Blumer at the University of Chicago (Babchuk 1997).

<sup>117</sup> Herbert Blumer – worked with Mead and was a Univeristy of California, Berkeley Professor who developed the term symbolic interactionism (Cronk 1973).

Morrison 2000). Cronk (1973) explains that symbolic interactionism is linked to grounded theory because

“ . . . Mead defines emergence as the principle of novelty. Despite the rationalistic and scientific demand for determination, explanation, and prediction, the world is not fully determinable, explainable, or predictable; the world emerges before us, i.e., it develops in unexpected and therefore surprising ways. The concept of emergence, according to Mead, is the philosophical expression of the perception of novelty in experience. It is the action of the "I" that gives the social process its unexpected and surprising events. It is the "I" that interprets, defines, and reinvents the symbols which arise in the processes of inter-subjectivity.” (p.7)

The basic principles include the following: (1) human beings possess the capacity for thought, which is shaped by social interaction; (2) people learn meanings and symbols through social interaction; and (3) people are able to modify or alter the meanings and symbols they use in interactions by interpreting the situations they are engaged in. Grounded theory can be located within the interpretive paradigm because of it being deeply ingrained in symbolic interactionism and because its origins were intended to respond to major criticisms of positivism as being inadequate. Goulding (1999b) verifies this by placing its creation within the philosophical rationale of symbolic interactionism

“ . . . The roots of grounded theory can be traced back to a movement known as symbolic interactionism whose origins lie in the work of Charles Cooley (1864-1929) and George Herbert Mead (1863-1931). The concern of these scholars was to avoid the polarities of psychologism and sociologism. Psychologism is a view predicated on the assumption that social behaviour is explicable in genetic terms and by logical or neurological processes. Sociologism is the opposed fallacy which looks at personal conduct as if it were in some way programmed by societal norms.” (p.5)

It is from this theoretical basis that the methodology of grounded theory was formulated and introduced (Glaser & Strauss 1967). Grounded theory developed as both a research methodology derived from the assumptions and theoretical underpinnings of symbolic interactionism and a method for systematically deriving empirically-based theories of human behaviour and the social world through an ongoing process of comparative analysis (Benoliel 1996). It is, then, an interpretive methodology that allows for the predominant use of qualitative instruments during the research process (Goulding 1999b, Douglas 2003b). It is a rationale that provides the researcher with a set of guidelines and techniques relative to inductive analyses of empirical data that have been sourced from social settings (Strauss 1987, Strauss and Corbin 1997, Goulding 1999b, Harris 2003, Marvasti 2004).

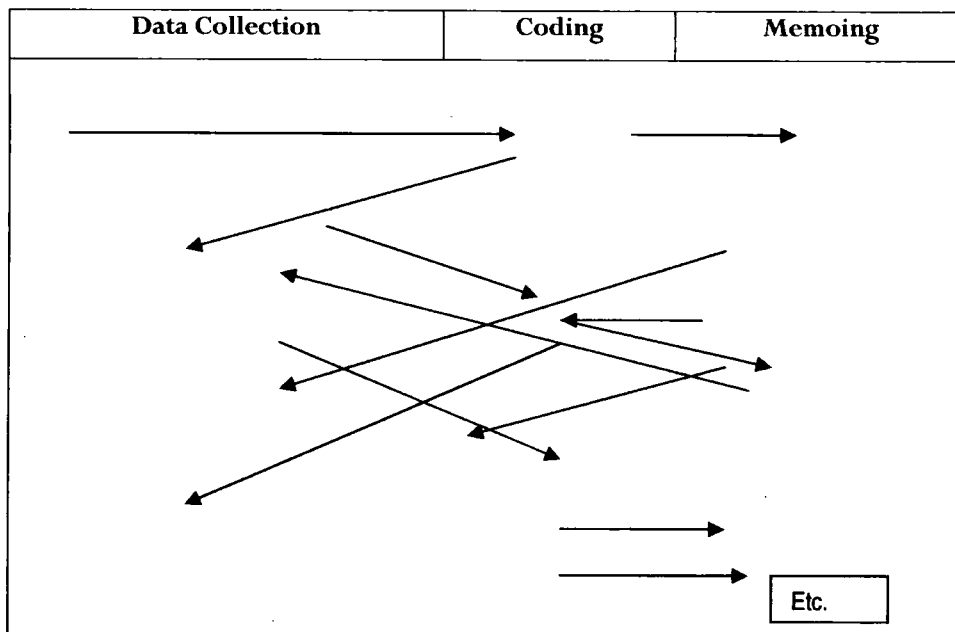
### **3.5 METHODS AND PROCEDURES**

The original proposition in *Discovering Grounded Theory* (Glaser and Strauss 1967) provided post-modernists in sociology with the challenge to adopt new approaches to interpreting the social world and was thus at the forefront of the “qualitative revolution” during a critical time in social science history (Charmaz, 2000, p. 509). Some of the problems with this original call were that social scientists were confused about the techniques and procedures that could be used (Strauss 1987, Harris 2003). Because Glaser and Strauss (1967) challenged the principal view in the 1960’s that the only scientifically sound form of systematic social inquiry consisted of quantitative methods, the challenge to adopt new practices meant that there was a demand for explaining the canons of grounded theory. The original discourse on grounded theory presented a conditional structure to qualitative research and garnered respect because it took advantage of reputable mathematics through quantitative and qualitative ideas (Goulding 1999b). Despite this, some early criticisms

were that the original description of the method was vague, particularly for students of research (Strauss and Corbin 1997). In response to this, Strauss (1987) wrote his book, *Qualitative Analysis for Social Scientists* to “. . . instruct anyone who is interested in learning or improving his or her ability to do qualitative analysis of data” (p.xi). Strauss was determined to explain the method and show how the process was determined by a back-and-forth movement between data collection, coding and memoing, which was best described as non-linear and overlapping. Data collection and analysis in grounded theory is an ongoing and integrated activity, and, because it relies on constant comparison, requires that multiple collections and analyses of data occur (Wilson-Scott 2004). (A quick and clear way of understanding how this is undertaken is presented in figure 3.B, which outlines the data collection, coding and memoing process within grounded theory.) From this simple outline it is easier to explain the methods, instruments and techniques available to the grounded theorist.

**Figure 3.B The coding process that overlaps with data collection**

Adapted Strauss 1987



The movements of the process are determined by the data and the decisions that arise from analysis.

The rigour of grounded theory hence arises from a set of clear guidelines that help to build explanatory frames about the relationships between concepts. Charmaz (2000) proposes that its strategies include: (a) simultaneous collection and analysis of data; (b) a two-step data coding process; (c) comparative methods; (d) memo writing aimed at the construction of conceptual analyses; (e) sampling to refine the researcher's emerging theoretical ideas; and (f) integration of the theoretical framework. Figure 3.C shows how these strategies occur as stages within the research and, despite the sequential iteration, they are in fact meant to be overlapping phases.

**Figure 3.C Grounded Theory Procedural Stages**

Procedure	Example
1. The concept-indicator model that directs coding	Actual data – words of interviewees and informants, behavioural actions and events, observations or descriptions in documents and literature. This data yields the origins of concepts that are constantly compared against each other.
2. Data collection	The ambiguity of data collection is part of the process that leads to concept development. The way that access to data is made forms the concepts and categories, so for example the style of obtaining data from a library, the pages selected for photocopying or journals selected for reviewing influence concept and theory development. This data collection is in the irreducible form.
3. Coding	An essential component of qualitative research, which underpins the excellence of the research itself. A technique that identifies the element of data that is distinguishable within the rich context of qualitative data. This leads to the formation of concepts, categories, and hypotheses and towards theory building (see coding paradigm in results section).
4. Core Categories	<p>“The goal of grounded theory is to generate a theory that accounts for a pattern of behaviour, which is relevant and problematic for those involved.” (Strauss, 1987, p.34)</p> <p>Core categories account for variations in patterns, so a category may appear as different words, narratives, observations and or</p>

	<p>behaviours that articulate into a larger property. It can be seen as a tree with branches coming off it with a number of concepts. Core categories can be depicted through illustrations and Strauss and Corbin (1997) support this use in the development of categories. This procedure underpins theory building as it “. . . has the prime function of integrating the theory and rendering it dense and saturated as the relationships are discovered.” (Strauss, 1987, p.35)</p>
<p>5. Theoretical Sampling</p> <p>6. Comparisons</p> <p>7. Theoretical saturation</p> <p>8. Integration of theory</p> <p>9. Theoretical memos</p> <p>10. Theoretical sorting</p>	<p>This is the judgement that a researcher makes in deciding who and what shall be accessed as data for analysis. The emerging theory is a proponent of theoretical sampling, and thus the way that the researcher identifies the relevance in data, so this will influence the next set of data collected.</p> <p>Briefly mentioned above; this procedure overlaps the entire process until saturation is achieved. Constant comparison against data, codes, memos and techniques. It is comparable to a large-scale <i>reflection</i> that is undertaken as a method of verification.</p> <p>When the research has reached the stage where additional data collection is no longer necessary. It is the point when research questions have been answered and require development into meaningful results.</p> <p>This procedure streamlines the cluster of analyses that have occurred to this point in time. It is when diagrams, memos and writings are integrated to provide an overall statement on the theory developed.</p> <p>A major means for integrating theory as it is the procedure for organising codes and discovering emergent categories and concepts. It is when the researcher writes questions, hypotheses, summaries, and theories into a written perspective.</p> <p>The sorting of memos and codes for the integration of theory</p>

The strength of grounded theory is its ability to describe patterns of behaviour or patterns, while recognising that the individual is an essential part of these behaviours (Goulding 1999a). One of its

greatest strengths is the challenge it presents to researchers to actively seek variation (Wilson-Scott 2004). While staying focused on the concept, the researcher's deliberate citation of all data characteristics, comparing and contrasting, coding and substantiation, and the intentional seeking of negative cases lead to saturation of categories, rich data, and complete explanations of phenomena. The theory is thus presented as a balanced and well-rounded explanatory model that has emerged from data (Goulding 1999a, Goulding 1999b, Brown et al 2002, Douglas 2003b).

### **3.6 GROUNDED THEORY: A FRAMEWORK FOR THEORY DEVELOPMENT**

The collection of data in research, once the methodology has been selected, is possibly the easiest and most enjoyable part of a study; it is the time for dynamic interaction with the research context and hence, elicits deep satisfaction in the researcher. Grounded theory requires that theory development comes from the data and that imposing other theories onto the data is not a valid phrase of interpretation (Glaser and Strauss 1967, Strauss 1987, Strauss and Corbin 1998).

“This means that data from participants determine a) what is explored in the research; b) the literature searched; c) the research question developed; and d) the number of participants in the study. This is one of the reasons why those conducting grounded theory research need to explain their inquiry process when developing a theory.”(Chiovittia and Piran, 2003, p.428)

The inquiry process<sup>118</sup> manifests data, which then undergo analysis; the researcher's own ability to interpret the analysis influences the character of any concept and or theory development. This synthesis is preceded with, and intersected by, a scheme of coding, which is part of the analytic journey. The journey, consequently, is an interconnectedness of themes that can be described as a rich tapestry of colour, dimension, texture and form. The pattern that emerges is not an inferred

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<sup>118</sup> This has been outlined in chapter 2.

logic; it is, however, a network that comes from ordinary activities demanding that the theorist using this strategy “. . . Invent a new way of grouping, or ordering, information about an event or phenomenon, when the relevant dimensions one should use to do so are unclear or unknown: In a real sense, one must start from scratch”(Olszewski-Walker and Coalson-Avant, 1988, p.51). With reference to this statement, analysing the data is the organization, arrangement and ordering of it in order to create a pattern model, which can be extended so that it relates to and resembles its context.

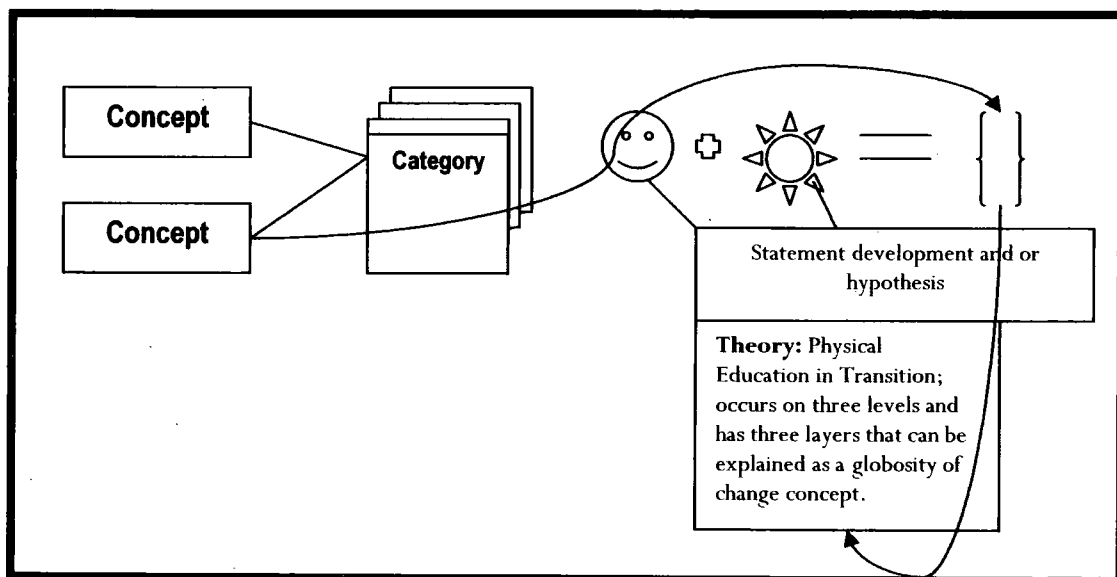


Figure 3.D A Diagrammatic Explanation of Theory Building in Grounded Theory

Figure 3.D above shows pictorially how the de-chunked process of theory building appears.

Concept derivation commences right at the start of a research project as even the idea to examine within generalised parameters requires that some concept characteristics are noted. A derivation strategy is both 1) organic and 2) systematic. It is organic because despite objectivity and the tactic of rigour, there is an undeniable influence of the researcher’s conceptual pool guiding the emergent patterns. It is also systematic as the methods contained within a given methodology delineate the

extent of rigour and hence, the participants of a study provide the landmarks in the research terrain. Moreover the two-fold strategy is a condition of development as extrication is impossible in either qualitative or quantitative approaches; qualitative researchers make clear the process leading to hypothetical construction whereas quantitative researchers intuit and, so, state hypotheses for testing. Glaser and Strauss (1967) term this organic dimension as Theoretical Sensitivity. It is meant to be the transparency of the given personal quality a researcher introduces into a study. In the 1967 text written by Glaser and Strauss, introducing the world of research to new thinking on theory development, the case that was presented exacted that researchers should be suitably aware of their environment to carry out the necessary abstractions central to its proposed methodology. A technique called *bracketing*, which states the perceptions a researcher has on the possible outcomes of a research (Brackenridge et al 2002) is one way of managing the data as they start to arrive. The exercise can prepare the inquirer to anticipate the yielding of theory and also, to recognize when the rejection of any preconception has occurred. In a study by Brackenridge et al (2002) on child protection in football, where the research team was anxious about some of the concepts that might be discovered, it served as a rehearsal "of their hopes and fears" (p.30). The discovery of theory, therefore, also carries with it the existing knowledge of the researcher (Strauss and Corbin 1997).

The analysis of data leading to the discovery of theory depends on the techniques of analysis. These techniques are coding, theoretical sampling and memos and diagrams (Strauss and Corbin 1998). Coding requires substantial skill and when engaged in for the first time can be misapplied (Strauss 1987). By the time this study was undertaken the researcher had experience of coding through application as a post-graduate student and as a researcher on a national project as well as through instruction and guidance as a teacher in higher education supervising under- and

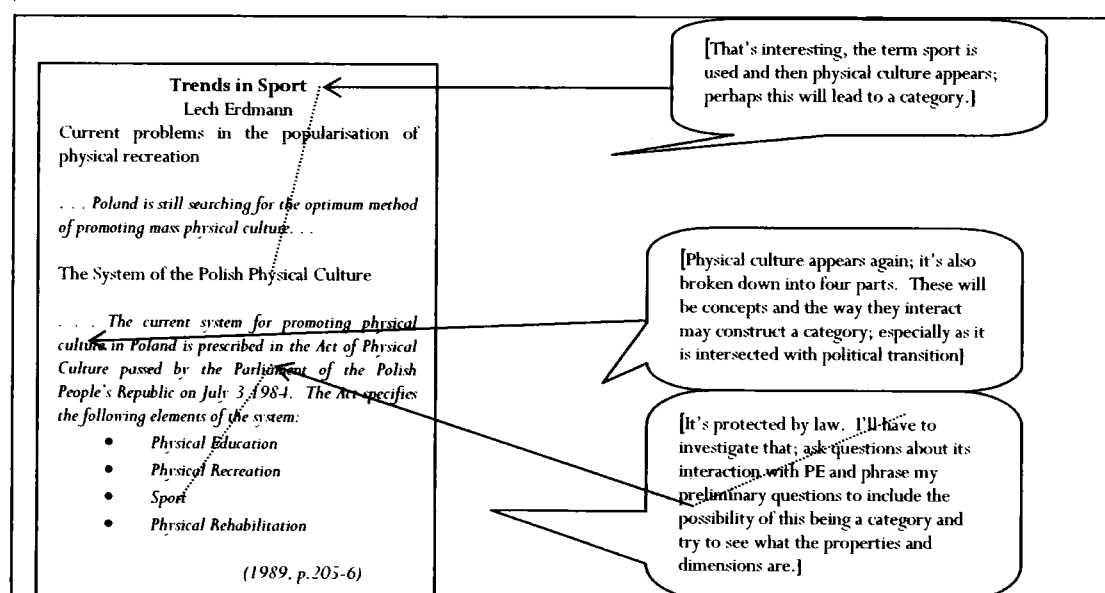
post-graduate projects. Despite this experience, coding during this study was tricky as a new dimension, the Polish language and its translation, complicated the decision-making when characterizing concepts and categories; this was because it was the first time that the researcher had forayed into a dual language pool for the purpose of researching. This is an important facet that influenced the shaping of the concepts as theory, in the words of (Chiovitti and Piran 2001) should “use participants’ actual words” (p.427). Furthermore, it requires stating that the construction of concepts was the result of the inter-twining of two languages and, so, some precision may be lost in translation. Aside from this anxiety, the process of constant comparison, which included the relaying of concepts back to participants during the formative stages, provided some scope for testing the selected words to describe concepts. Coding, as a result, is equally exciting and trepidatious. Moreover it provides a systemic thread throughout the theory generation process in that it

“(1) Both follows upon and leads to generative questions; (2) fractures the data, thus freeing the researcher from description and forcing interpretation to higher levels of abstraction; (3) is the pivotal operation for moving towards the discovery of a core category or categories; and so (4) moves towards ultimate integration of the entire analysis; as well as (5) yields the desired conceptual density [that is] relationships among the codes and the development of each.” (Strauss, 1987, p.55-56)

### **3.7 OPEN CODING**

As soon as the first sets of data are acquired the researcher can set about open-coding. This is a technique of making general comments and statements pertaining to the isolation of concept characterization, category identification and suggestive acquaintance between them. It is a good idea to start the process of coding as early as possible so that the theoretical framework can start being assembled; it is also necessary for comparisons to be made. In this study, the first data were

derived from a literature review. Key words had to be identified for searches to commence and this original action bore the first attempt at coding. One of the first articles accessed through an inter-library loan was *Trends in Sport* by Lech Erdmann, 1989. Although the title suggested that 'sport' was the subject of the chapter, it transpired that 'physical culture' was its core category. The article was marked extensively and compared against others, where the comparison quickly led to the formulation of questions that when posed to a sample of academics in the field were verified as a pertinent area for coding and, therefore, presented the study with its first category – Physical Culture.



**Figure 3.E A Simple Diagram Depicting the Open Coding Technique in Grounded Theory**

Each event leading to data acquisition requires comparison against the last. So, the above example (refer figure 3.E), which belonged to a large literature review progressed to an interview with Professor James Riordan (1999), an expert on, what was termed as in the UK, sport in communist Russia; USSR. On asking the question –

*ZP – “. . . How has sport changed in eastern Europe since the fall (sic) of communism?”*

The reply came back as:

*JR – “What do you mean by sport? It doesn’t mean the same thing as in Britain . . . it is physical culture in Poland . . .” (personal communication Riordan 1999)*

This response led to the commencement of a process for the verification of a concept that was to feature strongly within the core category. As an aside, this judgement to select further data is a mechanism of the methodology’s sampling process, called theoretical sampling, and is discussed later in this chapter. In adherence with grounded theory, this next stage started to create “a dense relationship around the axis of the category being focused upon” (Strauss, 1987, p.64) and hence, it being called axial coding.

### **3.8 AXIAL CODING**

Axial coding is the process that goes about restructuring the data that had been splintered during the open-coding mode. Its purpose is to identify and link the sub-categories that make up the complex system within a category. It serves to provide an architected view of how phenomena are emerging. What is more is that because the coding process is not sequential, but in fact overlapping, it protracts the properties and dimensions related to categories; this means that the scope for developing dense explanations is wide.

“An explanation . . . tells a story about the relations among things or people and events. To tell a complex story, one must designate objects and events, state or imply some of their dimensions and properties . . . , provide some extent for these, indicate a condition or two for whatever action/interaction is selected to be central to the story, and point to, or imply, one or more consequences.” (Strauss and Corbin, 1998, p.124)

The story contained within a study should contain a transparency that exhibits the skeletal form of categories and sub-categories; this would illustrate the assembled forms that a researcher has estimated as a reflection of what has been observed. Anyone reviewing a theory, then, can

independently judge if the studied phenomenon tells a story of interaction of reasonable degrees. Axial coding propels the story as it is the outcome of an analytic stage that “look[s] to questions such as why or how come, where, when, how and with what results, and in so doing . . . uncover relationships about categories” (Strauss and Corbin, 1998, p.127). The outcome is paradigmatic as it provides a scheme of organisation that gathers orders and subsumes the structure and process (Wilson-Scott 2004). A further point that Strauss (1987) makes about axial coding is that the analyst should avoid rigidity during this coding phase as paying literal service to its systematicity can hinder the capture of complexity; the nature of relationships is dynamic and affected by perspectives (see Figure 3.F), and by over-emphasising the process of substantiation, it can trammel the essence contained within a situation under inquiry, which can often be the point that omits any originality that constitutes new theory.

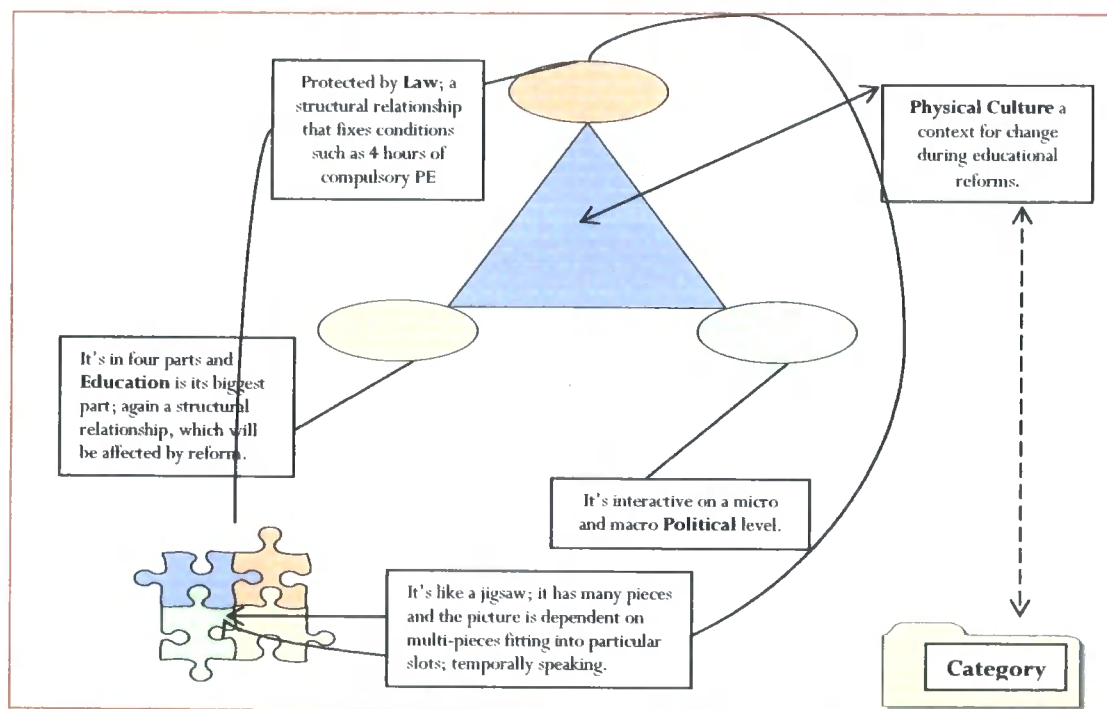


Figure 3.F - Showing the Dynamics of Axial Coding in Grounded Theory

So, as a result of open-coding *physical culture* with its four distinct areas for creating sub-contexts or even overlapping contexts (education, recreation, rehabilitation and sport) will have particular cross-relationships and, therefore, can show how in-roads can be made towards the development of categories. It is this interaction between the seemingly static structures that will show relational dimensions and properties and provide the researcher with the emerging story.

### 3.9 SELECTIVE CODING

“Watching data evolve is a fascinating process. It does not happen overnight (although one might have a sudden “insight”). It does not arise like magic out of the page. Rather integration is an ongoing process that occurs over time. One might say that it begins with the first bit of analysis and does not end until the final writing.” (Strauss and Corbin, 1998, p.144)

Selective-coding is the routine that integrates and refines theory; it is the accrual of data collection and the sequential analysis of that data. All the probing, reflecting, mapping of progress is absorbed into a unique identity that returns an image containing an intricate mosaic, that is, the evolution of the study. Selective coding is technique that sculpts emergence so that a dense story can be told.

Before the research story can be told, it is essential to be able to discriminate between the detailed classification of concepts and the statements developed to explain the relationships between them; the former is raw data and the latter interpretation of that data. Additionally, statement development and or hypotheses can be either made overtly in the story or be adopted “innocuously into the narrative” (Strauss and Corbin, 1998, p.145). In some ways this *innocuity* could be identified by writing the storyline from the research. Each researcher is absorbed in the real life interaction of the research project. The story of the research surrounds the inquirer and the relationship that occurs at the interface of the context; and data collection creates the start of

the storyline. Outlining this position can yield to the isolating of a core category, which is the category that interrelates with all other categories, sub-categories and concepts. Through selective coding, this strategy can augment the central category for developing theory as it moves from essence to substance linking emergent themes to categories and concepts and hence, endowing the research with the opportunity to abstract. Selective coding can use words, pictures and diagrams as a method of discovering theory as a way of showing the complex construction that leads to theory development (Strauss and Corbin 1998).

### 3.10 MEMOS

Memos are the written records of analysis and are named as 1) code notes; 2) theoretical notes; 3) operational notes and 4) diagrams. The intention of the memo in grounded theory is to analyse and conceptualize the data through a process of writing and diagram construction. It allows the researcher to forge directions within the research and identify the products of analysis. In this study, memos were created in a number of ways and included 1) NVivo; 2) hand-written notebooks (see appendix D - Memos; 3) small and large diagrams (see appendix D – Memos); and 4) electronic notebook. It allowed for the development of thought that was to relate to the process of the study. Memos should be made throughout the research process as it provides a transparent journey of theory development; therefore, open, axial and selective coding will all produce code notes deriving from them. The table below explains the purpose of memoing and diagrams during the stages of coding, which “appear differently at various points in the analysis” (Strauss and Corbin, 1998, p.223). The following table 3.1 has been devised to show the logic of memoing in grounded theory by explaining its function at different stages of data acquisition and coding. The use of data from the study in this thesis has been employed as a way of exemplifying its mechanisms.

Table 3.1 (in three parts) Memoing in Grounded Theory

	Code Note	Theoretical Note	Operational Note
<p><b>Open Coding</b></p>	<p>This is the early stage of coding and therefore memos can be hesitant as inchoate thoughts and ideas are written down. There is no regard for the views of others at this point as it is meant to be a reflection on early impressions, thoughts about the data and directions to oneself.</p> <p><i>(Taken from the data)</i></p> <p><i>“Physical education is the largest component of physical culture. Every child has experience of physical culture through education; it is seen as the most relevant context for it. In the past PE was all about competitive sport for an elite few . . . now the government relies on votes it has to please the electorate and they want physical recreation opportunities and not taxes spent on elites.”</i> (Field notes, quote from interview with PW, 25.08.1999<sup>119</sup>).</p> <p><i>The director of physical culture is emphasising that PE is central to instilling values in physical culture; he is distinguishing the process between now and the former communist government. From this code note I can hypothesize that there is a transitional event occurring. I can also detect the emergence of a property, that is, that PE will contain the components of physical culture within its definitional framework; it is perhaps interchangeable conceptually.</i></p>	<p>Theoretical notes flow from the code note and estimations on properties can be theoretically postulated; these will then lead to theoretical sampling.</p> <p><i>29.08.1999 Theoretical Note – Properties of PE.</i></p> <p><i>Physical education is not the same as physical culture, although it is where a significant part of its social construction occurs, so the properties will be physical recreation, rehabilitation and sport. Education will have its own structural context however and the transitory journey for physical education will then be exaggerated within this context as the government will no doubt want to redefine political culture through it. So at this stage I have two choices – to examine it through education or as a wider socio-cultural investigation. Which of these contexts would provide a clearer explanation? In terms of theoretical sampling I am faced with a decision. Do I take the Physical Culture route through education or outside of it? Maybe its relationship is more complex than that and I can't extricate it.</i></p>	<p>Operational notes lead from theoretical notes by ideating the next stage such as more interviews, observations and or literature searches.</p> <p><i>31.08.1999</i></p> <p><i>I'll need to conduct a literature search on education reform and political redevelopment; and in addition I will identify one of the AWF's as a potential context for further interviews. I will be able to examine as to how PE and PC interact and how the dimensions and properties distinguish. I will also need to know how political redevelopment affects education reform and therefore PC.</i></p>

<sup>119</sup> Memos should always be dated

	Code Note	Theoretical Note	Operational Note
<b>Axial Coding</b>	<p>This is where the data starts being assembled like a jigsaw puzzle; pieces are matched, compared and initial attempts to merge start to occur. A little bit of trial and error is associated with this stage. Axial coding is the stage when the development of categories happens (through properties and dimensions). Memos will reflect that process.</p> <p><i>Interview with HG on the meaning of physical culture in Poland and its relationship with PE – 11.06.2002</i></p> <p>“... Physical culture is for everyone. There are some people who believe it is only for the sporting individual. Sport is the smallest aspect but it has the highest profile. They forget that it is cheaper to protect than cure degenerative diseases. Education reforms should take into consideration education for lifelong care of the body... physical culture is necessary to arrest the development of some illnesses. We need to educate and not force people to be active; and this needs to be done so that they can do it after they leave school. Because it is part of culture it is also valued beyond biological needs. Sporting elites cannot be accommodated through economic rationalism.”</p> <p><b>PHYSICAL CULTURE/PHYSICAL EDUCATION/REFORMS/CHANGING VALUES/TRANSITION</b></p> <p>Code Notes\ - 12.06.2002</p> <p><i>As a property of physical culture, physical education provides a context for the education of students. It is here that the values of physical movement that pertain to culture are established. Elite sport is seen as a system of the past and an excluding activity. It may have conflicting values contained within it when presented as a method of PE in a reforming system of education.</i></p>	<p>Theoretical notes during axial coding naturally flow on from the code notes and can go in any direction. It can explore a relationship as such:</p> <p><i>Theoretical Note – 16.06.2002</i></p> <p><i>On the other hand, a dimension of PE is the instilling of a cultural value through physical movement. It is a complex relationship and category development needs to be careful here. It may mean that theory development emerges out of the relationship.</i></p> <p>Or, the theoretical note may pull together a series of memos and explore the emergent theme from the code note and make a summary such as;</p> <p><i>18.06.2002</i></p> <p><i>I've compared this interview with the focus group memos and some private conversations with staff at the AWF – everyone talks about PC and PE as interchangeable concepts – education reforms will take on the construction of cultural values of physical culture. Teachers will be charged with redeveloping these values when they may have divergent ones because of their experiences and teacher education during a communist Poland.</i></p>	<p>Operational notes come off theoretical notes and following with the example being used it lead to the following memo;</p> <p><i>Operational Note - 18.06.2002</i></p> <p><i>If I were to hypothesize, I'd say that pre-service teachers will have divergent views and values pertaining to PE and its role in developing physical culture. I will design a questionnaire that examines these points so that I can strengthen any type of emergent theory.</i></p> <p>Operational notes during the axial coding mode can identify the strategies for strengthening the emergent theories.</p>

	Code Note	Theoretical/Operational Note
<b>Selective Coding</b>	<p>This is the final step of analysis that integrates the concepts around a central category. Memos and diagrams during this phase will greatly enhance the theoretical landscape of the study. Code notes are limited in this mode as the idea is to fill in gaps for the refinement of theory. Code notes can be instructional in the way that they provide directions for integration. So broad statements on what the research is all about may be made.</p> <p><i>31.12.2003 Code Note</i></p> <p><i>In the questionnaire 77% of respondents viewed education reforms to have had a positive influence on PE. Despite the individual criticisms it appears that political redevelopment through PE was anticipated and ultimately seen as necessary in this epoch.</i></p>	<p>Theoretical and operational notes will be specific in its direction and in terms of theoretical sampling will be directed at those sources that can clarify disturbances in nuances.</p> <p><i>Email from tmkosiba@ Monday, November 24, 2003 10:40am</i></p> <p><i>"In response to your questions . . . the out of school hours sports clubs have changed and the values that are supposed to be associated with them now is that sport is for all children, and not just the talented ones. This is a bit complicated though because it was changed because of finances and teachers are no longer paid for running them, they must do them as part of their teaching commitment . . ."</i></p> <p>This answer cleared up some of the confusion surrounding the answers that questionnaire respondents were giving on the new out of school hour's sports clubs. It led to the saturation of a dimension contained within a category.</p>

Memos can aid the development of a grounded theory as they allow the researcher to return to the origins of a concept by exploring the words and thought that were being made along the route of emergence (Strauss 1987). Memos are supposed to be integrated into the entire process of the research and have an overlapping condition contained within the technique. Memos support the development of theory by documenting thinking and are normally subsumed during the integrative phase of theory development often providing the words to describe concepts and categories related to a grounded theory (Strauss 1987, Strauss and Corbin 1998).

### 3.11 DIAGRAMS

“An integrative diagram helps to give a clearer picture of where you have come from in the research after all that data collecting, coding, and memoing. It puts together into a larger pattern, however provisional, a lot of otherwise scattered materials – or scattered sense of those materials – into a sense that this project *has gone somewhere*” (Strauss, 1987, p.185). Diagrams can support the process of integration and theory refinement and, so, can explicitly show how the cross-relationships between the evolving categories work. Diagrams can be used right from the start when open coding commences. The diagram at this point will be nebulous. However it is an opportunity to archive the diagram and return to it at a later point to see just how the thinking about the data was beginning to shape. Although the gestalt will have altered it is helpful to understand its origin and it can show vital clues about the journey of theory development. In addition to diagrams matrices can assist the process of integration. The matrix below (labelled as table 3.2) belongs to this study and shows the interrelatedness of macro and micro conditions of physical education in transition and how a situational context has been established. Strauss and Corbin (1998) explain that in grounded theory the use of a conditional/consequential matrix provides the researcher with a technique for “locating a phenomenon in context . . . it means building a systematic, logical and integrated account” (p.182). The matrix does not tell the whole story of the research it; does, however, show the process of one of the principal instruments for relating categories and thus locating the central phenomenon (Wilson-Scott 2004).

**Table 3.2 Conditional/Consequential Matrix: The Interrelatedness of Physical Education in Transition**

Category	What	When	Where	Why	How	Consequence
Physical Culture	Shifting cultural values.	Constant and can be traced historically.	In physical education curricula.	To reform the past values that were propelled by elitism; move towards equity.	Reform curricula, pre-service teaching, and teacher qualifications. Insert autonomy into programme planning; devolve central government agencies and make schools accountable to local authorities – both quality of teaching and finances for implementation.	Accountability
	Ideological values inserted within legal framework.	Every time political culture is subject to change.	Central and local government policy units.  Linked with government finance and budgets.	To ensure that democratic discussion shape new PC.  Economic rationalism.		

Category	What	When	Where	Why	How	Consequence
Physical Education	Provide engagement with physical culture.	Constant and can be traced historically.	Policy at central level.	To present democratic values.	To make explicit the outcome on the individual.	Ideological shift - from erroneous application of Marxism to economically unattainable social equity within economic rationalist framework.
	To instil lifelong habits in physical activity.	Adapting to local political agendas within broader central aims.	Curriculum adapted to local needs.  School, Principal and PE teachers to implement changes.	To be accountable.  To affect cultural change and deliver national curriculum.	Devolved finances that are equally distributed.  To provide equal opportunity and lifelong participation; Western-democratic rhetoric enters dialogue.	
Reform	The shift from an authoritarian communist political culture to one of a	Since 1989 and has been constant since.	In all areas of Polish society; political structures, public services,	To politically redevelop.  To respond to the forces of	Decentralization  Autonomy  Freedoms of expression	Ideological conflict  Cultural uncertainty  Perception of

	democratic and capitalist.		free-market economy, public and private life.	globalization.	Economic rationalism	responsibility
Decentralization	To create local authorities that are responsible for local budgets and whose politicians are democratically elected.	Since 1989 – restructuring has been completed however the application of processes is ongoing.	From central government level to the individual; individuals are now free to move around the country (and parts of EU) without registering movements to central government.	To become a democratic nation.	Economic rationalism. Individual responsibility.	Accountability
Political Re-development	Transforming political culture and structure; from communism to capitalism.	Since 1989 and ongoing.	Ideological Structural Individual	To modernise the nation so that it conducts itself within a viable economic framework in response to globalization.	Democracy Accountability Free-Markets Equity	New dialogue Anxieties Widening inequality Perception of “rights”

Category	What	When	Where	Why	How	Consequence
Autonomy	Freedom to make critical judgements in achieving goals.  Governments placing responsibility elsewhere.	Since 1989 and ongoing.	In curricula at a micro-level.  In local authority plans.  In private sector.	To devolve social responsibility.  To emphasize freedoms.  To stimulate cultural autonomy.	Creating local authorities.  Creating policy units that are democratically managed.  To allow for local contexts to influence interpretation of policy and curricula.	Bureaucratic

New Pedagogies	New approaches to understanding, interpreting and implementing curricula.	Since 1997 with Physical Culture Act (Ust.) and ongoing.	In higher education institutions, schools, physical culture departments, sports clubs, health services.	To achieve the ideological premise that democracy means equal opportunity for all.  To deliver on constitution, where education is a given right.	Changing teacher promotion structure.  New teachers to undergo pre-service training exposing them to new political culture.  A long-term plan that will build an infrastructure necessary for delivering the goals – facilities, equipment and resources.	Frustration and or Confusion
Economic Rationalism	Designing a national and local budget for public expenditure based on the amount of finance in the entire system.	Since 1989 and ongoing.	All public services.	To adapt to the challenges of globalized economies.	Devolved government; new local authorities.  Accountability	Transparency
Democracy	A social condition of classlessness and equality with a government representative of its people and elected by its people.	To shift away from communist governance with its absence of freedoms and oppressive political culture.	Since 1989; immediate but still developing.	In every area of social existence; personal, community, national and now international dimensions.	Decentralisation  Elected governments  Equal opportunities	Conflicting attitudes; older generation not comfortable with new responsibilities; new generation wanting what is rightfully theirs “now”.

To understand the matrix it is necessary to explain how the conditions, actions/interactions and consequences contained within it make up the “multiple and diverse patterns of connectivity” (Strauss and Corbin, 1998, p.188). The categories running down the

first column have emerged as being central to understanding the context and thus theory in this study. The questions – what, when, where, why, how and what consequence – capture the paraphrase of participants' collective definition or intent in relation to the category. The further development of the core category was approached with the use of a reflective coding matrix, which led to the definition and detailing of the study as a whole. One of the instruments that can be used to develop the core category is a reflective coding matrix and this leads to the construction of properties and dimensions and the locating of a central phenomenon.

### 3.12 THE PROPERTIES AND DIMENSIONS OF CATEGORIES

As categories are discovered the building of properties and dimensions commence. It is essential this occurs so that clear distinctions between concepts can be made. For example, in this research physical education in transition is characterised by three distinct properties. When this concept is disassembled it is clear to see that ideology, structure and the individual are the properties that begin to construct its definitional framework. The relationship between them and other sub-categories will, then, lead to the discovery of a central phenomenon. Physical education, which includes the property of education, hence, has a variational quality about it that contains dimensions such as curriculum, pedagogy, teacher values, school resources, government aims, and engagement of pupils in physical culture. Each category has multi-properties and to further elucidate understanding, the property should have its dimensions outlined. Moreover, locating properties within the dimensional or sub-dimensional ranges will lead to the creation of more complex groupings within the data. For example, when reflecting on *education* along the dimension of *reform* it uncovers sub-categories that include *teacher perceptions*, *globosity of change* and

*physical education as the reforming context for physical culture.*<sup>120</sup> The systematic development of properties and dimensions through the reflective coding matrix, then, leads the researcher towards the location of a central phenomenon because of the connections and relationships between the core category and sub-categories. The matrix below (table 3.3) shows how the use of a reflective coding matrix was used in this study to discover the properties and dimensions of the core category.

**Table 3.3 the Reflective Coding Matrix for Physical Education in Transition**

Reflective Coding Matrix			
Core Category	Physical Education in Transition		
Properties	Ideological	Structural	Individual
Processes	Political	Education	Socio-Cultural
Dimensions	<ul style="list-style-type: none"> <li>• Democracy</li> <li>• Meritocracy</li> <li>• Economic Rationalism</li> <li>• Capitalism</li> <li>• Equality</li> <li>• Accountability</li> <li>• Individualism</li> <li>• Globalization</li> <li>• European Union</li> </ul>	<ul style="list-style-type: none"> <li>• Accountable</li> <li>• Democratized</li> <li>• Devolved</li> <li>• Politicized</li> <li>• Reforming</li> <li>• Micro Governance</li> <li>• Equitability</li> <li>• New Funding Models</li> <li>• Legality</li> <li>• Curriculum</li> <li>• Pedagogy</li> <li>• Quality of Teaching</li> </ul>	<ul style="list-style-type: none"> <li>• Autonomy</li> <li>• Accountability</li> <li>• Confusion</li> <li>• (In)-dependability</li> <li>• Enablement</li> <li>• Equality</li> <li>• Freedom</li> <li>• Frustration</li> <li>• Conflicting Values</li> <li>• Willingness to Engage in Change</li> </ul>
Contexts	Central Government	Local Authority and Schools	Pedagogical

<sup>120</sup> These categories have been contained within the theory, see chapter 4.

### 3.13 SAMPLING IN GROUNDED THEORY

“The quality of a piece of research not only stands or falls by the appropriateness of methodology and instrumentation but also by the suitability of the sampling strategy that has been adopted” (Cohen et al, 2000, p.92). In grounded theory “theoretical sampling is the process of data collection for generating theory whereby the analyst jointly collects, codes, and analyzes his data and decides on what data to collect next and where to find them, in order to develop his theory as it emerges” (Glaser and Strauss, 1967, p.45). The gaps that are created within the data collection will lay emphasis on the steps that should be taken next. Questions raised during open coding will demonstrate as to where the answers lie. Sampling during this phase, known as open sampling, is best executed when allowing all possibilities to be considered; so that it provides the most auspicious opportunity for discovery. Moreover, because variation has not yet been achieved and so theoretical relevance is low, vagueness surrounding the research can occur. Designing data collection within a rigid sampling frame will prohibit emergence “because these might mislead the analyst or foreclose on discovery” (Strauss and Corbin, 1998, p.206) and, so, some general steps can be followed (see Table 3.4).

**Table 3.4 Some Ideal, Practical and Feasible Strategies towards Open Sampling**

	<b>Some Ideal, Practical and Feasible Strategies Towards Open Sampling</b>
1.	Researcher looks for persons, sites or events where data relating to categories and related properties and dimensions are found.
2.	Systematic adherence to a list or every person willing to participate within the study; sampling on the basis of convenience. Comparison still occurs as there are natural variations in situations.
3.	Theoretically significant events occurring during field observations, interviewing, or document reading. Theoretical sensitivity requires that the researcher respond to the event and ask questions. Theoretical sensitivity evolves through emergence and is then linked with theoretical sampling during open coding.
4.	Returning to the data themselves and reorganizing according to theoretically relevant concepts.

(Adapted Strauss and Corbin, 1998, p.208-209)

As soon as axial coding begins the sampling focus alters because the probe of categories and sub-categories is more intricately involved with detailing properties and dimensions. Sampling is about "looking for incidents that demonstrate dimensional range or variation of a concept and the relationships among concepts" (Strauss and Corbin, 1998, p.210). This sampling is called relational and variational and depending on the situation, that is, if a researcher has unlimited access to sites, persons and events, then a predetermined list can be drawn up. Otherwise the researcher must proceed with limited access and pose questions wherever it is feasible. Both situations will elicit legitimate discovery as "the analyst is comparing incidents and events in terms of how these give density and variation to the concepts to which they relate, then he or she is doing theoretical sampling" (Strauss and Corbin, 1998, p.211).

Acute sampling will occur during the selective coding phase, where purposeful sites, persons and literature are sought out. The integrations of categories require sampling to be intentional and this is called discriminate sampling. It is about taking full advantage of opportunities to assay comparatively. It is about saturating categories and the return to specific sites, individuals or documents is necessary to collect data that will validate any emergence of theory. Theoretical saturation is reached when categories have been filled so that no new or relevant data emerges in terms of categories. At this point the category should be compellingly developed so that its properties and dimensions have a demonstrable diversity. If a category is not saturated then the theory will not be developed evenly and an overall lack of acuteness will present itself in the final draft.

### 3.14 SUBSTANTIVE AND FORMAL THEORY

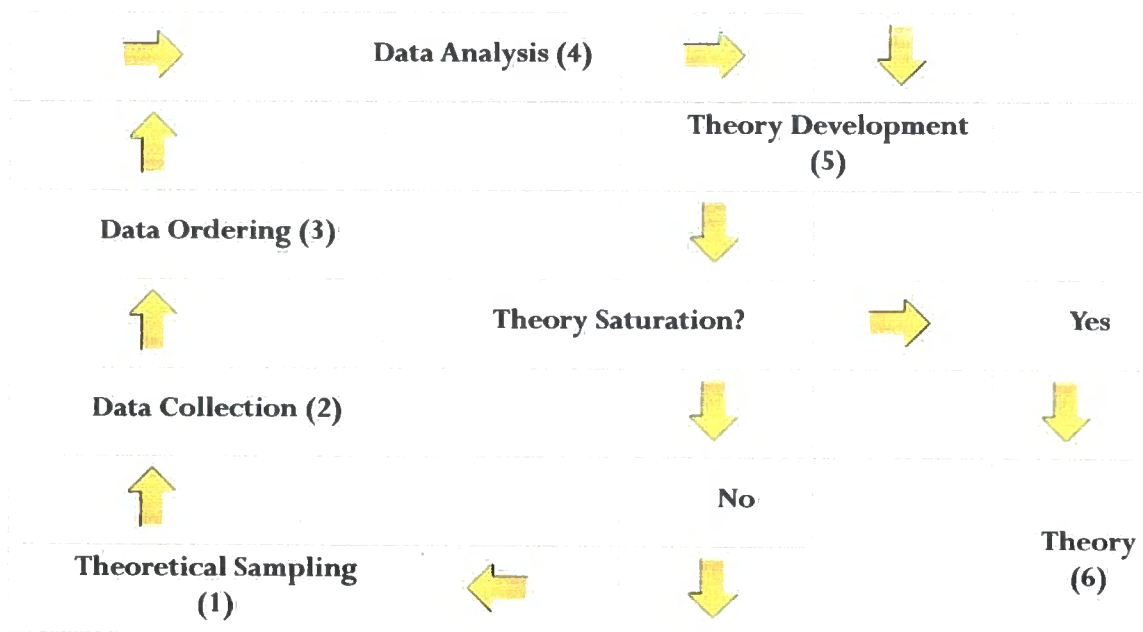
In grounded theory methodology there are two types of basic theory that can emerge: substantive and formal. "Substantive and formal theories exist on distinguishable levels of generality, which differ only in terms of degree. Therefore, in any one study, each type can shade at points into the other . . . both substantive and formal theories must be grounded in data" (Glaser and Strauss, 1967, p.33). Despite this *greyness*, a researcher should distinguish between the two types of theory during the stage of research design so as to clearly proceed with a study. Formal theory is "less specific to a group or place, and as such, applies to a wider range of disciplinary concerns and problems" (Strauss and Corbin, 1998, p.23). It contributes to the development of a "formal, or conceptual, area of sociological inquiry, such as stigma, deviant behaviour, formal organizations, socialization, status congruency, authority and power, reward systems, or social mobility" (Glaser and Strauss, 1967, p.32). Substantive theory on the other-hand is located within areas of inquiry that examine phenomena connected with the development of a significant or observed area of sociological inquiry; this could include specific groups or organizations and in the instance of this research includes the inquiry into physical education during reforms as viewed by a group of physical educators. This research is, as a result, a study that intends to develop substantive theory.

### 3.15 WRITING THE THEORY

Writing the theory is probably the trickiest part of the grounded theory process as it requires clarity, skill and analytic logic (Goulding 1999b, Douglas 2003a, Wilson-Scott 2004). During the research process, the coding and memoing that has accompanied theory development has taken a detailed journey. It is the role of the theory to have contained within its boundaries the analytic story, which has emerged out of the complex body of data. A stack of memos can invariably fill-in the

details of an outlined story. It is however a daunting prospect to finally commit judgement and write the theory, as discrimination of detail will tell the final story and some memos are finally relegated to a lesser role. Writing a theory is about transcending the process so that abstractions can be made. The figure below (figure 3.G) shows how a grounded theory study represents the operations by which data are broken down, conceptualised, and put back together in new ways; it is the central process by which theories are built from data (Strauss and Corbin 1998).

**Figure 3.G Interrelated Processes of Data Collection, Data Ordering, and Data Analysis to Build Grounded Theory (Pandit 1996)**



### 3.16 THE DEBATE ON DIVERGENCE WITHIN GROUNDED THEORY: GLASER OR STRAUSS?

Since its inception in 1967 when Glaser and Strauss presented their Grounded Theory methodology to the world, there has been a divergence in how it is conceptualised.

“This is largely the result of the two original authors reaching a diacritical juncture over the aims, principles and procedures associated with the implementation of the method. This bifurcation was largely marked by

Strauss's 1990 publication of *Basics of Qualitative Research: Grounded Theory, Procedures and Techniques*, which provoked accusations of distortion and infidelity to the central objectives of parsimony and theoretical emergence." (Goulding, 1999a, p.867)

Dick (2003) argues that "Glaser's approach [is] more clearly emergent and more clearly justified as emergent" (p. 2) singling out the detailed coding and memoing process that was outlined in the 1990 text as making it rigid and, consequently, deviating from the principles of emergence. The biggest difference lies between how Strauss and Glaser discover theory through data. Strauss seems to be relatively more concerned with producing a detailed description of the cultural landscape and conversely Glaser appears to be more deeply committed to the principles and practices ordinarily associated with what can be loosely described as the qualitative paradigm (Charmaz 2000), viewing grounded theory as a more lenient type of process which is essentially flexible and guided primarily by informants and their socially-constructed realities. To him, the informant's world should emerge naturally from the analysis with little effort or detailed attention to process on the part of the researcher; yet also demonstrating commitment to providing some important insights into the realities of cultural participants. Glaser, then, argues that Strauss' perspective leads to a 'forced' result because of myriad rules and procedures, which can prove time intensive and confusing for the grounded theorist in the field (Dick 2002). Because Strauss (1987) (and subsequently Strauss and Corbin 1998) maintains that the *canons of good science* such as replicability, generalisability, precision, significance, and verification are made explicit, Charmaz (2000) argues that it may place his perspective closer to more traditional quantitative principles. Glaser himself agrees with this and insists that Strauss's understanding of grounded theory is a 'misconception' of the work that had been started together he argues that it sharply deviates from the logic of discovery and emergence of integrated theory preferring to concentrate on mandatory descriptions of concepts (Glaser 1992). To the present day he maintains that "GT is about concepts not accurate

descriptions” (Glaser 2002, p.9). In his *The Basics of Qualitative Research* (1992) Glaser goes as far as to denigrate Strauss’ understanding of the method as being “. . . Without conscience, bordering on immorality . . . producing simply what qualitative researchers have been doing for 60 years or more: forced, full conceptual description” (Glaser, 1992, p.3). As if to complicate matters Glaser (1998) also purposely avoids labelling grounded theory as a qualitative methodology. Moreover, rather than attributing grounded theory to symbolic interactionism, as do many scholars, Glaser identifies symbolic interactionism as one of many sensitizing agents for conceptual development.

Strauss defends his and Corbin’s development of the theory as a necessity for students of research to be able to understand the constitution of the methodology as a repertoire of techniques and always stresses that it is not meant to be a literal instruction (Strauss and Corbin, 1998); researchers are still intended to interpret the use of the methodology, which was the central plank of the 1967 text. This is exemplified in Strauss and Corbin’s *Grounded Theory in Practice* (1997) text, which is a selection of other people’s research having undertaken grounded theory as its process and which all have “chosen to emphasize different aspects of grounded theory methodology and methods” as contributing factors in theory generation (Strauss and Corbin, 1998, p.viii). The debate, however, continues to rage and those who select the methodology are now required to clearly distinguish between the coeval standing of the process; Glaser’s or Strauss’ vision as “. . . Not only are there differences in style and terminology, but Strauss’ 1990 version of the method has been reworked to incorporate a strict and complex process of systematic coding” (Goulding, 1999a, p.52).

This study was conducted within the analytic vision that is Strauss’ (and Corbin’s) development of the methodology. The original 1967 text was initially read so as to understand the general principles of the process and how it could be utilised as a valid research methodology.

Inevitably, this reading led to further texts<sup>121</sup> and articles on grounded theory and because of the way that Strauss (and Corbin) had developed the technique and detailed its functions, it was judged a more reliable direction to take, but only because of the stage of (in)-experience that the researcher was in when originally selecting the methodology for inquiry. That is not to say that Glaser's vision is in-actionable, as many researchers use it successfully and are more drawn to it because of the view that it is less restricting and seemingly more open to interpretation. Strauss does, however, state throughout the development of his work that the methodology is not to be taken as an exacting technique and that those students of research using it should adjust the processes accordingly to their own interpretations and analytic vision (1987).

### 3.17 LIMITATIONS OF GROUNDED THEORY

As with any methodology, grounded theory has its own internal drawbacks that create a set of limitations. According to Charmaz (1983), the assumptions made in the course of a grounded theory study and its relative analytic methods have incurred criticism from qualitative researchers on the basis that its practitioners fail to appropriate exacting judgments with both the data collection techniques and the quality of the data collected through them. She believes that this perception of lack of rigour is down to misinterpretation of the aims and methods of grounded theory, and in part this criticism is the reason as to why Strauss developed these techniques in his book *Qualitative Analysis for Social Scientists* (1987). According to Walker-Olszewski et al (1988) who present a pragmatic approach to interpreting grounded theory, "it is important to avoid primitive . . . [and] umbrella terms" (p. 37) when determining the critical attributes of concepts and to stage them within cases that exclude such ambiguities. This strategy, however, does

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<sup>121</sup> Strauss' - *Qualitative Analysis for social Scientists* (1987), Glaser's - *Basics of Grounded Theory Analysis* (1992) Strauss and Corbin's - *Grounded Theory in Practice* (1997) and Strauss and Corbin's - *Basics of Qualitative Research: Techniques and Procedures for Developing Grounded Theory* (1998).

emphasize the discriminatory approaches between Glaserian and Straussian schools of thought in that one is deemed to 'force' data into categories (Strauss) and the other deals only with categories that emerge from observed situations to explain observed behaviours (Glaser). Goulding (1999b) believes that this creates a weakness in the method as the two originators cannot agree upon a mutual interpretation. In addition to this she argues that

“ . . . There have been further discrepancies in the development of the method from those other than the two key figures . . . [a] number of academics with no first-hand contact with either Glaser or Strauss . . . have independently invented rigid rules for judging the credibility of grounded theory products . . . these adaptations [are]. . . 'cooked up' translations which are guilty of breaching the essence of the method and the inherent creativity of the original.” (p.15)

From a more philosophical stance the method is criticized by Haig (1995) for not reflecting developments within contemporary philosophy asserting that

“ . . . Although the influences of American pragmatism on grounded theory methodology are manifold, the impact of contemporary philosophy of science on Glaser and Strauss's writings is almost non-existent . . . it is also unfortunate that, in their formulations of grounded theory as general scientific method [they] have continued to ignore pertinent developments in philosophical methodology.” (p.2)

Symbolic interactionism in particular has been accused of having an astructural bias, that is, it fails to deal with macro-structural issues (Reynolds, 1993). Critics have also argued that it ignores how the interpreted meanings of individuals are channelled by society's dominant institutions (Meltzer and Herman, 1990). These criticisms have also been translated into challenges directed against grounded theory methodology. Grounded theory is, thus, charged as having the potential for conservative bias and may serve to support the status quo (Layder, 1989).

Because both Strauss and Glaser insist on independent interpretations, methodological transgression can occur; or as Skodol-Wilson et al (1996) put it is "the frank violation of the grounded theory philosophy and methodology" (p.224). This means that the method can be misinterpreted and leads to "methodological muddling, such as phenomenological research being presented as grounded theory . . . but also applies to cases where the canons of quantitative method are modified and applied to interview or textual data, and where the outcome is a study described in positivist terms, random sampling, reliability, validity statistics, independent and dependent variables and so on" (Goulding, 1999b, p.16).

*Premature closure* is another common criticism (Goulding 1999b), and is taken to mean leaving the field too soon: This can also relate to the under-analysis of textual or narrative data. Carvalho et al (2003) isolate this as being a particular disadvantage particularly for a beginning researcher as the method "is still considered a very subjective process, relying a great deal on the researcher's abilities" (p.13), which can be prone to hesitation and, so, leading to misinterpretation. The constant comparison method that leads to the saturation of categories means that the researcher should collect and analyse data until no more concepts or categories emerge, which is the inherent condition for avoiding premature closure (Strauss and Corbin 1998). This skill is dependent on a researcher's internal levels of confidence but can also be affected by just ending the process out of boredom, lack of time or the sometimes unfortunate condition of not seeing *it all*; which is reliant upon theoretical sensitivity and is vastly different in each researcher.

Despite the limitations of grounded theory, it continues to be a powerful methodology for recognizing the interactive nature of both data collection and analysis. The constant comparison technique and analytic syntheses are central to the challenges that arise out of criticisms thus becoming powerful techniques for moderating the research context (Goulding 1999b).

Furthermore, the criticisms that have been levelled at grounded theory studies provide constructive discourse that leads to the fostering of growth and maturity of the methodology (Haig 1995, Goulding 1999b, Douglas 2003b) allowing it to retain its relevance through time. Field areas such as information technology (Bainbridge et al 2003, Ray 2004), business (Goulding 1998, Macri et al 2002, Ashill et al 2003, Douglas 2003b) and education (Douglas 2003a, Harris 2003) have begun to explore the use of grounded theory as a method that explains the meaning of socially negotiated communication, which is integral to the functions of contemporary uses in technology. Grounded theory is, consequently, adaptable and transcends time as it is meant to provide a means for understanding symbolic interactions amongst cultural groups (Ray 2003).

### 3.18 ETHICS IN RESEARCH

The basic principle of ethics in social research is that the researcher makes explicit the responsibilities associated with the relationships that yield data (Robson 2002). Marvasti (2004) explains that ". . . Most researchers, regardless of their discipline or methodological orientation, recognize that when working with human subjects (as opposed to cultural artefacts or objects), certain steps must be taken to protect the dignity and safety of the research participants" (p.134-135). This condition is implicit in all human relationships, whereby degrees of courtesy and social manners exhibit respect for those we interact with and is described by Jago and Bailey (2001, p.528) as important "ethical and moral conduct". In research, this responsibility necessitates formal documentation that is the outcome of an academic institution's authorisation to proceed under the auspices of its ethical agreement (Gratton and Jones 2004). Nicholson (1986) (in Jago and Bailey 2001) identifies three questions that ethics committees should ask as part of this process; "1) is the right question being asked?; 2) is the study the right way to answer it?; and 3) if the study does

provide an answer, will it be worth knowing” (p.118). The moral connection, however, is a basic respect for human dignity and as a researcher this means that human participation in the study must be regarded (Marvasti 2004). The general principles were, therefore, applied to this study; firstly ethical clearance was attained from the University of Durham and secondly this was followed by a code of conduct that is described below.

- Voluntary Participation - The study ensured that any human participation was on a strictly voluntary basis. No individual or groups were coerced, threatened or forced to participate. All participants were made aware of the research and no surreptitious data collection was engaged in. No monetary rewards were offered to any participant.
- Protection of participants – At times, participants in the study, particularly in the first two years, demonstrated unease when talking about former communist practise. Some participants did not want to have their views recorded and this request was respected by a protocol that demanded an initial outline of the research followed by the option to be or not to be recorded. When interviews were planned in advance, an interview that was semi-structured in form would have had the questions emailed or sent to the participant so that full impact was known before hand.
- Confidentiality and anonymity – The case study that forms this research has been made entirely anonymous. Photographic data had been obtained, with consent, from the AWF, but its use in the study was finally rejected as its distinct character would have revealed its identity. Although the AWF had consented to the use of the photographs in this study, the judgement was not to take this offer up. The reason for this is because some students at the AWF expressed strong views that may offend or even characterize the AWF in some way. As this was not the intention of the researcher the decision was made not to use this data. In addition

confidentiality is a condition that a commitment has been made to and subsequently it was promised that any tapes or notes would be either destroyed or physically anonymised to prevent future detection, after the study had been completed.

- **Mutual Benefits** – Participants of the study were assured of the mutual benefits of the research. The opportunity to raise contemporary issues in teaching in post-communist Poland was verbalised as an exciting prospect for the participants. The chance to discuss potential areas for planning has already commenced at the institution with senior staff using results to inform future curriculum planning. In addition to this an offer for the researcher to teach at the institution as a visiting lecturer has also been left open for the foreseeable future.
- **Informed Consent** – Either a written or verbal statement was provided to participants before any data collection was commenced. Questionnaires were adapted by the AWF staff to include a standard iteration of informed consent at the beginning.
- **Research Audiences** – Ethical consideration continues to be given on the appropriateness of disseminating the research and in particular the audiences that receive it. Dialogue between the AWF and researcher is in flux and each piece of research that is disseminated either through conferences or publications has been made available to a number of the participants.

This outline has described the principles of ethics in the context of the study. It is acknowledged that this is not a discourse on ethics, but a statement of compliance with social research practices (Smith 1975, Cohen, Manion and Morrison 2000, Marvasti 2004). Bearing this in mind, there were additional ethical considerations as part of the researcher's reflections: the linguistic dimension. Translating languages is a skill that requires fluency not just in language but in

cultural practices (James 2002). Some of the research itself required a familiarisation of cultural dimensions in Polish education, for example engaging in higher standards of courtesy with peers and those in authority; that requesting copies of literature would involve either a personal or institutional expense that the participating University could not afford; that frequent correspondence was requisite in showing appreciation for the contribution that scholars had made to the study; and that refusing hospitality would be to cause offence. The decision to engage in cultural practices with the academic community, such as team meetings, regional conferences, playing sport and social engagements were a necessary activity to ensure that ethical responsibility could be applied when describing cultural differences. Newmark (1988) suggests that this type of engagement in culture elicits greater reliability when transposing conceptual understanding in translation. This participation also influenced the improvement of language skills that strengthened the theoretical saturation process.

### **3.19 MODES OF DATA COLLECTION**

This section is a description and justification of the modes of data collection that were employed in the study. In keeping with the principles of grounded theory, more than one particular instrument was employed for the purpose of data collection. Although there are myriad tools available to the researcher only those that contributed to the study have been emphasised.

### **LITERATURE**

Researchers often bring with them a long established knowledge base from former readings and research. This in some way has influenced the types of research questions that are asked in the future and from a grounded theory perspective, this prior knowledge should be acknowledged in studies (Strauss and Corbin 1997). As initial research questions are posed, then so are the areas

from which literature can be obtained. This was the first stage of data collection. A literature review on sport and physical education in Poland and communism and post-communism was instigated. Strauss and Corbin (1997) advise the researcher to keep the initial literature review general and wide so as to avoid limited category development. Because constant comparison provides the researcher with opportunities to narrow a concept or category, the wider the initial context of literature then the greater opportunity to understand the relationships between categories and related concepts. The initial literature review also establishes key authors, academics, institutions and problems that needed clarification. For example in this study, the discovery of the category Physical Culture through literature meant that physical education had to be explored as an interrelating concept.

**“Before beginning a project, a researcher can turn to the literature to formulate questions that act as a stepping off point during initial observations and interviews . . . Initial questions derived from the literature also can be used to satisfy human subjects committees by providing them with a list of conceptual areas that will be investigated.”**  
(Strauss and Corbin, 1998, p.51)

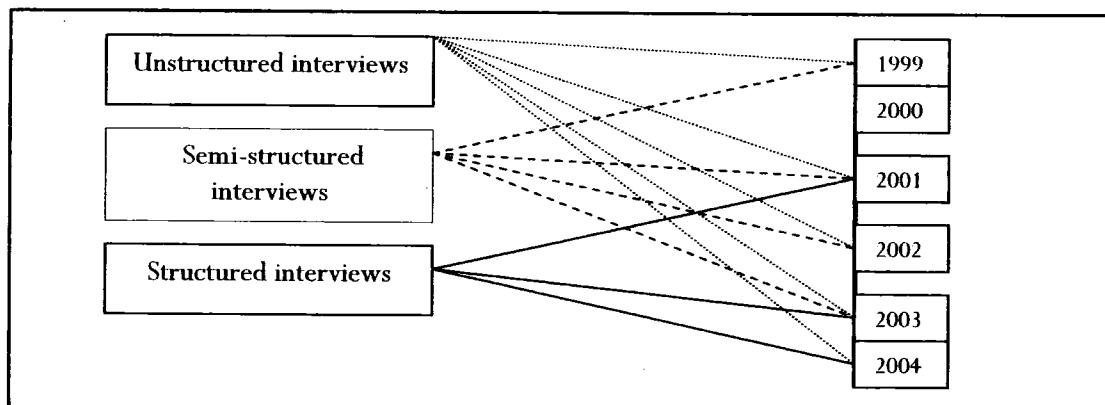
Literature provides an opportunity to make sense of other data in the study and to compare against as emergence begins (Dick 2003). Its function in the research is constantly present as well as having been the point of instigation.

## **INTERVIEWS**

The commencement of a literature review led to the the initial construction of categories and these categories revealed problems related to inquiry. As questions were formed around the categories, then so, it became clearer as to who may be able to answer some of those questions and this seamlessly led to the identification of individuals who could be approached for interview. The

appropriateness of using interviews for data collection is underscored by the difficulty in measuring phenomena (Gratton and Jones 2004). Its relevance to this study becomes apparent when factors such as lack of literature, cultural expedience and issues of transition were introduced into the research environment. The early stages of research also influenced the choice of this method, as exploration of phenomena was necessary to identify what could be used to improve on the developing character of the investigation. Interviews are widely used in social research and are typically broken down into three styles; unstructured, semi-structured and structured (Cohen, Manion and Morrison 2000, Kosiba and Madejski 2001, Robson 2002, Marvasti 2004, Gratton and Jones 2004). All three styles were used in this study at varying times and this was necessitated because of the grounded theory process, which is built upon the process of constant comparison. Interviewing as a form of data collection carries wide ranging benefits for the researcher. Its use in understanding rich and complex situations has become a conventional method of sorts especially in symbolic interactionist research (Sparkes 1992, Marvasti 2004, Gratton and Jones 2004). The differing styles of interview enhance the ability to yield understanding and make sense of contexts that are influx. The study, for that reason, took on an interviewing sequence that is illustrated in figure 3.H.

**Figure 3.H Interview Styles - Depicted through a Timeline**



The choice of style was determined by the stage of the research. It can be seen that unstructured interviews were used throughout the entire study. Unstructured interviewing is the technique where the interviewer has a general idea about direction, but also where there is an importance in allowing themes to emerge organically. Oppenheim (1992) sees this as a way of exploring the research context, making it possible for this style to be used for heuristic purposes and which can lead to the process of constructing purposeful questions, which is in line with grounded theory (Strauss and Corbin 1997). There are two ways of conducting them; the first is as an informal conversational style, where questions emerge from the immediate context and the second is an interview guide technique that has some topics and issues specified at the outset of the interview. The guide would have been constructed from an initial literature review whereby generalised categories would have started to emerge (through the open coding technique). The interviewer has control of when these topics are introduced into the discussion and can use individual judgement to deviate at any point (Gratton and Jones 2004, Mavasti 2004). The disadvantage with these styles is that varied responses are elicited from the interviewee and so can problematize the use of grounded theory, which requires some repetition of themes to establish theoretical dimensions. The analysis of such data can also cause problems, because of the digressional nature of the response. The streamlining of emerging concepts and categories can lack acuteness and, so, may prove difficult when trying to establish meaningful patterns. There are also issues centring on the interviewer's ability to include all the pertinent topics and questions. Although interpretivism is built on the ability of a researcher to interpret symbolic interaction, vast differences in interviewee responses would occur if only this style was used, as interviewer flexibility and judgment in sequencing topics will invariably affect emergence (Cohen, Manion and Morrison 2000). There are, however, advantages from this style of interview. Interviews are built-on from the emergence of themes and issues and can be used throughout a study for the

purpose of constant comparison, grounded theory's process of theoretical sampling. There is also the added value that comes from applying flexibility and congruence to meet the needs of individuals, which the unstructured interview can assure. Trust and confidence can be nurtured, particularly if repeat interviews are necessary. This can lead to greater leaps in information disclosure as the interviewee responds to the informality of the interview and supports the cultivation of depth and richness of data. If the guided approach is used then there is also the added benefit of creating logical gaps in data, which can to a certain degree become ghost-like demarcations of emerging concepts and or categories. When using unstructured interviews in this investigation the settings were varied and were characterised by three types of approaches. The first approach was informal and accompanied by Polish hospitality; at dinner, over coffee, during lunch-time meetings. The second approach was in formal settings; focus-group team-meetings at the AWF, academics' offices, museums, local authority offices and over the telephone. The third were opportunistic; in between conference presentations and in corridors. (The third approach required that conversations be written up as a reflection of discussion; permission to use the discussion as data was always asked for).

Semi-structured interviewing is when the interviewer “. . . -uses a standard set of questions, or schedule. However, the researcher adopts a flexible approach to data collection, and can alter the sequence of questions or probe for more information with subsidiary questions” (Gratton and Jones, 2004, p.141). Again the style itself has a number of advantages and disadvantages. A greater degree of systematicity can be employed, which can lead to a more determined outcome with the emergence of concepts and categories. The fixedness of predetermined questions and themes itself will have inherent boundaries, which can serve as a technique of constant comparison, if it follows a literature search or unstructured interview as a

process of grounded theory. The gaps that can occur between data can also be predicted to a certain extent and, as a consequence, greater control can be exerted to avoid interruptions of logical movement between themes and categories. As a technique of constant comparison the progression from unstructured to semi-structured interviews can also be used as a method of triangulation (discussed in 3.13). There is also a greater fluency between stages when one style leads on to the next, hence, strengthening the construction of concepts and categories during the overlapping process of data collection and coding (Strauss and Corbin 1998). The disadvantage from this style of interviewing is that a certain amount of *emergence* (central to grounded theory) can be reduced due to its guiding nature. In addition, when repeating interviews with different participants, although the themes may be approximately similar, the ordering may change because of certain degrees of flexibility. This can, as a result, elicit substantially different responses in participants, which may affect analysis of comparativeness (Patton 1980).

The third style that was used in this study was structured interviewing. This is where the exact wording of a question is determined before the interview. There is also a strict compliance with the order of the questions with the same questions being asked in the same order with each participant. This is done so that comparability between answers can be analysed more systematically and can support the collection of quantitative data. Coding is also easier to conduct as the nature of the questions will themselves contain fixed categories and themes and hence, the randomness of emergent concepts is somewhat reduced. When using grounded theory, this style of interview can be used to verify the characteristics of emergent concepts, categories and themes and can lead to the development of statements, which is "an important goal of theory development" (Olszeski-Walker and Coalsan-Avant, 1988, p.75). Interviewer bias is also reduced as there is not the same flexibility that the other two styles afford, and hence, the predetermined progression of

questions will elicit greater organisation of data. Reviewing the interview schedule as an instrument of research is easier to evaluate also, as the uniformed responses will reveal weaknesses in original scheduling. The disadvantage, however, is that the inflexibility contained within the style can ignore the organic emergence of themes, which would probably negate the grounded theory process if used at the beginning of a study. It is also not congruent with all participants and in ethnographic situations can hamper the relations between interviewer and interviewee, thus reducing the possible meaning contained within a research situation (Robson 2002). In addition, the set wording of the interview schedule will not adapt to emergence and this could lead to the omission of important themes (Cohen, Manion and Morrison 2000, Marvasti 2004). An illustration of the three styles of interview that were used in this study with a depiction of the roles of participants is shown in the data collection section.

## **FOCUS GROUPS**

In addition to interview style there are also two types of participation 1) individual and 2) focus group. A focus group interview is when two or more participants are asked the interview questions and the responses lead to a group discussion. This type of participation can aid with verification of statements that have been made on an individual basis, particularly where a high level of confidentiality and anonymity has been associated with responses. It is almost like a censoring process as peers and associates moderate each others views as skewed views can lead to conflict. An example within this study showed that some informants, when interviewed alone, were determined to state that communist political culture had no influence on the processes of physical education. This was at odds with literature and even the Ministry of Education and Sport (2004). A focus group interview however demonstrated that this was not accurate and adaptations to interview schedules were made to reflect this knowledge.

## **INFORMANTS**

Informants in a grounded theory study should not be chosen randomly but should be selected according to theoretical sampling (Strauss 1987). Initially after gaining access to a number of individuals and groups involved in physical culture in two regions of Poland, the ideas gained from this group led to a decision that one particular area should be isolated so that a more acute focus of inquiry could be undertaken. The purpose of the study was to achieve theoretical saturation and this strategy was seen as appropriate given the time-scales and practicalities of travelling between two countries. A total of thirty-one interviews, which overlapped the process of data collection and analysis, were conducted during which the opportunity to use a questionnaire presented itself. This strategy was judged as effective in that it would provide the study with an extraordinary capacity to saturate categories. It also offered informants a high level of anonymity to express their views on reforms. This was an important facet for those teachers who had been educators during the totalitarian years (see 'The (Questionnaire) Sample' for justification on the selection of these informants.

## **RECORDING**

The interview responses themselves were recorded using a number of techniques. The interviews used an ethnographic technique whereby not every word and or gesture was noted, however the emergent concepts and themes were written in a note-book. The questions were asked in Polish and the responses were written mostly in English (see appendix D - Piotr Wentel for an example) or a mixture of English-Polish, if an immediate understanding was not clear. Some of the interviews were recorded, where permitted, and these interviews have a word-for-word transcription (see appendix F – Transcribed Interviews) that allowed for comparability of responses between notebook and transcript. Some grounded theorists proceed with interview recording but

take the view that unless the response is pertinently remembered either through memory or broad category transcriptions then it is not powerful enough to contribute to category development (Dick 2003).

## QUESTIONNAIRES

Questionnaires were utilised as instruments of data collection. After the interviews had established reliable categories, it was necessary to use a tool that could identify and itemise in greater detail the emergent themes. The questionnaire can move the research from more general themes towards very specific categories that can be constructed into hypotheses (Mavasti 2004). For the questionnaire to succeed in this aim it should include recognition of the following needs.

“(a) Is clear on its purposes; (b) is clear on what needs to be included or covered in the questionnaire in order to meet the purposes; (c) is exhaustive in its coverage of the elements of inclusion; (d) asks the most appropriate kinds of question; (e) elicits the most appropriate kinds of data to answer the research purposes and sub-questions; (f) asks for empirical data.” (Cohen, Manion and Morrison, 2000, p.247)

Because this study was contained within a grounded theory methodology, where the words of informants are integral to creating categories, the selection of an *open* and word-based questionnaire was designed (see appendix H); Oppenheim (1992) suggests that this approach provides a valuable strategy in eliminating bias by enabling respondents to use their own words and thus exhaust categories. This is exactly what happened and provided a strong rationale for discriminating between categories and the division of properties and dimensions. The words of informants led to the construction of categories relating to physical education in transition. Demographic data such as age-band, sex, years of experience and academic qualifications were also obtained so that an understanding of attributes could be made.

### 3.20 THE PILOT STUDY

Questionnaires can be difficult to design in terms of wording (Cohen et al 2000). This study presented two additional problems, the first being the use of two languages and translation issues, and the second, that cultural difference in research practice needed to be addressed. Piloting the questionnaire was an integral part of its design and was done to maximise reliability, validity and practicability. The following steps are an outline of the design strategy:

- The questionnaire is designed and written in the English language. On the 19<sup>th</sup> April 2002, the questionnaire is discussed with a work colleague (informant AC07 - see Appendix J, 'list of informants' for details). This informant was a PE teacher in Hungary during the communist period and his understanding of issues and some cultural resonance would be important in the design. Additionally, as he was also an academic used to preparing questionnaires himself, his feedback influenced the final length of the questionnaire. The questionnaire was discussed question by question (and contributed to the data collection – see Appendix D). The initial advice was to shorten the questionnaire as in its current state it was far too long and many questions were repetitious.
- The questionnaire was shortened and then translated into the Polish language. It was then given to a bilingual (Polish/English) speaker for corrections to grammar.
- The questionnaire was typed and photocopied (10 copies) and during the April 2002 visit it was distributed to the PE department at the AWF selected for the study. Polish academics working in the field of PE provided critical comments on the pilot questionnaire (see Appendix G for a copy). Three academics responded to the request for comments and revisions were made to the following areas: 1) a consent form that was attached was

removed and it was explained that in the instance of a questionnaire being distributed from the AWF to PE teachers in the field, consent was implicit by responding; 2) major revisions to grammar were made to capture colloquial resonance; and 3) a useful and simple technique (for question 7) for eliciting views on education reforms removed question 8 by asking respondent to go over question 7 (where changes to PE were named) and place a + (plus) sign against positive reforms and a - (minus) sign against negative reforms.

The questionnaire was then amended, typed, checked for accuracy by one of the academics at the AWF (this was done by email) and sent off to reprographics for copying and collating. Four hundred copies were made and distributed during the November 2002 visit.

#### **OUTCOMES OF THE PILOT ON THE FINAL QUESTIONNAIRE**

The high return of questionnaires (348 out of 400) was possibly an outcome of the questionnaire being short and simple to understand. The modifications to the original questionnaire influenced practicability. A disappointment arising from the modified questionnaire, however, was that very little comment emerged about 'communism' or even 'socialism' and this question had to be raised as a consequence of a low response. In fact, the comments referring to this era were more commonly expressed as 'how it used to be', 'in the past' and 'before reforms'. However, this was also recognition of the 'actual' words that informants used to describe a former political culture, and from that point of view, the questionnaire captured the necessary words and voices.

#### **3.21 THE (QUESTIONNAIRE) SAMPLE**

The questionnaire was distributed to three distinct groups of PE teachers, which are detailed:

1. Ninety-six (n=96) full-time PE teachers, employed by the State in schools located within the region of the AWF, were selected in the questionnaire sample. The rationale was in keeping with the design of the study in that; it provided voices from the profession of teaching.
2. One-hundred-and-fifty-two (n=152) student teachers of PE in their final semester of a four-and-a-half years Master's programme were selected as part of the sample. The rationale behind this was that they would have all had six months teaching practice completed and would be well versed in the demands of a 'new curriculum' and the associated pressures of an adapting society.
3. The final group was 100 student teachers of PE who were all in their first semester of the four-and-a-half years Master's programme. The rationale for this was that the entire group had all been educated, since Primary school, in an educational context that was entirely democratic. This group would make up the voice of an entirely new generation of teachers, who, as argued by Salitra (2003) and Adamus-Matuszynska (2004) would be part of the 'generational shift' necessary in all areas of a 'new' Poland.

#### **OUTCOMES, OF THE SAMPLE GROUP, ON THE RESEARCH**

The selection of this sample group led to data that enabled the Four Scenarios Model to be developed (see Chapter 4). Differences in experiences could be explored and in particular the three distinct groups, although showing many commonalities in views, often had varying reasons for their views. For example, younger teachers and teachers still in training, would state that new approaches to teaching were necessary for a new generation of students. On the other hand, older teachers, and those used to a pre-democracy profession, were critical of a 'new youth' who were

disrespectful and were stating that teacher powers should be the same as in the past. The sampling strategy, therefore, proved to have achieved its intended purpose.

### 3.22 DATA COLLECTION

The process of data collection “involves a dynamic interaction between the researcher and the participants; and context under investigation” (Gerdes and Conn, 2001, p.186). The outline of the types of data that were collected during this study has been presented above and the process of *showing* the ascribing of context, selection of participants and related interactions are thickly described. The purpose of this section, then, is to provide the details of which data were collected at what stages of the research; it is a timetable of events. It is done in order to show how the generation of a substantive theory that provides comprehensive explanations of the following question: *How do teachers of physical education view the changes that education reform has had on physical education?*; it is, then, fundamental that the data collection process is explained.

#### 1998

- Literature review – research methods; sport and PE in communist and post-communist nations (the decision to read widely is a recommendation of grounded theory (Strauss and Corbin, 1998); socio-history of Poland; post-communist politics and nations in transition.
- Preliminary visit to Poland – a one week visit was made for logistical purposes; deciding on geographical location, arranging accommodation, identifying libraries, museums, and Institutions that could support research, and estimating travel time so that realistic time-scales could be developed.

## 1999

- Literature review – history, sociology, law on physical culture; history of sport and PE;
- Interviews – Professor James Riordan<sup>122</sup>, Ewa Bładowska,<sup>123</sup> Janusz Jędruch<sup>124</sup>, Dr. Wiesław Skoczylas<sup>125</sup>, Piotr Wentel<sup>126</sup>, 2 former PE students<sup>127</sup>, focus group with 6 non-educationists who had engaged in PE classes (see appendix E for a list of interview questions).
- Field-Notes (see appendix D).

For a clear and simple reference of the number of interviews, the style of them and the role of participants in this study, Figure 3.I provides an overview (see Appendix J for detailed list).

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<sup>122</sup> University of Surrey, Guildford (June)

<sup>123</sup> Librarian – Wojewódzka i Miejska Biblioteka Publiczna im. Marszałka Józefa Piłsudskiego w Łodzi 4-5th August 1999. Provided direction in terms of literature, advised me on the academics that I could contact and the system of AWF's. See appendix D.

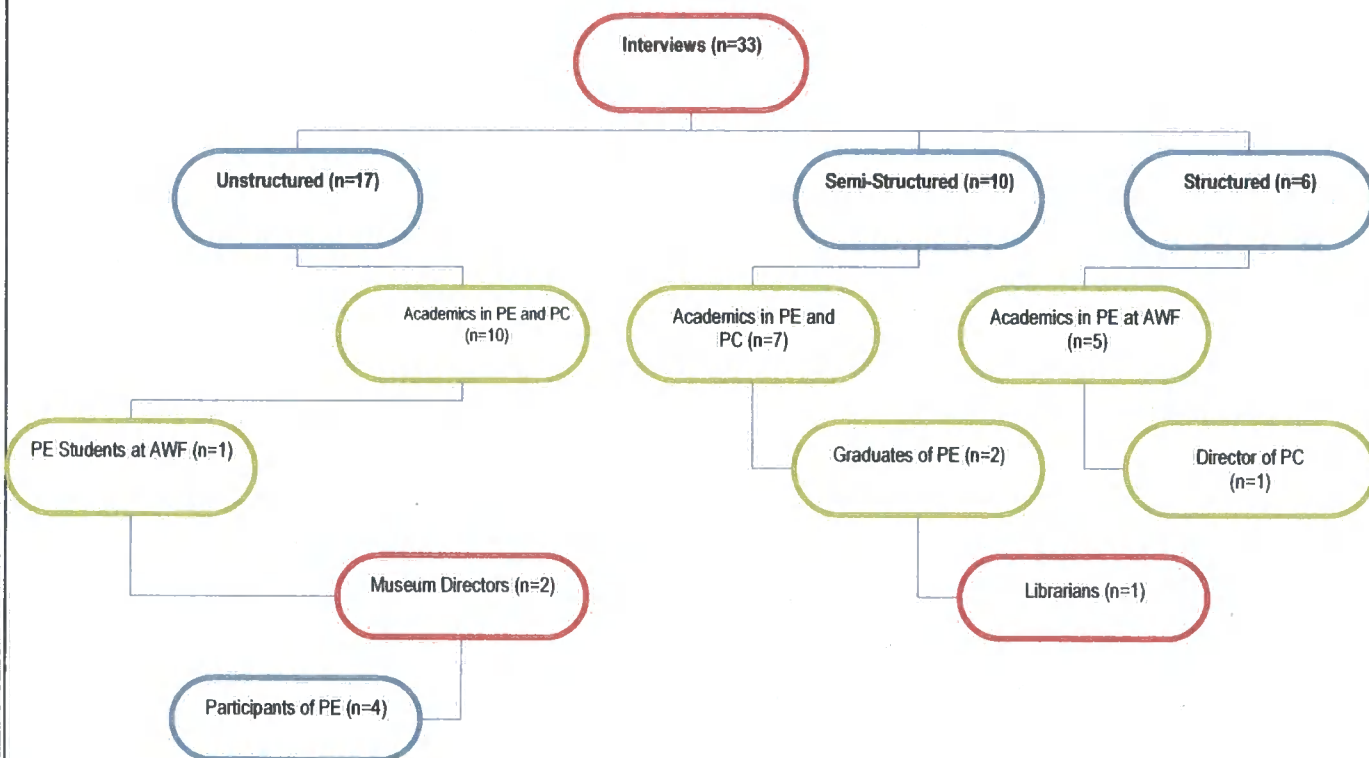
<sup>124</sup> Assistant Director of the Muzeum Sportu i Turystyki Oddział Muzeum Historii Miasta Łodzi. See appendix D.

<sup>125</sup> University of Łódź, 24<sup>th</sup> August 1999; provided with Physical Culture Act, AWF's Curricula, literature and contact of PE specialist in Poland.

<sup>126</sup> Assistant Director of the Department of Physical Culture, Sport and Tourism, 25<sup>th</sup> August 1999 – provided me with budget details of sport clubs, direction of Physical Culture, the past system and links to former students of PE. See appendix D.

<sup>127</sup> Anonymous

Figure 3.1 Number of interviews, style of interviews, and role of participants.



2000

- Literature review – Education reform; political influence on education reform; curricula in PE.

## 2001

- Literature review – PE in Poland; education reform in PE; Education system in Poland; AWF's in Poland.
- Interviews – Henryk Grabowski<sup>128</sup>, Focus Group, Other Academics (anonymous – see Appendix F).
- Field-notes – See appendix D. These were typed directly into a lap-top.

## 2002

- Interviews – follow-up type with academics
- Pilot questionnaire designed and carried out (see Appendix G)
- Field-Notes

## 2003

- Distribution of questionnaires; 400 (see Appendix H) were distributed and there were 348 returns (see appendix I for an example); a return rate of 87%<sup>129</sup>. Distribution of questionnaires was done in the week of November 2002, and was completed by June 26<sup>th</sup> 2003. The questionnaires were delivered to 148 PE teachers (over 60 schools) in

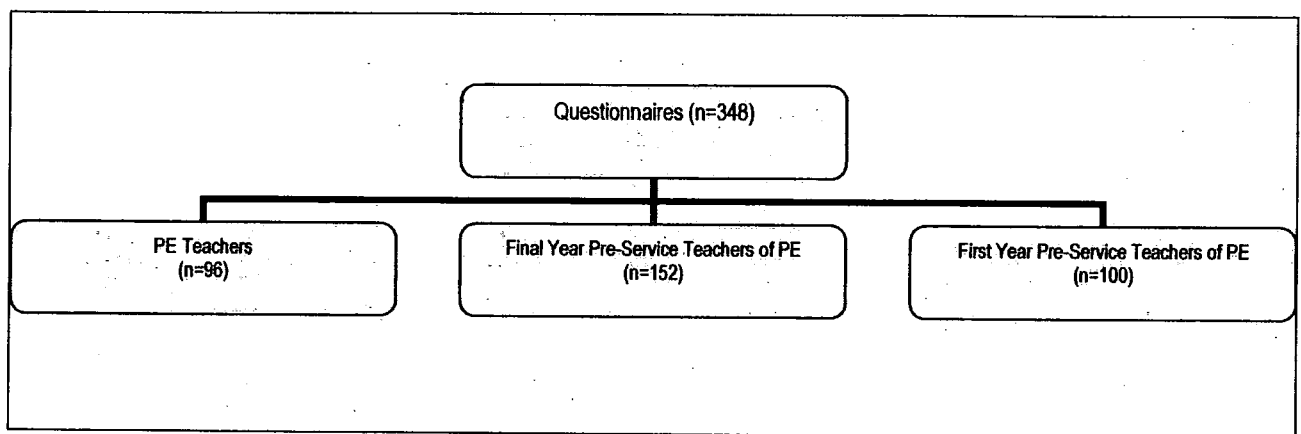
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<sup>128</sup> Professor of Physical Education – Author of various pieces of literature used in this study and a series of informal, semi-structured and structured interviews (taped; 11<sup>th</sup> 12<sup>th</sup>, 13<sup>th</sup> June, 2001). See Appendix F.

<sup>129</sup> This was because delivery and return of questionnaires was organised so that pre-service teachers of PE at the AWF carrying out their practicum, delivered the questionnaire in person to the PE department where they were teaching; and they were then responsible for returning them back to the AWF. Each individual carrying out this task received instruction on how to carry it out with information being provided relating to the purpose of the study, who was collecting the data and where further information could be obtained.

the selected region and 96 were returned to the AWF coordinating the returns. The other two groups were 1) 152 pre-service teachers who all had six months teaching experience and were in the final semester of their PE Master's programme. 2) 100 pre-service teachers of PE in the first year of their PE Master's programme. With both these groups, questionnaires were distributed in a *Methods and Practise of PE* seminar. The diagram (Figure 3.J) below shows the breakdown of the questionnaire.

**Figure 3.J Questionnaire Break-Down**



- Structured interviews relating to questions that arose from the analysis of the questionnaire; this was carried out face-to-face at the AWF and later (in 2004) carried on via email and telephone; these tended to be precise questions emanating from selective coding techniques.

Overall the interviews served as overlapping phases of data collection that enabled the research context to be established simultaneously with literature searches. The early stages, that is 1999-2000, saw a greater reliance on unstructured interviews as concepts, themes and categories were only just emerging; the category of physical culture was identified as central to PE and hence,

its prominence in this thesis. The middle stages of interviews, that is, 2001-2002, were dependent on semi-structured and structured interviews as categories emerging from this stage were to be used for the development of statements for theory building, which was to lead to questionnaire design. The final stages of interviews (2002-2004) were mostly structured interviews as they were deliberate attempts at answering relevant questions that had emerged from the questionnaire responses.

### 3.23 ANALYTIC PREFERENCES

At the planning stage of the research it had always been intended to use a combination of quantitative and qualitative data, which was a response to contemporary debates on educational research and how there should be a greater link between research style and principal duty to society (Scriven et al 1997). Fitz-Gibbon (1998) argues that replicability and generalisability are necessary as a way of avoiding the randomness of single instance research. This combination of data types is a strategy that can improve the standing of validity and reliability in research (Kerlinger 1986, Fitz-Gibbon 1987) and in grounded theory can aid the saturation of categories (Strauss 1987). Analysis of two data types requires greater resources and compliance with strict procedures for its management (Cohen et al 2000). Without this compliance the research stage of analysis can be severely hampered by any lack of consideration. Statistical analyses should be identified in the early stages so that congruity of data in computer packages provided the highest level of appropriateness. Strauss (1987) advises that this mixed methods approach to acquisition and analysis of data also leads to the yielding of categories within grounded theory; he does not, however, provide detailed guidance on its utilisation. It is, consequently, stated that descriptive statistics supported the creation of emergent concepts and categories as statements and is carried

out with some trepidation as no examples were found during this study to provide an explanation as to how it may be done. So, this strategy required a good deal of autonomous interpretation.

### 3.24 SPSS STATISTICAL ANALYSIS AND QUANTITATIVE DATA

SPSS is a Statistical Package for the Social Sciences. It is used for processing and analysing data that is designed to be turned into numerical form. Before SPSS can be used it requires familiarisation with so that research design and instrumentation can be selected effectively to ensure compatibility (Cohen et al 2000, Pallant 2001). This study employed the use of SPSS Version 11.5 to manage some sets of data. The questionnaire during its design stage adhered to the aforementioned principle; in addition to being aware of the need of developing scales and measures that were reliable and valid. After the questionnaire design it was necessary to prepare a codebook. A codebook is a summary of the data that has been collected. It allows for the defining and labelling of each variable and then converting responses into possible numeric representations. Each questionnaire in this study was assigned an individual code (see Figure 3.K) and number to assist in the uniformed organisation of data. This type of codification also assigns an identification number so that any errors that may occur in the inputting stage can be easily checked.

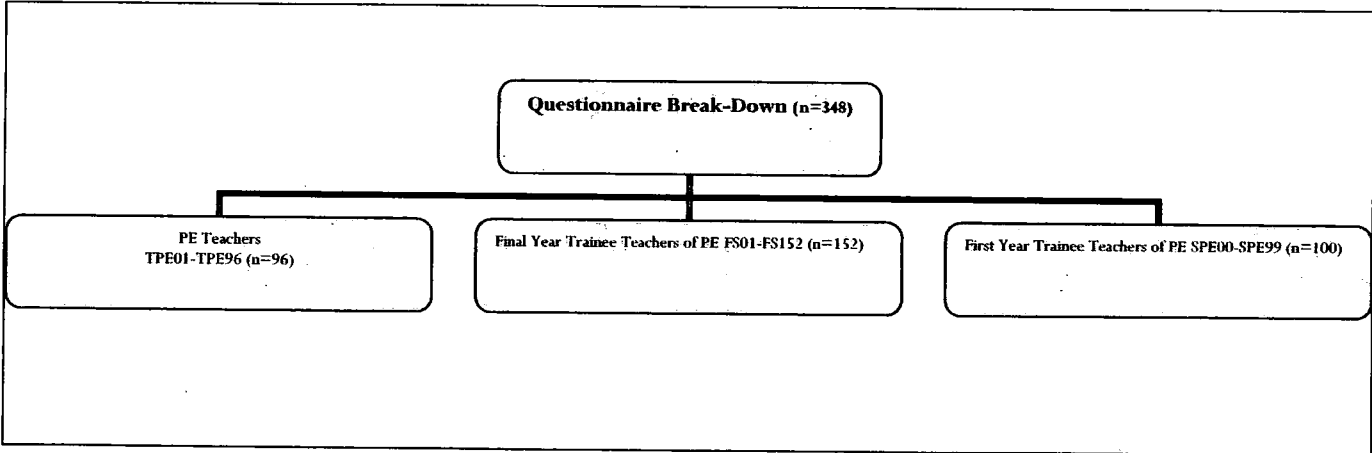


Figure 3.K Coded Questionnaires

After the initial separation of participants into PE Teachers, Final Year Trainee Teachers of PE and First Year Trainee Teachers of PE, other variables were also coded and two examples from this study are shown below to provide an explanation as to how this data was managed.

**Example One - Question 1 (Grupa wiekowa<sup>130</sup>)**

- The age of participants were grouped into bands –

<b>Age Band</b>	U 21	21-25	26-30	31-35	36-40	41-45	46-50	50+
<b>Code</b>	1	2	3	4	5	6	7	8

**Example Two** - SPSS can handle questions on a questionnaires or surveys that are open-ended as the answers can be transformed into numeric data for analysis. One of the sections of the questionnaire asked informants to list the changes that had occurred in PE over the last ten years. Informants were then asked to return to their responses and make judgements on whether these were positive or negative (by placing a minus (-) for negative and or plus (+) for positive sign against the listed responses. Respondents depicted the items as either all positive, all negative, a mixture of both, no response, or stating that “no changes had been evident”. In order to deal with this with SPSS the coding was assigned as follows –

<b>Changes Rated as</b>	Positive	Negative	Positive and Negative	No Opinion	No Noticeable Change
<b>Code</b>	1	2	3	0	4

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<sup>130</sup> Age Group

The use of SPSS to manage and analyse data in this grounded theory study enabled the description of characteristics to occur and thus led to the saturation of categories. Pallant (2001) explains that descriptive statistics in research have the following uses;

- Description of characteristics of the sample
- Check variables for any violations of the assumptions underlying the statistical technique that is used to address research questions.
- Addresses specific research questions.

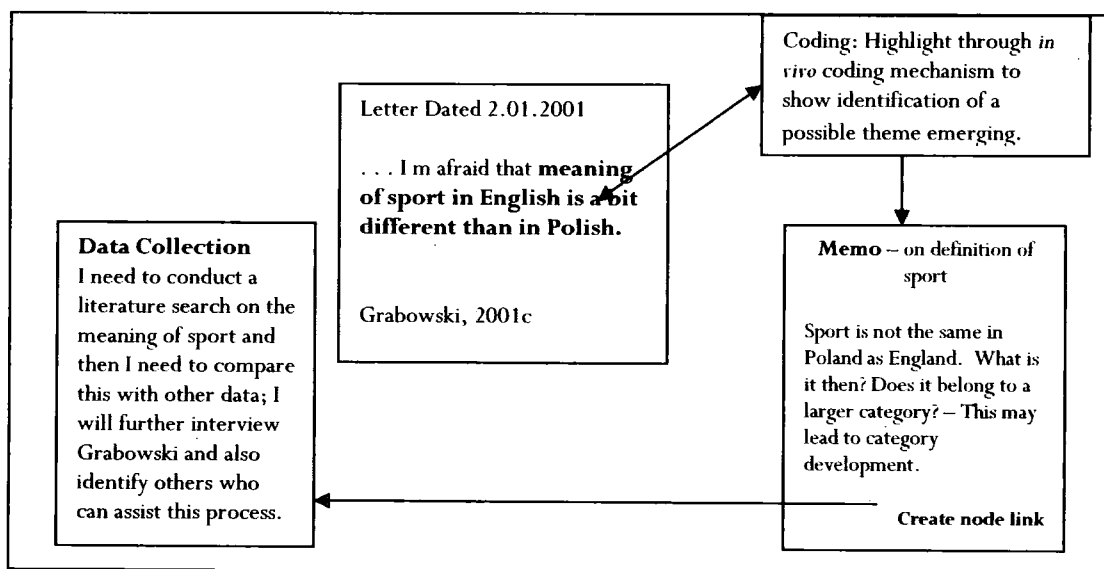
### 3.25 NVIVO AND QUALITATIVE ANALYSIS

Qualitative computing has become standard practise in education and social sciences (Richards 2000). NVivo is a software package that can support the management and analysis of research projects. It does not serve to locate the research within a given methodology; it merely facilitates the storage management and analyses of data. It is a useful tool as it enables ideation to occur simultaneously with administration and analysis. It provides a multiple approach to handling data with the advantage of providing a clear and simple filing system. This filing system links all types of data (primary and secondary) through a system of memoing, done internally of the software, or externally, through linking other data-bites; this can be photographs, videos and other documents. This study employed the use of NVivo 1.3 (and is often recognised by its earlier name of NUD\*ST) for the storage, management and analysis of data sets. Memoing is a technique within NVivo that supports the building of categories, themes concepts and ideas, all of which lead to the development of theory in the instance of grounded theory. It is a system that can be described as an analytic dimension that provides a transparent method for storing and organising the thinking emanating from data. The emergence of ideas, links, statement development and theory building is supported through this procedure; when used early on it can provide a clear picture of

emergence that informs the decision making requisite to proceeding with a study. It also permits coding to originate within the first piece of data that is stored in its filing system. For example, if the first data is a letter from an academic responding to a request for interview on, (in this instance), *sport*, it can be transcribed into a document and then initial coding can commence:

*"I m afraid that meaning of „sport” in English is a bit different than in Polish.”*  
(Grabowski, 2001c)

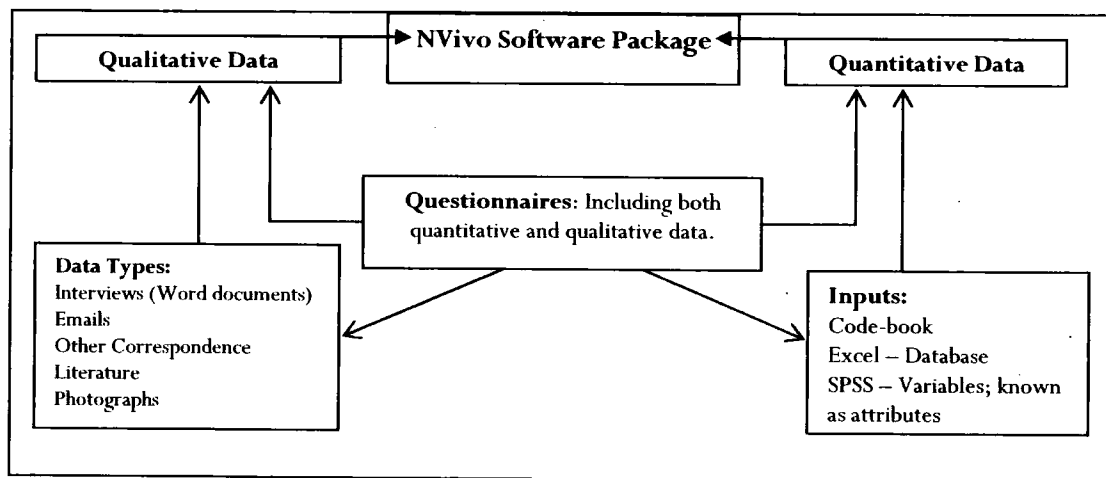
This statement within the main body of the prose can be coded and a memo noting thought development and any other questions needing to be asked for further data collection can be linked (see Figure 3.L).



**Figure 3.L Coding in NVivo**

This is one of the reasons why using a sophisticated software package such as NVivo is advantageous, it prevents the loss of data and coding that can happen when the research is nebulous and inchoate. NVivo has a number of collaborative mechanisms that can support the

use of large quantities of data across several software packages. It cooperates with both Excel<sup>131</sup> and SPSS and imports the variables stored in such a database; it should be pointed out that NVivo calls variables *attributes*. It can also import Word documents<sup>132</sup> and make links to other electronically stored data such as emails, photographs, scans, movie-clips, electronic diaries. With the on-set of elaborate technological advancements the scope to include all forms of data are immense. Audio-notes in hand-held computers or MP3 technology, photographs from mobile-phones, folders in on-line internet portals and digital recordings (both audio and visual) can greatly enhance research by making transparent the processes of analysis, which can be recorded more easily due to this technology and software that can handle its interface. NVivo supported the multi-layered approach to data collection in this study. Figure 3.M below presents diagrammatically as to how NVivo worked with both qualitative and quantitative data and alternative software packages.



**Figure 3.M Managing Data in Software Packages**

<sup>131</sup> A software package that allows spreadsheet development with built-in analysis of simple numerical data; it does not carry out complex calculations such as SPSS.

<sup>132</sup> It imports Word documents but they must be saved in Rich Text Format and not contain characters other than letters, spaces, commas, full-stops and inverted commas.

### 3.26 SUMMARY STATEMENT

The present study utilized grounded theory methodology as developed by Glaser and Strauss (1967) and described in detail in this chapter. This method is uniquely appropriate in the study of physical education in post-communist Poland since there was little known about the phenomenon and because the identified process involves describing the meanings and social interactions of those involved in the research setting. Techniques for determining the setting, sample, and procedures of this study were derived from a Straussarian grounded theory and the techniques, processes and canons that are its method, although described in a systematic and sequential order, were used as an overlapping set of methods that led to the integration of data and associated analyses, all of which is in compliance with the method. It has also been explained that grounded theory has developed into two separate and distinct approaches to undertaking research, which has led to an explanation as to how this has characterised the study. The selection of interviews and questionnaires, as techniques for data collection, led to decision on sampling and piloting. It also meant that data sets required two tools for managing and analysing them, SPSS (v.11.5) and NVivo (V.1.3) were selected for this exercise. Chapter 3, then, is a detailed explanation of the methodology, rationale for selecting informants, an iteration of which types of data collection techniques were used, the production of instruments (and refinement) and the methods of analysis, all of which had a final impact on the construction of the emergent theory in this study. The results from the findings are, as a result, characterised by the interpretation of grounded theory and the next chapter is the outcome of this attempt.

## CHAPTER 4

### FINDINGS RESULTING FROM THE STUDY

#### 4.1 INTRODUCTION

This chapter presents a grounded theory developed from interview (n=33) and questionnaire (n=348) data that were collected and analyzed using the grounded theory methodology as developed by Glaser and Strauss (1967), Strauss (1987) and Strauss and Corbin (1998). The aims of the study were to address gaps in knowledge by seeking to understand what was going on in a substantive area of education reform and thus answer the question - how will physical education change during political transformation? The question took on a twofold intention during inquiry: (a) to elucidate the experiences of professional and pre-service teachers' *concerns* about education reform; and (b) to formulate a logical, systemic and explanatory theory of *physical education in transition* in response to socio-political redevelopment, thus leading to the construction of a grounded theory.

During the course of this study literally hundreds of concepts emerged from the data. The integrative stage was the time when the most pertinent concepts were structured around categories that would eventually lead to theory development. This chapter presents the categories and related ideational statements that have been used to build a grounded theory. The rationale behind this discussion is to show the logical progression of the most relevant categories that have led to the construction of a Grounded Theory of Physical Education in Transition. This chapter begins with a brief reiteration on the development of categories and concepts and how these led to the development of a grounded theory. It is followed by a discussion on the identification of the core category; physical education in transition. There are three levels in the transitory journey of physical education and it is integral to the study's understanding that they be discussed, as they

form the levels of transition for all of education. Despite there being three levels of transition, (macro, meso and micro) this study has been contextualised through the life world of the PE teacher and has been done by submerging into the micro level (PE teacher) of the *three levels of transition*.

At the micro levels the analysis of data has led to the emergence of a new concept in education reform, one that elaborates on the appearance of distinct relationships between the categories in this study. The *globosity of change* concept is an integration of all data and analysis and presents an explanation of what is happening in physical education reform in post-communist Poland. In this chapter the breakdown of this concept will be discussed, as it is structured around three distinct layers with related sub-categories, and will appear in the following order;

- Ideological Layer – Europeanization, Globalization, Democratization
- Structural Layer - Improvements, New Pedagogies, New School Structures, Autonomously Interpreted Curriculum
- Individual Layer – Professional Frustration, Conflicting Values, Autonomy-Dependence Continuum

While these layers and related sub-categories will be addressed through a discussion that distinguishes them from the concept (*globosity of change*), they are all interrelated through a complex relationship. Additionally, further analyses of emergent categories were explored for deeper understanding and this led to the discovery of four distinct analytic stories, which surfaced out of the data and that were then developed into a Four Scenarios Model. An explanation of this model is presented by showing how it has captured the reality of physical educationists in Poland's reforming education system.

#### 4.2 EMERGENCE OF CONCEPTS, CATEGORIES AND THEORY DEVELOPMENT

During this study the emerging of concepts were broadly placed into three areas of development: 1) emergence of new or non-existing concepts; 2) existing but nebulous and or inchoate concepts; and, 3) existing concepts that altered due to the influence of changing contexts and/or specific conceptualization of groups of people. All three types of concepts became the building blocks that allowed for categorization to occur and hence, led to a substantive theory emerging from the analyzed data.

The open-coding phase in this inquiry led to the construction of original categories, these were then merged into broader themes during axial coding (the start of the reflective phase), and finally refined during selective coding into fundamental categories; not all will be listed as they were not necessary for conveying the theory<sup>133</sup>. Soon after the interviews began, it became clear that there was a lot more emerging with PE in transition than would fit neatly into extant definitions of transitory journeys during education reform. The most important facet leading to this emergence of uniqueness is that PE teachers in post-communist Poland had to adapt to a completely new cultural existence in their professional and private lives. Reforms to education were, and continue to be, only one contributing factor in the transitory journey in Poland's newly formed democratic culture (Zawodowska 1995, Gomez 2003, Adamus-Matuszynska 2004). The way teachers (and the entire population) were all adapting to new cultural forces can be described as a *socio-cultural shift* (McKenzie et al 2002). This study shows how the sudden and all-embracing move from *collective ideology* during communist politics to *individual responsibility* and *equity* as part of the rhetoric of democratic ideologies has taken a complex and somewhat paradoxical journey

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<sup>133</sup> Chapter 3 contains the conditional/consequential matrix that shows the interrelatedness of physical education in transition and the Reflective Coding Matrix for Physical Education in Transition; these have been contained in the methodology chapter so as to contextualise the canons of grounded theory in practice and can therefore be referred to in tandem with this chapter if necessary. It is also not necessary to present all categories that have emerged out of the data as the integrative process is meant to transcend the literal appearance of categories (Strauss and Corbin, 1998).

(Apple 2001). This paradox forms a long and complex theme through the *globosity of change* concept.

#### 4.3 DISCOVERING THE CORE CATEGORY

The core category in grounded theory is the one that all other categories are linked to by purposeful relatedness. During this study it was important to examine the context of physical education and how it related with other unpredictable concepts and complex contexts so as to extricate the properties and dimensions of all relevant categories, which would lead to the identification of the core category. Physical education in Poland is meant to inculcate young people into the practices of physical culture (Demel 1969, Żukowska 1993, Ust. 1996, Grabowski 1997) and as much as PE is a component of PC, PC is realised through the educational context. Physical education has been compulsory since education reforms in the early 1950's (Shimoniak 1970, Gaj and Hądzelek 1997) and was part of an overall curriculum, which only required students to have 1-2 hours of PE. In addition, this curriculum condition was not audited by the Government of the day (personal communication Skoczylas 1999, personal communication Wentel 1999). PE, in light of education reform, has become compulsory for 'all' students in State schools and includes an earlier introduction to PE through Primary education (which now commences at the age of six and not seven as it use to be pre-democracy); and also includes post-16 education, which means that 16-18 year olds staying on at school must attend compulsory PE (Kosiba 2003, Ministry of education and Sport 2004). Returning to the earlier point, because PE is compulsory then as a cultural activity it should lead to individuals developing a physically active life. Grabowski (personal communication 2001a) explains it as follows -

"There are many motives for engaging in physical culture, for example, one person may do so to enhance and sustain the aesthetic appeal of the

body. Another may do so for health reasons or to be better prepared for work or for competitive sport or even just for the pleasure and enjoyment of being physically active and physical education is its foundation.”

Political redevelopment, decentralization and education reform have led to physical education to shift its meaning, structure and delivery in society. Having integrated the categories from this situational ‘shift’ into a single theme, one of them played a central role in explaining how different categories were all linked to each other. This was the core category into which all other categories and subcategories were systematically integrated. *Physical education in transition* is the core category of this grounded theory. It captures the culmination of the entire process of physical education as it transforms in relation to physical culture, education, political redevelopment and the adoption of new structures and ideologies through decentralization. It can, for that reason, be linked to its past, explain the present and make assumptions about the future<sup>134</sup>. Physical education is simultaneously dependent on the changes that physical culture and education must make in the political redevelopment of Poland. Furthermore, because of the intersecting contexts of education and physical culture and the relationship between them and those who exist within that perspective, new concepts that emerged explain the entire process in terms of grounded theory.

#### 4.4 THE THREE LEVELS OF PHYSICAL EDUCATION IN TRANSITION

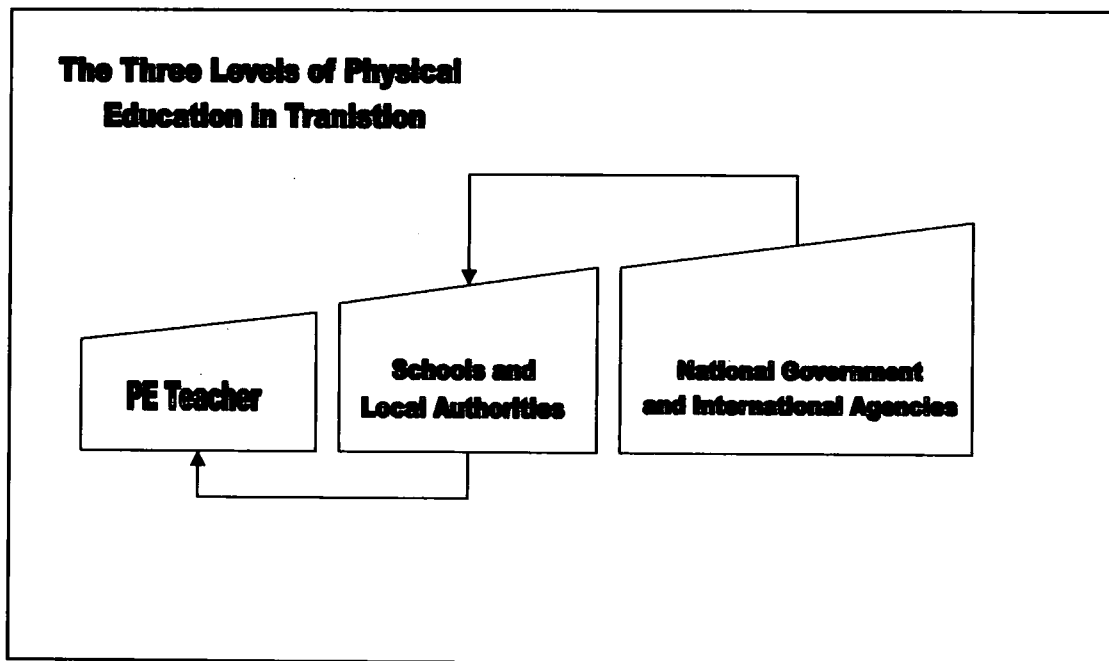
Political redevelopment is the ultimate aim of all the new democratically elected government(s) in Poland and education reform is invariably a process that follows from this general aim. Its impact on physical education as it emerged in this study shows that transition has occurred on three levels. These three levels are diagrammatically presented in Figure 4.A and are –

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<sup>134</sup> Although the future is discussed it is also unknown given the fact that reforms to physical culture and education (and all other structures and systems) are yet unfinished.

- Teacher (physical education) level - the teacher is situated at the micro level of transition, however, is also connected through the meso (structural) and macro (ideology) levels. At this level individuals are expected to adapt and conform to new conditions of a reformed teaching profession, which include new ideas about political culture, decentralized approaches to delivering education and confronting the challenges of democracy as it presents itself in the school context; and this includes dealing with students and processes that have been enabled through democracy.
- School and Local Authority Level (including governing bodies) – is situated in the meso level of transition and is located between both the macro and micro level, which impact on its processes. At this level changes and reforms manifest themselves through a new political force as decentralization has created locally elected governments that now yield control over public services and who report back directly to central government. This has introduced new management systems for schools, which are based on ideologically driven policies such as equal opportunities, lifelong learning and globalization. Funding for salaries and school resources are now being driven by central and local government policies that require a justification on spending in relation to local needs. Further to this a new National curriculum for PE has been implemented and teachers and schools are responsible for interpretation that will be audited by central authorities thus creating a greater transparency between central government and the school (and hence, teacher) through local authority control.
- National Government and International Agencies level – these are situated at the macro level of transition. Transition at this level includes a major overhaul of the mechanisms that create policy for public service reform. New ministries, such as the National Ministry

of Education and Sport have been created for the purpose of developing and maintaining a curriculum that is resonant of a new political culture. Democratic nations lean heavily on Policy Development Units and in Poland's transitory journey it has been planned for a new policy creation and development unit to be established for education and sport. This level is also responsible for meeting demands in national and international skills and the rhetoric of globalization and Europeanization has been absorbed into the transitory journey. New economic frames have led to a restructuring of financial models at the national level and the modernisation of diplomatic mechanisms have been made so that membership of international agencies, such as the European Union, can be exploited for the development of Poland's new economic and political challenges.



**Figure 4.A the Three Levels of Physical Education in Transition** - Figure 4.A shows how the position and steepness of the levels graduate from a micro, to meso, to macro level with the size of each level depicting the scale of significance in the transitory journey of political reform. The individual teacher is connected by the levels and provides a 'thin end of the wedge' explanation of the changes that have been occurring in Poland's transformation to a modern democracy.

#### 4.5 CONSTRUCTING THE MACRO, MESO AND MICRO LEVELS OF TRANSITION

The three levels of transition as depicted in Figure 4.A were constructed out of the words provided by informants. The informants, predominantly, came from the micro level and, for that reason, the model reflects the 'actual' words that were used. When referring to the macro level, informants tended to use the words: Government, EU, Globalization, Life-long Learning and Democracy (Wentel 1999, Skoczylas 1999, Grabowski 2001a, Grabowski 2002, Kosiba 2003), when discussing changes to PE at the micro level. Grabowski (2001) exemplifies this point by linking the two

"Politicians and governments crave for international success and on a micro level this is also evident, for example, PE teachers are praised and rewarded for achieving sports trophies in events. Never do they receive the same kind of acclaim for instilling effective techniques in the physical care of the body . . . I do point out that the reasons for the current state of sport is political, economic and propaganda use. After all it is ideology . . . my view [of PE] is [that physical] education [is] for the lifelong care of the physical. This is what I believe is viewed in the West as 'lifelong sport' (sic)." (Personal communication, see Appendix F)

During the construction of the 'levels of transition' it became apparent that all three were connected by the meso level. Field (2000) explains that there must be "a degree of distance between policy rhetoric [ideology] and policy achievement [schools and PE teacher] . . . Between conception and delivery lie a series of mediating institutions and actors [meso level]" (p.249) and as he goes on to clarify "lifelong learning has been no exception to this general rule". The meso level, then, are the words that informants have used that can be ascribed to this 'distance'. Skoczylas (1999) draws out a significant problem with the meso level in this study by saying that

"There is a lack of funds to fulfill the ideological intent in government reforms and as such it becomes all talk without substance. The teacher is the most important part of the equation in reforms, and given the lack of financial support for increased responsibility, there has been an effect upon motivation." (Personal communication)

Skoczylas (1999) links the consequences upon the meso level by identifying ideology (macro level) as the event that has made structural (meso) changes necessary. He then goes on to specify that the PE teacher (micro level) is the evidence for attaining the outcomes of both the macro and meso levels. This guidance in the study, through the words of PE academics and a local authority Director of Education and PC enabled the 'levels of transition' category to be constructed. The PE teacher was through their words placed at the centre of education reform and, as a result, led to data collection from this group and contributed to the development of a new concept (as detailed in 4.6). To some extent, it is evident that all three levels are significant drivers of change in Poland's societal transition, there are however, significant omissions of detail to the meso level, as depicted through the words of informants and this could only be justified by the reason that PE teachers were the predominant participants in this study and, as such, made either tenuous links or lacked detail knowledge of this level. The words that were most often used, however, were suggestions to improvements to facilities, teacher training and school leadership (see 4.11 for detailed analysis).

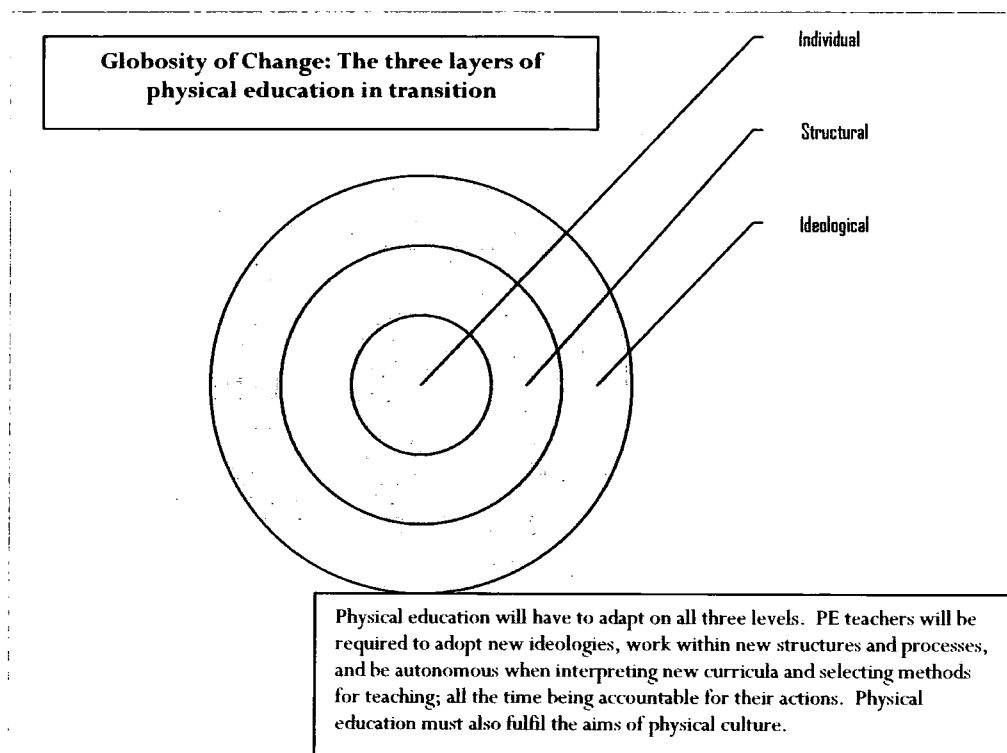
#### **4.6 THE GLOBOSITY OF CHANGE CONCEPT**

All three of these levels have been identified as affecting *physical education in transition* and in this study, through the mechanisms of coding and constant comparison, it emerged that there were three layers of implementation necessary for these levels of transition to shift into a new socio-political paradigm. In this study, informants were asked to explain the techniques and processes that had been employed to initiate the transitory journey towards a democracy through education reform. It became apparent that the three layers of implementation leading to changes in society and thus education gravitated towards the individual teacher and could be explained at the micro level of transition. These three layers emerged as: 1) the *ideological layer* – including democracy,

meritocracy, equality, economic rationalism, capitalism, European Union rhetoric, and globalization; 2) the *structural layer* - including decentralization, public service reform, devolved funding, new administrative processes, new school structures, new pedagogies, local demands for resources and governing bodies for auditing public services and new leadership and management styles; and 3) the *individual layer* - leading to individual and local agreements on *devolved interpretation* of policy and law with those who deliver it, for example, curricula, the law courts, local authority policy on housing and welfare; all of which influence the individual teacher and lead to categories that include professional frustration, conflicting values and an autonomy-dependence continuum. During integration of categories the *Globosity of Change* concept was constructed as a way of understanding physical education in transition as it provided a full explanation of how teachers of PE were adapting to the three levels of transition. Figure 4.B captures the reality of transition as experienced by teachers of PE by placing them at the centre of the sphere and showing the onion like layers that encapsulate them in the context of change. These layers are the three layers of physical education in transition and arranging them through the sphere was judged a clear way of explaining transition through education reform because the layers have emerged from the words of informants. In addition the logic of the sphere can provide figurative explanations on transitory journeys, as globes can orbit along trajectories, and, in the case of education reform as a goal of political redevelopment in this study, can conceptualize the life world of the PE teacher. To further the metaphoric explanation of the *globosity of change* concept, the informants in this study (PE teachers) are uniquely affected by the compounding pressures that the structural and ideological layers place on them in the teaching context as explained through the concept of a globe. To problematize these individuals' context further, adaptations to shifts in society on a personal as well as professional level are part of this transitory journey and it is important to detail the *globosity of change* with the words of informants to truly understand the all encompassing effect

that reforms have had at the micro level (the individual layer) and to explain this new concept in education reform as it appears by grounding it in the data of this study.

**Figure 4.B Globosity of Change Concept**



#### 4.7 THEORY VERIFICATION

From this section onwards the chapter describes the results of the study in an attempt to verify the generated theory and examine its relevance to education reforms. Interviews were initially carried out before and after the construction of a questionnaire and in total thirty-three (n=33) interviews were carried out amongst a varied group of individuals involved in PE and PC. Four-hundred (n=400) questionnaires were distributed to three distinct groups of PE teachers and three-hundred-and-forty-eight (n=348) questionnaires were returned by the cut-off date (September 1<sup>st</sup> 2003).

The three groups were made up of the following physical educators:

- Group 1 (TPE) was made up of ninety-six (n=96) teachers of PE employed in a school on a full-time basis.
- Group 2 (FS) was made up of one-hundred-and fifty-two (n=152) pre-service teachers in their final year of study at one of Poland's AWFs (physical education universities). These teachers all had a minimum of six (6) months teaching experience through *practicum* as part of their four and a half year Master's degree.
- Group 3 (SPE) was made up of one-hundred (n=100) pre-service teachers of PE all in their first year of study at one of Poland's AWFs. Although this group had no formal teaching experience, they were selected for the study as they made up an important sample-group that was an age group that would have experienced their entire education within the post-communist tradition and with their intention to become PE teachers would make up the voice of a new generation.

The questionnaires were analysed and the results of the data analysis have been embedded within the explanation of the grounded theory in this study. The analysis has consisted of both statistical descriptions, and will be presented as a demographic profile, and through the coding techniques of grounded theory, which provide thick descriptions in presentation and discussion of categories and concepts.

#### 4.8 DEMOGRAPHIC PROFILE

All respondents to the questionnaire (n = 348) were either full-time teachers or student teachers of PE. Table 4.1 summarises the demographics of each group and the totals of all group.

**Table 4.1 - Role of Questionnaire Informant**

<b>Groups</b>	<b>(%)</b>	<b>n = 348</b>	<b>M/F split %</b>
Group 1 (TPE) Teachers of PE	27.6	n=96	33/67
Group 2 (FS) Pre-Service Teachers of PE Final Year	43.7	n=152	57/43
Group 3 (SPE) Pre-Service Teachers of PE 1 <sup>st</sup> Year	28.7	n=100	48/52
<b>TOTALS</b>			48/52

## Education

The region in which this study took place has been kept anonymous for ethical reasons and the following demographic is not situated in any particular geographic locale as it would expose the identity of informants. The presentation of this descriptive statistic is intended for the purpose of showing how PE teachers are predominantly educated in an AWF closest to where they work. This reveals an important socio-cultural condition in post-communist Poland as it reflects a restriction on the freedom of movement that was present during the communist period of governance.

During communism there was no private ownership of housing and all citizens were bound by law to make formal registration and this had to be done through a link to a residence (owned by the government) and thus bound them to a locale. This resulted in a loss of freedom to move without redress and exposes a condition of the past when analysing the education demographic in this study.

There are six AWFs in Poland where PE teachers are educated (see chapter 2, part B for map). There are, however, some Faculties in other Polish Universities that provide teacher education for PE and this category has been presented in this study as 'other'; only one respondent came from this category. Five (1.4%) respondents came from AWF1, one (0.3%) from AWF2, one (0.3%) from AWF3, three-hundred-and-thirty-nine (97.7%) from AWF4 and none from AWF5 and 6, one respondent failed to assign the Institution where teacher education was obtained.

These numbers have been randomly assigned and do not correspond with the questionnaire for the purpose of anonymity.

### Teaching Experience

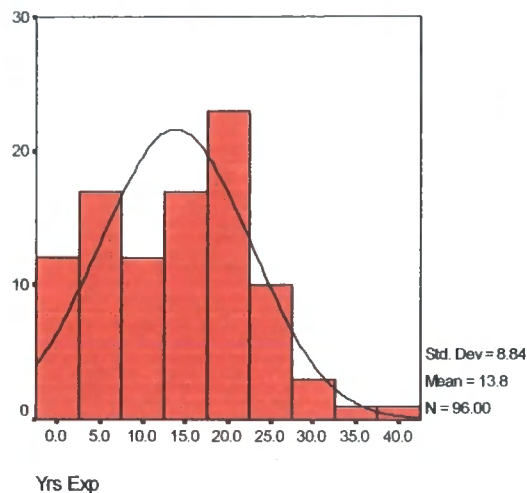
The following description of informants' teaching experience is presented in Table 4.2. It was important in this study to have a description of the number of years teaching experience that informants had so as to make judgements about the perceptions of reforms that they held. It would provide insights on individuals' adaptations to education reforms and elucidate critical views on how these were perceived throughout the profession. It would also reveal the varied views that could be held by those teachers who had gained their entire education and most of their teaching experience under a former communist regime alongside those who had entered the profession with a greater experience of a democratic Poland.

Table 4.2 Teaching Experience in Years

Teaching Experience in Years	Mean Std.	n=
Group 1 (TPE) Teachers of PE	13.8 ±8.84	n=96
Group 2 (FS) Pre-Service Teachers of PE Final Year	0.5	n=152
Group 3 (SPE) Pre-Service Teachers of PE 1 <sup>st</sup> Year	0	n=100
<b>TOTALS</b>		<b>n=348</b>

Although the mean shows an average of 13.8 years teaching experience in the 'teacher' group (TPE) Figure 4.C (below) presents the distribution of this statistic in a histogram and is followed by Table 4.3 (below) showing the descriptive statistic for all the informants from the questionnaire.

**Figure 4.C Histogram Showing Number of Years Teaching Experience in Group 1 (TPE)**



As can be seen, up to 41 years teaching experience is contained within the professional teacher (TPE) group.

**Table 4.3 - Descriptive Statistic Showing Number of Years Teaching Experience for all Informants**

	N	Minimum	Maximum	Mean	Std. Deviation
Yrs Exp	348	0	41	4.03	7.611
Valid N	348				

As it can be seen the teaching experience ranges from zero (0) to forty-one (41) years with a mean of 4.03 years and a standard deviation of 7.6 years when analysing the entire group.

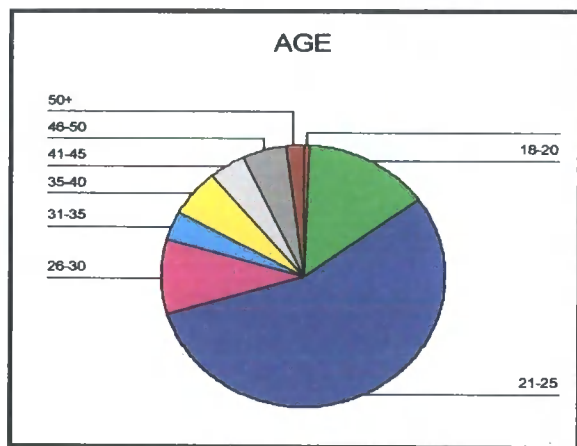
### Age

The age of respondents was not deemed an overly necessary demographic at the outset of the study, although it eventually provided a link for understanding how different generational groups may adapt to education reform. The informants were asked to highlight an age-band that they belonged to and the results are presented in Table 4.4 and Figure 4.D (below) for a clear description.

**Table 4.4 - Age-Bands of Informants**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2	.6	.6	.6
18-20	50	14.4	14.4	14.9
21-25	193	55.5	55.5	70.4
26-30	31	8.9	8.9	79.3
31-35	13	3.7	3.7	83.0
35-40	20	5.7	5.7	88.8
41-45	15	4.3	4.3	93.1
46-50	17	4.9	4.9	98.0
50+	7	2.0	2.0	100.0
Total	348	100.0	100.0	

**Figure 4.D – Pie-Chart Describing Informants’ Age-Band**



In summary, the demographic description of the 348 informants that responded to the questionnaire goes some way to describe the questionnaire sample in this study. The implications are that this characterisation of informants, through descriptive statistics, contributes to the understanding of the informant who has provided words that led to the construction of a substantive grounded theory and consequently, provides evidence and verification of definite

attributes that teachers of physical education in Poland have. In addition, using the questionnaire approach to attaining an understanding of PE teachers in Poland has strengthened the strategy for 'saturation' of categories. This is because 348 informants all responded to the same questions in the same time-frame thus providing an opportunity for words and statements to be repeated enough times so as to make constant comparisons between data. It also assigned a strong direction for further questions to be asked in the interviews that followed as the number of informants who told their stories in the open-style questionnaire showed a unison of experience, thus limiting the incidence of error because of 'strength in numbers'. In the same vein, concepts that never fully developed because of this strategy, such as an individual or small number of informants raising an issue, also provided an opportunity for exploring the relatively low incidence of emergence. For example, during the study a low incidence of reference to the past (communism) was detected as unusual. A question was, consequently, designed to deal with this and is presented in 4.10 of this chapter. Additionally, it is important to explain that even though the demographic of the sample is an imperative component of the study presented in this thesis, grounded theory method is deliberately sensitive to individual comments, which are analysed and compared with other data and subsequently raise related questions for further exploration until further data satisfy the reasons for emergence and provides closure in all cases. This means that despite a general character contained within the responses of the questionnaire, random statements were further explored for the relatedness that they had on emergent categories.

#### 4.9 IDEOLOGICAL LAYER

The *globosity of change* concept that has emerged out of the data in this study has been constructed around the words of informants. The concept is based on the idea that the individual teacher can be

described as a globe that has three layers. These three layers are where adaptations to education reform must occur in each individual and thus, the globe describes the interrelatedness of categories that form the transitory journey.

The first and outer layer is the *ideological layer*, which is characterised by political and economic mechanisms of cultural distribution. Bates (1975), in his discourse on Gramsci's<sup>135</sup> *Theory of Hegemony* in education, explores ideas on how the school context is a critical element for reproducing ideology as a place for socially constructing groups so as they replicate political culture. Apple (2001) agrees with this reproduction of political ideology in an educational context by examining the impact of contemporary ideologies such as globalization. In this study the ideological layer was isolated as an important layer of adaptation because of the extent of transition from Totalitarian Communism to Capitalistic Democracy. The sub-categories that have constructed this layer all have a dimensional range and fit into the ideological layer of the globosity of change. They also exist through extant literature and thus have been verified through this study. The uniqueness of their explanation in terms of this study is the interrelatedness between these existing concepts, such as globalization, and the way that they manifest themselves in the lives of PE teachers in Poland's transitory journey of social and educational reform. The real lives of PE teachers are affected by these macro forces and the outer-layer in this explanation contains characteristics and explanations that are consistent with existing literature but also when viewed through the entire explanation of physical education in transition, take on a unique appearance that can only be explained through the globosity of change.

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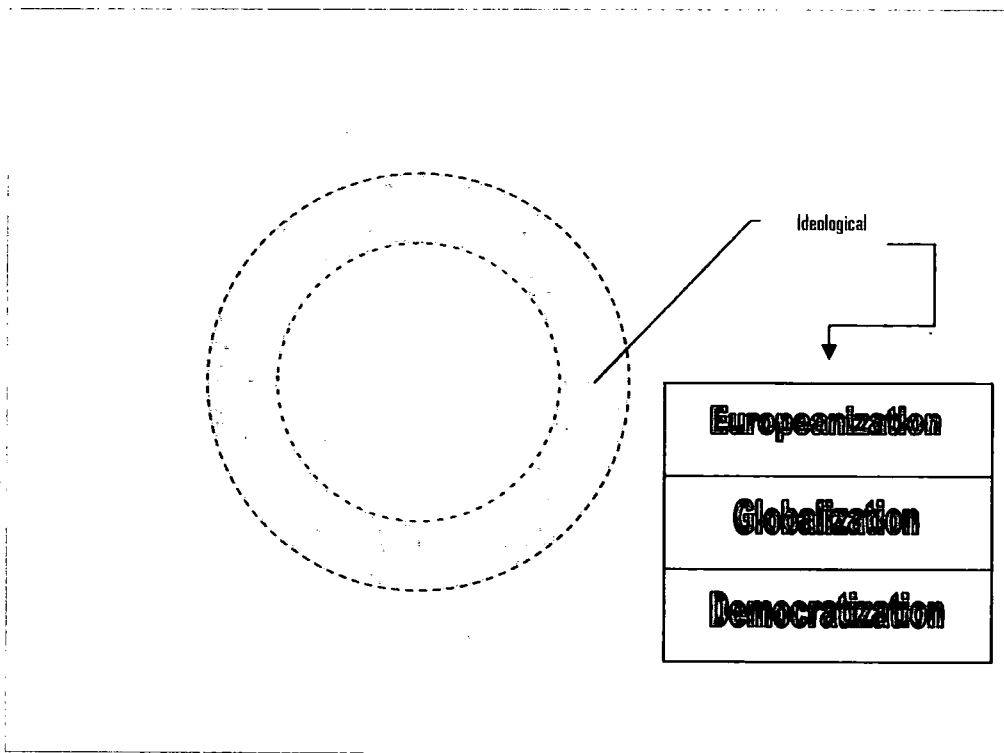
<sup>135</sup> Antonio Gramsci - Italian Marxist (Bates, 1975)

#### 4.10 DEMOCRATIZATION, EUROPEANIZATION AND GLOBALIZATION

The ideological layer is categorised by three sub-categories that are: 1) democratization; 2) Europeanization; and 3) globalization and is diagrammatically shown in Figure 4.E (below).

Presenting a grounded theory necessitates that these categories be discussed in the context of extant literature, informants' words and grounded theory analyses.

Figure 4.E the Ideological Layer with Related Categories

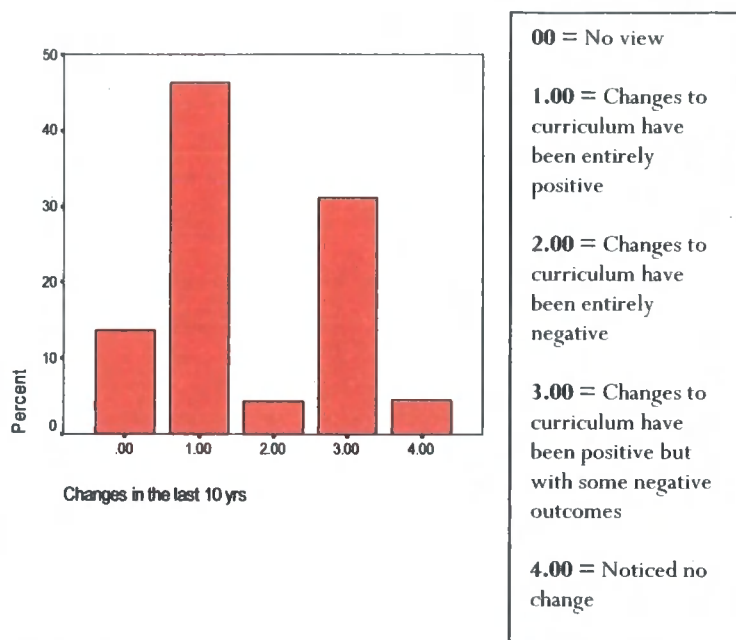


Arising out of the data in this study the ideological layer is determined by a central aim of the Polish government, which is a determination to shift its socio-political culture into a new paradigm (Levitas and Herczynski 2001, Gomez 2003, McKenzie et al 2002). This new paradigm, regardless of Polish society's erstwhile discontent with communism (Zawodowska 1995, Prizel 1998), requires an entire nation to transfer from one set of socio-cultural values to another. One of the

emerging problems with this is that the two sets of values are at odds with each other. This means that ideological conflicts between individuals and groups and their associated contexts may arise. Although this section is concerned with explaining the outer-layer in the *globosity of change* concept, its interrelatedness with other layers and sub-categories means that *ideology* seeps through the layers to affect the individual teacher and so, elicit the category of 'conflicting values'. This shift in socio-cultural values through ideology, despite having been significant on a global scale and thus reported extensively (Davies 1996, Henderson and Robinson 1997, Prizel 1998, Levitas and Herczynski 2001, Gomez 2003), has not been described on a micro-level and it is because of this that the reforming countries of Eastern Europe appear to have subsumed capitalistic democracy without a challenge to it (Elsner 2000). One of the aims of this study was to address this absence of understanding and the first outer-layer contained in the *globosity of change* captures informants' words on matters resulting from the ideological shift. The new governments of Poland have made every effort to redefine the country's identity on a national and international level (Henderson and Robinson 1997, Prizel 1998, McKenzie et al 2002), aiming to subsume the ideology and rhetoric of democracy (Gomez 2003). This has meant that every organ in society has undergone reform, and in the case of physical education, has had an affect on the working lives of teachers (Zawodowska 1995). Change was inevitable from the first moment of 18<sup>th</sup> August 1989 when communism was no longer deemed to be an appropriate political culture for Poland's nation and its society (Prizel 1998, Levitas and Herczynski 2001, Duczmal 2003, Gomez 2003). Soos (2002, informant AC07-see appendix D) explains that this would lead to an unpredictable future where PE would be aligned with the "standards of EU and globalization". Without this knowledge, change or political reform was assumed to be what most of Poland wanted (Adamus-Matuszynska 2004); education reform should, in that case, in theory have been welcomed by its teachers. This is verified in the bar-chart below (Figure 4.F), which shows PE teachers' response to the question on whether they

viewed education reforms in the last 10 years to have been positive (1), negative (2), or both positive and negative (3).

**Figure 4.F Informants' Views on Education Reform**



**Table 4.5 Frequency and Percentage of Informants Responding to Questions on Education Reform**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	.00	48	13.8	13.8	13.8
	1.00	161	46.3	46.3	60.1
	2.00	15	4.3	4.3	64.4
	3.00	108	31.0	31.0	95.4
	4.00	16	4.6	4.6	100.0
	Total	348	100.0	100.0	

As can be seen 77.3% of PE teachers held the view that reforms were either entirely positive or had some positive outcomes.

Seventy-seven percent (n=269) of informants viewed reforms to have been positive on some level.

The most common reason given for reforms having been 'positive' was linked to changes to the

Physical Culture Act (Ust.1996), which stipulated that five hours of compulsory PE should be adopted by all schools<sup>136</sup>. This amount of hours had no political reasoning behind it other than it was deemed an 'idealistic' number, probably linking it to one hour of physical activity a day for school children. In total 55% of teachers (n=191) named the increase in hours as a positive aspect of education reform.

**TPE 26** "the positive aspects have been the increase in PE hours, the independence to write own programme and multi-faceted activities. It's part of democracy."

**TPE27** "moving to democracy has included an increase in PE hours from two to three and increasing sports classes."

**TPE30** "Increasing PE hours in the week is now more like the rest of Europe."

**TPE34** "Positive aspects have been the increase in PE hours and the introduction of new activities such as weights and fitness. We can now do what the rest of the world does"

Teachers expressed that this was a good idea as it placed emphasis on the importance on physical culture within a school context; it also means that teachers generally agree with the 'idealistic' tendency of the government. The disappointment with this aspect of reform, however, was that no sooner was a third and in some cases fourth hour introduced into the curriculum, then it was then taken out as it was unfeasible to achieve in the present infrastructure in light of economic rationalism. The outcome is that financial realities have imposed themselves on what the government initially introduced as 'ideal' curricula. The development of new curricula and the legality of five compulsory hours as stated in the Physical Culture Act (Ust. 1996) were not designed with a view to realities of actual resources. In separate interviews with an academic of PE

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<sup>136</sup> Art.19.2 W ramach planach nauczania szkół podstawowych i w pierwszych dwóch latach nauki w szkołach ponadpodstawowych zapewnia się 5 godzin lekcyjnych obowiązkowych zajęć wychowania fizycznego w ciągu tygodnia, z zastrzeżeniem art.61. (Ust. 1996)

and a local authority director of education it was said that democracy had made politicians prone to ideology and 'wish-listing' (personal communication Wentel 1999, personal communication Skoczylas 1999). Skoczylas (1999) cited the Physical Culture Act (1996) as now making it a legal requirement for local authorities to provide

“ . . . Five hours of PE for every school child and in addition that each school child should have equal opportunity in terms of access to sport and physical recreation.”

These political directions have frustrated teachers who in theory agree with ideologies of equity and developing a population that is well versed in physical culture and lifelong learning, however, the realities of implementing 'idealistic' curricula were never thought out as Wentel (1999) and Skoczylas (1999) explain.

“In my opinion, in the future it will become a better system, and more reliable. However, there is difficulty with transformation as we're not all moving at the same pace. For example economic factors are not going to go away and actually have the greatest impact on whether or not idealistic objectives can be achieved, like equal access to sport and recreation in students' out-of-school-clubs.” (Wentel, 1999)

“The system remains exactly the same as in the past in that there remains a lack of resources. Reforms to the Physical Culture Act mean that there are greater reliances upon the creativity of a PE teacher (and the motivation of students). Some schools have absolutely no physical resources (facilities), not even a sports hall. Achieving reforms will be problematic because there is supposed to be equal opportunities for everyone.” (Skoczylas, 1999)

Teachers who are contextualised at the micro level (and linked to the meso and macro levels) have experienced this ideological intent of equal opportunity, which was intended to be aligned with EU rhetoric, as being unfeasible as the realisation of such ideologies requires finances, new pedagogies and apposite infrastructures. The following words of informants capture this view when asked to identify the negative impact that reforms have had on them.

**TPE43** “the negative impact of reforms is a lack of facilities and few finances. We’re supposed to have equal treatment, they mean equally bad.”

**TPE58** “There should be an increase in funding for sports equipment to match the increase in hours that are now taught, this has been negative for us as we’re responsible for the new programmes but we can’t fulfil the aims in the current infrastructure.”

The reality of introducing an extra hour has not meant an increase in finances. In fact, it has just meant a reorganization of activities. The extra hour has been introduced at the cost of out-of-school sports clubs and increased class sizes, which means that equal opportunity and access to physical culture on an equal basis as part of the rhetoric of democracy and Europeanization has been diluted because of fiscal realities. Ideology of opportunity and access for all has necessitated a reduction in activities that formerly produced elites. This was part of the ideology of the past where elite performance in international sport was a vehicle for promoting communism abroad (Erdmann 1989, Gyöngyi 1990, Macleod 1991, Gyöngyi, Riordan 1992, 1993, Krawczyk 1996, Liponski 1996) and thus school activities in PE were aligned with the aims for producing this outcome. Informants have criticised this new approach to out-of-school sports clubs and increase in student numbers in classes because it frustrates their abilities to deliver a curriculum that in their view is relevant. The following words of informants are presented to capture criticisms of education reform that were ideologically based.

**TPE01** “Changes to PE in the last ten years are increases in PE hours, which although positive in theory are actually negative in practice as students are now deprived of out-of-school activities, as there is no extra money for it. I think that changes to school PE should include additional hours more than four hours, the improvement of facilities and re-introducing out-of-school activities.

**TPE08** "Positive changes include increases to hours and education reforms. The negatives are the cutting out of school activities, these have all been stopped."

**FS150** "Classes are too big and there are too many unemployed teachers. The current programme isn't bad, the problem lies elsewhere, with hours for example, class sizes are too big and there are not enough hours in the school curriculum for achieving aims. It's all confused."

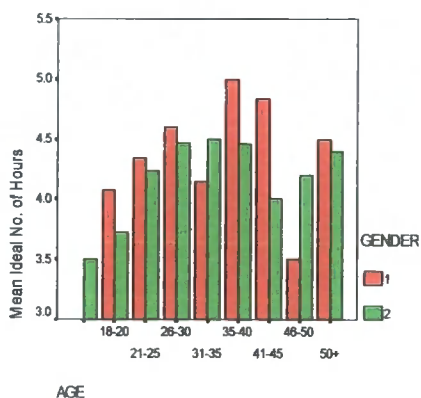
**FS48** "There need to be improvements so lessons are delivered to one class only. Teaching a lesson to two and sometimes three classes is not ideal, it doesn't allow for PE to have an impact on students. It just means that we are literally delivering the curriculum and quality is reduced. Didn't someone think about this?"

In fact, out of those informants who were working as full-time PE teachers (TPE) and who had a mean of 13.8 ( $\pm$  8.84) years of work experience, under half, 47% (n=45) thought that more than four hours of PE were necessary for achieving the government's curricula aims. An interview with AC03 (see appendix J) revealed that teachers in the reformed system are required to teach more hours of PE without an increase in pay. The shift towards new ideologies, connected with education reform, have altered the focus of teaching from one that delivered only two hours of PE a week - and then had the teacher focus on out-of-school sports competition particularly for elites - to one of four (or five when it is finally implemented) hours of PE for every school child - and student-out-of-school sports clubs being delivered with a new ideological rhetoric of *access to all*, which is a direct link to democratization through equal opportunity ideologies. In addition to this, out-of-school activities have been subsumed into the overall responsibilities of the curriculum; whereas, in the past teachers were paid an extra coaching fee for running competitive sports clubs, which provided them with an incentive to collaborate with the development of sporting talent within the school system. Teachers of PE are apprehensive about having more demanding teaching timetables (see Figure 4.G for views on how many hours of PE should be taught) with extra numbers of students to teach, which has come about because of changes at the structural layer.

This deters them from agreeing with the government's 'ideal' stance of five hours and general rhetoric of equity, because it will mean greater demands on them without any improvements to remuneration. In unstructured interviews that followed questionnaire analysis AC02 and AC03 both highlighted the difficulty of changing economic realities on the demands of teaching.

**AC02** "Teachers are working harder now because the government has new aims. They are not being paid any more and in fact, since democracy everything is so much more expensive and so there is more hardship."

**AC03 (2004)** "Since May and EU membership, Polish prices have gone up again and salaries have remained unchanged. It's difficult for everyone at the moment."



**Figure 4.G – Informants' View of Ideal No. of PE Hours (1=Male, 2=Female)** This histogram shows the age band and gender of informants and their related view of how many hours of PE should be introduced into the school curriculum. As can be seen only the 35-45 age groups of males agree with the government's stance of five hours.

The reality of how many hours are actually taught shows 84% (n=81) of informants of those teachers (TPE) in the full-time employment category reporting an average of three hours of PE a week for each school-age child is currently the standard practice (see Figure 4.H below). This is 40% short of what the government view of 'ideal' is, which has been outlined as a minimum of five hours in the Physical Culture Act (Ust. 1996). Reforms were meant to take into account the challenges of the future such as equal opportunity and lifelong learning, which were important

inclusions in education reform as they demonstrated a leaning towards EU ideologies on ideas relating to democracy and citizenship. Wentel (1999) explains that

“ . . . Local authority objectives are more like ‘local affirmations’ and guarantees, which are really just for upholding general Government ideology and the legislation that comes from this.” (personal communication)

It was also the government’s attempt to alter the perception of PE as somehow being connected with sporting elites and or a subject of little value as its connection with physical culture was always tenuous because of former obsessions with competitive sport. Wentel (1999) adds that

“ . . . Before 1990 the system had a huge pool of money, which was unaccounted for, and came from central Government. Elite sport was a fixture in many places, such as in the workplace . . . after 1990 this ended. Financial viability became a central aim of the Government and as a consequence the elite sporting model has been ceased, at least at the level at which it was previously supported.” (personal communication)

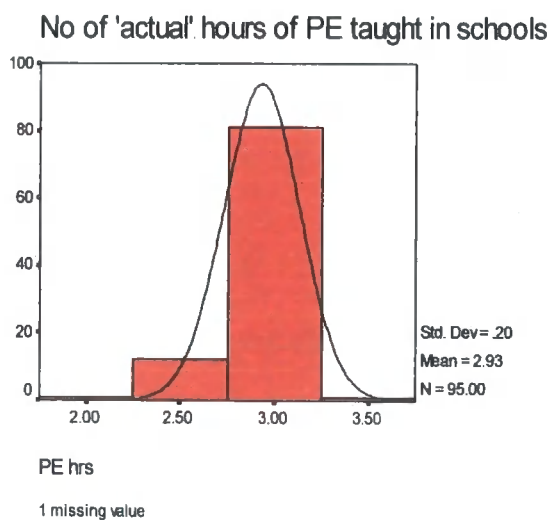


Figure 4.H – No. of Actual Hours of PE Taught in Schools

Despite most teachers viewing reforms as being positive and only 4% (n=15) viewing reforms as being entirely negative, the percentage of informants who viewed that there were negative aspects was actually 35% (n=123) with 31% (n=108) having a mixed view of matters associated with reform. Interestingly, only four informants linked responsibility for negative aspects to the government, which is possibly a cultural condition of the past where there were great fears associated with openly criticising governments. This is one of the perplexing outcomes of this research, whereby informants showed a great reluctance to openly criticize those agents (government and political entities) who had shifted Poland's socio-political paradigm. Those who did criticize the government preferred to focus on pragmatic solutions, which are presented below.

**FS151** "Government should dedicate greater finances to build facilities, improve equipment, teacher attitudes and better teacher pay. It's not the worst curriculum; the problem lies with delivering it in some schools with poor/no facilities."

**FS32** "Facilities should be expanded and financed by the government."

**FS92** "There needs to be a greater investment of finance by government in PE, if we are to achieve its demands."

Informants preferred to highlight the negative aspects of reforms without apportioning blame to themselves, school management and or local authority or central government. It would appear that even when asked what they would change if they could, only one person said they would like to see a change in government.

**FS100** "I would change the Minister of Education, Prime Minister and President."

This absence of politicisation was originally difficult to explain. It was supposed that freedom of expression, a new cultural condition, was not well practised as informants had been careful to criticise conditions of pay, the structures, the curricula and resources, without making direct

accusations at local or central government. It could on the other hand also have been a reflection of a mature society that understands the reality of economic rationalism and that's why it does not blame politicians and policy makers for the difficulties that reforms cause. Reluctance to name the past in the context of the future, for example informants not using the term 'communism', stood out as a strong feature by its omission in this study and two interviews (one semi-structured focus-group and one structured individual interview) eventually revealed some answers for this. The focus group interview produced interesting conflict amongst its participants. On asking the question about the difference between PE during communism and post-communism a long debate on PE and PC and its contemporary meaning emerged almost as if to deflect a direct response –

**FGZP01** – “PE in contemporary terms is not different from other educational subjects, however the individual and the physical self has to fit in the overall process of culture, for which education prepares one. It's about lifestyle and could be termed as cultural, particularly with individual behaviour that can be broken down to the main body of culture.”

**FGZP02** (Questioning FGZP01) – “Don't you think that new pedagogical techniques will be required for changing this outlook and attitudes for the teaching of PE?”

**FGZP01** (Responding) – “No, because the body is tangible and physical, pedagogies are not competent enough for this direction.”

**FGZP03** (Interjecting) – “The dictionary for pedagogy does not have a definition for AWF; it does however have a definition for health education. It is our role to find new ways to develop a valuing of the field of study contained within school lessons.”

**ZP** (Asking the question again) – “What are the differences between communist and post-communist traditions?”

**FGZP01** – “There are none, PE was not affected by it.”

**FGZP04** – “I'm sorry but yes there were. Physical education like all other parts of education was affected. In fact some of the traditions are taking quite some time to be phased out. Grenade throwing was an inter-school competition that was part of the militaristic tendencies of communism.”

**FGZP05** – “Yes, some of the schools I deal with still have the competition, I mean I saw one only recently.”

There was definite tension amongst the informants in the focus-group particularly with the communist/post-communist questions. It was deemed that the question needed to be asked directly in a future interview and the response is presented below.

**ZP** – “Why is it that no educationist wants to talk to me about communism?”

**AC03** – “Look, we didn’t really have that type of communism, we only had socialism.”

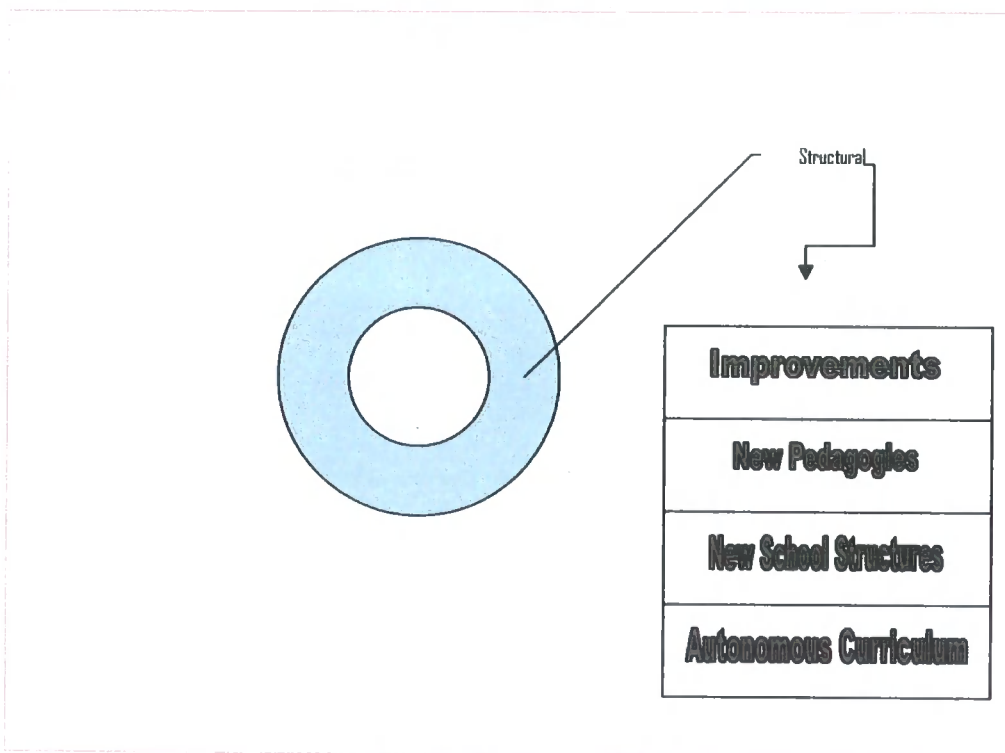
This response is greatly at odds with the National Ministry of Education and Sport (2004), academics such as Krawczyk (1996) and Zawodowska (1995) and government officials in this study (Wentel, personal communication 1999) who clearly stated that the totalitarian system of communism was present in all parts of society and education was no exception. AWFs during the communist period all taught Units of study on Marxism and Socialist Citizenship. These have now been replaced with Units on Law and Economy in Physical Culture, Consumption in PC and Sports Law (Jaworski 1998). The programme has always carried within it compulsory study of a foreign language, the emphasis has, however, shifted from the Russian language to the English language; this is a deliberate move so as to respond to the challenges of Europeanization and Globalization. The National Ministry of Education and Sport (2004) state that “continuous education is the basic factor for determining economic growth” (p.1) and thus the concept of building a knowledge based society is an educational reform goal for achieving the ideology of lifelong learning, which complies with the rhetoric of Globalization (Giddens 2002, Rhoten 2002, Gomez 2003). It is, consequently, clear to see that new ideologies underpin the outer-layer in the globosity of change. Teachers understand there is a new political rhetoric that has entered education policy and the curriculum, if only because there has been demise in the old one. Equity

is something that has been attributed to students and has impacted on the way those schools and teachers deliver the curriculum. These issues are identified in both the structural and individual layer as democracy takes its position within education and brings with it ideas on globalization and Europeanization.

#### 4.11 STRUCTURAL LAYER

The structural layer is categorised by four sub-categories that are: 1) improvements; 2) new pedagogies; 3) new school structures; and 4) autonomously interpreted curriculum and is diagrammatically shown in Figure 4.I (below).

**Figure 4.I the Structural Layer with Related Categories**



The construction of the structural layer lies in the emergence of categories that have been linked to greater levels of enablement in individual teachers and schools as a consequence of education

reform. The teaching environment has been affected by the filtering down of influences from the ideological layer (macro) to the structural (meso, for example school management) layer. Teachers are showing signs of enablement by voicing their views on the new curriculum. This includes views on its interpretation and the necessary resources and skills to implement government's reforms. There is evidence that teachers are taking a pragmatic view of the challenges ahead of them, however, it is important to stress that the needs and demands of this pragmatism are likely to require significant capital investment. And, although there are building plans that have commenced for new sporting and physical education facilities (Levitas and Herczynski 2001, National Ministry of Education and Sport 2004), these are all inhibited by time, space and availability of public finances. And, it is at the individual layer that structural forces filter down to trigger tensions, problems and issues. To understand how this impacts on the individual teacher the structural layer is explored in this section of the study's results.

#### **4.12 AUTONOMOUSLY INTERPRETED CURRICULUM**

Autonomy is a new condition that has been devolved to local authorities and schools, and includes the permission to respond to local issues and problems, including negotiating resource allocation and teacher salaries at the local level. This condition of autonomy has also been extended into the curriculum and teachers are now supposed to design a school programme that has a full interpretation of the National Curriculum contained within it (Salitra 2003). Many teachers voiced their approval of autonomy in both local management of schools and the curriculum; for example, the words of informants say that this is a valuable reform of the former system and allows for greater creativity for resolving local problems, needs and demands. The following words of informants have been selected to exemplify how this category was constructed.

**TPE14** "Thanks to the changes teachers can now write their own programme for the school that they teach in."

**TPE26** "We can now interpret the curriculum for ourselves and it reflects the school reality of how many students we have and what is expected of us by the community."

**TPE01** "The current curriculum allows for each teacher to be able to choose activities independently as long as it adheres to the broad recommendations of the Ministry of Education."

**TPE52** "The curriculum allows for much choice and the autonomy to adapt it accordingly to provision it means that it has many possibilities."

**FS81** ". . . Each PE teacher writes their own programme to match organisational and facility realities, there is no compulsory curriculum anymore."

Interpretation is still supposed to closely resemble the curriculum framework as set by the Government (Salitra 2003) and teachers of physical education in Poland are responsible for adhering to the stipulation that PE is supposed to instil values and participation in physical culture in its population (Demel 1989, Grabowski 2001d, Kosiba and Madejski 2001, Ministry of Education and Sport 2004); the Physical Culture Act of 1996 makes this aim explicit. Students of PE are supposed to leave the school system having been exposed to a variety of activities that make up physical culture, this is then supposed to lead to the outcome of individuals being able to independently undertake lifelong care of their bodies through adequate levels of physical activity participation (personal communication Skoczylas 1999a, personal communication Grabowski 2001d); 65.6% (n=214) of teachers in this study cited this aim the most frequently<sup>137</sup> as being an important aim of the new curriculum, thus agreeing with the Government's core aim. Physical culture is, then, meant to elicit participation in activities that have: 1) physically rehabilitative; 2)

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<sup>137</sup> Described statistically as modal

physically recreating; 3) educative; and or 4) sporting excellence dimensions. The way in which PE teachers in this study interpreted the curriculum is presented in table 4.6 (below).

**Table 4.6 Informants' Views on the National Curriculum (PE)**

<b>Teachers' Valuing of Physical Culture in the Curriculum</b>					
<b>Physical Rehabilitation</b>		<b>Physical recreation</b>		<b>Sport</b>	
Independently carry out life-long care of the body	65.6% (n=214) of respondents cite this outcome as being the most important in PE	Being active during own free-time	57.5% (n=200) of respondents cite this as being the second most important aim of PE	Competitive Sport	67% (n=233) of respondents viewed competitive sport as an unimportant aim in the new curriculum. Only 3 respondents (less than 1% and all three male) thought it was the most important aim of PE.
Postural exercises	49.5% (n=172) of respondents cite this aim as being the third most important in PE			Out-of-School sport clubs	Are now termed "students' out-of-school sports clubs" and funding that was allocated to teachers for coaching sport has now been absorbed into salaries – with no pay increases.
Prevention of Coronary Heart Disease	Only 31.5% (n=110) of teachers viewed PE as the context for teaching students about its prevention.				

Posture, as a component of health education is interestingly viewed as more valuable within the curriculum than instilling physical culture values, which is deemed as an outcome of the PE curricula accordingly with law and government aims. It can, however, be argued that physical rehabilitation, which includes postural correction exercises, is an adherence to this core aim. Only 27.9% (97) of teachers, though, viewed physical culture as an important over-arching outcome of the new curriculum. The words of participants on posture are persistent and also emerge as the biggest health concern amongst physical educators, thus providing evidence for educators' concerns for Poland's future health.

**FS25** "I would spend more time on corrective exercises for posture and to instil personal responsibility of hygiene for life."

**FS52** "I would like to have more time to individualise programmes, introduce posture and better health promotion. All of these are now possible and are all positive changes to the curriculum; I would like to have the time for this though."

**FS63** "I would increase hours in PE but only if I could adapt the curriculum so that it included one hour at the pool and one permanent lesson on correcting posture for everyone, but that is what I would want."

**SPE11** "I would place greater emphasis on activities for developing better posture but above all the current use of one discipline such as one sport should be avoided and several disciplines should be used for better physical development in students."

**SPE28** "Greater emphasis on aesthetic development of the body, particularly the posture and not just physical development."

**TPE57** "The changes that I would make to the curriculum are to increase PE hours for corrective exercise for posture and to include swimming lessons and activities for individual exercise."

It has, then, emerged that the condition of autonomy has permitted teachers to start thinking about the curriculum and voice their concerns about health and a variety of physical activities. Teachers are using their informed judgements to stress the importance of health, as depicted through

posture, as a central value of the PE curriculum. To a greater extent this concurs with the government's delineation of PE in the Physical Culture Act (Ust. 1996). In the view of teachers it tends to manifest itself in the 'rehabilitative' component of physical culture and thus has a health education slant to it. This study allowed teachers of PE to think about the changes to the curriculum and simultaneously provide views on interpretation and personal agreements with the National Curriculum. Teachers were most confident discussing these points as experientially it is a part of their world that they think about on a daily basis. The informants were vocal and detailed on the curriculum and their views of what is necessary. It is interesting to note that informants, when asked what they would change about reforms, often stated that they would adapt the curriculum to include or remove an activity. These teachers already have the authority or autonomy to do so, so the emergence of 'improvements' became an important category in this study.

#### **4.13 IMPROVEMENTS**

In fact, the greatest area of frustration that emerged in this study was with informants' views that much of the education reforms have now placed emphasis on improving the structural layer in the globosity of change. Teachers have identified that a lack of local and school resources will impact on their ability to deliver the curriculum in the form of government expectations. The teachers in this study, despite being positive about changes to the PE curriculum, were also troubled by the fact that the schools in which they were teaching had either poor or no facilities, and were consequently required to teach four hours of PE a week with no foreseeable investment in an infrastructure that would lead to the fulfilment of such a criteria. This reality has created tensions between teachers and the curriculum and emerges at the individual layer as professional frustration.

It is evident that improvements are required to physical resources and this assertion is verified in the views of informants.

**FS01** "The use of a sports hall just once a fortnight is scandalous."

**FS06** "The increase in PE hours needs to have an improvement to facilities, either that or lower the number of pupils per class and with all of this there should be an improvement to how students are taught, I mean there should be greater individuality - pupils should have greater choice in their lessons."

**FS81** "Some schools have had new equipment and new activities such as aerobics and fitness, which is good. And generally there has been a move away from gymnastics towards team games, which is positive. Yet new facilities should be built near schools and new sports clubs ought to be created. There also needs to be an improvement in the status of PE."

**TPE02** "Those children who have notes that excuse them from PE should have to attend an alternative compulsory lesson, such as theory. The programme that is delivered should take into consideration the types of facilities and equipment available and the abilities of pupils. Both of these need improving."

**TPE06** "The negative aspects to reform have been the increase of PE hours to four without a firm commitment to its delivery, which resulted in that fourth hour being cut, because of a lack of resources. There is a need for improved facilities and equipment, infrastructures dedicated to PE and increasing the number of environments so that out of school activities can be carried out. This includes facilities for carrying out more lessons in fitness training so that young people were not dependent on the out-door pitch and the weather."

**TPE63** "There needs to be improved facilities, equipment and changing rooms as they currently do not reflect the demands of the PE curriculum. The curriculum can be adapted and apart from the lack of facilities and resources for delivering it I would change nothing else; maybe pedagogy."

In total a third (33%) of teachers (n=115) suggested that improvements to current resources and facilities were necessary so that the curriculum could be fulfilled, with an additional 23% of teachers (n=80) saying that there needs to be an improvement to existing equipment to have any effect. Teachers are satisfied that the reforms have resulted in their subject being taken seriously

within the school curriculum, however, there is growing evidence of frustration that is linked with finances and resources not being sufficient for fulfilling this new valuing of PE. There are worries that the additional hours and resources may not be forthcoming and that PE will ultimately be under-resourced. This is particularly worrying for teachers as foreign languages and Information Technology are seen as more relevant to a future workforce that is meant to compete in a global economy, particularly with employment boundaries being widened to include the EU.

**FS128** "PE needs to be equal to other subjects and the lack of facilities is worrying because there aren't the resources to deliver on new directions."

**FS129** "There needs to be a bigger role for PE in schools so that it becomes equal with other subjects. The current equipment is not good enough for this."

Improvements are, as a result, generally seen as something that need to occur at the structural level so that the Government's ideological aims as contained within education reforms and the curriculum can be achieved. Consequently, the ideological layer has created problems at the structural layer and is ultimately identified at the individual layer where the informants from this study have come from.

#### **4.14 NEW PEDAGOGIES FOR NEW SCHOOL STRUCTURES**

New pedagogies are linked to the category of improvements and it is the process of selective coding that has led to the development of this category. The fact that the Physical Culture Act (Ust.1996) stipulated an increase in PE hours for every school-aged child meant that it was inevitable this would lead to greater demands on resources (as explained in the 'improvements' category) and teacher time thus creating unique conditions for adaptations to a new curriculum to happen. In addition, education reforms have led to the creation of new *high-schools* with post-compulsory education for 16-18 year-olds now being contained within them - and physical education is now

compulsory for this age group as long as they choose to stay on at school. Primary-age schooling was also amended so that it reflected a greater comparability with the EU and thus the starting age for primary school education was lowered from age seven to six, with physical education becoming a part of the curriculum for these students. The increase in hours and in the number of students required to undertake compulsory PE, in addition to new ideologies such as equity and opportunity, have placed new demands on teachers in the areas of pedagogy, physical resources and time within the school time-table. In this category of 'new pedagogies', however, it has emerged that teachers of PE are concerned about the level of skill necessary for engaging age-groups that they were not trained to deal with in their original teacher education courses. These teachers are also concerned about the increased hours of PE, particularly as it has been hard enough to motivate students in the past time-table of two hours only. This has now doubled and students are showing a lack of motivation to this new curriculum demand. In addition to all of this, there is a new generation that is emerging that is out-spoken, is aware of the common western-culture attitude of 'rights without responsibilities' and who do not care for the old authoritarian way of pre-democracy teachers. Teachers of PE recognise that they should be reviewing their pedagogy to accommodate the new school structures and all that it brings with it. The words of informants have been isolated to show how this category has emerged within the globosity of change and in particular show a growing voice amongst teachers who would like to be supported in this area of their professional life.

**FS11** "Improve the qualification for teaching PE so that it copes with new demands."

**FS52** "Since reforms there needs to be an improvement of the profile of PE through PE teachers and their pedagogical approaches, something like making the aims of lessons transparent during the activities."

**SPE84** “There needs to be a better approach to teaching the subject after these reforms, more diversified lessons of PE and more thoughtfulness from the teacher.”

**TPE07** “Addressing teaching methods in Polish schools and improving facilities and equipment for PE should be the focus for reform.”

**TPE40** “. . . introduce better teaching methods.”

**TPE63** “Positive changes have been an increase in PE hours and the autonomy to write a programme. I would also like to see a change in the way that parental notes excuse children from PE. These practices should be monitored as they are currently abused and teachers have no power to make children participate in lessons.

**TPE15** “. . . with the new demands from reforms there should be precise courses and training teachers to be multi-disciplinarians in sport and the methods of PE.”

**FS129** “Someone needs to raise the profile of PE so that other teachers in the school value it. Maybe this could be done with new pedagogies taught in professional development courses to improve the qualifications of current PE teachers.”

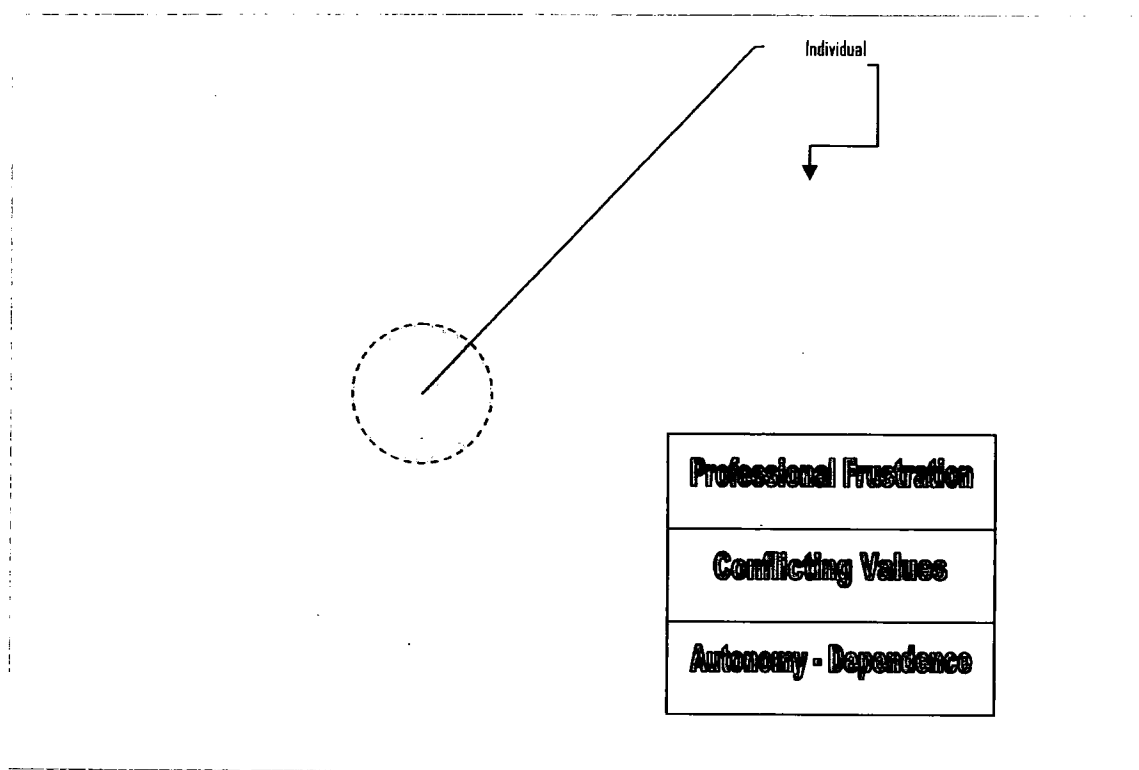
**FS113** “Teachers should be tested for their ability to teach in the reformed system as some are completely unsuited to teaching I would personally want to see a change in teacher approaches to pupils.”

Teachers themselves recognise that one of the challenges to fulfilling the curriculum requires them to address teaching methods and new approaches to pedagogy. These problems are contended with at the individual layer but manifest them as a structural problem as the support for improving and or adapting pedagogy to accommodate reforms has not yet been tackled. In the transitory journey this has emerged as a pertinent issue for educational leaders to consider.

#### **4.15 INDIVIDUAL LAYER**

The individual layer is categorised by three sub-categories that are: 1) professional frustration; 2) conflicting values; and 3) autonomy – dependence continuum - and is diagrammatically shown in Figure 4.J (below).

Figure 4.J the Individual Layer with Related Categories



The *globosity of change* has a core that is depicted by each individual teacher who contributed words to this study. It is at this layer that issues arise because of the trickle down effect from the ideological and structural layer. Education reforms were initiated with a strong ideological drive to shift Poland's political culture towards a democratized and globalized perspective (Gomez 2003, Salitra 2003) and this has been evident through decentralist approaches to education reform (Scott 2002), which is consistent with other nations' approaches to education reform in light of globalization and economic rationalism (Rhoten 2000, Apple 2001). Teacher realities are affected by both ideology and structure and the words of informants in this study come to make up the three distinct sub-categories related to the core of the *globosity of change*.

#### 4.16 PROFESSIONAL FRUSTRATION

As teachers have started to adapt to education reforms they have also begun to accumulate new professional experiences. Some of these have been a direct result of the decentralizing policies that include new economic frames and restructuring of political culture to include Europeanization (such as equal opportunity and EU comparability of primary and secondary school systems).

*Professional frustration* amongst younger and pre-service teachers has emerged due to the inability of the new political system to “maintain full employment . . . coupled with the social consequences of upheaval in a rapidly changing society. Newly emerging income disparities have brought increased hardships for many” (Mckenzie et al, 2002, p.3). The challenge to economic, political, and social stability in the country has led to this group of PE educationists taking an unsentimental view of older teachers who were part of the former communist system; particularly as unemployment and job competitiveness is part of the *new professional structure for teachers*. Presented here are some of the words of participants who articulate this frustration and thus contributed to the construction of this category.

FS121 “Old teachers should retire as the old political system resides inside them, which transpires in lessons of PE.”

FS23 “Old teachers have teacher registration cards granted out of teaching experience and not educational or actual achievement of qualification, this is a negative aspect of reform that needs to be addressed.”

FS04 “To phase out teachers who only have a diploma and maybe retrain them. But I think that ultimately they should be replaced with new graduates who are better prepared for the role of teaching in the reformed system.”

In addition to the differences between teachers there have been frustrations that have arisen from increases in PE hours without the infrastructure to support them, a need for new pedagogies to deal

with new student attitudes and the frustrations related to the demise of out-of-school activities, which informants have cited frequently in this study. In fact over one in four informants (27%, n=94) cited this as being a negative aspect of reform that they would personally like to see reversed.

**TPE04** "It has been negative that reform led to a cut-back in SKS (out of school sports clubs) and so have all other out of school activities. There's this permanent lack of funds for equipment and activities . . . there need to be more out of school activities particularly sport and any interests that pupils may have.

Frustrations have ultimately arisen because of changes that have occurred at the structural layer, which are connected with the ideological layer. The concept of frustration, as it emerged, revealed that there was a distinct character between those who were educated pre-democracy and those who were educated post-democracy.

#### 4.17 CONFLICTING VALUES

The way that it manifested itself at the individual layer led to the identification and then construction of a sub-category named as *conflicting values*. Teachers of PE who had been educated during communism were used to delivering a strict curriculum underpinned by the ideologies of an authoritarian government and thus had an authoritarian approach to teaching. Adaptations to democracy by teachers in the context of a teaching environment thus presented new challenges. A new generation of teachers entered the profession and this mix of communist and post-communist educated teachers has led to different levels of adaptability to autonomy amongst them. In addition to this, the new generation of students in schools were children who had been brought up in a new Poland, entirely free from communist ideology and their fear of authoritarian figures such as teachers was in rapid decline. This situation has led to a conflict in values as teachers have begun to

question the feasibility of delivering physical education to the 16+ year groups and cite problems with discipline as the new youth ceases to fear *quasi-authority*, in the form of teachers.

**TPE23** "Teachers should have the power to expel a student for poor discipline. The creation of high-schools has been a negative one, it wasn't like this before."

**FS101** "Opening of high schools has had a negative influence on pupil behaviour in lessons. These new students don't know how to behave"

The professional development of older teachers becomes an important contingency for supporting the new demands in teaching. These conflicting values have emanated because of the opposing ideologies that have been associated with teacher education. Pre-democracy teacher education had a strong Marxist and socialist leanings. The following excerpt has been taken from a paper written by Suchodolski (1983) who captures some suspicions in Polish academe in terms of Western culture.

"The capitalist system has been and is a system of social conflict, injustice, a system in which sharp contrasts in the possession of property, impossible to overcome and control, reveal the hopelessness of existence, a system in which the struggle for a change of the existing relations appears quite futile and oppressed. After the privileged social groups have reached high standards of prosperity they come to face dramatic questions: prosperity and what next? This question, so often raised by the enlightened writers in the United states, shows that although prosperity is an achievement towards supplying human needs, yet in the longer run it leads people into a blind alley, because none of them knows why life is valuable and what more is to be done about it, when a high standard of prosperity is achieved in the upper strata of society." (p.8-9)

Former ideologies have since been replaced with capitalist economics and consumption theories (Jaworski 1998), which will have led to a teaching profession that is polarized by different teacher education programmes. The words of informants in this sub-category of *conflicting values* led to further analysis during the integrative stage of theory development and, alongside with the

autonomy-dependence continuum, have supported the building of the Four Scenarios Model (discussed later), which seeks to present an analytic story of this mix of PE teachers.

#### 4.18 AUTONOMY-DEPENDENCE CONTINUUM

It is also pertinent to consider the dimensional range of democracy and individualism as the newly present ideologies in society and the curriculum. As much as individualism will present the democratic notion that all are equal in terms of rights and responsibilities in the new system, it also means that a new attitude amongst young people has emerged in that they believe that their experience of education should enable them to achieve their aspirations. This has placed greater pressure on teachers to deliver individually meaningful lessons. Participants in the study emphasized the need for greater diversity within the curriculum to rise to this challenge.

**TPE31** "Introduce swimming lessons for all classes. Trendier sports such as break-dance, climbing, rollerblading."

**FS09** "Introduce new and attractive disciplines such as introducing modern activities like fitness and jogging."

**FS46** ". . . introduce lessons for tennis and aerobics."

Some teachers have, however, identified this as an area of individual interpretation, recognizing the role of autonomy in curriculum practise and teacher responsibility in the design of programmes of study. The following words of participants exemplify the point that some teachers are aware of the responsibility to interpret the curriculum at the individual and school level.

**TPE48** "Positive changes have been new educational aims that are student-centred, independence for teachers to write a programme that adapts to school realities and new activities such as fitness."

**TPE14** “Thanks to the changes teachers can now write their own programme, however the lack of facilities and equipment restricts the choice of activities.”

**TPE64** “I work on my own programme and adapt it to match facilities at the school.”

**TPE67** “Positive changes include the ability for teachers to be innovative by writing their own programmes, so activities like aerobics or ones with a social emphasis can be included. Activities can also be selected according to the standard of facilities in the school.”

**FS136** “Reforms mean that we can now write our own programme . . . this is positive.”

**FS80** “There is no National Curriculum<sup>138</sup> in PE, every teacher writes own programme.”

This apparent mix in attitudes about individual responsibility showed that some teachers were not necessarily adapting to the demands of autonomy. This was evidenced by a lack of recognition that the design of local level curricula were individual and school responsibilities thus when asked what individual teachers would change about reforms – adaptations to the curriculum – was a misinterpretation of what reforms had actually required of them. This sub-category of *autonomy-dependence continuum* has presented areas of contestation amongst physical educators as transition has created a profession that has a range of attitudes and beliefs connected to autonomy. Teachers educated in the communist tradition were not educated or even permitted to function autonomously. So, it is no surprise to find teacher frustrations emerging from greater levels of autonomy being demanded and or frustrations from teachers who understand this but work alongside colleagues who do not understand how this relates to them. The following respondent felt strongly enough to make this statement in relation to this point.

**FS109** “A lack of responsible teachers is negative since reforms.”

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<sup>138</sup> There is a National Curriculum (Salitra 2003); this informant is apparently unaware.

There were teachers who expressed a need for a new curriculum or individual programme thus ignoring that this was part of reforms.

FS11 "I don't know the curriculum but in my view children should have diversified activities that they value."

#### 4.19 GROUNDED THEORY OF PHYSICAL EDUCATION IN TRANSITION

The development of theory requires a complex level of abstraction as it is the time when concepts, categories, statements, hypotheses, linkages and definitions all come together at the same time. Education is a context legitimated by practice despite its policy framework and over-arching theories; and, so, substantive theory development is necessary as a way of bridging the gaps that occur between these transgressing contexts. Theory development is, then, needed when there are concepts or relational statements within a researcher's area of inquiry and no apparent linkages to assimilate them together. A theory is a "set of interrelated relational statements about a phenomenon that is useful for description, explanation, prediction, and control" (Olszewski-Walker et al, 1988, p.133). The construction of theory as an interrelated system of ideas is presented in this section to show the connections between concepts and categories as a way of embracing more aspects of the phenomenon under investigation. The categories that were presented previously dealt with the three levels and layers of physical education in transition. The construction of a theoretical model to explain the grounded theory in this study has used diagrammatic (model) and narrative (theory) forms thus far. To summarise, the Grounded Theory on Physical Education in Transition is a phenomenon that exists on three levels: 1) the PE teacher; 2) school and local authority; and 3) national government and its relationship with international agencies. All three of these levels are transiting independently of each other as well as being interrelated with each other. It is so because each level can be delineated in terms of functions and

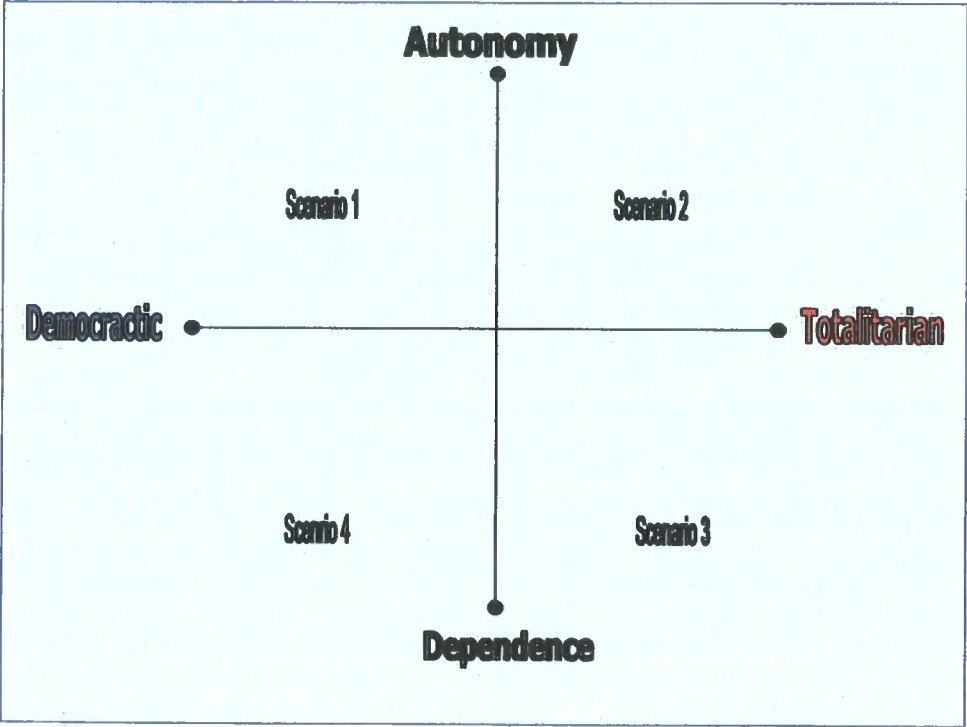
processes and, so, be described as separate contexts; yet all three levels are connected through explicit and implicit macro and micro politics, thus, creating an overlapping context that subsumes all three of these levels in some way. The impact of these three levels on teachers of PE can be depicted through the *globosity of change* concept, which has three layers. The diagram that has been constructed to explain this shows how the PE teacher is at the centre of these layers, which have resulted from the three levels of transition. At the point of each layer, related categories have emerged, which capture the symbolic interaction between individual and context. At the ideological layer, Europeanization, globalization and democratization have supplanted former communist ideologies of Sovietization, socialism and totalitarianism. Despite political redevelopment, it would seem that Poland's new political culture retains an old approach to politics and that is one of a highly ideological rhetoric. As a result, the mode of engagement is the same; it is the focus that is different. The new ideologies themselves have an influence on the PE teacher as they trickle through the layers; the intensity in which they are being implemented though creates an added dimension that is networked through the structural layer of new pedagogies to the individual layer that have outcomes in conflicting values. The diagram depicts the grounded theory on physical education in transition and is a consolidation of the categories that have been detailed in the earlier part of this chapter. The grounded theory was developed from the words of informants who are real people existing in real contexts constructing realities of varying degrees of symbolism. To tell their stories analytically is a necessity that binds this study within the parameters of these teachers' shared understanding of the transitory journey.

#### **4.20 AN ANALYTIC STORY: A FOUR SCENARIOS MODEL**

Embedded within all the data and its analyses lays an analytic story that captures the entire process of the research. To tell the story two categories were crossed at their dimensional range to

emphasise the differences between scenarios of teachers of physical education in a newly democratic Poland. The two categories were: 1) democracy, which is a new political culture and the dimensional range runs from totalitarianism to democracy; and 2) the autonomy – dependence continuum. When these two categories were intersected an exciting discovery was made that enabled the study to detail the grounded theory by presenting four scenarios that reveal four stories about PE teachers during the transitory journey of political redevelopment through education reform. A Four Scenarios Model was constructed to initially show and then tell the stories of four separate accounts, the results of this were the construction of four quadrants, each of these representing a scenario (Figure 4.K below).

Figure 4.K – A Four Scenarios Model



The scenarios were constructed by exploring the extremes of the dimensions and using the words of informants and all the analyses related to them to explore the differences between the scenarios. This led to a number of concepts that characterised each scenario. The concepts were then positioned graphically in the quadrants (see Figure 4.L below). Based on the selected dimensions, four stories have emerged that will be told through the scenarios.

### Scenario 1 – Autonomous and Democratic Teacher

Since 1989 Poland has been a democratic republic. The last fifteen years have seen the introduction of personal freedoms into public and private lives. Education has and continues to undergo reforms. The scale of change that has been introduced to its structures and processes has altered the educational context, including its students and teachers, through a process of democratization. In addition to this, public discourse, political culture, free markets and the ideologies of equal opportunities, lifelong learning and individualism have entered the rhetoric of Polish culture. There has, then, emerged an entirely new teacher as a consequence of change. This teacher is young, energetic, better qualified than his/her predecessors, knows only democracy, is uninhibited to speak their mind (within reason), understands the influence of new technologies and has expectations from the new system that recognises that a public sector job requires varying degrees of accountability. This teacher knows that he/she is expected to interpret new curricula independently of the State, but within the parameters of a national curriculum and dependent on local resources; this means a flexible attitude to the profession of teaching. This teacher understands that devolved responsibility means personal accountability. This teacher knows that the anxieties of accountability are part of the professional condition. The teachers also acutely aware that economic rationalism plays a big role in delivering the curriculum, which means that funding is unpredictable; he or she also knows that the reality of this framework of funding will

bring with it higher levels of financial scrutiny thus creating new standards for teaching and an auditing process of some sort. It also means increased job competition. These conditions can be summarised with the following characteristics:

- Autonomous – can interpret curricula and carry out its implementation
- Democratic - understands the political culture and its relationship with education
- Responsible – recognises that failure to deliver curricula is also ‘own’ responsibility
- Accountable – knows that teaching will be reviewed by the school, local authority and central government auditory system
- Independent – does not need detailed instruction from school principal or local authority
- Enabled – seamlessly works within the system and relates professional activity with social opportunity
- Values congruent with present political culture – in-step with the over-arching political rhetoric
- Flexible – able to work with unpredictable circumstances

#### Scenario 2 – a Teacher Enabled by Autonomy but Finding it Problematic to Shed Old Ideological Layer

Since the fall of communism there have been many changes imposed on education. The system of the past was restrictive and totalitarian; it stifled creativity. The system of funding education, particularly physical education was unknown. Some regions received greater funding, some schools had better facilities, there was no financial model that was transparent or accountable; all decisions were made by central government. The reforms to education are seen as positive by this teacher who is middle-aged (forty plus), has a strong philosophical stance on education that is linked to Socialist principles and who was comfortable with the old ideologies. This teacher views

education reform as a pragmatic reality and has both positive and negative attitudes towards reforms. This teacher understands that despite the frustrations of low funding for physical education, he/she are at least comfortable that 'all' schools are in pretty much the same position. The financing of education has become transparent and that makes it easier to understand as to why there are a lack of funds for PE and out-of-school competitive sport; however, they are also critical of this aspect as it means that the old traditions of nurturing elites has receded as part of the new funding model. The best part of reforms is that PE continues to be protected by law through the reformed Physical Culture Act (1996) and a minimum of five hours delivered to each pupil has been cited as requisite; this, however, has become a major challenge as fulfilling this obligation by raising hours from two to three (as the five are financial unfeasible) has placed an immense pressure on resources. The strategy for attaining increased hours of PE has been to increase class numbers, which carries problems with it such as a demand for re-training for improved and new pedagogies, greater cooperation with external agencies and associated resources, a call for improved or new teaching facilities and the frustration of dealing with new student attitudes. One of the disappointments of reforms has been that initially four hours of PE were introduced as a consequence of the Physical Culture Act (1996) and then immediately scaled back to three until central government can devise a budget and correlating economic growth to justify the expenditure. This teacher does view some of the reforms to have been negative; out-of-school sports clubs have either been stopped or been subsumed into the overall duties of teaching, which is now part of the teacher's salaried job. In the past, one of the perks for running these highly competitive clubs was that the teacher was paid for coaching and organising. It means more work for the same and sometimes less money. In addition, the underlying ethos for the clubs now is participation and opportunity for all, as opposed to winning local, regional and national sports competitions. This teacher has come from the old totalitarian system and the ideologies were part

of the teaching tradition. This teacher is, however, pragmatic and has adapted to autonomy, but struggles with shedding the old ideological layer. The teacher who is contained within these conditions can be summarised with the following characteristics:

- Autonomous – can interpret curricula and carry out its implementation
- Old Ideology - is struggling to understand the changed political culture particularly the increased job competitiveness, changing student attitudes and the shifts in values of elite sport and sport for all.
- Responsible – recognises that curricula design at the local level has become ‘own’ responsibility
- Accountable – knows that teaching will now be reviewed by the school, local authority and central government auditory system and is comfortable with the change
- Independent – does not need detailed instruction from school principal or local authority but has mixed views on reforms and this is because of the old ideology struggle
- Enabled – seamlessly works within the system and relates professional activity with social opportunity
- Values Unchanged – and so some incongruence between old and new values has emerged.
- Pragmatic – despite predominant ideology linked to the past understands that the future is democracy and so complies with new demands, but not without a value struggle
- Adaptable – to demands of autonomy

### Scenario 3 – Teacher Dependent on Old System

This teacher is aged between 40-65 and views education reform as mostly negative. The teaching environment has become unpredictable in that the students’ attitudes have changed; they are more demanding and less respectful of teachers. This teacher thinks that there should be a process for

expelling students who are disruptive and or show such high levels of disrespect and hence, struggling to shift teaching perspectives from totalitarian traditions to democratic practices. The new school structure of post-sixteen education being subsumed into secondary schools is also a difficult issue to contend with as the students are supposed to have compulsory lessons of PE, and this teacher thinks that they do not want to engage with such lessons. This teacher does not care much for the need for individuality that is being expressed by students and younger colleagues. Education reforms are viewed as varied, some things are positive, such as four hours of PE, but every thing else has been negative. The curriculum is viewed as not relevant and there are calls for it to be changed. There is also no recognition of how economic rationalism works as there is an expectation for more money to build sports halls, swimming pools and ice-rinks for each school. This teacher is inflexible and some of the 'old' methods of PE, such as drill and inappropriate levels of authority cannot be changed until the teacher naturally leaves the profession; probably through retirement. This teacher is also disillusioned as democracy has seemingly failed to improve education. These conditions can be summarised with the following characteristics:

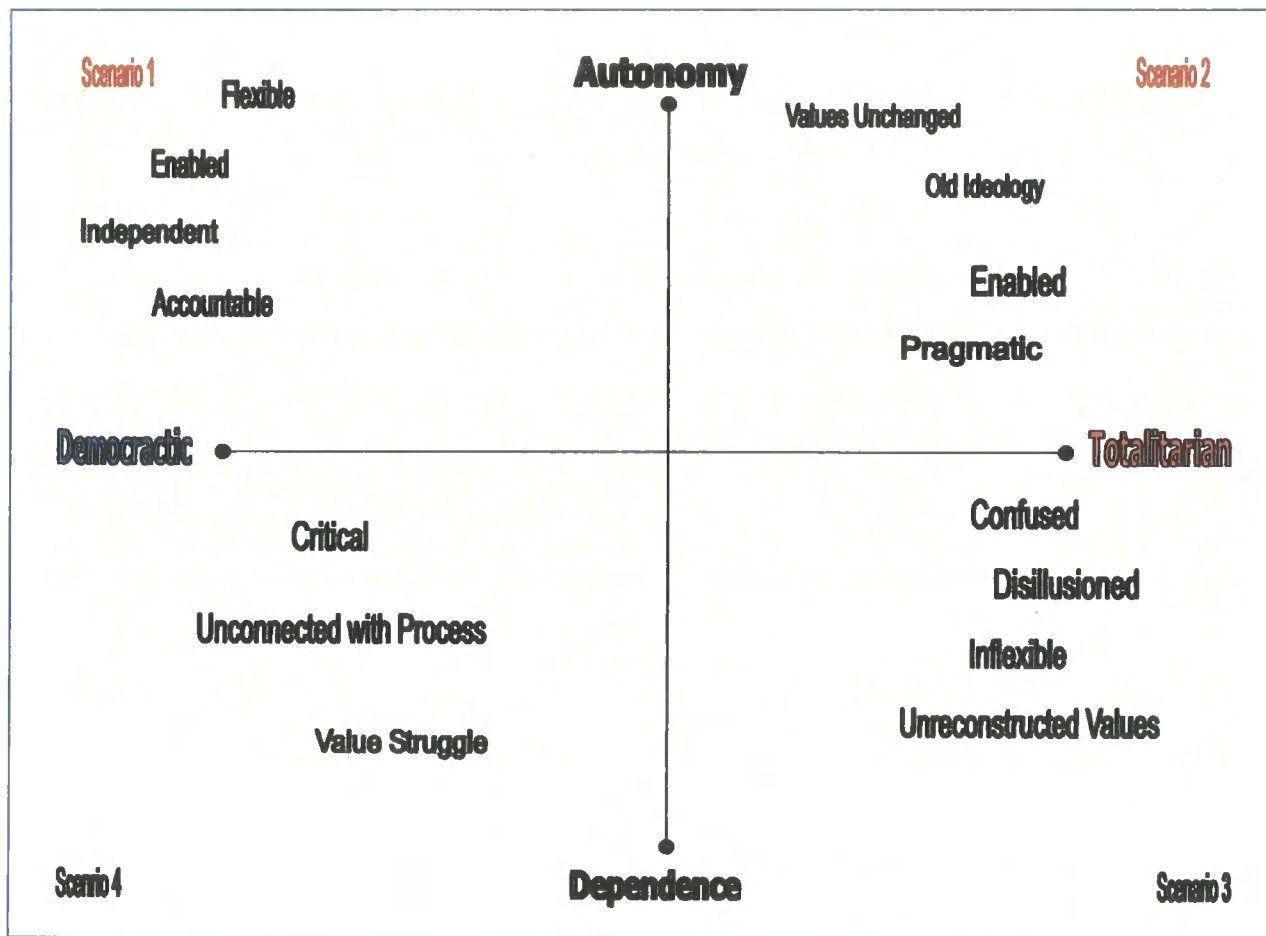
- Dependent – teacher training, work experience and social conditions have contributed to this condition
- Confused – doesn't understand why democracy has not improved the work environment
- Disillusioned – believes that education and social reform has created problems such as 'bad attitude' amongst young people, greater demands for the same and sometimes less money, and failed to support the demands of change
- Inflexible – unable to or struggles to adapt to new demands
- Values unreconstructed – struggling to understand the full implications of democracy as the values from communism has become part of the teacher's personal narrative.

#### Scenario 4 – Teacher Dependent on New System and Aware of Rights Emanating from Democracy

This teacher is dependent by nature and despite being educated in a democratic Poland does not understand many of the prevailing conditions of teaching in a democratized context. This teacher does not link personal autonomy with the interpretation of a curricula; a standard response is that “. . . I would change the curriculum so that it would include . . .” not recognizing that this can be done on a micro level. This teacher is demanding that the government do something about pedagogy as students in the context of real-life teaching do not respond to the pre-service training that has been received. There are low levels of adaptability and personal responsibility. This teacher is young, uncertain, inflexible and unprepared for the challenges of teaching. This teacher is less a product of the system and more of a type that chooses teaching as a profession as it provides a certain amount of job security, which has become an important feature in a country that has to comply with the demands of an economic frame; high unemployment levels and a demand for new skills within an information age society. These conditions can be summarised with the following characteristics:

- Dependent – needs literal instruction on how to carry out teaching role
- Critical – blames students, principal, budgets, politicians and government for issues arising from personal struggle
- Unconnected with processes – does not have an opinion on education reforms and or does not know that any have been implemented
- Value struggle – in terms of a strong personal philosophy on teaching.

Figure 4.L - Four Scenarios Model - Characterised



The aim of the Four Scenarios Model was to tell an analytic story that was consistent and familiar with the words of informants. The design of the two-dimensional model has resulted in four scenarios that describe a rich context of the life-world of teachers of physical education in transition. These scenarios are not without limitations and are not meant to be precise descriptions of four discernible realities; they are meant to show the complexity of PE as it is adapted to change whilst recognising that individuals exist within the large frame of change. The scenarios present a challenging iteration that can lead to strategies to support those individuals contained within these contexts. This is where recommendations from this study will be made.

#### 4.21 SUMMARY STATEMENT

A grounded theory of physical education in transition is a newly identified process in Poland's reforming society. The process includes three levels of transition that includes changes to the macro, meso and micro level. A critical juncture for the implementation of change, as presented in the findings, can be described by through *globosity of change* concept. This concept has used words from informants, predominantly at the micro level, to construct three layers that surround the PE teacher. Although physical education in transition occurs at all three levels (macro, meso and micro), when contextualised at the layer of the individual it shows that the ideological and structural processes of reform elicit new concerns, frustrations and problems. These 'problems' have been categorised within three layers and include existing concepts such as globalization, democratization and Europeanization, and completely new ones, such as the 'autonomy-dependence continuum'. As a result, new concepts led to the construction of a Four Scenarios Model, which has surfaced, in this research, as an analytic tool. The model has been able to intersect at the dimensional range of two categories, one from the individual layer (autonomy - dependence) and the other at the ideological layer (democratic/totalitarian), and provides four separate scenarios of PE teachers in transition. These scenarios capture the words of informants and provide complete explanations, through the telling of analytic stories. Although PE teachers are all undergoing the same transition within education reform, their unique personal history means that they experience change in distinguishable ways. The findings from this study have been presented and include a new concept and model for understanding education reform in post-communist Poland and will next be discussed in the context of existing literature.

## CHAPTER 5

### DISCUSSION

#### 5.1 INTRODUCTION

The aim of this chapter is to discuss the grounded theory of physical education in transition by linking it to extant literature followed by a critique of it. A summary of the theory is presented and is done so as to capture the results of this study in a clear way before it is detailed through any comparisons to existing literature. This is followed by a discussion on recommendations for physical education in Poland and is particularly focused on teachers' realities and how the curriculum, pedagogy and its associated practices are linked to the study's findings. The chapter finally concludes with a discussion on recommendations for further research.

#### 5.2 SUMMARY OF A GROUNDED THEORY OF PHYSICAL EDUCATION IN TRANSITION

As explained in chapter 1, the purpose of this research was to (a) to elucidate the experiences of professional and pre-service teachers' *concerns* about education reform; and (b) to formulate a logical, systemic and explanatory theory of *physical education in transition* in response to socio-political redevelopment. The grounded theory research method was chosen for this study because it seeks to uncover what is going on in a situation and it is designed to take into consideration relationships, context, and meaning.

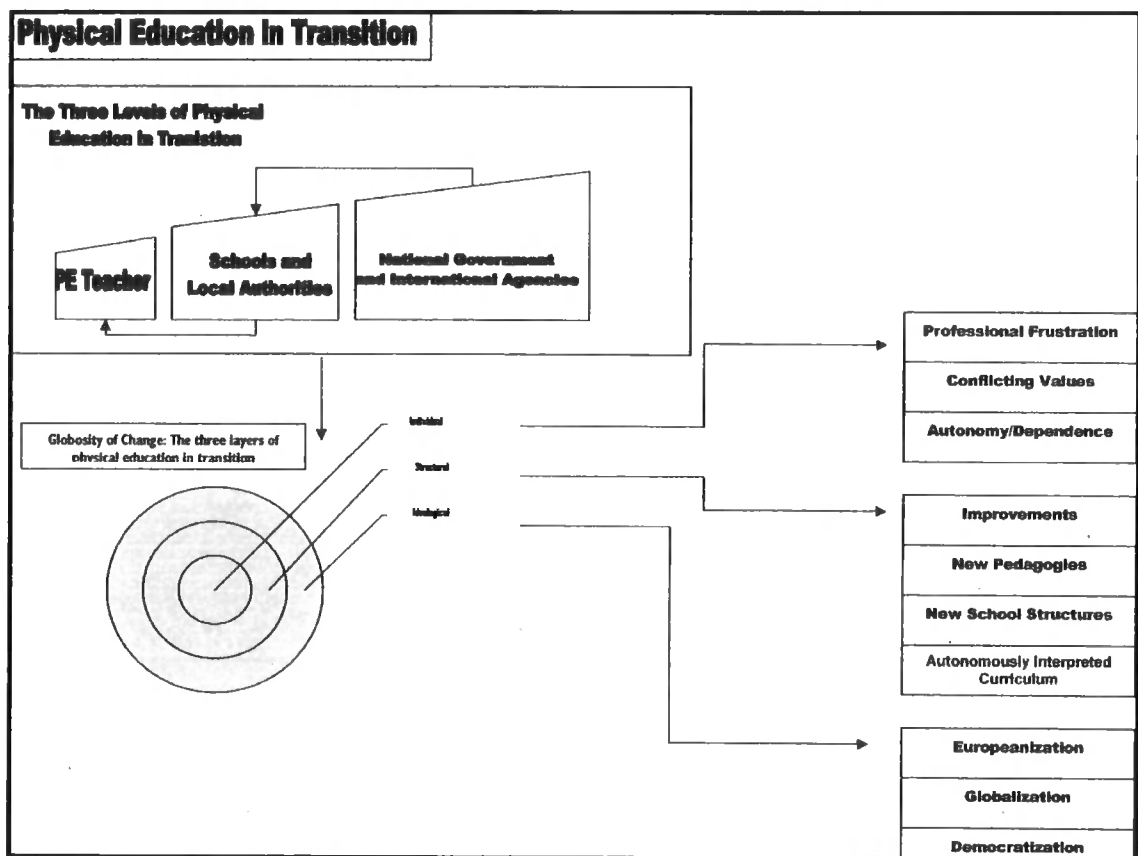
Poland is a society undergoing many changes as it moves from a former communist system of centralised control towards a modern democratic one that has resulted in greater autonomy for all educational institutions (Zawodowska 1995, Levitas and Herczynski 2001, Gomez 2003, Salitra 2003). This Grounded Theory on Physical Education in Transition draws on the words and insights gained from informants, who are physical educators and professionals working in physical education and physical culture in Poland. The process of change and the types of reform modernisation,

structural and systemic that have been implemented have launched physical education onto a transitory journey that must make level shifts related to: 1) the individual; 2) school and local authority; and 3) national and international agencies. For these level-shifts to occur it has been ascertained that a *globosity of change* concept emerges out of the data as a necessary part of the journey; as individual teachers must make transferrals of ideology, adaptations to new structures and at the centre contend with individual challenges that the transitory journey has presented (such as professional frustrations, conflicting values and adaptations to autonomy).

Each layer of implementation and change, as contained within the *globosity of change* concept can be characterised: 1) at the ideological layer, Globalization, Europeanization and Democratization are the *neo* ideologies that necessitate a shift; 2) at the structural layer, autonomously interpreted curriculum, new pedagogies, new school structures and improvements to all factors related to realizing PE make up the layer between ideology and the individual; and 3) at the centre, the individual layer, the characteristics include professional frustrations, conflicting values and an autonomy-dependence continuum. The interrelatedness of the three layers makes up the life-world of the physical educator as he/she journeys through the reforming of education in particular and society in general. This individual life-world is also connected to the levels of transition and the *globosity of change* concept is situated at the micro level, that is, the PE teacher who is part of the three levels of physical education in transition. Figuratively, it can be said that the globe rotates on an axis, which is located at the foot of the three levels of transition. This also means that as the transitory journey travels along its trajectory then so will adaptations occur within the layers. The layers will retain a consistency about them pertaining to the individual, structural and ideological layers. However, through time they will be characterised differently as that is an outcome of transition; nothing stays the same for too long. What is meant by this is that any particular journey, for example the transition to an economic frame that responds to globalization,

will elicit continuous adaptations for the purpose of attaining the aims and or further changes to a globalized economy and perhaps culture. The longer that democracy is part of political culture in Poland and as generational shifts occur, then the characteristics of the layers will adapt to reflect the changes in society. A summary of the theory is presented in Figure 5.A, which shows the three levels of transition, the three layers of implementation as depicted by *the globosity of change* concept and its associated categories set at each layer.

Figure 5.A – A Grounded Theory of Physical Education in Transition



### 5.3 COMPARING LITERATURE WITH THE GROUNDED THEORY

In this section the theory of physical education in transition will be compared with findings from studies and discourses on education reform in Central and Eastern Europe, political redevelopment

through decentralization, teacher adaptations to democracy and autonomy and the challenges of physical education curricula in the 21<sup>st</sup> Century. It will be argued that the findings of this study that generated a substantive theory of physical education in transition differ from previous discourses on education reform and decentralization because informants have provided words that explain the teaching context that is currently undergoing transition and because transition is not a static phenomenon it required explanations about the journey itself.

#### 5.4 COMPARING THE DIFFERENCES

The comparison of commonalities and dissimilarities in the extant literature will show how categories can be systematically located within the descriptions of other studies and theories. The entire explanation of physical education in transition and in particular the *globosity of change* concept and the Four Scenarios Model will show how this study's grounded theory makes a contribution to a substantive area within education reform.

The critical features of studies examining education reform in Central and Eastern Europe have focused on what Scott (2002) identifies as a distinguishing feature of communist rule, which he says was "more nuanced and less totalitarian than is commonly supposed" (p.137), although this correlates with the words of some informants in this study it does not provide an explanation for the widely held view that totalitarianism was the mechanism of communist governments (Melosik 1991, Krawczyk 1996, personal communication Wentel 1999, Gomez 2003, Salistra 2003). Aside from this, it is relevant to point out that 'transition' as opposed to 'transformation' has been the central process of education reform (Zawodowska 1995, Huffman and Johnson 2001, Marga 2002, Scott 2002) as it depicts a less radical approach to restructuring education. Poland was the first country in Central and Eastern Europe to reform its political culture by transiting towards a market economy (Henderson and Robinson 1997, Prizel 1998, Huffman and Johnson 2001, Levitas

and Hurczynski 2001, McKenzie et al 2002). The economic and political transition in Poland commenced at the beginning of 1990 with its first aim of reform referred to as the Balcerowicz Plan, which was meant to stabilize the macro-economic environment, introduce rapid price liberalization, and reduce State subsidies for all goods and services (Huffman and Johnson 2001). The politics of decentralization were to be a central plank of Poland's reforming society and Levitas and Hurczynski (2002) detail the early initiatives by explaining that "... over the first six months of 1989 . . . negotiations were designed to find a peaceful way to extricate the country from its self-evident political and economic impasse and covered virtually all spheres of social and political life" (p.4).

Despite Scott's (2002) inference that communism in Central and Eastern Europe was nuanced it was inevitable that changes to society and education would be vast and all encompassing (Levitas and Herczynski 2001, Salitra 2003) and that there would literally be no part of Polish society and culture that would be left unaffected (McKenzie et al 2002). Adamus-Matuszynska (2004) makes clear what one of the problems from such a vast shift would be by scaling the problem down to the individual and presenting their internal conflicts, which must shift from one set of values to another and explains that "the problem for an individual living in a post-communist country is his (sic) identity, which he/she tries to name: Who am I? Where am I going?" (p.1). Scott (2002) supports this view by arguing that with the supplanting of Marxist ideology as the central theme of political culture in Central and Eastern Europe with its homogenised culture, the transitory period itself introduced another political condition that was replicated across this region, that is, transition. Therefore, transition became a critical period of political culture that was symptomatic of new directions of ideology and so, the internal conflicts of individuals in transition would be present. This position is concurred within this study's *globosity of change* concept, which aims to explain the

first and outer ideological layer affecting the transitory journey. The Four Scenarios Model, which presents an analytic story, further emphasizes this struggle through the words of informants and is depicted in scenarios 2 and 3, where the former totalitarian system has conditioned teachers of PE educated in the communist tradition with values that must now come under struggle. A study by Piekarz (2004), who examined the attitudes of educated Russians and their support of democracy, concluded that individuals “when confronted with the question of whether to abandon democratic principles or values in order to feel more secure, citizens who are insecure will choose security in place of democracy” (p.9). This may provide an explanation for those teachers in Poland who were educated pre-democracy and who in the Four Scenarios Model are represented in scenario 3 and thus have higher levels of dependency on the systems that manage them, such as the school, local authority and government instruction. This is because it provides them with a sense of security amidst socio-cultural shifts that through individualism, democracy and economic rationalism require higher levels of independence and autonomy, all of which are uncharted waters (scenario 3) or unexpected professional demands (scenario 4) and hence, provide an explanation for the autonomy-dependence continuum.

Aslund and Hewko (2002) who examined Cuba's reforming society and who have compared the reforms to those of Central and Eastern Europe support the view that the old generation and those who had adapted to communism would struggle with changes because

“ . . . Life under communism was simple. Most things - even the lines, the shortages, and the inefficiencies - were predictable. Everyone but the communist elite was equally poor. Nobody worried about investments, college tuition, and mortgage payments . . . the arrival of capitalism with its plethora of choices and risks upset that predictability and proved unnerving to most of the working class and older generation.” (p. 11)

In a study by Whitehead (2000), who examined education reforms in Albania, and who agrees with this complex problem of individual transitions, discovered that attempts to restructure teacher education needed to be done in such a way so that they are seen in the context of any current generation. This is because professional lives had been carried out within a rigid ideology contained within a State monopoly and centralized systems and because “. . . Attempts at restructuring also need to be understood in relation to the values, attitudes and experiences that previously dominated, since these inevitably have an influence on the direction and subsequent pace of change” (p.86). Scott (2002) emphasizes this by pointing out that a crisis exists in education as educational institutions have developed policies designed for “retaining inappropriately qualified staff and to rebalance portfolios of academic programmes to reflect new political and social conditions, both of which are examples of post-communist adaptation . . . [and] of the wider impact of global forces” (p.144). Salitra (2003) argues that despite collapses in State communism, transition was a political phase in waiting, which Segal (1997) explains was a consequence of a global trend towards decentralization as a response to global forces and hence, was inevitable regardless of ‘collapses’ in communist politics in the region (Salitra 2003, Scott 2002). Huang (2003), in a study on China’s reforming education system during communist governance, supports this claim and locates its within the nation’s adaptations to a global economy emphasizing that “since 1978, with the implementation of the open-door policy and economic reform, China has once again sought Western models and made various attempts to internationalize its higher education” (p.225), when it had previously been using Soviet models of education. So, despite the failings of communism in Poland (Henderson and Robinson 1997) education reform in the form of decentralization (Snoek et al 2003) may have happened regardless of collapses in communism (Gomez 2003). This study concurs with the concept of transition and in the words of informants it has been identified as a pertinent phase that affected physical education. New ideologies pertaining to transitions in

economic frames and political and socio-culture have all been detected within the context of education reform and hence, extant literature supports the notion of the transitory journey that is an important category of this grounded theory. For that reason, physical education in Poland is inescapably captured within this transitory journey, which is a stage in its socio-history and which means that the categories that have emerged as part of physical education in transition in terms of its levels and then *globosity of change* concept present an explanation of the phenomenon.

Social and political transition is part of the political culture of reforming nations and given that most democratic nations are constantly reforming public services and the policies that govern them so as to adapt to economic frames (Mok 2000, Gomez 2003, Huang 2003, McCarthy et al 2003, Bates 2004), then, to a certain extent, transition is an ever-present condition of modern political culture particularly with globalization being an instrumental driver of change (Segal 1997, Rhoten 2000). Thrupp (2002) argues that given that education reform is linked to social change then critical analyses of education policy are necessary. This is because

“ . . . Education policy should consider what weight to give to generic, international policy trends ('the global') versus national and intra-national contexts ('the local') as well as the related problem of how much to stress the macro level of the state ('the bigger picture') compared with the micro-level of messy policy making, dissemination and contestation ('the detail')." (p.321)

The *globosity of change* concept is a sub-category of physical education in transition in this grounded theory and it has been constructed with the words of informants at the micro-level, which Thrupp (2002) describes as the contested and detailed level to try to explain how macro and micro layers affect education policy reform. Wissler and Ortiz (1986) conducted a literature review on decentralization in education policies and highlighted that the literature predominantly focused on external exchanges in power and its influence on education, such as governments and politics. They

argued that “research on school system decentralization is incomplete. Imposed models have been inappropriate, and important details have gone un-investigated” (p.290). This, in recent times, has changed due to greater levels of autonomy at local level that decentralization policies led to and hence, there has been a growing tendency to examine cases located within schools, colleges and Universities (Chapman 2000, Feuerstein 2002). They do, however, continue to explore exchanges in power as opposed to teachers’ voices (Klein 1999). And, hence, the grounded theory on physical education in transition makes a foray into the critical context that is the life-world of physical educators so as to determine the realities of transitory journeys due to education reform. The ideological layer in the *globosity of change* is characterized by three categories: 1) Democratization; 2) Europeanization; and 3) Globalization, that have emanated from the voices in this study in constructing categories and hence, extant literature is linked to these categories that belong to the ideological layer.

#### **5.5 IDEOLOGICAL LAYER: DEMOCRATIZATION, EUROPEANIZATION AND GLOBALIZATION**

Globalization is not entirely defined by the economic transactions of a nation, its national economy and its relative association to global economic frames Rhoten (2000) argues. She explains that it is, in addition, found in “new material realities as well as in new ways of thinking about political, economic and social spaces” (p.593). Given this argument globalization is about reconstructing the state, market, and society coupled with the reorganization of associated roles, responsibilities and relations, which at the micro level of teaching will be affected by changing roles and responsibilities. Bates (2004, p.118) supports this view and furthers the argument by locating current rhetoric on the restructuring of education within “concerns with ‘the new economy’, ‘globalisation’ and the need to ‘remain competitive’ through ‘world class’ institutions and ‘quality

assurance' 'benchmarked' against 'best practice'". This he contends is the rhetoric of business elites and governments alike thus education's link with it has been unavoidable and it ultimately presents itself at different levels of education's delivery. Its appearance, therefore, in Poland's reforming education system as argued in this study is a matter of expectance particularly as Poland aspired and finally obtained European Union membership by harmonising its educational regulations and standards with those of the West (Sports Information Bulletin 1991, Elsner 2000). This move towards Europeanization is a shift from the major symbol of Poland's former education, which was framed in Marxist-Leninist ideology (Svoboda 1990, Melosik 1991) and has now been supplanted with the view that the school must be renewed by replacing its alienated, bureaucratic, and technocratic orientation with one that is community-based and relies on the creation of functioning relationships between adults, teachers, and students and hence, taking on principles of a modern democracy (Rust 1992). These principles are also to be contained within a market economy where education is meant to satisfy the economic, technological and political development of the nation (Adnett and Davies 2002, Apple 2001, Gomez 2003). The strategists have concluded that for this to happen then Europeanization and or Internationalization of education should be part of the process of achieving this (Sports Information Bulletin 1994, Elsner 2000). The Bologna Process is the most important and wide ranging reform of higher education in Europe and has been designed to establish a European Higher Education Area by 2010 in which staff and students can operate with a certain amount of uniformity of educational standards and qualifications. Richter (2004) explains that the Bologna Process was intended to address "... Enhancement of the cross-border collaboration [so as] to align the different European higher education systems to one another and to improve student mobility and international exchange up to the year 2010" (p.70).

Although this reform was particularly directed at Higher Education, it meant that Poland's reforming education system would adapt teacher education to reflect this change in higher education hence, the vastly different educational values and social coherences amongst teachers who obtained teacher status pre and post democracy. It also means that it provided Poland with a template for reforming its education structures so that the challenges of globalization could be achieved through a European consensus. Whitehead (2000) believes it has been done so that it would lead to "the prospect of mobility and job opportunities" (p.90) outside of Poland; hence, providing a new generation of Poles the opportunity to move within the EU and seek out work other than in Poland. This is all part of the trajectory for neo-liberal reform as Poland's government in the process of democratizing its politics and society withdraws its interventionist approach to education through decentralization (Levitas and Herczynski 2001, Gomez 2003). Seddon<sup>139</sup> (1999), in her study examining the impact of neo-liberal reforms in education in the context of globalization, concluded that this mix of non-intervention yet subscription to a strong ideological force results in a "new problematic in education . . . [underscoring] the problematic question today: who do educators educate for?" (p.49). Ultimately the problems that she presents are that the democratized teacher, whose educational policy has been embedded within an economic frame and the ideology of globalization, must develop individual strategies that are both pedagogical and corporate. Apple (2001) extends the argument into a need for more general acceptance that globalization and decentralization are ideological forces. Zawodowska's (1995) assertion that "education to democracy means first of all treating students as responsible persons who have their rights in schools and freedom of choice" (p.41) exacerbates this problem that Seddon (1999) presents. This is because the demands of democracy will take its toll on teachers at

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<sup>139</sup> This study examined Australian Education Policy in the State of Victoria (Seddon 1999)

the micro-level as they attempt to make adaptations to democracy in the context of rigid economic frames. The *globosity of change* concept identifies the three layers, of which ideology is the first-outer one, and diagrammatically and through a narrative attempts to consolidate the impact that this has had on the physical education teacher at the micro level. The purpose of the transitory journey is to arrive at the destination whilst having made adaptations at the three layers of transition; these will not be without struggle or conflict and are explored when comparing extant literature at the structural and then individual layer. Yet at this macro level of change, the ideological layer complicates the life-world of the teacher. This is because not only will new demands in PE be challenging *per se*, the generational range within the teaching profession (Whitehead 2000) will create unique problems that cannot be predicted by current literature alone. Hence, this study has attempted to bridge this gap in knowledge of education reform by linking macro and micro forces to the individual layer. Salitra (2003, p.107) in her study on the education of Polish teachers in post-communist Poland, encapsulates this by predicting that despite the scheduled reforms in 2005 “one can already see such constraining factors as a dramatic lack of resources, insufficient preparation of universities for new ways of training teachers, and the need for a radical change in mentality on the part of the teachers, school inspectors and educational authorities.” These issues identified in Salitra’s study articulate into this study’s findings by concurring with the *globosity of change* concept as characterised by the structural layer.

#### **5.6 STRUCTURAL LAYER: IMPROVEMENTS, NEW PEDAGOGIES, NEW SCHOOL STRUCTURES, AUTONOMOUS CURRICULUM**

The antecedent reasons for education reform are normally associated with political decisions (Massialas 1977, Paulston 1977, Gitlin and Margonis 1995, Apple 2000, Snoek et al 2003). Klein (1999, p.28) reasons that politics “for teachers and administrators . . . remains an imposing

problem". Amongst the list of reasons that he cites, he singles out politicians and policy developers as the agents who open up the way

" . . . For charter schools, school choice, and vouchers. Of greatest concern is that we are losing our voice in the greater debate about what's important for children and for the classroom. We're losing out to the tyranny of certainty when we know that the answers are far more complex." (p.28)

At the structural layer, in the *globosity of change* concept, the voices of teachers have underscored the debate on what is important for students, the curriculum and teachers. The following extant literature is compared with the results from this study focusing on the challenges of improvements to resources, development of new pedagogies, criticism of new school structures and its impact on physical education and the demands of the autonomous curriculum.

'A study conducted by Mintrom (2001), who examined the motives of the U.S. government and the teaching of democracy, emphasised that "education of the young presents both extraordinary challenges and extraordinary opportunities for governmental regimes" (p.623) in the construction and maintenance of political regimes. These motives invariably impose themselves through politicalization on the structure of education, evident in its systems, processes and procedures when delivering education (Washington 1973, Apple 2000). Greater autonomy because of changes in fiscal policy and political ideologies pertaining to democracy such as globalization (Apple 2001), lifelong learning and equal opportunity (Salitra 2003), will require changes to school leadership styles (Samier 2002), local interpretations of the national curriculum (Whitty and Power 1997), review of pedagogy to match both new aims and changing clients (the students) (Karsten 1998) and the array of improvements that need to occur in resources, professional development and administrative structures (Apple 2001). Samier (2002, p.36) isolates educational leadership as problematic in modern education that has been through processes of decentralization (and or been democratized) as "the traditional scholarly ethic itself mitigates

against leadership in certain respects . . . [and] the bureaucratic does not allow for leadership, essentially a political role . . . in administrative positions". In the case of Poland's communist past, its administrative structures would have been centralized (Zawodowska 1995, Krawczyk 1996, Levitas and Herczynski 2001, Duczmal 2003) and thus, the conflict arising from new school structures would in fact be complicated by new shifts towards democracy (Salitra 2003) and the problems of democratic leadership in public services as argued by Samier (2002). In this study, this problem is identified by informants at the structural layer of the *globosity of change* concept through their frustrations in terms of new pedagogical demands without the professional development that should have been organised at the structural and local level. This is supported by Karsten's (1998) study on school autonomy as a consequence of decentralization that explains that a new layer emerges between central government and local school boards as a consequence of greater autonomy. The study concluded that this additional layer became a constraining force whereby "a buffer zone has come into being between central government and the schools, which further complicates the relationship between the two levels" (Karsten, P.401). This leads to inaction on arising problems as neither central government nor local school-boards feel responsible for problems such as professional development for new pedagogies in relation to education reform. In terms of this study it means that one of the problems that physical education in transition will face is a restructuring of administration that must provide relevant leadership capacities. The study has also identified within this structural layer that autonomy has had an impact on a variety of processes, where Robinson et al (2003), in their comparative study between the UK and New Zealand, examined the impact of greater levels of autonomy on school governance and concluded that "growth in responsibility has been accompanied by a parallel increase in the rigour of audit and accountability regimes, as central government attempts to specify and monitor the standards it requires of its governing bodies" (p.263). This greater emphasis on quality and accountability to

show that public expenditure is both fair and effective has intensified the teaching context in Central and Eastern Europe (Scott 2002). And in the case of Poland has inserted a new level of expectation set at the structural level (Levitas and Herczynski 2001) and that impacts directly on the morale of teachers (Salitra 2003) and more acutely has been evidenced by Kosiba (2004) in her study on PE teacher's changing attitudes to the profession as having caused frustrations. Giles (1998) argues that the levels of accountability that have been inserted into the decentralized educational context are in fact:

“thinly disguised as empowerment . . . [and] rather than improving the capacity of teachers and schools to engage willingly in the process of planning change and improvement, structural reforms like site-based management have increasingly looked to teachers like vehicles for government manipulation.” (p.413)

Apple (2000) supports this view by criticising education reform in the light of economic rationalism because the system can “ignore the lives of teachers and administrators in schools that are beset with these supposedly wholly meritorious reforms” (p.430). A further study by Apple (2001), evaluated marketisation in the context of teaching and recommended that reforms should be examined within a more open debate about the ideologies that drive them (such as globalization and economic rationalism) emphasising that “these transformations are already having a profound effect on the ways teaching is done, who controls it, and what schools themselves are for” (p.182). All of these pertain to the structural level in the *globosity of change* concept in this grounded theory, as informants have identified restructuring of school administration and finances as being out of synchronicity with the demands of the curriculum and the realities of what can be feasibly provided. The hidden costs of reform when applied to this layer will in fact determine the achievement of curricular aims (Apple 2000) as greater accountability at the local level (Zawadowska 1995, Levitas and Herczynski 2001 National Ministry of Education and Sport 2004) and the demands to adapt to

socio-political shifts (Adamu-Matuszynska 2004) will result in a greater need for educational leaders (Samier 2002) to consider the impact on individual teacher's ability to make adaptations to the demands of marketisation, globalization and democracy (Rhoten 2000, Gomez 2003). Thomas (1999) explains that leadership and managerial judgment at the local level will in fact affect resource allocation, which will exacerbate teachers' work practices as they struggle to deliver the educational reforms as set by a national curriculum yet implemented at the autonomously interpreted local level. This argument is not a new one as Callahan and Shalala (1969) initially explored the effects of decentralization on resource allocation in the mid 1960's in the USA and concluded that "decentralization proposals have seldom been directed to the resource problem" (p.41), which in fact have outcomes on the ability to deliver equal access to education of all groups in society. Salitra (2003) in her study on Poland's reforming educational system postulates that equal opportunity of education may be an ideology that ultimately fails as fiscal realities will only exaggerate local differences in terms of access and, as Thomas (1999) suggests, resource allocation. In addition the need for new pedagogical approaches to meet the demands of a reformed curriculum in the context of modernised structures and a democratized generation of students will require both strategic and operational plans that put pay to the professional development of physical education teachers. This is supported and argued by Salitra (2003, p.107) as being essential as "one has to admit they [teachers] are not fully prepared today for the changes in teaching resulting from the decentralization of curricula"; she goes on to argue that given the financial strain of economic rationalism it is doubtful that the professional development of these teachers will be taken on adequately. A study by Pratte and Rury (1988), who explored the growing trends towards teacher autonomy in the 1980's, concluded that "expertise is taken to be the key to autonomy and a sense of professionalism" (p.72), hence, supporting this study's results and Salitra's (2003) arguments that new pedagogies will be a part of the expertise necessary for delivering the autonomous

curriculum. The structural layer in the *globosity of change* concept presents an explanation amongst the relationship of already established concepts as linked with the extant literature in this section and encapsulates a distinct layer associated with physical education in transition. All the layers are interrelated and are to be viewed as a whole. However, it is also necessary to present this grounded theory as distinct from the concepts already in existence by explaining that the layers compound and revolve around the individual layer, which is where the teacher is placed and who is affected by macro forces and the way that they devolve into smaller units within the structure.

#### **5.7 INDIVIDUAL LAYER: PROFESSIONAL FRUSTRATION, CONFLICTING VALUES, AUTONOMY-DEPENDENCE CONTINUUM**

At the individual layer in the *globosity of change* concept the sub-category of conflicting values is linked to the ideological layer by the way that it trickles through to manifest itself in the reality of individual teachers. The same is said of the autonomy-dependence continuum, which is linked to the ideological layer of education reform where curricula have been devolved, are then realised at the structural layer through local implementation and creates individuals' struggles at the centre of the globosity of change. Professional frustration is a sub-category that is also linked through the middle and outer-layer as it emerges because of the adaptations that are necessary in teachers. It is also interrelated with the sub-categories at the individual layer as it becomes an outcome of transition and also a condition that teachers must learn to contend with in their professional lives. In this section extant literature is identified and linked with the grounded theory on physical education reform to support and discuss this study's findings.

Education reform in Poland has led to greater scrutiny of teachers' professional lives and has been deliberately linked with economic realities (Salitra 2003) hence, the greater link between the individual and central government (Apple 2001). A study by Pullin (2004), who examined the

increased levels of accountability on teacher education in the USA, recognised that the relationship between individuals and school autonomy is compromised by increased levels of accountability arguing that as consumerism becomes a feature of the educational context, due to capitalistic forces, then so will greater institutional control be over individual teachers. This is because public taxation is spent on education as an intention to deliver on the necessary skills a globalized economy will need (Rhoten 2000, Gomez 2003) and, so, requires governments to check up on their investment for the future and this argument is increasingly supported by other academics (Zawodowska 1995, Apple 2001, Gomez 2003). In this case, the character of professional teaching alters and professional frustrations begin to arise as teachers experience less control over their professional decisions (Smith-Merz 1986) and become embroiled in the realities of fiscal decisions (Levitas and Herczynski 2001). In Poland's case the communist past provided no autonomy for teachers (Zawodowska 1995, Krawczyk 1996, Levitas and Herczynski 2001) and because of the centralized model applied to education and all other social structures was able to make individuals indistinguishable from the system (Scott 2002). The introduction of greater autonomy alongside a new and more rigorous approach to accountability (Zawodowska 1995) will in fact debilitate a teacher's ability to make decisions on curricula interpretation and pedagogical design because, as Crawford (2001) suggests, accountability negates autonomy as the relationship is contrariwise. This view is supported by the words of informants in this study (see section 4.16 in Chapter 4) who have shown frustration at the new curriculum, which is supposed to be enacted independently, yet lacks certain feasibility due to poor preparation of resources and teachers' pedagogical capacities; these problems could have been avoided by greater planning for reform. Apple's (2001) exploration of the paradox that decentralization has on the teacher's level of autonomy supports this argument as he explains that the State dictates the decentralized context of the teacher by imposing rigid processes for delivering on a National Curriculum, which is its investment in sustaining a skilled

workforce (Giddens 2002), but also has a tendency to ignore local realities and necessary actions for realistic change. This view is once again supported in the study, which shows that teachers at the individual level are frustrated by new demands in the curriculum, particularly with the introduction of a new National fitness test for children, which they know to be irrelevant due to the receding fitness levels of children. This frustration to deliver on a central government demand, which intends to arrest declines in fitness, is in stark contrast to what physical education teachers know as being effective in the context of teacher-student relationship and the lesson. It is also daunting for the PE teacher in Poland's transiting educational context to suddenly become more exposed to the demands of perceived autonomy, which is an issue of flexibility to adapt to the changing demands of State governments (Crawford 2001). A study by Eden (2001), who attempted to identify who controlled the teacher in a decentralized context and what the emergent issues would be concluded, that teachers were overtly controlled by principals of schools who were acutely affected by client demands, which included students and parents. In this study teachers increasingly voiced the changing attitudes of students as democracy became a more stable feature of political and social culture. Students were beginning to voice their dislike of particular pedagogical practices, such as authoritarian and didactic teaching styles, and were also refusing to participate in lessons that were not relevant to their developing cultural tastes, such as fitness, court-sports and swimming. Eden (2001) explains that the changing nature of education due to such reforms will impact on teachers' ability to behave autonomously as self-confidence is central to its existence in professional conduct. Reforms in Poland have exacerbated professional frustration in physical education teachers as the new parameters for student-centeredness requires that teachers have "respect for the child, guaranteeing their physical, moral, intellectual, spiritual and social development in normal, healthy conditions of freedom and dignity" (Salitra, 2003, p.103). The freedoms of a democratized youth who understand their rights, however, are showing a growing

evidence of “disruptive behaviour in schools [which] is becoming a concern for teachers . . . since it is most often directed at them” (Poland Library, 2004, p.2). Zaremba (2003) a Polish journalist, has spoken out against the effects of education reforms, which have included the removal of teachers assessing student’s individual behaviour at the end of each semester and the stripping of certain authoritarian practices such as raising their voices or sending out unruly students, because they are linked with Poland’s communist past. He argues that this is a ridiculous situation as students become increasingly confident about their rights whilst ignoring their responsibilities and that teachers are burdened with nothing but responsibilities as the affects of accountability paralyses their confidence in teacher rights. In this study, teachers have argued for more stringent methods for disciplining students; they have also expressed a need for greater professional development to cope with the changing attitudes of students, recognising that the ability to motivate students will instil some sort of stability with this growing problem (see 4.14 in Chapter 4). Salitra (2003) agrees with this but also doubts that this will be resolved at a national level because of the scale of financing this solution. In such a situation when a teacher feels unsupported Blase (1991) states that teachers will feel angry and frustrated towards those who lead them; and in the new structure, that will mean administrators and principals (Robinson et al 2003).

Professional frustrations have also emerged because teacher workloads have increased as a way of delivering on the new National Curriculum. In a study by Timperley and Robinson (2000), it was identified that when schools became accountable at a local level, workloads increased thus having a negative impact on teachers. They suggest that the solution to this problem is in the role of educational managers to “conceptualize the shifts required for teachers to be involved effectively at a systemic level, and then to create the conditions to facilitate these shifts” (Timperley and Robinson, 2000, p.59). These changes however will require time and finances, in which the Polish government is reluctant to invest (Salitra 2003) because of political reform being in the context of

EU membership (Elsner 2000) and globalization's demands (Levitas and Herczynski 2001, Duczmal 2003, Gomez 2003) and thus the altering priorities of an economically viable Poland (Zawodowska 1995, Levitas and Herczynski 2001). Long (2004) follows this trend of decentralization and its affect on teachers and establishes that in this situation and over time teachers

“ . . . Lose hope, confidence, and, most frighteningly, a sense of themselves as knowledgeable professionals. Over the years, they internalize messages sent through programmatic mandates and testing frenzies that teaching is not about leading but about following and that curriculum comes from teachers' guides and programme models not from thoughtful reflection based on theoretical knowledge and close observation of children. In many places, this has become the expectation, the norm.” (p.142)

In this study, teachers have expressed conflicting values as they recognize the new demands of autonomy but are trapped in the old ways of dependence on instruction as accountability of decisions is made more explicit (see 4.17 in Chapter 4). This dependence on State instruction Apple (2001) argues is a weakening of the argument that decentralization creates greater autonomy, in fact the argument he presents is that there is an inherent conflict of values between the rhetoric of decentralization as a force for freedom and accountability as being inherently tied to its power-frame, which in this case is a rigid financial structure and the ideologies of democracy. In addition to the contradictions of autonomy (Apple 2001), Poland's teaching profession and society in general as it transits through socio-political reform, contains within its society a mix of pre and post democratic values (Adamus-Matuszynska 2004). Melosik (1991) explains that during communism “the Polish school was to be a factory that produced supporters of communist ideology” (p.191), thus these individuals received an education that was an “anti-global, divided and a fragmented view of the world” (Melosik, 1991, p.191). The shift towards global culture (Green 1999, Gomez 2003), internationalization through EU membership (Elsner 2000, Levitas and Herczynski 2001, Salitra 2003, Richter 2004) and the need for a participatory society so as to

achieve economic stability (Melosik 1991) mean that teachers' internal values, linked to ideology and educational theories (through either Marxism or Democracy), will result in both personal conflicts of values as transition occurs and conflicts amongst teachers where values are polarized due to the generation in which they were educated. The Four Scenarios Model presents an explanation of how these teachers may appear within the current phase of transition. The words of informants have constructed this analytic story and the argument that conflicting values arise out of polarized traditions and teachers have expressed frustration because outside pressures have obliged them to choose one set of socio-political value at the expense of another. Gorostiaga-Derqui (2002) agrees with this argument when examining decentralization policies in Argentina and Brazil and concludes that "this trend may suggest a subordination of education to the market, playing a role in the process of social polarization" (p.576). Linde (2003) extends this argument by locating the problem with the changing role of nations stating that

... The role of the nation has changed throughout the world and individual states have become relatively weaker in relation to competing corporate entities and organisations; thus, it has become more difficult for them to assert their own legitimacy in decisions over people's education and upbringing." (p.114)

In the case of Poland the transitory period is more ambiguous because the relationship between State and Industry are both in transition ( Duczmal 2003) and it is yet uncertain as to whom will be the key players in years to come (Huffman and Johnson 2001), thus creating further frustrations during nebulous times (Salitra 2003). For physical education teachers it seems that frustration will be a reality for some time still (Kosiba 2004) as education reforms although scheduled to be complete by 2005 (Salitra 2003) have endured constant criticism (Poland Library 2004) and are predicted to continue for many more years (Levitas and Hercynski 2001). In this Grounded Theory of Physical Education in Transition this ambiguity and uncertainty is presented by the

*globosity of change* concept as it depicts the transitory journey through a revolving motion and attempts to capture the temporality of transition through the voices and words of physical educationists.

## 5.8 SUMMARY STATEMENT

The Grounded Theory of Physical Education in Transition, which emerged in the data from the present study, is supported by extant literature in education reform. Physical education in transition explains the process that occurs when PE teachers attempt to adapt to the changing context of education as it reforms. In this study a new model (Four Scenarios Model) has been presented as an analytic story that captures the unique and real life character of physical educationists as they journey through education reform and make up a professional workforce that can be narrated, temporally speaking. The model was constructed so as to tell the story of individuals as they appear at the PE teacher level of physical education in transition and as a way of explaining the different types of teachers that emerge from the effects of transition as explained in the three layers of the *globosity of change* concept. Physical education in transition is, then, set within three levels of change: 1) national government and its relationships with international agencies (macro level); 2) schools and local authorities (meso level); and 3) the physical education teacher (micro level). Extant literature has identified that these three levels can be explained on a case by case basis, normally examining either one of these levels or a relationship between two. What is not clear in the extant literature is that despite the understandings of the three levels, voices of teachers at the micro level have not made a strong contribution to understanding education reform and transitory societies. The reason for this is that most nations that have undertaken education reform in the form of decentralization have not had to do so from an entirely centralized and politically polar status. The grounded theory presented in this study makes a

substantive contribution to existing theories in education reform. The grounded theory also presents an entire explanation of physical education in transition through the *globosity of change* concept, which uses the words of informants to construct the layered reality of individual PE teachers. Extant literature has supported the existence of a number of sub-categories that emerge at each layer and support the layered globe and the way in which it has been constructed when examined on a category by category basis and when exploring the complex relationship between those categories and relative layers. This grounded theory subsumes the emergent categories into a bigger picture and attempts to explain the entire transitory journey through the *globosity of change* concept and hence, make a conceptual contribution to existing theories in education reform.

## CHAPTER 6

### CONCLUSIONS

#### 6.1 INTRODUCTION

Having generated a substantive theory to explain Physical Education in Transition, the final chapter presents a reflection upon the entire study. In so doing, evaluation of whether the canons and methods of ground theory have been observed through out the study becomes possible, and above all, the outcomes and limitations of the study can also be addressed. Hence, the researcher's experience can be consolidated. For simplicity of discussion, this reflection is divided into four sections: the purpose and aims of the study, methods and limitations of the study, findings and recommendations and implications for future directions of study.

#### 6.2 REFLECTING UPON THE PURPOSE AND AIMS OF THE STUDY

At the beginning of this study the question "how will physical education change during political transformation in Poland?" was identified as being central to the inquiry and, so, became its purpose. To structure the study it was then critical to develop clear aims so that a methodology, related techniques, instruments and strategies could be decided as part of any research design. So, the aims took on a twofold direction: (a) to elucidate the experiences and consequences of professional and pre-service teachers of physical education in the context of political transformation and hence, education reform in the work setting; and (b) to formulate a logical, systematic, and explanatory theory on teacher adaptations to education reform in a formerly authoritarian political culture. The study did capture voices and experiences of teachers in the education reform context in Poland and has contributed to the systematic development of a grounded theory. There were, however, expectations at the start of the study, such as thinking that PE teachers would be vocal

and highly critical of Poland's political past. This in fact, did not present itself in quite the way as was originally imagined, that is, it would be deprecated posthumously. In many ways, this failure of expectation was a strong affirmation that preconceived categories were not forced onto data from the study. It also revealed that education in Poland was a complex and unpredictable context that required an understanding of transitional societies as well as how physical education worked. As a consequence, the purpose of this study has been achieved through the discovery of a new concept (globosity of change) and educational model (Four Scenarios Model). These outcomes have defined the original purpose, which although succinct at the time was nebulous due to the researcher knowing very little about the life of the physical educator in Poland. The aims in context of the interpretation of the methodology, subsequently, have elicited and formed the entire character of this thesis. This reflection on aims and purposes leads to retrospective considerations on the study's methodology.

### **6.3 REFLECTING ON THE METHODS AND LIMITATIONS OF THE STUDY**

So, the aspiration for incorporating an appropriate theoretical framework, to inform the practices of PE in post-communist Poland, resulted in the conduction of a grounded theory study in education reform. Bearing in mind that the intention of the study was to understand the experiences of PE teachers in a real-world environment, (and to generate a substantive theory of PE in the context of education and societal reforms), literature was consulted so as to locate the inquiry within a relevant methodology. The review of literature strongly suggested that grounded theory was an apposite method for an inquiry of such a complex and unpredictable nature. In addition, the fact that two languages and cultures were to be used by one researcher meant that any methodology selected would need to be powerful enough to deal with potential limitations, such as attaining conceptual equivalence. In this study, the researcher's own experience in education, in

tandem with the literature review, not only helped to put the study into perspective but also shaped the focus of the study, which in grounded theory is considered to be the condition of 'theoretical sensitivity'. Some care, however, had to be taken as preconceived ideas, resulting from the reliance of an experiential pool, might increase the chances of forcing research data to fit with existing concepts. The criteria used to judge the capability and or rigour, of the emergent grounded theory included the "researcher's collection and analysis of qualitative [and quantitative] data [and] is in one sense equivalent to what he (sic) knows systematically about his own data" (Glaser and Strauss, 1967, p.225). The criterion of suitability was achieved through the building of a theory (Strauss and Corbin 1998). Data were not forced or selected to fit pre-conceived or pre-existent categories or discarded in an attempt to keep an extant theory intact. The grounded theory is, hence, located in the study's data (Strauss 1987) and thus has been developed to present a substantive and empirical area of sociological enquiry into education reform. In the present study, the emergent *facts* included the views, judgements and actual realities that surfaced as informants explained their situation of physical education in reform. Relevance was achieved because the grounded theory method allowed the core problem and processes to emerge from the informants' words, rather than having been predetermined or deduced by a pre-conceived logic. The theory proved to be flexible throughout the grounded theory process. Data collected and analyzed through the theory process and the post-theory literature review served to augment, exact and verify the theory.

The Grounded Theory of Physical Education in Transition is a complete explanation of Poland's education reform in the context of PE. The *globosity of change* concept is a newly identified conceptual area that presents an argument that places individual teachers at the centre of education reform and explains how ideological, structural and individual layers present separate and related explanations of the transitory journey at the micro level of change. This study methodologically

adhered to Straussian grounded theory and its methodological limitations have already been explored in chapter 3. As delineated in the sections that follow, the distinctive description of the theory represents important opportunities for future research in education reform and it is, subsequently, important to explain the limitations of this study so that they can be considered in the case of future inquiries into the same phenomenon and or using the same method. The following limitations are, therefore, presented.

1. The volunteer sample consisted of a group that was highly educated and located in one of Poland's regions and thus the character of informant and 'place' may have played a role in the gestalt of informants' words. Because the theory did not seek to explain differences in experiences it is a description of this groups' reality and hence, the *globosity of change* concept and the Four Scenarios Model carries uncertainties about the collective experiences of all physical educationists in Poland. Future research should attempt to include participants from other regions and so provide a greater opportunity to discover higher levels of consistency across regions.
2. The volunteer sample consisted of participants who were willing to talk about physical education in reform and hence, this experience of informants may include views that are not held by all physical educationists. It is always problematic when data for research purposes come from a voluntary sample; it means that only those who are willing to speak will do so. To a certain extent this obstacle cannot be resolved on ethical grounds; however, it is important to make clear that this study carries meanings that are subject to this limitation.
3. The grounded theory of physical education in transition is the first of its kind, so there is no parallel extant literature with which to compare it as a complete explanation. Certain categories and explanations pertaining to relationships exists, however, the conceptual development within the theory itself is new to the area of education reform. So, further grounded investigation of the

processes in physical education reform and other areas of teaching are necessary as it will create a general theory that has greater depth and a more explanatory nature.

4. The globosity of change concept and The Four Scenarios Model has not been previously identified in the literature, so comparisons were not possible. Further theoretical sampling is needed to more fully describe the layers within the globosity of change and more detailed explanation for the construction of the Four Scenarios Model, particularly with a view to testing its ability to adapt to different contexts and conditions of education reform so that it can be applied more generally to education.

5. The theory contains areas that have been broad and touch only superficially on several important concepts, therefore, further theoretical sampling is needed to more fully describe them.

6. Extant literature that can be linked with categories and related relationships contain a certain amount of inconsistency in terms of concepts on education reform being vague. This is because there has been a tendency for concepts to have been constructed through discursive explorations or small case-study analyses that have not used normative processes for verification. This study has attempted to do so and, therefore, presents further studies to include a mixed methods approach so as to more clearly identify gaps between interpretive and normative descriptions of physical education in transition and education reform.

7. Knowledge about teachers' views on physical education in transition, an important goal of this investigation, is viewed through the perspective of academics of PE, physical education teachers and pre-service teachers of PE. Although there have been a consistency of views between these groups it is important that future studies of physical education in transition include students of PE, school principals and a wider participation of local authorities and providers of physical culture.

8. In this study unstructured interviews throughout the study were used to solicit views for the purpose of designing further interview questions, the questionnaire itself and saturating categories

during axial and selective coding. Theoretical sampling underpinned the rationale for making selection of individuals whose words and corresponding world permitted the researcher to understand how physical educationists perceived education reform; this, however, may also become a procedural limitation of the study. The reason for this is that knowledge of being included in the study may have been sufficient to cause some of the informants to describe what they think the researcher wanted to hear rather than what they really experienced, thereby, diluting the data quality by possibly agreeing with the slant in interpretation that the researcher had. Although this study used all three interview types and a questionnaire, the cumulative process of coding, which requires interpretations to be made at the axial point onwards, may have internal biases that will not be replicated in further studies, hence, an emergence of narrow and or wide differences in explanation. Further research should include studies of both identical and divergent processes so that differences can be observed.

9. Informants in this study may have over-focused on recollecting their most frustrating experiences, which may turn out to be, as far as their daily practices are concerned more atypical than generally viewed. It is fair not to expect entirely objective recollections of experiences of physical education particularly as grounded theory's theoretical underpinnings are rooted in symbolic interactionism. Nevertheless, this does not mean that the data are inconclusive and should be abandoned. The fact that the researcher does not have any personal connection with the questionnaire informants and that participation was entirely voluntary and anonymous, by and large, reveals genuine experiences. More importantly, with the technique of constant comparative analysis, the underlying structures of the codes and categories have been preserved. Further studies however should recognise that informants' subjectivity requires a clear strategy for constant comparison.

10. Transition itself is an unstable context and this study made contact with informants between the years 1998-2004, which mean that the initial move towards democracy in Poland in 1989 has an absence of nine years in the theory's descriptions. The transitory journey is, consequently, described after significant events had already taken place and as a result there could be omissions in the theory that were unavoidable. The theory is also described within a particular time frame and further studies will no doubt have adaptations or even vastly different conclusions and thus must be designed to take into account this possibility.

11. The researcher is bilingual and born, raised and educated in the UK. The idiosyncrasies that arise between cultures and the learning of foreign languages are specific to micro and macro influences. Even if the design of this study was carried out identically and the same informants made the same contributions the individual making language translation decisions will have altered the meaning, this is inescapable when translating – there is no such thing as literal accuracy and hence, the character of the research is affected by this. Further research must take this point into consideration so that further verification, refutations and or adaptations consider this condition. To a certain degree grounded theory is ideal for this type of study as theoretical sensitivity is a requirement for making decisions on coding, memoing and constant comparison thus assisting the neutralization of this limitation to a certain degree.

The current study identifies a powerful and formerly unidentified social process contained in the *globosity of change* concept and the Four Scenarios Model, which make up the Grounded Theory on Physical Education in Transition. The theory is powerful because it is relevant to the lives of physical educators in Poland's current education system. Future inquirers have an opportunity to use the theory in other education reform situations outside of PE and Poland itself as it can be modified for a wide variety of situations. It is an evocative theory, which has the power to

widely inform practitioners and leaders about the realities of the struggle between personal and professional adaptations to education reform and political redevelopment through it.

#### **6.4 FINDINGS AND RECOMMENDATIONS**

Informants in the present study provided words linked to their unique experiences of physical education in transition. The views and stories that emerged can be linked and likened to those found in extant literature but point to an absence of complete explanations that can be applied at the micro level of teaching. Grounded theory provides a researcher with a method for discovery in such a situation and is used to ascertain the emergence of new concepts with which new or existing theories can be constructed. The method allows for a systematic and rational solution to previously unknown and or little-known phenomena. The inherent innovations within it must, then, provide explanations for this situation and carry out its tasks in a way that shows evidence of continuity of new conceptual and theoretical structures within a tradition's shared beliefs. The recommendations that are made as a consequence of this study's findings are linked to the conceptual and theoretical structure of physical education in transition and provide continuity of a tradition's shared beliefs by way of recognising the actors involved in the future of physical education in Poland.

#### **RECOMMENDATIONS FOR TEACHERS OF PHYSICAL EDUCATION**

"Looking to the 21<sup>st</sup> Century, the time is ripe for the profession [of PE] to seek global consensus as to the development of physical activity competencies every child and young person needs in his or her educational experience that is typically mandated by his/her respective country" (Ziegler, 2002, p.114). The challenges of the 21<sup>st</sup> Century, then, provide an added dimension into any

political and, thus, educational reforms. Despite the goals of politicisation, in any nation, the test is to focus on the specifics of curricula and determine the goals of physical education within a broader context of reform. Grabowski (2004, p.1) proposes that there are two problems for present educators in Poland (and the rest of the developed world): 1) tackling the physical activity deficit due to the processes of modernisation; and 2) the outcome from the first, that being, cultural atrophy, as we lose the physical capacity to maintain involvement in physical culture beyond voyeuristic participation. The growing trend towards sedentary lifestyles, in developed and developing nations, presents a change-agenda in addition to political initiatives to reform education. Physical education is a context for primary engagement in physical activity, which should become a precursor to lifelong participation (Greendorfer 1977, Grabowski 1997). Grabowski (2001d) emphasizes this view with regard to Polish society by saying that

“ . . . If the goal of education in the broad sense is to prepare the young to a receptive and creative participation in (broadly understood) culture, then the goal of physical education is to prepare the young to participate in this sphere of realities and values that constitute physical culture”.  
(p. 1)

Makuła (2003) stresses that physical education is not just about schooling bodies but is also about instilling an attitude towards the body that values its health and knows how and when to engage in physical activity and with levels of inactivity in decline ill-health in Poland related to the deterioration of fitness, will become prevalent (Przewęda 1995, Surgeon General 2004, WHO 2004). This means that the role of physical education will come into question as the challenges of a modern Poland begin to reflect those of other developed nations (Lee 2004). Physical education in transition includes the challenges of the 21<sup>st</sup> century and individual interpretations of curricula have shown that teachers of PE are concerned with the health status of their students.

Teachers of PE who are transiting towards a reformed education system will need to recognise that their individual capacities to adapt to change will be crucial for the character of physical education. The grounded theory of physical education in transition may indeed denote this crucial capacity as it points to a need to develop a systematic means for preparing teachers for change through professional development. Grabowski's (2004) discussion suggests that PE teachers should understand the challenges of PE without recourse to political redevelopment and the ideologies of education reform. This, however, is not an entirely appropriate call for Poland's physical educators as focusing one's professional expertise on the development of a child's body and inculcating practices with physical culture, actually strips the relationship of the cultural context when its meanings are devoid of political dimensions, which Grabowski fails to link. Teachers then should be aware that the curriculum is politically influenced and that the ideological layer identified in the *globosity of change* concept will impose on it structural and individual realities and hence, influence teaching at the micro level. In Poland's communist past when authoritarian control was yielded over its people and structures (Zawodowska 1995, Krawczyk 1996, Gomez 2003, Salitra 2003, Adamus-Matuszynska 2004), physical educators had no option but to adhere to strict ideological underpinnings in curricula (Melosik 1991). A politically reformed Poland, however, has not permitted an escape from ideology (Salitra 2003) in fact its mode of engagement is as intense it is its new focus that makes it different (Gomez 2003); teachers of PE will now have to make independent choices about how these ideologies will be realised and new auditing procedures (at the meso level) will make transparent the decisions made at a school level, hence, making a teacher more responsible for the interpretation of curriculum. As an example to support this, Enders (2002), in his paper on the role of educational institutions in the context of the ideology of globalisation, maintains that education "contribute[s] to the generation and transmission of ideology, the selection and formation of elites, the social development and educational upgrading of societies,

the production and application of knowledge and the training of the highly skilled labour force” (p.2). Teachers will, for that reason, need to develop a new collective narrative that is both effective in terms of achieving government goals and supportive of each other in uncertain times.

#### RECOMMENDATIONS FOR AWF'S

The grounded theory of physical education in transition brings to the surface a number of implications for teacher education (in PE). Recommendations include strengthening higher education programmes to include preparation of students so that they are aware of the demands of change in education, which requires flexibility. AWFs should review their teaching strategies so as to improve pre-service teachers' empowerment through helping students to identify the necessary skills for establishing effective intra-and inter-professional relationships. This should also be extended to those teachers already in the field of teaching and particularly to those who had been educated during communist governance. Those educators in AWFs who have had to alter teacher education courses so as to remove former ideologies related to communism and introduce new ones relating to democracy and globalization, should closely examine implicit messages transmitted to students, particularly traditions of the discipline that sustain conflict and power imbalances. This, however, could be very difficult as Enders (2002) explains that: “(1) the concentration on policy effects, neglects the input side of policy formation, and (2) the concern with macro level policy-making and meso level organisational adaptation, neglects to some extent the micro dynamics and effects in the actual practices and performances” of educationists (p.13). This includes higher education institutions and thus, imbalances of power are already replicated there (Enders 2002). Despite this, the professional development of student teachers could include reviewing practicum

so that it leads to a repertoire of skills for adjusting to the realities of day-to-day practice, highlighting that education reform is something that modern government appears to favour.

Specifically, the Grounded Theory of Physical Education in Transition uncovers three layers of transition that affect individual teachers in the workplace and hence, reveal that they are unprepared for some of the challenges of education reform, particularly with a view to pedagogical demands resulting from the new curriculum and the changing character of a young democratized generation. The AWFs could help to prepare pre-service teachers through curricula that include recognition of the three layers in the globosity of change, that is, they will need to be aware of and have strategies for dealing with the ideological, structural and individual layers. This could be done by preparing students for the real world through practicum and the facilitation of dialogue that uncovers sources of conflict between core ideological beliefs, professional realities contained within the structural layer, and government expectations. AWFs should acknowledge the power that government and the economy yields over curriculum decisions in terms of aims and design. They should also introduce professional components into teacher education courses that go to the root of modern education and include strategies that prepare students for workplace contradictions such as higher levels of bureaucracy, contending with new leadership styles that include a new layer between schools and central government, in the form of a local education authority and the pedagogical demands when contextualised within an equity framework. If students are presented with an opportunity to practice dealing with these problems as part of their course, they may find ways of dealing and/or avoiding them when they arise in the workplace. If students are presented with the contradictions of teaching and new economic frames it may in the very least avoid disillusion amongst them and enable them to devise contingencies that sustain a lifetime dedication to teaching and or support each other in a work context.

AWFs also need to recognise that new economic frames will impact on physical educators in two ways: 1) PE teachers are currently specialists and spend 4 – 5 years in higher education preparing for teaching in PE only. In some other European countries, physical educators are expected to be able to teach in other areas of the school curriculum and although this may never translate itself in Poland, due to the Physical Culture Act (Ust. 1996), it may be something that becomes increasingly obvious to policy planners as they try to find a way of bridging financial gaps in education funding; and 2) education reforms that have attempted to meet the skill demands of globalization may find that Poland's physical educators, in a Europe with greater confluence if borders, will seek out work in the EU and thus lead to the migration of Poland's own investment in education. As education is a constitutional right and also free at point of access, the 4-5 year teaching degree may find itself being reduced to have greater comparability with EU members and also as a way of reducing the financing of higher education.

During the communist period of governance, AWFs became independent institutions with University status; this may change in the future and AWFs may find themselves being subsumed into Faculties of larger Universities and hence, have their funding reduced by having to compete with other teacher education courses. This may also influence future decisions to reduce the length of the degree so that its funding model is consistent with other degrees. AWFs need to prepare for the future so that the quality of teacher education in PE reflects the needs of teaching realities and carry out independent research for themselves to prepare for possible changes as opposed to waiting for education reforms, which may significantly impact on the morale of the profession.

#### **RECOMMENDATIONS FOR SCHOOLS AND LOCAL AUTHORITIES**

In a study that Chapman (2000) carried out where he examined the impact of education reform in the form of decentralization and responses to economic rationalism (including globalization) he underlined that

“... Education managers of the future will need to become increasingly articulate about the pay-off of continued investment in education, increasingly knowledgeable about strategies that are effective in producing those outcomes, and skilled at moving the system toward those ends with even fewer resources than in the past.” (p.293)

Poland's education reforms have been all-embracing (Levitas and Herczynski 2001, Gomez 2003) and the urgency to apply the values of the West to its education model (Scott 2002, Gomez 2003, Salitra 2003), economic frame (Levitas and Herczynski 2001, Ducmal 2003) and socio-political culture (Prizel 1998, Adamus-Matuszynski 2004) will require resources and strategies that include a commitment to professional development of teachers, particularly as a study by Adey (2000) who was examining the role of educational leaders in the UK's restructured educational context, found that:

“... The acceptance of responsibility for staff 'performance' does not extend to responsibility for the overall professional development of subject teachers. It is *reactive management* (if there is a problem that could affect 'results' it needs to be addressed) divorced from any notion of *proactive leadership* (accepting responsibility for a planned programme of individual staff development which addresses not only the remedying of weaknesses but also the nurturing of strengths).” (p.429)

This is particularly important for Polish principals who themselves would need educational leadership training particularly as William and Loudon (2000) explain in their paper, where they explored three discerning dilemmas encountered by principals in light of restructuring:

“... First, principals need to manage a dilemma of autonomy. They need to provide leadership that is strong *and* shared. Second, principals are faced with an efficiency dilemma. They need to provide leadership that is both democratic *and* efficient in terms of the amount of time and effort committed to decision-making. Third, principals are confronted with an accountability dilemma. They are accountable for the school's compliance with policies set by government agencies and school systems *and* they need to generate local commitment to these policies.” (p.173)

PE teachers in Poland's reformed system may, then, be struggling with conflicting values and have struggles with autonomy. William and Louden (2000) have revealed in their study that Principals are aware and "... acknowledges that teachers are suspicious of performance management" (p.178) where 'autonomy' is introduced as part of restructuring. It could then, be the perfect opportunity for school governance and local authorities to develop a strong relationship between teachers and educational leaders by exploring ways to negate mistrust and/or a lack of enthusiasm for reforms. Riley et al (1999) support the view that something needs to happen to resolve conflict. In their study on Local Education Authorities in the UK, they discovered that teachers were not as enthusiastic as educational leaders to have their performance measured as part of the autonomy/accountability restructure. They say that "... if target setting is to be more than a paper exercise, local authorities will have much to do to persuade teachers of the importance of these strategies" (p.42). Educational leaders should take the view that teachers have been surprised at the demands of change and expecting them to magically adapt to a new curriculum, new pedagogies and a new generation of students, could be both unrealistic and unreasonable. Older teachers will need assistance in making the adaptations, particularly as flexibility was not a necessary trait during communist governance. The understanding that transitory periods are legitimate phases with legitimate behaviours, narratives and actions is necessary so that PE teachers can feel that their expertise is a part of the future. Professional frustrations are all par for the course in the transitory period as depicted at the individual layer in the *globosity of change concept* and local authorities and school governance must find the patience to assist teachers and develop strategies for managing them through the journey towards full reform. The Four Scenarios Model could be utilised as a way of understanding how four distinct groups of PE teachers have emerged during the transitory journey. Personnel management could include these scenarios in planning leadership and motivation techniques for leading this diverse character of teachers. In addition they

can explore the model as a way of identifying the professional development that can support the neutralization of weakness and utilisation of strengths in the teachers as identified through it. The model provides an analytic insight into the personal and collective narratives of physical educators and their take on physical education in transition. Educational leaders will recognize through the model that PE teachers who work along side each other may have conflicting ideologies of education and/or be struggling with the conflicting values of a pre- and post-democratic education system. Assisting them in adapting to change and making clear what is required of them, particularly those that are uncertain and unconfident about curriculum autonomy will make a significant difference to achieving educational reforms and retaining the teaching expertise of those who are struggling with socio-political change in the context of teaching.

Further to the strategies that require consistency for integrating teachers with education reform, local authorities need to examine new ways for delivering on the physical education curriculum in the context of physical culture and new future recreation demands of its local populace. Improvements to school buildings and physical education facilities may need to consider a wider use of community and business facilities. Incentives for local businesses need to be investigated so that alternative funding can be identified when strategising for future sporting and physical recreation facilities. Schools can take on a more important cultural role in a community by having facilities developed that have a dual use purpose and hence, aim to achieve the more general aims of physical culture and the way in which it appears in the PE curriculum. Students of PE will also assume these new strategies as part of a cultural condition and hence, can support the strategies for increasing physical activity levels in a population by ensuring that participation at the school level can be accessed beyond schooling age. Given that building works have only just commenced, these types of initiatives can lead to greater compatibility between the curriculum and Physical Culture Act (Ust. 1996).

Finally, the new school structures that have elongated the average student's attendance at school have been carried out at both ends. Primary age schooling now commences at the age of six and not seven as it was during the communist period. In addition, post-16 education is now contained within the secondary school system and PE is compulsory for this age group as long as students are registered for study. Teachers of PE have never taught this age group and need greater assistance from school leadership to provide guidance on styles of teaching and approaches to dealing with young adults. School discipline has altered in a democratized Poland and young people are increasingly aware of their rights, sometimes to the detriment of a teacher's professional motivation. Local authorities and educational leaders need to review this situation and devise local level policy and processes for supporting teachers so that they can carry out their jobs in relatively low conflict scenarios.

All of these strategies will require a commitment to creating and sustaining dialogue between all the stakeholders of physical education and includes PE teachers, other teachers, educational administrators and leaders, students, their parents and local community. This is ultimately the responsibility of local government, which is also charged with fulfilling the aims of education reform.

#### **RECOMMENDATIONS FOR POLICY DEVELOPERS AND GOVERNMENT**

The transitory journey necessitates a period of reflection that ensures that before standards are measured there should be a system that supports PE teachers on a professional and personal level as they make adaptations to the macro, meso and micro forces of change as depicted through the *globosity of change* concept. The Four Scenarios Model can assist policy makers and Government in understanding how political culture affects curriculum and in turn influences the professional character of a teacher. It is prudent to recognize that any education reform will necessitate change and the *globosity of change* concept provides an explanation to governments as to how ideology

impacts through the three levels and arrives in the context of the individual teacher. The *globosity of change* concept recognizes the force of ideology on the structure of education and the individual and any changes to it will trickle through the globe and have related problems and successes.

Governments need to ensure that their aims are thoroughly prepared and have associated implementation strategies that include the support of teachers to make the necessary adaptations. So, if a government wants to introduce the ideology of equity and hence, expect teachers to adapt this rhetoric, then it would be beneficial to understand how this ideology is understood by the teaching profession. It would also be necessary to calculate the financial impact of such an ideology as equal access to sport and physical recreation in schools as depicted in the 'five hours of PE' in the Physical Culture Act (Ust. 1996) meant that schools had to devise strategies for achieving this, without considering the impact on teachers. PE teachers now teach more students in one class than in the past. They have also had to redefine out-of-school sports clubs so that they no longer focused on the best performers in sport; they are now for all students regardless of ability. These clubs are now part of the teacher's working day whereas in the past they were paid for running them in addition to a salary. This has de-motivated teachers who have had their working week extended. Governments need to recognize that swinging from one ideology to another will destabilise the teaching context as it results in value conflicts amongst educators. Although Poland had no choice but to move rapidly with socio-political reforms, it could be said that governments and policy makers could extend the reforming period to ensure that teachers are fully comfortable with adaptations. This could be done alongside designated funds for professional development so that teachers can assist changes more effectively. Merely waiting for a generation of teachers to recede into the background by waiting for their retirement is not a strategy that rewards a profession for educating a nation's populace. Teachers need to be valued during these vast reforms as they

themselves have rights to lifelong learning and equity. Preparation for education reform should always consider the impact on human resources as well as physical ones.

#### 6.5 IMPLICATIONS FOR FUTURE DIRECTIONS OF STUDY

The current study identifies a new concept and model in education reform and thus, its resultant theory, founds a unique perspective on PE in post-communist Poland. Because the theory is very much associated with education reform in one country, it provides opportunities for future research that can move in many directions. The theory, then, calls for additional research that could further explore and more fully develop the *globosity of change* concept so that it: 1) begins to identify comparisons between other nations' education reform programmes; 2) continues the debate that teachers at the micro level experience unique conditions resulting from ideology and structure; 3) conducts an exploration of the meso level in transitional societies, so that the structural layer in the *globosity of change* is asserted by the words of informants from this level, for example educational leaders, governing bodies in PE and PC and school administrators; and 4) modifies the theory to include teachers in other subject areas so that commonalities and dissimilarities can further the development of categories. In addition, education reform research is needed to shed light on what teachers in Poland understand about reform, the depth of their understanding, how this understanding features in their every day decision making at the micro level and how the influence of ideology filters through structural and individual layers of operation.

Qualitative and quantitative research is also needed to explore the reliability of the Four Scenarios Model as an analytic tool in education planning contexts. Teachers are frequently presented with change agendas (Apple 2001) and consequently, their professional development may be central to achieving education reform aims. In this case, then, the Four Scenarios Model could approximate the characteristics of teachers so that it aids educational leaders and

administrators in managing change. For this to happen, however, research would need to concentrate on the following areas: 1) further study at the meso level so that congruity between 'scenario' and practicable management solutions could be identified; 2) the testing of the scenarios in the model, through quantitative data, by exploring more acutely the attitudes of teachers predicted in each case; and 3) applying the model in an education reform setting in other nations. This could lead to the finding of a more general application of the model. The Grounded Theory of Physical Education in Transition easily lends itself to the development of a formal grounded theory in education reform, one that is generalizable to other substantive areas of sociological inquiry. There is an opportunity to use the theory with other professions and to revise it for a wide variety of populations, particularly as Poland is an entirely transitional society.

#### **6.6 SUMMARY STATEMENT**

When the present research study was initiated, the following research question was central to its beginnings: How will physical education change during political transformation in Poland? Because grounded theory requires that predetermined thinking be replaced in preference of emerging theory, this question became intentionally tentative, so that discovery and flexibility of exploration could facilitate a deeper understanding about what is going on in physical education as it adapts to education reform but with the firm strategy of contextualising it in the experiences of PE teachers. An initial literature review included the broad areas of Physical Culture, political redevelopment, and education reform. Through the accumulation of data, it became clear that more was transpiring with teachers of PE than could be explained by existing literature; thus, a substantive Grounded Theory of Physical Education in Transition emerged from the data. This new theory encompasses the concept of a *globosity of change* that attempts to explain how the levels of transition manifest themselves at the micro level, which is the teacher, and is layered through ideology, structure and

the individual. The theory however reaches further by identifying an analytic story that is told by using the words of informants and depicted through the Four Scenarios Model and extends the conceptualization of the theory by better explaining a distinct character of teachers in the transitory journey. Based on the life experiences of PE teachers, the Grounded Theory of Physical Education in Transition is a powerful new theory that has goodness of fit with extant literature, the reality of the physical educator in Poland, and reliability, and is easily modifiable to take into account other education reform situations outside of Poland itself. It, therefore, utilises and transcends extant literature on education reform and decentralization policies, and explains the layers of the *globosity of change* concept as a newly identified socio-cultural process, which is also relevant to many other substantive areas in political reform. It also offers important implications for teaching practice in PE, higher education and pre-service teachers of PE, local authorities and school governance, and policy makers and government. In the context of the vast socio-cultural adaptations that have been instigated because of political redevelopment in Poland the theory presents an opportunity for further research opportunities in the area of public service reform, particularly in situations where there are shifts in ideology as relating to the political culture of a nation. The globosity of change provides opportunities for other reforming public services to view reform and adaptations to change as having three layers to it, and most importantly it is a way of explaining what is happening at the micro and individual level of change. Further to this the Four Scenarios Model can be adapted to cross the dimensions of alternative categories to discover analytic stories of individuals adapting to change.

The aims of the study were to reveal the story of PE during education reform in a nation undergoing deep changes to its society. The findings from this study have, as a result, revealed that at the micro level of teaching within physical education in Poland, there are many and varied complexities.

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# Appendices

## APPENDIX A

### *Chronology of Education Reform and State Strategies Since 1989*

1990 – Higher Education Act – curricula development and teacher training reform.

1991 – Education System Act – legislation regulating the functioning of the education system for young people and adults.

1993 – Coordination of qualifications system between Ministry of National Education and Ministry of Labour. The basic premise is to streamline the qualifications system that functions outside of the school system so that greater synonymy is achieved.

1996 – Physical Culture Act re-written to reflect Constitution and aligned with EU legislature. Physical Culture is to be continually protected by law and outlines formal organisation of physical culture.

- Higher Institutions of Vocational Instruction Act – separating vocational and academic programmes of higher education.

1998 – Education Reform: Basic Concept Policy Document – outlining a comprehensive reform of education.

- Compulsory education extended until the age of eighteen (18) as written into the new Constitution.

1999 – Eight-year primary school system is reformed into the six-year school as part of the comprehensive reforms. *Gymnasiums* are now the new secondary schools and this coincides with new core-curricula in all schools.

- Post-primary school administration is transferred to the newly established local governments (*powiats*).

- Central Examination Board and eight Regional Examination Commissions are established.

2000 – New system for promoting teachers is established.

2001 – The Ministry of Education is renamed to the Ministry of National Education and Sports.

2002 – State Accreditation Commission assessing the quality of education commences activities.

2003 – The strategy for the developing Continuing Education (until the year 2010) is adopted by Council of Ministers.

- Compulsory education from the age of six (6) is outlined from September 2004.

- Policy department within the Ministry of National Education and Sport is reintroduced and hence, democratic sophistication begins and so strengthens the ministry.

2004 – System of accreditation for in-service teacher training institutions planned.

## APPENDIX B

### *The Partitions*

#### RUSSIAN PARTITION 1772-1918

In 1773 the Russians achieved the first official partition of Poland (Davies 1981). As early as 1667 the Russians had been steadily gaining lands from the left-bank direction of what is now known as the Ukraine (Prizel 1997). The second partition took place in 1793, which was an expansion programme for the Russians taking in the right bank of the Ukraine. The third partition of 1795 encapsulated the remaining land of the Grand Duchy right up to the river *Bug* and *Niemen* (Davies 1981). The expansion of Russian territory, through the acquisition of Polish territories, was an inevitable occurrence of political geography (Davies 1981). In 1793 a 'medal had been struck for Catharine II<sup>140</sup> with the inscription: *I have recovered what was torn away*' (Davies 1981, p.80) which demonstrated that Russian perceived that it was only regaining its own territories. After Poland's disappearance off the map in the late 18<sup>th</sup> Century, courtesy of the three crowned, Edmund Burke remarked in Westminster, 'Poland might be, in fact considered as a country in the moon.' (Zamoyski 1990, p.4), which at the time was meant to express British anxiety for a former crowned state vanishing from the map of Europe (Davies 1981, Zamoyski 1990, Zamoyski 1992). The demise of the Polish Empire brought six major changes to the political life of the former Polish province, which was engulfed, into Russian territories and is explained by Davies (1981, p.82) as being:

- 1) The abolishment of traditional democratic institutions.
- 2) Introduction of a centralised administrative machine<sup>141</sup>.
- 3) Reforming of officialdom whereby officials were now nominated as opposed to elected.<sup>142</sup>

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<sup>140</sup> Catharine Empress of Russia 1763-96

<sup>141</sup> This part of the reforms due to the partitions created parallel administrative procedures to that of the Russians, which formed the backbone of all future political administration. This uniformity was symptomatic of all Communist regimes in Eastern Europe during the post-war years (Henderson and Robinson 1997).

<sup>142</sup> This established a culture of autocracy and mistrust of officialdom, which influenced the perception of Polish society and could be detected through the attitudes of many generations to follow (Prizel 1997).

- 4) Where formerly a volunteer mercenary force existed the Russians replaced it with an organised, vast and permanent military establishment.
- 5) The introduction of elaborate means of political coercion.
- 6) A transformation of relationship between the state and the individual.



The Russian Partitions, (1773-1915)

(Davies 1981, p.83)

#### PRUSSIAN PARTITION 1772-1918

The Prussian Partition focused on the acquisition of land from the former Polish-Lithuanian Republic and was termed by the Prussians as 'our Polish Provinces' (Davies 1981, p.85), which indicates recognition of the Poles as a people but not an independent State. Polish society was able to function in the territories now recognised as Prussia, and this ensured the continuation of many Polish cultural characteristics. These Poles were considered to be 'Polish-speaking Prussians' (Davies 1981, p.110). The lives of Poles in this framework functioned in regular procedures and legal means, underpinned by an authoritarian system that was 'well oiled ... and widely admired' (Davies 1981, p.111) by other European nations. To compare between

the lives of the Poles in Russia and those in Prussia, both encountered degrees of oppression and losses in freedom. The experiences however, could be distinguished because of different traditions of governance. The Poles in Russia experienced oppression through 'irrational and arbitrary whims' and the Poles in Prussia through 'predictable pedantry of petty officials supported by the letter and the majesty of the law' (Davies 1981, p.112). The experiences of Poles living in Prussia influenced the shaping of an indigenous people, who took into account the processes of a successful industrial revolution, a sophisticated understanding of cultural life<sup>143</sup> and the conceptual reinforcement of well-designed systems of procedure<sup>144</sup>. This would have a significant impact on Polish society in future years, as the development of Polish culture was not only sustained in Prussia, but also refined (Davies 1981).



The Prussian Partitions, (1773-1918)

(In Davies 1981, p.113)

<sup>143</sup> Inclusive of sport and recreation

## AUSTRIAN PARTITION (1773-1918)

In 1773 the Kingdom of Galicia and Lodomeria was created from the First Partition of Poland. In 1795, by 'the addition of the westerly district of *New Galicia* at the Third Partition' (Davies 1981) the territories were further enlarged. Part of this acquisition had to be reneged in 1809, as a campaign against the Duchy of Warsaw was unsuccessful. This however, was reversed during the Congress of Vienna in 1815, were 'most of the former New Galicia, except Cracow' were awarded. By 1846 the 'remaining effects of the late Republic of Cracow' were inherited. Davies (1981) states that 'according to the official historical fiction, the new kingdom was supposed to be a restoration of a long-forgotten medieval realm, which had once been subject to the Hungarian Crown; and it derived its name from the ancient Ruthenian principalities of Halicz (Galicia) and Włodzimerz (Lodomeria). In fact, it possessed little natural coherence. Occupying a long, rambling swathe of territory to the north of the Carpathian mountains, from the Oder in the west to the Zbruch in the east, it covered over 20,000 square miles and was the single largest province of the Austrian Empire'. The Habsburg Emperors, who were to be the landowner's, resided in Vienna, and appointed Governors, were loyal Habsburg servants. This resulted in inattention towards the governance of this province. Although considered as a respectable province, the 'leading intellectual centre, Cracow, lived in the shadow of a more glorious, shattered past' (Davies 1981). During this era, Austria experienced a number of political disasters as a consequence of experimentation (Davies 1981). In terms of Polish society, a number of aristocratic families<sup>145</sup> were permitted<sup>146</sup> to live in the styles that they had formerly been accustomed to; however 81% of the population was made up of Polish peasants. To this group of people, who were mostly illiterate, it was immaterial as to how the wider developments of serfdom and political governance developed, as their economic conditions sustained little impact (Davies 1981). Cultural life for Polish society was, therefore, less cohesive than for example for the Poles in Prussian territories, however the ancient Jagiellonian University 'enjoyed a new lease of life' (Davies 1981) earning a worldwide reputation with its Faculty of History, Medicine and Physics.

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<sup>145</sup> Tarnowski's, Zamoyski's, Potocki's, Gołuchowski's and Lubomirski's (Davies 1981, pg 143)

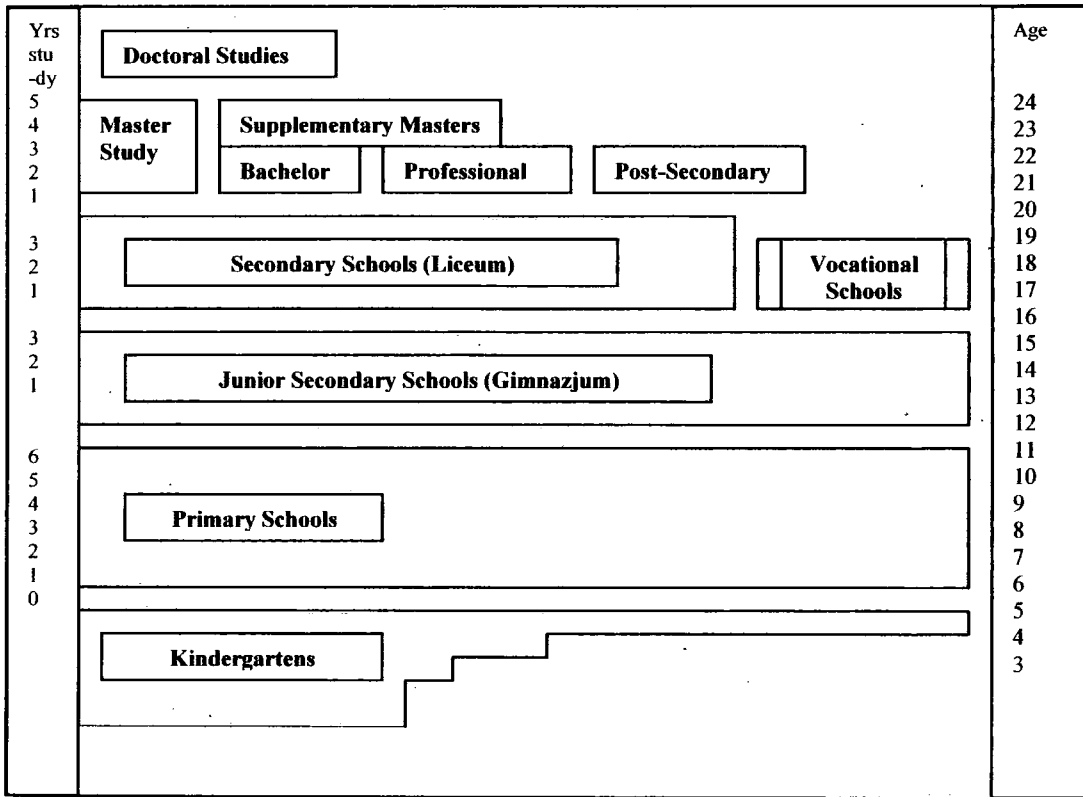
<sup>146</sup> Petent's of nobility received in the 1780's



Austrian Galicia, (1773-1918)

(In Davies 1981, p.140)

APPENDIX C



Structure of Education in Poland's Reformed System



Handwritten notes at the top of the page, including the word "Handwritten" and some illegible scribbles.

511

Large area of very faint, illegible handwritten notes and scribbles, possibly representing a list or a set of instructions.

CODE NOTE

EB1999

Lodz - good at boxing  
in Lodzi Sokol was born in  
1905

Met with the deputy director for the museum of sport and tourism. Janusz Jedruch offered me a guided tour. He also offered up the Sports Hall which is used in the city for major sporting events - the most recent having been the Poland v's Australia Volleyball competition. The stadium holds 8,000 spectators.

Janusz then showed me the museum archives, inclusive of the library. On request he has given me the opportunity to research the archives. The museum also houses all the degree and post-graduate degree thesis which are related to sport and physical culture. The first meeting has been arranged for Friday at 9am with which the deputy-director is left on his holiday.

The library holds books which are no longer available to the public as they are no longer published. These books would be important to the study.

Janusz Andrzejewski

 MUZEUM SPORTU I TURYSTYKI  
Oddział Muzeum Historii Miasta Łodzi

Janusz Jedruch  
zastępca kierownika

ul. Skrzynki 21 • (0-42) 36-40-53, 34-83-58

### JANUSZ JEDRUCH

This is an entry in my field-book that documented my visits. This was my first visit to the Museum of Sport and Tourism in Lodz and I met with the assistant director. An unstructured interview was held and a number of sources for the study were acquired.

PIOTR WENTEL

P. Wentel

25/2/90

1. Every four years elections are held in local regions and this causes the greatest upheaval but more than government policy.
2. The merging in 1940 the merged School-Education was borne together with Physical Culture - until 1944.  
After which in local authority - 'Obywatelskie Związki' (ZPN) ← <sup>right side</sup> local parliament was the greatest number elected party -  
then the coalition.

via Wolności - etc

1944 - it was all split Education - sport, kultura fizyczna i turystyka.

SLD → (left party has won) and now new changes are being implemented and they are now again merged.

1944 1/1/1945

3. What does this mean to the ordinary person

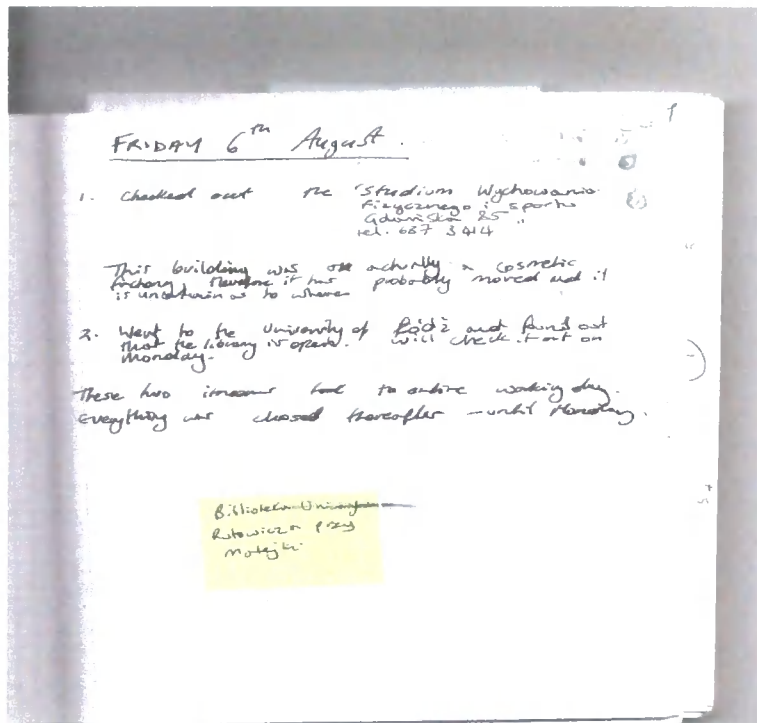
More accountable on 105% spent on salaries and the expenditure on few departments - politics play a big part - and economics is the biggest part -

  
Urząd Miasta Łodzi

Piotr Wentel  
Zastępca Dyrektora Wydziału  
Kultury Fizycznej, Sportu i Turystyki

Piotr Wentel was assistant director at the department of physical culture, sport and tourism in the city of Lodz at the time of my visit to Poland in 1999. Piotr was also a former elite athlete so he was able to provide me with words that related to Poland's former communist system. His assistance in helping me understand former restrictions were important as he was one of very few people who was willing to talk about time under communist rule and the associated limitations to freedom. This is a scan of one of the pages that was written during my structured interview with him. Piotr also directed me to other informants that I interviewed later on in the trip.

FIELD-NOTES - 1999



This is a copy from my hand-written field-book, which I was using to keep a record of all my visits. It includes a code note for each event including library and museum visits, interviews and visits to academic institutions and sporting facilities.

## FIELD NOTES 2001

In 2001 I started to keep a combination of word-processed and hand-written field-notes and I have included an example of a typical entry.

11/06/2001 21:21

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Arrived in XXXX, Poland at local time 14:30; after the bus trip into the centre of the City it was deemed more practicable to take a taxi to the Akademia Wychowania Fizycznego (AWF1).

After settling into the student accommodation that had been booked by Professor XXA, a tour of the facilities was embarked upon. From my initial observations the AWF had a similar design to that of the AWF2, which I had visited in September 1999. The campus is large and set in amongst land that is quite park like [CODE NOTE: ask a question about the lay-out of AWF's – what is the emphasis and how has it changed over the years?]. The buildings are reminiscent of Islington's 1960's buildings. Some of these buildings appear to be in need of some maintenance [CODE NOTE: ask something about when buildings were developed and if communist period had anything to do with developments]. The sports facilities building however was of a newer design and an informed guess would be that they had been constructed in the last five to six years. One of the sports halls, which contained some gymnastics equipment, also housed a professional climbing wall. The hall adjacent to this was organised as a permanent gymnastics hall. It was being used by a gymnastics group of young males and boys. The ages ranged (approximately) from seven to twenty-one. An interesting method of training as it inculcates a general culture of elitism (and masculinity).

After finding the gym and establishing price and access for use I went to look at the building where lecturing took place. After this I returned to my accommodation. I had a message from Prof. XXA and called him as he had requested that I do so. He explained that he was coming over in ten minutes. Ten minutes after the call Prof. XXA arrived. We were both very excited to meet each other and engaged in polite and courteous discussion. We then agreed to meet at 11:00 hrs the following day. Prof. XXA explained that he had organised a meeting with Prof. XXB at the XX2 AWF. He enquired if I still wanted to see Prof. XXC, who remembered me from my 1999 visit. I explained that I did, even though he mentioned that she would not be as helpful to me as other academics.

I reflected on this comment and realised that I was forming a judgement of Prof. XXC that was not a positive one. This was occurring as I felt a mutual trust forming between Professor XXA and myself. I then realised that I had to control bias that may be forming so early in the stages of data collection with AWF1.

As a consequence I have decided to definitely interview Prof. XXC. [CODE NOTE: get hold of XXX's work to see if there is a justification for this.]

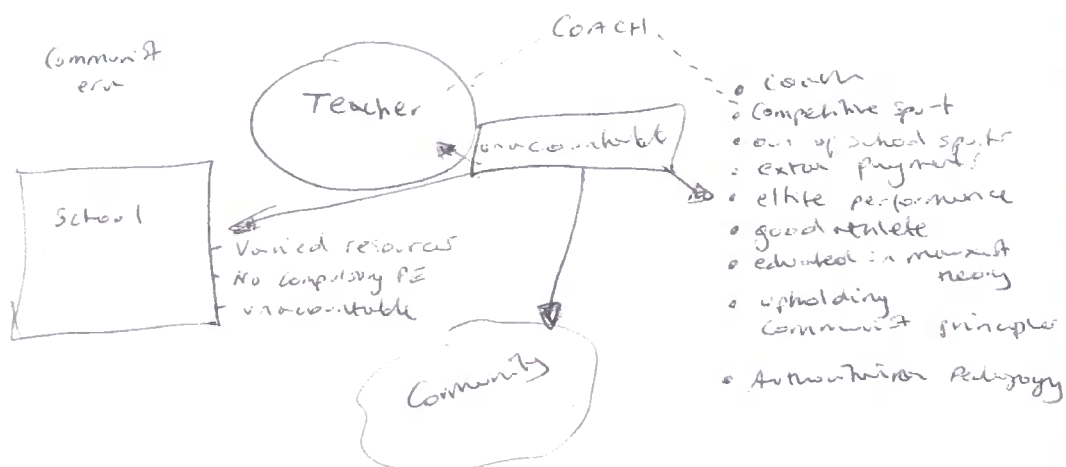
Selective Coding: After axial coding I had identified common themes emerging and used this matrix so as to analyse the categories. As you can see I was attempting to explore possible contexts and the related properties.

Category: EDUCATION IN REFORM  
 PHYSICAL CULTURE - DIMENSIONS

Contexts	Properties			
POLITICAL	Re-development of Political culture	European Union	Globalization	Democracy
Pedagogical	Re-training	New student Attitudes	Public Health ISSUES	Fitness testing
Curricula	National expectations	Reforming	Autonomy	Audits
Educational	Integration of health into the curriculum - S-P	Local Authority Accountability	New Curricula + ISSUES	New Pedagogical ISSUES
Socio-cultural	PE is experience of Physical culture	Instituting cultural practices for socio-physical benefit	Exercise democracy	
Professional	New promotional structures	Some too pay for increased responsibility	Accountability	Professional Independence
Resource	Lack of spaces	Lack of equipment	Too few teachers = increased classno's	New Schools being built
Students	more PE more students	Expectations for extra lessons	Apathy and parental concern to school	Compulsory PE until age 18.
Teachers	Divergent views between old and new	Awareness of changing student attitudes	Anxiety about resources, larger classes, longer periods	New pedagogical for Gendered classes
Pre-service Teachers	Some evidence of disinterest with pre-service teachers	Vocal views on free speech	Health and individual focus in PE + health	Variety of teaching methods
Universities	Possible loss of independence in the future	Competing with private universities	Some academics out of current curricula	Putting PE higher up the agenda
Economic (Finance)	Affects P.C. Act and its legal delegates	Pragmatic realities on delivering outcomes	Affects resources	Affects teacher pay, Accountability

Memo: Theoretical note – I was exploring the category of accountability to try to develop an explanation on teachers' transitions between dependency and autonomy.

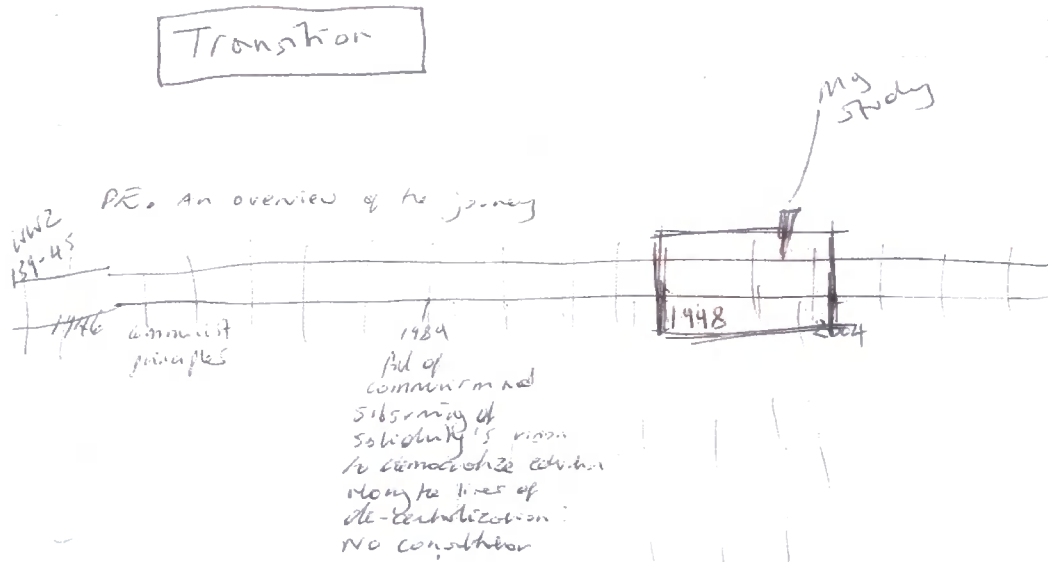
## Accountability: ~~is~~ → The Shadow side of ~~the~~ democracy



Accountability is the ~~real~~ ~~has~~ ~~been~~ ~~realized~~

Accountability is ~~the~~ the pay-off for autonomy in designing a local or micro curriculum for a school; although this is to be written within the curriculum framework devised by policy-makers.

Example Memo: This memo was drawn to help me think about my study and the movement of transition. I had to accept that things were changing all the time and that my study could feasibly only comment on a part of this transitory journey.



PE. teachers

◦◦◦ Gimping but  
 avoid recognizing that change was inevitable

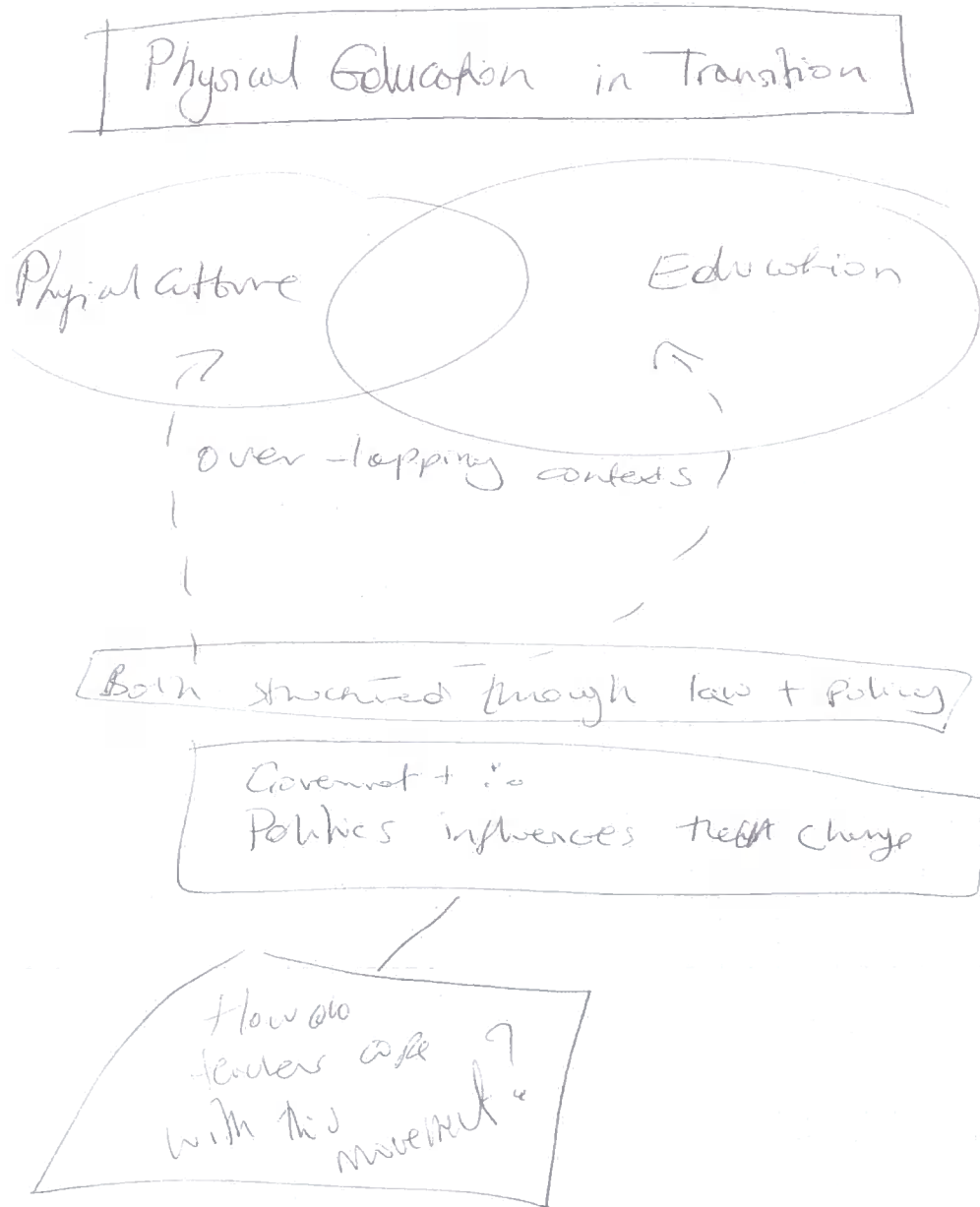
Commitment with the  
 socio-political aspirations of  
 the nation.

Constant

Change

- EU membership
- Unemployment
- poverty
- free-market
- ~~Education ref.~~
- Commitment to reform
- Commitment

Memo: This is a code note that I made during axial coding when I was attempting to think about how PE in transition interacts with both physical culture and education contexts. At the bottom of the note I ask the question on how teachers cope with this complexity.

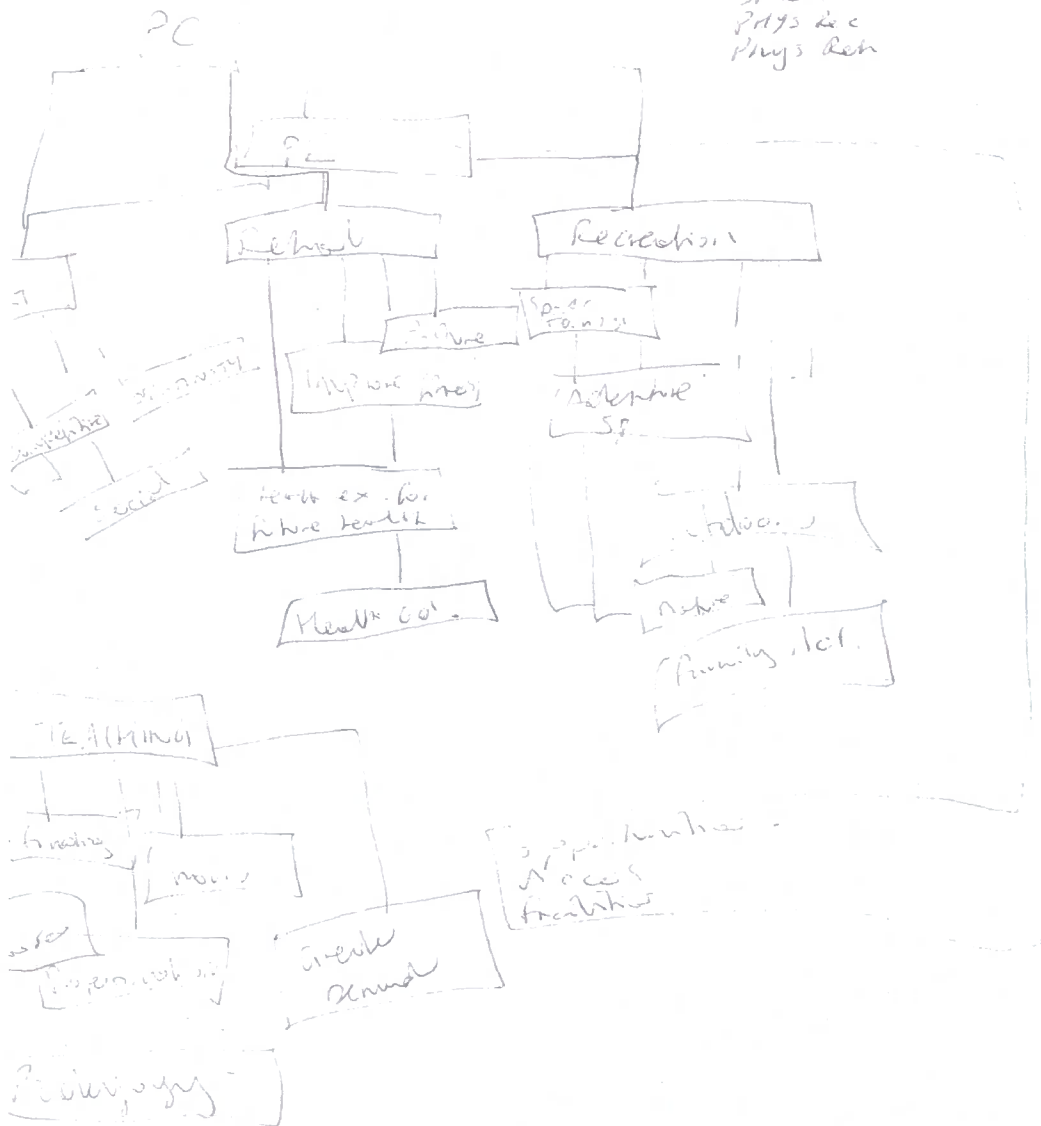


A diagram to explore categories: I was exploring the relationship between categories so that I can delineate between the core category and sub-categories.

and some

re focused draft → development  
 Director of Phys Col  
 Museum Architects

social culture often used in place of PE  
 PE  
 Sport  
 Phys Ed  
 Phys Act



AC07

INTERVIEW  
STRUCTURED

19/4/02

1. Age ..... 40 .....                      2. Gender ..... male .....

3. When were you registered for study at AWF Krakow:                      NAGYKANIZSA  
From:...../...../.....                      To:...../...../.....                      (City)

4. How many years have you been a P.E. teacher:..... one year .....

5. Which school do you teach at?    Name of School.....  
Town.....  
Borough.....

6. How long have you worked in this position? .....

7. What is your work title?..... PHYSICAL Education .....

8. a. Have you taught PE at any other school? (please tick)    Yes                      No

b. If you answered Yes, then what other schools have <sup>you</sup> taught at?

1. .... From:...../...../..... To...../...../.....

2. .... From:...../...../..... To...../...../.....

3. .... From:...../...../..... To...../...../.....

AC07

9.a. Have you undertaken any other study since graduating from AWF Krakow?

(Please tick)

Yes No

b. If you replied yes, please could you provide the title of the course and dates it was studied.

Course Title..... 1st degree ..... Date...../...../..... 1985

Course Title..... Post-graduate ..... Date...../...../..... 1986

Course Title..... Date...../...../..... (taught 20 h

10. How many hours, on average, does each pupil at your school engage in PE?

..... 2 .....hrs - raised 3 (1985-6) now 2 by 1997

11. How have you seen this figure change over the course of your career?

(i.e. did pupils have more PE lessons before 1990 or less etc? Please detail.)

2 -  
3 - 1985 - 97

Encouraged but of school activities  
Can't afford PE teacher (some schools)  
More important subjects - Gov. 'sports  
can't be overloaded' and new technologies  
are more important than P.E.  
P.E. is now not graded - written  
report now

ACOF

12. How many hours a week of PE do **YOU** think a school age child should be engaged in?

.....5.....hrs *every day*

If you want to, please explain why?

*minimum 3 -*

*20-25 minutes of rigorous activity a day would be ideal.*

13. On a scale of 0-10 where 0 is 'not prepared at all' and 10 is 'extremely well prepared',

(Please plot your response)

*How well*

a.. Did the course at AWK Krakow prepare you for being a PE teacher?



*How well did AWK*

b. Prepared you to adapt to change in education?

*Our PE Students have courage, they can find a job in a Co.*



*20% ↓  
Can get work as P.E teacher*

*this was further in last 10 years - (Part-time teaching or sports club - or school sports club) - less than 5%*

12. In your opinion what are the greatest challenges for a PE teacher at present?

*Adapt new requirements in life. Skill related PE*

*Teacher's profession is in decline. Fewer students now!*

*is important, health related issues, changes in attitude to activity. Young children are not prepared for activity. Family background is not conducive. Elite education - and now elite teachers. Standards were high. Young generation cannot pass same standards.*

1007

14. How have the challenges changed since 1990?

step by step, restructuring the system, quality evaluation accreditation (universities) - separate divisions, Number of Prof. and their reputation - finance related - grants/funding for research, language barrier, foreign contacts, PhD students - research budgets. (Subjective information basis in evaluations of after 1993)

15. In your own words, what do you think the future holds for PE?

Cable and Media

Unpredictable - will follow standards of E.U. Globalisation issues will arise, Hungarian children will be able to learn some new sports. Health-related physical fitness - quality is deteriorated

16.a. As a pedagogue, what worries you the most about your role as a PE teacher?

fitness level is deteriorating. Techno Urban sports like skateboarding, street games are becoming more popular - good in a way - but can demoralise the system if it is combined with indiscipline. - confusion 'what are life values'.

16.b. How has this changed since 1990?

System was very strict. A policeman instilled respect/fear and encouraged compliance to social rules. For a small % it has become better, but for most it is worse. Old generation (60s) say the former system was better, every one was employed. There was social security, community life was stronger.

If they don't aspire to certain level then they'll want to

demands system

possibly generated by the economic influences of the U.S.

4 Behaviour

ACOT

16.c. What do you think will be the worry of future generations of PE teachers in Poland?

They can't work properly. Can't control classes though young people's attitudes. Laissez-faire behaviour in future. A very hard and stressful job. Young generation not intrinsically motivated. A bigger gap in society.

17.a. What is the Government's involvement in PE?

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17.b. How has this changed since 1990?

---

---

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---

---

17.c. What do you predict will be the Government's role in the future?

To encourage better behaviour in youth for a better society.

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---

---

1107

18.a. What percentage of your time is spent on sport during PE lessons?

50...%

b. What was the percentage before 1990? <sup>70-80%</sup> .....

c. Do you think there will be increases or decreases in the future? Please explain.

future decreases.

19.a. What is the role of PE in today's terms?

health promotion. Stroshi theoretical lessons to be followed with physical improvement of physical set.

19.b. What was the role of PE before 1990?

skill related, concentrated socialist personality, community aspects.

19.c. In your opinion, what will the role of PE be in the future?

similar about to current role - improve personality, influence behaviour of individuals, base on an activity other than regular laboratory activities.

## APPENDIX E

### List of Interview Questions

1999

1. What cultural meaning does physical culture have in Poland's reforming political system?
2. What cultural meaning does physical education have in Poland's reforming political system?
3. What does its structure look like now?
4. What are the core values in the PE curriculum in post-communist Poland?
5. How has this changed since communism?
6. What have been the most significant changes to PE and PC between the two phases of 1946-89 and then 1989 – to the present day?
7. In your opinion are these changes positive or negative?
8. Do schools have access to sporting clubs funded by the City budget?
9. Is this information readily available to the public?
10. What are the funding arrangements for PC and PE?
11. Is funding distributed on an equal basis?
12. Are funding principles the same as during the communist period?
13. What was the best thing about PC during the communist era? And what was the worst thing about it?
14. What is the best thing about reforms to PC and PE? And what is the worst thing?
15. What is the current policy for PE and PC?
16. How does this policy work on a macro and micro level?
17. Are there official figures for participation in PC?
18. How is accountability managed?
19. How is PC delivered to rural areas?
20. How has PC and PE been a proponent of politics?

2001

21. Why is PC important in historical terms?
22. How does the PC law affect PE?
23. What has been Poland's history of PE?
24. What role does PE play in PC?
25. Who is PC for?
26. Why is PC so important in Poland?
27. How does PC manifest itself in people's lives?
28. How has PE changed during the last twelve years?
29. Why has it changed?
30. What have been the conceptual changes?
31. What have been the practical changes?
32. Why were AWFs created?
33. What are the values in the PE curriculum?
34. How has this changed?
35. How have the AWFs changed in the last 12 years?
36. How has PE pedagogy changed?
37. How are teachers coping with reforms?
38. How has autonomy been received by teachers?
39. What are the difficulties with transition in a teacher's context?

## APPENDIX F

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### TRANSCRIBED SEMI-STRUCTURED INTERVIEW HELD WITH AC022001 (TRANSLATED)

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Physical Education (PE) has changed conceptually rather than practicably. PE lessons, although stated in the Ust. Kultury Fizycznej 1996 that there would be five hours has only been realised as two to three in most schools. The new Act itself has not managed to increase the number of hours of taught PE.

In the past, because of political influences sport was seen as a way of underlining success. This ethos is linked to the past and the motives of the past are not necessarily the same as they were. In Sweden where there is a strong physical education culture, sporting success is relatively low when compared to Poland. In the past sport was seen as a way into a lifestyle that was in other ways prohibited. During the communist era success was limited and prohibited. Sport was a tool for the propaganda machine of the communist government and the totalitarian governments recognised that sporting success could be used to enhance the nation's reputation in a World that was predominantly hostile towards communism. One can draw parallels with the ideology of Hitler, who as a dictator, sought to enhance the reputation of Fascist Germany through the success of German athletes competing on a World stage.

In Poland during the communist era, competitive sport provided opportunity for travel. If one looks to countries where communism still exists, such as Cuba (and China), even though there is a considerable amount of poverty, sporting success is high. To suggest that physical education can promote sporting success is erroneous. There are however some contemporary methods in physical education that can nurture sporting success. The situation however is that since the transition from a communist state to one that is democratic has brought about a situation whereby the government can no longer invest in one single minority group. The government of today responds to all needs and that then requires a multi-faceted approach towards physical culture and that includes; health, education, culture and sport. I think that one cannot expect to find changes in physical education as a consequence of post-communist governing. In fact, physical education is regressing, as the economic situation in Poland is not conducive to delivering on physical education. This is why the Ust. States that there should be five hours of PE, however this has not yet been achieved. The methods that are used for physical education are ones that have been modelled on the systems in Sweden, Germany and Britain. There is no such thing as a Polish approach to physical education as it is identical to that of other countries. On the other hand conceptual and theoretical underpinnings of PE have evolved. Initially aims focused on physical education for the physical body as a way of enhancing and preserving the body. This was the point at which Sniadecki introduced PE to Poland. The second stage of this concept, which was adopted in Poland and across the World, was education through the physical. The aims were to educate the person through the use of the body. This could be termed as 'quasi-pedagogy'. Researchers have said that physical education is not just the training of the body but an influence over the whole person. The young body, although it demands a physically active lifestyle is not the sole purpose for physical education. This understanding functions in most countries in the World. The key aim of physical education is about preparing younger generations to use their bodies in a way that enables them to take care of themselves in old age. This, in my view is the overriding philosophy in Polish physical education, which of course I write about extensively in my book. It is noteworthy to point out that this should be the theoretical underpinning. In practice it has changed. During the communist era, even though it was never formally expressed, the key aim of physical education was for the development of elite sport. A strong emphasis on selection of athletes was placed on PE so that Poland could attain sporting success in an international sporting arena. This was translated into smaller practices by organising inter-school competitions, club competitions and so on. This type of practice can now be seen clearly in the United States where school sports are ranked as important competitive opportunities for the talented athletes only. In our conception of physical culture is that children regardless of their sporting ability should have the opportunity to participate in physical education so that it instils in them a lifelong participation in physical activity. In my opinion this is the overriding theme in Polish physical education. I have some involvement with this and in fact write about it too. I can bring you a book that will show you the history of physical education. I'm trying to figure out who else in Poland apart from me can help you with your study. Andrzej Pawudzki<sup>147</sup> (?) (Gdansk) – Contemporary approaches to PE. If you were able to go and see him I could arrange your visit.

---

<sup>147</sup> Przewęda

ZP-I'm returning in November and can visit him then.

AC02- He speaks English perfectly :o) you will have an occasion to speak in English.

ZP- General Questions:

1. (ZP) What does Physical Culture mean in Poland?

(AC02) I'll try to explain precisely. In my own book it is the overall values of education and results from that education relating to the human body. Some think that the general category is about movement, but others and I believe in this is, that the central component is the body. You can imagine physical culture without movement such as yoga. Culture is the formation of everything that the human has created and done and it can apply to all human beings or to the individual himself. The culture that applies to the individual is one of a psychological nature and the elements related to the body are invariably the elements of physical culture. One of Poland's most famous philosopher's (Tatarkiewicz) defined physical culture as the 'caring for the psyche and body'.

2. (ZP) For whom is physical culture?

(AC02) It is for everyone. Well, that is my view anyway. There are some people who believe that physical culture is inextricably linked with sport and the achievement of maximum results in sporting performance. The number of people however, who are physically capable and mentally motivated to aspire in achieving maximum results in sporting performance are very few. To put a figure on it would be; those who have the potential at approximately 3.5% of the population, and those who realise the results, probably half that figure. It is erroneous to view physical culture and sport as the same. To promote physical culture as sport in fact, creates a negative understanding in many people's mind. For example, the extreme levels of training, competition, scandals with drugs and doping etc. make many people think that sport and physical culture is somewhat negative. Physical culture as a phenomenon that embraces the care of the mind and body with a view to instilling the skill of lifelong care of the body, on the other hand, is the true meaning of physical culture. There are many motives for engaging in physical culture, for example, on person may do so to enhance and sustain the aesthetic appeal of the body. Another may do so for health reasons or to be better prepared for work or for competitive sport or even just for the pleasure and enjoyment of being physically active.

3. (ZP) how do you respond to the following statement: The emphasis placed on competitive sport and winning in Poland overrides any other foci within physical culture.

(Laughs)

This is such a small part of physical culture in Poland it does however, have the biggest exposure. Sport is omnipresent in the Polish press, on television, is heavily sponsored by successful business organisations and is increasingly seen as a commodity that has a strong economic and financial appeal. To add to this, every politician would like to see his country gain successes in international sporting events. It is easier to finance a small number of individuals to achieve this type sporting success then it is to adjust the national economy so that its focus is on the development of health, through physical culture, of the entire population. It is, therefore, more economical to invest in the training of a small number of Olympic champions then it is to teach every school age child how to swim. This would require a swimming pool in each school, which is not feasible. Politicians and governments crave for international sporting success and on a micro level this is also evident. For example, P.E. teachers are praised and rewarded for achieving sporting trophies in events and never do they receive the same kind of acclaim for instilling effective techniques in physical care of the body or for enhancing the physical health of most his or her pupils. This is never rewarded. It is like this across the entire world. This is not my view of physical culture, I do however stress that many of my colleagues believe that maximum sporting performance in competition is a measure of physical culture. I have to argue this here with my colleagues. I do point out that the reasons for the current state of sport is for political, economic and propaganda use.

***We strayed off the subject a little here and discussed how physical activity is known to benefit health and that in a modern civilisation where ill-health correlates with poor lifestyle behaviours, it would***

*be prudent to develop interventions that were rooted in 'prevention rather than cure'. This theme was recognised as pertinent in both the UK and Poland.*

The first conception was education for the physical body, the second was education through the physical body and my view, which is also the third concept, is education for the lifelong care of the physical. This is what I believe is viewed in the west as 'lifelong sport'. I understand that sport doesn't mean the same thing as sport in Poland. I know that the Germans name the whole concept of physical culture as sport, much the same as the British, however in Poland the term sport is acutely meant as competitive sport. You see, if you apply the term 'sport' to all physical activity, it renders the definition as mistaken. I say this because it is impossible to think that all people are predisposed to participating in sport. They are not and there needs to be an alternative term that embraces the activity and the understanding of what it means to care for the body, through the physical for life. In Poland this phenomenon is termed as recreation and is a key characteristic of physical culture.

4. (ZP) in 1999 central government reformed the structure of departments in local governments. As a consequence of these reforms physical culture was merged with the department of education. What has been the impact of this merge on physical culture?

(AC02) In Poland after WW2 the central commission for physical culture (Komitet Kultury Fizycznej I Turystyki), focused its attention on sport. It was responsible for the organisation of physical culture throughout the regions. Now this commission has been brought into the department of education. Physical Education departments and HEI's were accountable to the Physical Culture and Tourism Committee and they are accountable to the department of Education.

## OTHER ACADEMICS – UNSTRUCTURED INTERVIEW

AWFX 14/06/01

AC03 - Academic (Dr. of PE, Female, 20 yrs experience, age 46)

ZP – Why are some academics not capable of talking about the communist period?

AC03 - Well, it's not like communism was real communism, it was kind of socialist . . . many Poles don't see it as having been a communist system as people weren't into it in the way they were in the USSR.

ZP – So what have been the changes to PE in that case?

AC03 – Look, I have direct contact with PE teachers as I deal with the practicum and in all fairness PE teachers don't do themselves many favours in the staff-room . . . well, they are not the most eloquent of defenders of PE. The changes . . . people still don't trust that they can speak freely (I INTERRUPT TO SAY THAT SOME ACADEMICS WILL NOT ALLOW THEMSELVES TO BE TAPED AND HAVE ASKED FOR COMPLETE ANONIMITY) . . . well that's a link with the past. My own research shows me that teachers are anxious about the changes as there's a new system of managing their performance and as the resources are varied it means that lots of new pressures have been placed before them.

ZP – what sort of pressures?

AC03 – New programme for teaching and greater independence; some teachers aren't used to thinking for themselves (I INTERRUPT TO ASK IF THIS WAS LINKED WITH THE PAST AS I WASN'T SURE ABOUT HOW COMMUNISM DID NOT AFFECT TEACHERS. I SUSPECT THAT IT DID AND THAT TWELVE YEARS ON PEOPLE HAVE ALREADY TRANSITED TOWARDS NEW ATTITUDES. THIS MAY CAUSE SOME

INCONSISTENCY IN MY STUDY AND I SHOULD CONDUCT A LIT REVIEW ON RESEARCH IN REFORMING SYSTEMS. I SHOULD BUILD THIS INTO MY QUESTIONNAIRE TOO).

ZP- What other pressures?

AC03 – (WE'RE INTERRUPTED AS AC02 RETURNS TO OFFICE, WE HAVE A LAUGH ABOUT HIS SWEET-TOOTH. HE SITS DOWN AND WE ALL HAVE A CHAT ABOUT THE SIMILARITIES OF STUDENTS; AND THEIR MANY WAYS OF NOT STUDYING).

ZP – What about teaching methods, have they changed?

AC03 – I have just written a book (I AM GIVEN A COPY) it insists that teachers become better at evaluating their methods so that they become effective teachers. I don't think they're interested . . . some are . . . some of the older ones don't want to do anything new (I ASK IF IT'S TO DO WITH THE OLD SYSTEM) . . . some of it is but some are just tired of teaching and it's a job for them (I NEED TO BE ABLE TO DISTINGUISH BETWEEN THE TWO OF THESE) . . . most of the time the younger generation, our students here, a lot of them are keen and they recognise the health problems . . . but Zosia we have a problem with students not taking PE very seriously

list

Subject: AC03 12004  
From:  
Date: Fri, 12 Mar 2004 09:59:05 +0100  
To: Zofia Pawlaczek <zofia.pawlaczek@education.monash.edu.au>

Droga Zosiu,  
Dziękuję za długi list. Cieszę się, że jesteś zadowolona z pracy, że masz własny gabinet (office), że Twoje marzenia się spełniają.  
I thank you for your compliment about my writing English, unfortunately my listening and speaking are bad.  
I thank you for good advice, too. I'd like to write about my research, yet. The results of my early research show, that there are different reasons, that Polish teachers don't want to open. Only 40,6% of teacher took working with children into account. This is a positive motivation. Other reasons are: ambivalent - 26,6% (eg. interest in sport), negative - 25,8% (eg. the fact, that pedagogical studies are supposed to be easy) and neutral - 7% (eg. They wanted to be a student. They wanted to have a long holiday). About 50% of teacher were discourage by negative experiences at work. They often talked about: bad conditions at work, low salary, low prestige of a teacher job, the negative attitude of students towards school and learning (PE), problem connected with gathering documents which are needed for promotion procedure.  
The most interesting thing is, that the most of teacher (67,2%), if they were to choose their job again, they would choose the same job.  
I have a lot of interesting informations about PE teacher. If you want to write about teacher with me, we'll can write something together.

10 days.

I thank you for your invitation. I think, we will meet in Australia in future. I'd like it, very much.  
Zosiu, my również zapraszamy Cię do Polski, tym razem już nie do hotelu tylko do nas lub z nami.  
Pozdrawiam cie serdecznie. Trzymaj się ciepło.

Grażyna

P.S. Dziękuję również za pocztówkę. Zosiu daj mi znać - krótka informacja na mój domowy adres, czy list doszedł. Mój serwer w pracy znowu fiksuje (to trochę brzdkie słowo)

From **ACO3 / 2003**  
 Sent Monday, November 24, 2003 10:40 am  
 To [Zofia Pawlaczek <zofia.pawlaczek@sunderland.ac.uk>](mailto:zofia.pawlaczek@sunderland.ac.uk)  
 Cc  
 Bcc  
 Subject answer

STANDARD  
 INTERVIEW  
 RESPONSES TO  
 DIRECT QUESTIONS  
 FROM AXIAL  
 COLLEGE.

Droga Zosiu,  
 przesyłam odpowiedzi na cze?? pyta?, nast?pne przygotuj? i wy?!? jak  
 najszybciej.  
 Pozdrawiam, Gra?yna

Ad 1) SKS-y (Szkolne Kluby Sportowe) i UKS-y (Uczniowskie Kluby Sportowe) funkcjonuj? w szko?ach równoleg?e. SKS-y s? starsze - istniej? ju? od dawna (jak ja chodzi?am do szko?y, 30 lat temu, ju? by?y) i mog? powsta? w szkole ,bez zb?dnych formalno?ci, musi by? jednak minimum 10 - osobowa grupa uczniów, którzy chc? uprawia? dan? dyscyplin? sportu. UKS-y s? obecnie najm?odszyimi, sportowymi stowarzyszeniami szkolnym, które powsta?y w ramach realizacji programu "Sport wszystkich dzieci". Musz? by? zarejestrowane w s?dzie. Procedura jest tu bardziej skomplikowana. Kluby te (obydwa) obejmuj? ca?oksza?t pracy sportowej na terenie szko?y. Cele i zadania, jakie maj? do spe?nienia w znacznej cz??ci pokrywaj? si? i koncentruj? na:

- organizowaniu szkolenia w sekcjach sportowych, uczniów utalentowanych i zainteresowanych sportem,
- udziale w zawodach i imprezach sportowych,
- przygotowaniu i wdra?aniu do pracy m?odzie?owych organizatorów sportu,
- organizowaniu imprez i zawodów sportowych z udzia?em m?odzie?y szkolnej.

Dawniej na dzia?alno?? np. SKS-ów przeznaczano wi?cej pieni?dzy, do?? dobrze funkcjonowa?y w szko?ach, obecnie ze wzgl?du na braki finansów w szko?ach, dzia?alno?? tych klubów jest ograniczona. Chodzi g?ównie o zap?at? nauczycielom za prac? w ramach organizowanych przez SKS -y i UKS-y zaj??.

Wielu nauczycieli prowadzi te zaj?cia za darmo (bez zap?aty).

Ad 2) Struktura awansu zawodowego nauczycieli jest nast?puj?ca: nauczyciel rozpoczyna? prac? w szkole staj? si? sta?yst?, potem nauczycielem kontraktowym, nast?pnie mianowanym i wreszcie mo?e awansowa? na stopie? nauczyciela dyplomowanego. Dla najlepszych przewidziany jest honorowy tytu? profesora o?wiaty. Zasady awansu opisuje szczegó?owo ustawa (Karta nauczyciela). Na ka?dym etapie nauczyciel musi spe?ni? okre?lone wymagania, odby? sta? i uzyska? pozytywn? opini? dorobku zawodowego. Podstawowe dokumenty wymagane na ka?dym etapie awansu zawodowego, to:

- dokumenty potwierdzaj?ce kwalifikacje zawodowe lub ich po?wiadczone kopie,
- za?wiadczenie dyrektora szko?y o wymiarze zatrudnienia, zajmowanym stanowisku itp.
- zatwierdzony (przez dyrektora szko?y) plan rozwoju zawodowego i sprawozdanie z jego realizacji
- ocena dorobku zawodowego okresu sta?u

oraz

dokumentacja potwierdzaj?ca spe?nienie wymaga? kwalifikacyjnych na okre?lony stopie? awansu ( te wymagania s? ró?ne w zale?no?ci o stopnia awansu, o który ubiega si? nauczyciel, je?eli jeste? zainteresowana jakie? to napisz, a ja je dok?adnie opisze.)

Postępowanie kwalifikacyjne te? jest uzale?nione od stopnia awansu, np. sta?ysta uczestniczy w rozmowie z specjaln? komisj? kwalifikacyjn? i musi uzyska? jej akceptacj?, nauczyciel kontraktowy musi zda? egzamin przed komisj? egzaminacyjn?, nauczyciel mianowany musi otrzyma? akceptacj? komisji kwalifikacyjnej na podstawie dokumentów, które jej dostarczy.(sk?ad wszystkich komisji i wymagania , jakie musz? spe?ni? nauczyciele ubiegaj?cy si? o awans okre?la ustawa - rozporz?dzenia ministra edukacji narodowej z dnia 3 sierpnia 2000r w sprawie uzyskiwania stopni awansu zawodowego).

To wszystko nie jest w pe?ni akceptowane przez nauczycieli, którzy skar?? si?, ?e to jest zbyt du?a biurokracja, ?e nauczyciel musi zbiera? zbyt du?o

<http://hermes.sunderland.ac.uk/frame.html?rtfPossible=true>

24/11/2003

## APPENDIX G

### PILOT QUESTIONNAIRE

### KWESTIONARIUSZ

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Zwracam się do Państwa z prośbą o udzielenie szczerych odpowiedzi na pytania kwestionariusza. Uzyskane od Państwa odpowiedzi na temat zmian w polskim wychowaniu fizycznym w ostatniej dekadzie wzbogacą analizę tego zagadnienia o poglądy specjalistów z zakresu Wychowania Fizycznego. Proszę dokładnie zapoznać się z treścią pytań i pamiętać o tym, że każda udzielona przez Państwa odpowiedź jest właściwa. (Please consider responding to this questionnaire; by doing so you will be implying consent. The questions are on the subject of physical education changes in the last decade and will be analysed by physical education specialists. Please take care in reading the questions and bear this in mind during your responses to ensure that it accurately reflects your views.)

1. Grupa Wiekowa (Age group): 21-25

26-30

31-35

35-40

41-45

46-50

50+ (Proszę podkreślić – please underline)

2. Płeć (sex):.....

3. Miejsce Studjowania (place of study): AWF Gdańsk

AWF Katowice

AWF Kraków

AWF Poznań

AWF Warszawa

Inne (Proszę podkreślić)

4. Jak długo (ile lat) pracuje Pan/Pani w szkolnictwie? (How long have you been working at your school?)

.....

5. Ile godzin tygodniowo (według Pana/Pani), należałoby przeznaczyć w szkole na wychowanie fizyczne dzieci i młodzieży? (In your view, how many hours of PE do school children need?)

1 godn w tygodniu

2 - " -

3 - " -

4 - " -

Więcej niż 4 godziny w tygodniu

(Proszę podkreślić)

6. Czy wyrażony przez Pana/Panią w pytaniu 5 pogląd odpowiada rzeczywistej sytuacji szkolnego wychowania Fizycznego regionu Pana/Pani zamieszkania? (Is this the current reality in terms of PE hours at the school where you teach? How many hours are taught?)

Proszę uzasadnić swój pogląd

Tak  Nie  Nie mam zdania

.....

- .....
- .....
7. Jakie zmiany w wychowaniu fizycznym w Polsce w ostatnim dziesięcioleciu zaliczyłby Pan/Pani do najważniejszych? What have been the most important changes to PE in Poland in the last decade?

(Proszę wymienić)

.....

.....

.....

.....

.....

8. Czy wymienione w pytaniu 7 zmiany ocenia Pan/Pani jako zmiany pozytywne? Please indicate if you view these changes to be positive.

Tak                       Nie mam zdania                       Nie

9. Które z podanych poniżej celów Wychowania Fizycznego uznaje Pan/Pani za obecnie najważniejsze do realizacji?

From the curriculum aims (named below) do you view to be the most important – please indicate by ranking them with n0.1 as the most important.

(Proszę przepisać wymienionym celom wartości liczbowe według stopnia ich ważności – „1” oznacza najwyższą wartość)

Przygotowania do samodzielnej troski o w Życiu	
Kształtowanie odpowiedzialnych postaw społecznych	
Korygowanie wad postawy ciała	
Udział w zabawach ruchowych	
Udział w sporcie wyczynowych	
Prowadzenie higienicznego trybu Życia	
Przybliżanie wartości kultury fizycznej	
Wyrobienie umiejętności aktywnego spędzania wolnego czasu	
Kształtowanie zgrabnej sylwetki ciała	
Zapobieganie chorobom układu krążenia	

Wspomagania wypoczynku psychicznego	
(Inne)	
(Inne) see actual questionnaire for translation of this section	

10. Jakie wg Pana/Pani najważniejsze zmiany stoją przed wychowaniem fizycznym w Polsce?  
 What do you view to be the most important changes yet to come to PE in Poland?

.....  
 .....

11. Co Pan/Pani zmieniłby/a w programie kształcenia i Wychowania Fizycznego....

What would you currently change about the PE curriculum?

.....  
 .....

**DZIĘKUJĘ**

APPENDIX H  
ANKIETA (Questionnaire)

**(Consent – Preamble)**

Zwracam się do Państwa z prośbą o udzielenie szczerych odpowiedzi na zawarte w ankiecie pytania. Uzyskane odpowiedzi na temat zmian w polskim wychowaniu fizycznym w ostatniej dekadzie posłużą wyłącznie celom naukowym i pozwolą m.in. na porównanie systemu wychowania fizycznego w Wielkiej Brytanii i w Polsce. Proszę dokładnie zapoznać się z treścią pytań i pamiętać o tym, że każda udzielona przez Państwa odpowiedź jest właściwą.

(Please consider responding to this questionnaire; by doing so you will be consenting to participation in the study. The study is on the changes that have occurred in physical education in the last decade and will assist a researcher in the UK to understand what is happening in Poland. Please familiarise yourself with the questions so that you can accurately reflect your views.)

**1. Grupa wiekowa: 21-25**

(Age Group)

26-30

31-35

35-40

41-45

46-50

50+

(Proszę podkreślić)

(Please underline)

**2. Płeć (Sex):.....**

**3. Miejsce studiowania: AWF Gdańsk**

(Place of Study)

AWF Katowice

AWF Kraków

AWF Poznań

AWF Warszawa

AWF Wrocław

Inne

(Proszę podkreślić)

(Please Underline)

4. Jak długo (ile lat) pracuje Pan/Pani w szkolnictwie?  
(How long (in years) have you worked at your current school?)

.....

5. Ile godzin tygodniowo przeznaczają się w Pana/Pani szkole na wychowanie fizyczne?

(How many hours of PE does your school assign for PE?)

.....

6. Ile godzin tygodniowo (według Pana/Pani), należałoby przeznaczyć w szkole na wychowanie fizyczne dzieci i młodzieży?

(In your opinion, how many hours of PE are necessary within the school for children and young people?)

1 godz. w tygodniu (1 hour per week)

2 - " -

3 - " -

4 - " -

więcej niż 4 godziny w tygodniu  
(More than 4 hours per week)

(Proszę podkreślić)

(Please underline)

7. Jakie zmiany w szkolnym wychowaniu fizycznym w Polsce w ostatnim dziesięcioleciu zaliczyłby Pan/Pani do najważniejszych?

(What have been the most important changes to PE in Poland in the last ten years?)

(Proszę wymienić)

(Please name them)

.....  
.....  
.....  
.....  
.....

8. Które z wymienionych zmian uważa Pan/Pani za pozytywne, a które za negatywne?

(In your opinion, which changes have been positive and or negative?)

(Proszę przypisać wymienionym przez Pana/Panią zmianom odpowiednio znak (+) albo (-)

(Please place a (+) sign next to the positive changes and a (-) next to the negative)

9. Które z podanych poniżej celów Wychowania Fizycznego uznaje Pan/Pani obecnie za najważniejsze do realizacji? Which of the following aims in the new curriculum do you think are the most important to achieve?)

(Proszę przepisać wymienionym celom w wartości liczbowe według stopnia ich ważności – „1” oznacza najniższą wartość)

(Please rank the aims in order of importance)

1. Przygotowania do samodzielnej troski o ciało w życiu dorosłym (preparing students for lifelong care of their bodies)	
2. Kształtowanie postaw prospołecznych (Developing social coherence)	
3. Profilaktyka i korygowanie wad postawy ciała (Promoting good posture and correcting poor posture)	
4. Udział w zabawach ruchowych (Participation in human movement games)	
5. Udział w sporcie wyczynowym (Participation in competitive sports)	
6. Wdrażanie do higienicznego trybu życia (Instilling good hygiene habits)	
7. Wpajanie wartości kultury fizycznej (Instilling a valuing of physical culture)	
8. Wyrabianie umiejętności aktywnego spędzania wolnego czasu (Teaching students how to use their free time)	
9. Kształtowanie zgrabnej sylwetki ciała (Developing a shapely figure)	

10. Zapobieganie chorobom układu krążenia (Preventing CHD)	
11. Wspomagania wypoczynku psychicznego (Aiding psychological rest)	
12. (Inne)(Other)	

10. Jakie wg Pana/Pani zmiany powinny dokonać się w najbliższym czasie w szkolnym wychowaniu fizycznym w Polsce?

(In your opinion what changes to PE do you foresee in the near future?)

.....

.....

.....

.....

11. Co Pan/Pani zmienićby/łaby w realizowanym obecnie programie szkolnego wychowania fizycznego ?

(In your opinion what what you change in the current curriculum in PE?)

.....

.....

.....

---

**DZIĘKUJĘ (THANK YOU)**

---

## APPENDIX I

SPEL6

### ANKIETA

Zwracam się do Państwa z prośbą o udzielenie szczerych odpowiedzi na zawarte w ankiecie pytania. Uzyskane odpowiedzi na temat zmian w polskim wychowaniu fizycznym w ostatniej dekadzie posłużą wyłącznie celom naukowym i pozwolą m.in. na porównanie systemu wychowania fizycznego w Wielkiej Brytanii i w Polsce. Proszę dokładnie zapoznać się z treścią pytań i pamiętać o tym, że każda udzielona przez Państwa odpowiedź jest właściwą.

1. Grupa wiekowa:
- 21-25
  - 26-30
  - 31-35
  - 35-40
  - 41-45
  - 46-50
  - 50+ (Proszę podkreślić)
- 50 lat*

2. Płeć: KOBIETA

3. Miejsce studiowania:
- AWF Gdańsk
  - AWF Katowice
  - AWF Kraków
  - AWF Poznań
  - AWF Warszawa
  - AWF Wrocław
  - Inne
- (Proszę podkreślić)

4. Jak długo (ile lat) pracuje Pan/Pani w szkolnictwie?

.....  
5. Ile godzin tygodniowo przeznaczają się w Pana/Pani szkole na wychowanie fizyczne?

.....  
6. Ile godzin tygodniowo (według Pana/Pani), należałoby przeznaczyć w szkole na wychowanie fizyczne dzieci i młodzieży?

1 godz. w tygodniu

2 - " -

3 - " -

4 - " -

więcej niż 4 godziny w tygodniu

(Proszę podkreślić)

7. Jakie zmiany w szkolnym wychowaniu fizycznym w Polsce w ostatnim dziesięcioleciu zaliczyłby Pan/Pani do najważniejszych?

(Proszę wymienić)

..... lepszy sport ..... (+)  
..... większa świadomość społeczna w temacie .....  
..... uproszczenie kryterium w kryterium .....  
..... poprawa jakości ..... (+)  
..... mniejszy rywalizacja ..... (-)

8. Które z wymienionych zmian uważa Pan/Pani za pozytywne, a które za negatywne?

(Proszę przypisać wymienionym przez Pana/Panią zmianom odpowiednio znak (+) albo (-)

9. Które z podanych poniżej celów Wychowania Fizycznego uznaje Pan/Pani obecnie za najważniejsze do realizacji?

(Proszę przepisać wymienionym celom w wartości liczbowe według stopnia ich ważności – „1” oznacza najniższą wartość)

1. Przygotowania do samodzielnej troski o ciało w życiu dorosłym	11
2. Kształtowanie postaw prospołecznych	2
3. Profilaktyka i korygowanie wad postawy ciała	9
4. Udział w zabawach ruchowych	3
5. Udział w sporcie wyczynowym	4
6. Wdrażanie do higienicznego trybu życia	4
7. Wpajanie wartości kultury fizycznej	5
8. Wyrabianie umiejętności aktywnego spędzania wolnego czasu	10
9. Kształtowanie zgrabnej sylwetki ciała	8
10. Zapobieganie chorobom układu krążenia	1
11. Wspomagania wypoczynku psychicznego	6
12. (Inne)	

10. Jakie wg Pana/Pani zmiany powinny dokonać się w najbliższym czasie w szkolnym wychowaniu fizycznym w Polsce?

..... zwiększenie liczby godzin na piątki, soboty. W środy  
 ..... środy umożliwienie młodzieży korzystania z np  
 ..... zajęć z aerobiku .....

11. Co Pan/Pani zmieniłby/łaby w realizowanym obecnie programie szkolnego wychowania fizycznego ?

..... zwiększyłbym wymiar godzin w tygodniu, wprowadziłbym  
 ..... lekcje tenisa ziemnego, nowoczesnych gier .....

Dziękuję

APPENDIX J (LIST OF INFORMANTS)

INTERVIEWS

Code	Role	Date of Interview	Type of Interview
FGZP01	Focus group – the department of PE at the AWF where research was conducted. This included senior professors and junior lecturers (15 participants)	19 <sup>th</sup> June 2001 (11:00)	Semi-structured
AC02	Professor of PE	11 <sup>th</sup> June 2001 12 <sup>th</sup> June 2001 13 <sup>th</sup> June 2001 16 <sup>th</sup> November 12 <sup>th</sup> April 2003 11 <sup>th</sup> September 2003	Unstructured Semi-Structured Structured Unstructured Unstructured Semi-Structured
AC03	Academic and Polish Specialist in PE	13 <sup>th</sup> June 2001 11 <sup>th</sup> April 12 <sup>th</sup> April 12 <sup>th</sup> September 2003 24 <sup>th</sup> and 25 <sup>th</sup> November 2003 1 <sup>st</sup> December 2003	Unstructured Unstructured Semi-structured Unstructured Structured Structured
AC04	Academic and Polish Specialist in Physical Culture	14 <sup>th</sup> June 16 <sup>th</sup> June	Unstructured Semi-structured
AC05	Academic and Head of Department for PE at a different AWF	30 <sup>th</sup> August 1999	Unstructured
AC06	Professor James Riordan, University of Surrey	26 <sup>th</sup> June 1999	Semi-Structured
AC07	Dr. Istvan Soos, University of Sunderland	19 <sup>th</sup> April 2002	Structured
AC08	Professor Zofia Żukowska – specialist in PE pedagogy, AWF Warsaw	31 <sup>st</sup> August 1999	Unstructured
AC09	Dr. Wiesław Skoczylas, University of Łódź, PE specialist	24 <sup>th</sup> August 1999	Structured
AC10	Rektor of AWF, Professor of Physical Culture	11 <sup>th</sup> June 2001	Unstructured
MD1	Museum Director, Janusz Jędruch	6 <sup>th</sup> August 1999	Unstructured
MD2	Museum Director	14 <sup>th</sup> April 2003	Unstructured
PES1	Participant of PE	13 <sup>th</sup> September 2003	Unstructured
PES2	Participant of PE	13 <sup>th</sup> September 2003	Unstructured
PES3	Participant of PE	12 <sup>th</sup> July 2003	Unstructured
PES4	Participant of PE	12 <sup>th</sup> July 2003	Unstructured
DPC1	Director of Physical Culture and Tourism, Piotr Wentel	25 <sup>th</sup> August 1999	Structured
LL1	Librarian – Ewa Bładowska	4 <sup>th</sup> August 1999	Semi-structured
GPE1	Graduated AWF student	26 <sup>th</sup> August 1999	Semi-structured
GPE2	Graduated AWF student	27 <sup>th</sup> August 1999	Semi-structured
PES5	Student of PE at AWF	12 <sup>th</sup> September 2003	Unstructured

LIST OF INFORMANTS - QUESTIONNAIRES

	CODE	AGE in Bands	GENDER Male = 1 Female =2	Yrs Teaching Experience
1	TPE01	41-45	1	20
2	TPE02	26-30	1	2
3	TPE03	46-50	2	24
4	TPE04	46-50	1	20
5	TPE05	31-35	2	12
6	TPE06	35-40	2	13
7	TPE07	35-40	2	19
8	TPE08	41-45	1	20
9	TPE09	35-40	1	11
10	TPE10	46-50	2	21
11	TPE11	31-35	2	6
12	TPE12	41-45	2	15
13	TPE13	26-30	2	3
14	TPE14	26-30	1	4
15	TPE15	26-30	1	6
16	TPE16	26-30	1	2
17	TPE17	26-30	2	4
18	TPE18	21-25	1	1
19	TPE19	26-30	1	2
20	TPE20	35-40	2	13
21	TPE21	35-40	1	20
22	TPE22	41-45	1	19
23	TPE23	26-30	2	4
24	TPE24	35-40	1	10
25	TPE25	35-40	1	12
26	TPE26	41-45	1	15
27	TPE27	41-45	1	19
28	TPE28	35-40	1	13
29	TPE29	35-40	2	12
30	TPE30	46-50	2	23
31	TPE31	21-25	2	1
32	TPE32	31-35	1	10
33	TPE33	31-35	2	10
34	TPE34	41-45	1	20
35	TPE35	46-50	2	27
36	TPE36	26-30	1	8
37	TPE37	41-45	2	20
38	TPE38	46-50	2	21
39	TPE39	50+	2	29
40	TPE40	46-50	2	16
41	TPE41	41-45	2	16
42	TPE42	35-40	2	13
43	TPE43	50+	2	30

44	TPE44	41-45	2	18
45	TPE45	41-45	2	15
46	TPE46	50+	2	35
47	TPE47	50+	1	41
48	TPE48	21-25	2	1
49	TPE49	31-35	1	5
50	TPE50	41-45	2	18
51	TPE51	46-50	2	13
52	TPE52	46-50	2	19
53	TPE53	41-45	2	19
54	TPE54	31-35	1	5
55	TPE55	26-30	2	4
56	TPE56	26-30	2	4
57	TPE57	50+	1	22
58	TPE58	26-30	2	2
59	TPE59	21-25	1	1
60	TPE60	26-30	2	6
61	TPE61	26-30	2	3
62	TPE62	35-40	2	12
63	TPE63	50+	2	30
64	TPE64	46-50	2	20
65	TPE65	35-40	2	15
66	TPE66	31-35	1	13
67	TPE67	31-35	2	9
68	TPE68	35-40	1	10
69	TPE69	41-45	2	20
70	TPE70	26-30	2	2
71	TPE71	46-50	2	27
72	TPE72	35-40	2	13
73	TPE73	46-50	2	25
74	TPE74	21-25	2	2
75	TPE75	26-30	1	2
76	TPE76	26-30	1	4
77	TPE77	26-30	2	3
78	TPE78	35-40	2	14
79	TPE79	41-45	2	19
80	TPE80	46-50	2	24
81	TPE81	46-50	2	23
82	TPE82	35-40	2	14
83	TPE83	46-50	2	24
84	TPE84	46-50	1	25
85	TPE85	31-35	2	6
86	TPE86	35-40	2	19
87	TPE87	35-40	2	20
88	TPE88	35-40	2	11
89	TPE89	31-35	1	15
90	TPE90	50+	2	22

91	TPE91	31-35	2	4
92	TPE92	26-30	2	2
93	TPE93	26-30	2	3
94	TPE94	46-50	2	23
95	TPE95	31-35	1	14
96	TPE96	35-40	2	19
97	SPE01	21-25	2	0
98	SPE02	21-25	2	0
99	SPE03	18-20	2	0
100	SPE04	18-20	2	0
101	SPE05	18-20	2	0
102	SPE06	18-20	2	0
103	SPE07	18-20	2	0
104	SPE08	18-20	2	0
105	SPE09	18-20	2	0
106	SPE10	21-25	2	0
107	SPE11	18-20	2	0
108	SPE12	21-25	2	0
109	SPE13	21-25	2	0
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112	SPE16	18-20	2	0
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114	SPE18	18-20	2	0
115	SPE19	18-20	2	0
116	SPE20	18-20	2	0
117	SPE21	18-20	2	0
118	SPE22	21-25	2	0
119	SPE23	18-20	2	0
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121	SPE25	21-25	2	0
122	SPE26	18-20	2	0
123	SPE27	18-20	2	0
124	SPE28	18-20	2	0
125	SPE29	18-20	2	0
126	SPE30	18-20	2	0
127	SPE31	21-25	2	0
128	SPE32	21-25	2	0
129	SPE33	21-25	2	0
130	SPE34	18-20	2	0
131	SPE35	18-20	2	0
132	SPE36	21-25	2	0
133	SPE37	18-20	2	0
134	SPE38	18-20	2	0
135	SPE39	18-20	2	0
136	SPE40	18-20	2	0
137	SPE41	18-20	2	0

138	SPE42	18-20	2	0
139	SPE43	18-20	2	0
140	SPE44	18-20	2	0
141	SPE45	18-20	2	0
142	SPE46	18-20	2	0
143	SPE47	21-25	2	0
144	SPE48	18-20	2	0
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146	SPE50	18-20	2	0
147	SPE51	21-25	1	0
148	SPE52		2	0
149	SPE53	21-25	1	0
150	SPE54	21-25	1	0
151	SPE55	18-20	1	0
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153	SPE57	18-20	1	0
154	SPE58	21-25	1	0
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158	SPE62	21-25	1	0
159	SPE63	21-25	1	0
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161	SPE65	18-20	1	0
162	SPE66	21-25	1	0
163	SPE67	21-25	1	0
164	SPE68	21-25	1	0
165	SPE69	21-25	1	0
166	SPE70	21-25	1	0
167	SPE71	21-25	1	0
168	SPE72	21-25	1	0
169	SPE73	21-25	1	0
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176	SPE80	21-25	1	0
177	SPE81	18-20	1	0
178	SPE82	18-20	1	0
179	SPE83	18-20	1	0
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181	SPE85	18-20	1	0
182	SPE86	18-20	1	0
183	SPE87	21-25	1	0
184	SPE88	21-25	1	0

185	SPE89	21-25	1	0
186	SPE90	21-25	1	0
187	SPE91	18-20	1	0
188	SPE92	18-20	1	0
189	SPE93	21-25	1	0
190	SPE94	21-25	1	0
191	SPE95	18-20	1	0
192	SPE96	21-25	1	0
193	SPE97	18-20	1	0
194	SPE98	21-25	1	0
195	SPE99	18-20	1	0
196	SPE00	18-20	2	0
197	FS01	21-25	1	1
198	FS02	21-25	1	1
199	FS03	21-25	1	1
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201	FS05	21-25	1	1
202	FS06	21-25	1	1
203	FS07	26-30	1	1
204	FS08	21-25	1	1
205	FS09	21-25	2	1
206	FS10	21-25	1	1
207	FS11	21-25	1	1
208	FS12	21-25	1	1
209	FS13	26-30	1	1
210	FS14	21-25	1	1
211	FS15	21-25	1	1
212	FS16	21-25	1	1
213	FS17	21-25	1	1
214	FS18	21-25	2	1
215	FS19	21-25	1	1
216	FS20	21-25	1	1
217	FS21	21-25	2	1
218	FS22	21-25	1	1
219	FS23	21-25	1	1
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226	FS30	21-25	2	1
227	FS31	21-25	2	1
228	FS32	21-25	2	1
229	FS33	21-25	1	1
230	FS34	21-25	2	1
231	FS35	26-30	2	1

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233	FS37	21-25	2	1
234	FS38	21-25	2	1
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237	FS41	21-25	2	1
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274	FS78	21-25	1	1
275	FS79	21-25	2	1
276	FS80	21-25	2	1
277	FS81	21-25	2	1
278	FS82	21-25	2	1

279	FS83	21-25	2	1
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322	FS126	21-25	1	1
323	FS127	21-25	1	1
324	FS128	21-25	1	1
325	FS129	21-25	1	1

