



# Konteksty Pedagogiczne

PEDAGOGICAL CONTEXTS



nr 1(12)/2019

---

ISSN: 2300-6471

1(12)/2019

# Konteksty Pedagogiczne

Pedagogical Contexts



1(12)/2019

# Konteksty Pedagogiczne

Pedagogical Contexts



#### RADA NAUKOWA / ADVISORY BOARD

IRENA ADAMEK (Polska), GIUSEPPE ANNACONTINI (Włochy), RADMILA BURKOVIČOVÁ (Republika Czeska), DORIS CIHLARS (Niemcy), PIERO CRISPIANI (Włochy), ALWIRA GALKIENE (Litwa), TOMASZ GMEREK (Polska), JAN GRZESIAK (Polska), ZDZISŁAWA JANISZEWSKA-NIEŚCIORUK (Polska), WOJCIECH KOJS (Polska), WIEŚŁAWA KORZENIOWSKA (Polska), MIROŚLAW KOWALSKI (Polska), EWA KUBIAK-SZYMBORSKA (Polska), DAVID LUTZ (USA), IRENA MASOJC (Litwa), RADISLAV MILLROOD (Rosja), NATALIA MYKYTENKO (Ukraina), KAREL NEUBAUER (Republika Czeska), DANIELA DATO (Włochy), KRZYSZTOF ORLEAŃSKI (Norwegia), SŁAWOMIR PRZYBYLIŃSKI (Polska), BOGUSŁAW ŚLIWERSKI (Polska), ALINA SZCZUREK-BORUTA (Polska), BEATA WEBB (Australia), MILUŠE VÍTEČKOVÁ (Republika Czeska), JOLANTA ZIELIŃSKA (Polska), SHU-LAN YANG (Tajwan)

#### ZESPÓŁ REDAKCYJNY / EDITORIAL BOARD

**Redaktor naczelna / Editor-in-chief:** JOANNA SKIBSKA (kontakt: jskibska@ath.bielsko.pl)

**Sekretarz redakcji / Editorial assistant:** JUSTYNA WOJCIECHOWSKA (kontakt: jwojciechowska@ath.bielsko.pl)

**Redaktorzy tematyczni / Associate editors:** COSETTE FOX (USA) – psychologia/psychology; BOŻENA GRZESZKIEWICZ (Polska) – pedagogika przedszkolna/pre-school education; EWA KOCHANOWSKA (Polska) – pedagogika wczesnoszkolna/early education; MIROSLAV PROCHÁZKA (Republika Czeska) – pedagogika społeczna/social pedagogy; REMIGIUSZ J. KIJAK (Polska) – pedagogika specjalna/special education; URSZULA SZUŚCIK (Polska) – pedagogika twórczości, psychologia/pedagogy of creativity, psychology; MONIKA MICZKA-PAJESTKA (Polska) – pedagogika kultury/pedagogy of culture; LILIYA MORSKA (Ukraina) – lingwistyka stosowana/applied linguistics

**Redaktor tekstów anglojęzycznych / Co-editor (English texts):** KATARZYNA OŻAŃSKA-PONIKWIA (Polska)

**Redaktor statystyczny / Statistical editor:** PIOTR ZIEWIEC (Polska)

#### CZASOPISMO RECENZOWANE / PEER REVIEWED JOURNAL

Lista recenzentów jest drukowana w ostatnim numerze danego roku

List of reviewers is printed in the last issue of the journal of the year

#### REDAKTOR NUMERU / VOLUME EDITOR

Joanna Skibska

ISSN: 2300-6471

Tłumaczenie: Zuzanna Szatanik, Dominika Pieczka

Redakcja tekstów polskich: Joanna Kłos

Korekta tekstów anglojęzycznych: Elena Rozbicka

Skład: LIBRON

Projekt okładki: LIBRON

Czasopismo indeksowane w bazie Index Copernicus, POL-index, CEEOL, CEJSH, Google Scholar, Śląska Biblioteka Cyfrowa  
Journal indexed in Index Copernicus Journals Master List, POL-index, CEEOL, CEJSH, Google Scholar, Silesian Digital Library

Czasopismo afiliowane na Akademii Techniczno-Humanistycznej w Bielsku-Białej

The journal is affiliated by the University of Bielsko-Biala

Tłumaczenie zawartości 12 numeru czasopisma „Konteksty Pedagogiczne” i ich wydanie – zadanie finansowane w ramach umowy 462/WCN/2019/1 ze środków Ministra Nauki i Szkolnictwa Wyższego w ramach programu „Wsparcie dla czasopism naukowych”

Translation of the content of the 12<sup>th</sup> issue of the “Konteksty Pedagogiczne” (“Pedagogical Contexts”) journal and its publication – task financed under contract no. 462/WCN/2019/1 from the funds of the Minister of Science and Higher Education of the Republic of Poland within the program “Support for scientific journals”



Ministerstwo Nauki  
i Szkolnictwa Wyższego

Druk czasopisma sfinansowany przez Akademię Techniczno-Humanistyczną w Bielsku-Białej  
Printing of the journal was financed by the University of Bielsko-Biala

#### ADRES REDAKCJI / ADDRESS OF THE EDITORIAL OFFICE

Katedra Pedagogiki

Akademia Techniczno-Humanistyczna w Bielsku-Białej

ul. Willowa 2, 43-309 Bielsko-Biała

tel. 33/827 92 99

e-mail: kp@ath.bielsko.pl

Nakład: 200 egzemplarzy

#### WYDAWCA / PUBLISHER

Wydawnictwo LIBRON – Filip Lohner

al. Daszyńskiego 21/13, 31-537 Kraków

tel. 12/628 05 12

e-mail: office@libron.pl

# TABLE OF CONTENTS

Foreword / 7

**Cosette Fox, Ph.D., Milton E. Becknell, Anastacia Belden, Ruthie L. Firmin**

The Effect of Glucose and Emotional Arousal on Memory in College Students / 9

**Katarzyna Ożańska-Ponikwia, Beata Webb**

Emotions and Communication in Second/Additional Language:

Getting Students Ready for an International Experience / 27

**Olena Sukhenko**

Fostering Learner Autonomy: Self-evaluation in Enhancing English Writing Skills / 53

**Vitalia Primakova, Liliya Morska**

Educating Students in a Safe Educational Environment in Secondary Schools of Ukraine:

Current Issues and Challenges / 63

**Karol Konaszewski, Sebastian Rutkowski, Alfred Tuci**

Identification with Selected Educational Environments and Intensification of Antisocial

Behaviors in the Group of Juveniles Placed in Youth Educational Centers / 73

**Małgorzata Przybysz-Zaremba**

Concerning Depression and Suicidal Behavior in Children and Youth –

Selected Aspects and Research / 89

**Agnieszka Szczelina-Szczotka**

Art Therapy as an Educational Intervention Focused on Social Relations

of Children at a Younger School Age / 105

**Olympia Gogolin, Eugeniusz Szymik**

The Role of Drama in Developing Communication Competencies

of Early Primary School Students / 121

**Łucja Reczek-Zymróż**

Educational Methods, Forms and Aids Applied in Polish and Hungarian Schools

at the Level of Early Childhood Education. Research Report / 147

**Ewa Jędrzejowska**

Social Self-reliance of Preschool Children / 161

**Ondřej Šimik**

Types of Exercises in Primary School History Textbooks / 177

**Sebastian Skalski**

The Situational Motivation Scale (SMS-15) for Children: Design and Preliminary Psychometric Properties Assessment / 191

**Joanna Poziemska**

Construction of a Scale of the Locus of Control in School Situations / 205

**Barbara Superson**

Culture-Related Criteria of Intelligence and the Socio-Economic Situation of Children with Disabilities in Burundi. Survey Report / 225

## PREFACE

The articles contained in this issue of the journal contribute to the broad context of the processes and interactions aimed at changing individuals placed in different educational spaces. These changes depend primarily on social alterations and expectations, and are largely due to ideals, intentions and educational goals.

The texts in the first part constitute a presentation of research related to cognitive processes necessary for pupils and students to perform specific autonomous tasks. They raise issues regarding safe educational environments and the relationships that occur between anti-social behavior and a sense of identification with selected educational environments in a group of socially maladjusted youth. They also present the conditions and symptoms of depressive disorders while pointing to their effects, i.e., suicides committed by minors.

The next part presents, in turn, research devoted to art as an educational intervention aimed at improving social relations and communication competences of early childhood education students. It also includes an analysis of research on teaching methods, forms of organization of classes, didactic measures used by teachers of early school education, as well as the presentation of research results related to the social self-reliance of preschool children. This part also presents studies on the analysis of categorized educational exercises in school textbooks, based on the updated version of Bloom's Taxonomy.

Next, we present studies regarding the construction and initial assessment of psychometric properties of the Situational Motivation Scale (SIMS-15) for children as well as those regarding the means for assessing the reliability of the tool employed to test and diagnose the locus of control of school events in students.

*Joanna Skibska*





Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 9–26  
DOI: 10.19265/KP.2019.1129



## ORIGINAL ARTICLE

Received: 12.04.2019  
Accepted: 26.04.2019

**Cosette Fox, Ph.D.**

ORCID iD: 0000-0003-0006-1033  
Holy Cross College, USA  
cfox@hcc-nd.edu

**Milton E. Becknell**

ORCID iD: 0000-0002-8980-8289  
Cedarville University, USA  
becknell@cedarville.edu

**Anastacia Belden**

ORCID iD: 0000-0002-4566-4471  
Rehabilitation Medicine Emory University, USA  
anastacia.nichols@emory.edu

**Ruthie L. Firmin**

ORCID iD: 0000-0001-6618-8585  
Brown University, USA  
ruth\_firmin@brown.edu

## THE EFFECT OF GLUCOSE AND EMOTIONAL AROUSAL ON MEMORY IN COLLEGE STUDENTS

### WPŁYW GLUKOZY I POBUDZENIA EMOCJONALNEGO NA PAMIĘĆ STUDENTÓW

#### **Keywords:**

memory, emotional  
arousal, glucose,  
sex-related differ-  
ences, males, females,  
IAPS pictures, recall,  
recognition

**Summary:** This study investigated the effect of glucose administration and emotional arousal on memory. Participants were undergraduate college students randomly assigned to glucose (50 g glucose) and placebo groups (50.6 mg saccharine) and further divided into high and low emotional arousal groups. High and low emotional arousal groups were shown a slide show whose content was either emotionally arousing

**Słowa kluczowe:**  
pamięć, pobudzenie  
emocjonalne, glukoza,  
różnice związane  
z płcią, mężczyźni,  
kobiety, zdjęcia IAPS,  
odwołanie, uznanie

or emotionally neutral, respectively. Blood glucose measurements were taken, and memory recall and recognition tests were given at various intervals throughout the experiment. Glucose improved memory for immediate recall in females only, while emotional arousal resulted in enhanced immediate and delayed recall for all subjects. Furthermore, emotional arousal enhanced recognition memory for males only. While the present findings confirm the facilitatory effects of glucose and emotional arousal on memory, they simultaneously stimulate more questions on the differences in the effect of these two factors on memory in males versus females.

**Streszczenie:** Celem badania było sprawdzenie wpływu podania glukozy oraz pobudzenia emocjonalnego na pamięć. Uczestnikami byli studenci przydzieleni losowo do grup glukozy (50 g glukozy) i grup placebo (50,6 mg sacharyny), a następnie podzieleni na grupy o wysokim i niskim poziomie podniecenia emocjonalnego. Grupom o wysokim i niskim poziomie podniecenia emocjonalnego pokazano zestaw slajdów, których treść była odpowiednio pobudzająca emocjonalnie lub neutralna emocjonalnie. Wykonano pomiary glukozy we krwi, a testy pamięci i rozpoznawania były przeprowadzane w różnych odstępach czasu w trakcie eksperymentu. Glukoza poprawiła pamięć natychmiastową tylko u kobiet, podczas gdy pobudzenie emocjonalne poprawiło zarówno pamięć natychmiastową, jak i przywoływanie wspomnień u wszystkich badanych. Pobudzenie emocjonalne poprawiło pamięć rozpoznawczą tylko u mężczyzn. Chociaż przedstawione w artykule odkrycia potwierdzają usprawniające działanie glukozy i pobudzenia emocjonalnego na pamięć, jednocześnie prowokują więcej pytań na temat różnic we wpływie tych dwóch czynników na pamięć u mężczyzn i kobiet.

## Introduction

Glucose is the basic fuel for the brain (Sieber & Traystman, 1992). Years of research have confirmed that glucose facilitates memory both in animals and humans (for a review see Messier, 2004). Glucose is known to exert its effect mainly on declarative long-term memory (LTM) associated with hippocampal functioning, namely the verbal episodic (Craft, Murphy & Wemstrom, 1994; Manning, Hall & Gold, 1990; Messier, 2004; Messier & Gagnon, 1996; Sünram-Lea, Dewhurst & Foster, 2008; Sünram-Lea, Foster, Durlach & Perez, 2001, 2002a, 2002b). However, glucose has also been shown to facilitate other cognitive processes such as working memory (Martin & Benton, 1999; Sünram-Lea et al., 2001, 2002a, 2002b), non-declarative kinesthetic memory (Scholey & Fowles, 2002), reaction times (Owens & Benton, 1994) and attention (Messier, Gagnon & Knott, 1997). Glucose also seems to facilitate memory for tasks of recall more than recognition (Sünram-Lea et al., 2008).

There are various factors that modulate the glucose memory-facilitation effect, namely age (Craft et al., 1994; Messier, 2004; Messier, Tsiakas, Gagnon, Desrochers & Awad, 2003), task difficulty (Kennedy & Scholey, 2000; Meikle, Riby & Stollery, 2004; Scholey, Harper & Kennedy, 2001; Sünram-Lea et al. 2002b) and management of blood glucose level following a glucose load termed blood glucoregulation (Awad, Desrochers, Tsiakas & Messier, 2002; Craft et al., 1994; Knott, Messier, Mahoney & Gagnon, 2001; Messier, Desrochers & Gagnon 1999; Messier, Gagnon & Knott, 1997; Messier et al., 2003). Even though the results of these studies are not in complete agreement, the consensus seems to be that glucose exerts its effect on memory particularly in conditions where the cognitive resources have been challenged, such as in older subjects (Macpherson et al., 2015) or when completing difficult tasks that require high cognitive load (Hall et al., 1989; Meikle et al., 2004; Messier 2004; Scholey et al., 2001). However, it is important to keep in mind that glucose has repeatedly been shown to enhance memory in healthy young adults using a variety of memory tasks that vary widely in their level of difficulty (Metzger, 2000; Morris, 2008; Sünram-Lea et al., 2001; 2002a; 2002b; 2008).

Besides age, task difficulty and blood glucoregulation, emotional arousal also seems to modulate the effect of glucose on memory. Studies researching the effects of emotional arousal and glucose on memory have varied in their methodology on factors such as glucose dosage. Some administered 25 g to



all subjects independent of sex or weight (Brandt, Sünram-Lea & Qualtrough, 2006; Ford, Scholey, Ayre & Wesnes, 2002), some administered 50 g to all subjects (Mohanty & Flint, 2001; Parent, Varnhagen & Gold, 1999) and some gave dosages adjustable to body weight (Mohanty & Flint, 2001). Studies also varied in methodology on factors such as valence of emotionally arousing stimuli (Blake, Varnhagen & Parent, 2001; Brandt et al., 2006; Ford et al., 2002; Gore 2002; Gore, Krebs & Parent, 2006; Parent et al., 1999) and types of stimuli used (words [Messier, Desrochers & Gagnon, 1999; Messier, Pierre, Desrochers & Gravel, 1998; Parent et al., 1999] vs. pictures [Blake et al., 2001; Bradley, Greenwald & Petry, 1992; Gore, 2002; Gore et al., 2006]). However, the most striking methodological variability among the studies pertains to glucose administration. As discussed below, some studies did not administer glucose to subjects but rather measured their blood glucose levels under various emotional arousal conditions. Other studies, however, did administer glucose in conjunction with manipulation of emotional arousal.

In those studies where there was no administration of glucose, researchers assessed blood glucose level and its relationship to emotional arousal (Blake et al., 2001; Gore, 2002; Gore et al., 2006; Scholey et al., 2006). In a study where male participants viewed emotionally arousing or neutral pictures, it was shown that circulating blood glucose levels increased in those participants who viewed the emotionally arousing pictures, whereas those who viewed the neutral pictures did not show such a change. Furthermore, the increase in blood glucose levels seemed to be related to better recall for the emotionally arousing versus the neutral stimuli (Blake et al., 2001). In contrast, a study on young and older adults found that highly emotionally arousing pictures did not affect blood glucose levels, regardless of self-report of arousal. This study did, however, corroborate previous findings in that both the young and older participants who were exposed to the high arousal stimuli were able to recall more pictures than the neutral group (Gore et al., 2006). Results from a similar study indicated that while recall was impaired for older adults compared to young adults, both groups experienced an enhancement of recall based on self-reported arousal. Glucose levels were also not affected by arousal in this experiment (Gore, 2002). One study which used words instead of pictures obtained entirely different results. In this experiment, participants were placed into one of four groups based on combinations of level of arousal and level of mental effort. It was shown that there was an increase in blood glucose level for the high arousal condition compared to the neutral condition; however,

emotional arousal did not affect recall of the words (Scholey, Laing & Kennedy, 2006). Clearly, there is a controversy in this area of research, with some studies showing a relationship between elevated blood glucose levels, arousal and memory and some not showing such relationships.

Studies in which researchers investigated the effect of glucose on memory did not show a consistent memory facilitating effect of glucose (Beaver et al., 2017; Stollery & Christian, 2015). The first study to look at the combined effects of emotional arousal and glucose on memory was conducted by Parent et al. (1999). Participants in this study were given either a saccharin placebo or 50 g glucose drink and then exposed to a slide show accompanied by either a neutral or emotionally arousing narrative. Emotional arousal resulted in an increase in circulating blood glucose levels. Glucose administration, however, prevented the memory-enhancing effect of emotional arousal. Another study also using glucose and placebo groups showed that emotional words were both recognized and recalled better than neutral words, but there was no direct effect of a 25 g dose of glucose on memory for either type of word (Ford et al., 2002). Mohanty & Flint (2001) took Parent et al.'s study a step further and tested the effects of different dosages of glucose and emotional arousal on memory. They found that doses of 100 mg/kg and 50 g of glucose lead to impaired performances in spatial memory tasks for emotionally arousing pictures. However, their research also showed that a 100 mg/kg dose of glucose enhanced memory for neutral stimuli, while there was no effect following the 50 g dose. In addition, Brandt et al. (2006) examined the effect of glucose and emotional arousal on memory and conducted two experiments that differentiated between neutral, negative and positive emotional words (Brandt et al., 2006). In their first experiment, they found that negative words were remembered better than both neutral and positive words in a task of recognition. In the second experiment, the researchers divided participants into groups receiving either a placebo or 25 g of glucose and conducted the same experiment as before. It was shown that the glucose did not affect memory performance compared to the placebo group; both groups remembered negative words more than both neutral and positive ones. In conclusion, the few studies that did examine the effect of glucose administration in conjunction with emotional arousal vary in their methodology (pictures vs. words, dosage of glucose, and type of memory tests used). This variation in the methodologies could account for the disagreement in their findings regarding the effect of glucose on memory in the presence of emotional arousal.

The present research aims at shedding light on the contradictory results of the studies mentioned above by investigating the combined effect of glucose and emotional arousal on free recall and recognition memory. We hypothesize that glucose will enhance memory for immediate and delayed free recall tests that are known to be hippocampus dependent. Also, we hypothesize that emotional arousal will enhance memory on all free recall and recognition tests.

## Methods

All procedures used for this study were approved by the Cedarville University Institutional Review Board and were deemed safe and appropriate.

## Participants

One hundred sixty-two undergraduate students (120 females and 42 males) from a comprehensive liberal arts university participated in the present study in order to fulfill a course requirement. Each participant willing to participate signed a consent form. Exclusion criteria pertained to glycemic disorders such as diabetes mellitus, hypoglycemia, hyperglycemia and thyroid dysfunctions.

## Design/Treatment

This study is a  $2 \times 2$  between-groups design where subjects were randomly assigned to a glucose or placebo group. The glucose and placebo groups were each further divided into low emotional arousal and high emotional arousal groups. Subjects belonging to the glucose group received 240 ml of a lemon-flavored drink containing 50 g of glucose, whereas the placebo group received 240 ml of a lemon-flavored drink containing 50.6 mg of saccharine (Messier et al., 2003). Drink administration was double blind. The low emotional arousal and high emotional arousal groups were shown a slide show consisting of 51 colored pictures whose content was either emotionally neutral or emotionally arousing, respectively. The two sets of pictures were graciously provided to us by Dr. Marise Parent. They were obtained from the IAPS database (Lang, Bradley & Cuthbert, 1997) and were used in a previous study (Blake et al., 2001). However, in the present study, nine images were eliminated from the high arousal set due to sexually explicit content. In order to make both sets of power point presentations equivalent in number of slides, nine

images were also removed at random from the original low arousal slide show. The original two sets of slide shows obtained from Dr. Parent with 60 pictures each were specifically designed in the Blake et al. study to vary in arousal level but to be similar in valence level, so arousal is the only variable between the two presentations. Those two low and high arousal original sets of pictures had in males mean normative emotional arousal ratings of 2.65 and 6.46, respectively, and mean normative valence ratings of 5.17 and 5.37, respectively (Blake et al., 2001). Due to the elimination of nine pictures from each of the original sets of pictures and the fact that both males and females were used in this study, normative ratings of arousal and valence were re-measured in the present study on our campus using a sample of 40 subjects for each set of pictures. Those 80 subjects were male and female also undergraduate college students who constituted a separate group from the 162 subjects used for the main part of this study. The 9-likert point self-assessment manikin (SAM) rating scale (Lang, 1980) was used for both arousal and valence. The arousal and valence values obtained in this study echoed those found in Blake et al. The mean normative emotional arousal rating for the low arousal set was 3.17 and the rating for the high arousal set was 5.47. The mean valence ratings for the low and high sets were, however, very similar at 4.85 and 4.15, respectively.

## Procedure

All participants were asked to abstain from food and drink, with the exception of water, beginning at midnight the night before the experiment. The sessions were held from 8:30 a.m. through 10:00 a.m. Testing started with a fasting baseline blood glucose level followed immediately by ingestion of the glucose or saccharine placebo drink. Blood glucose measurements were also taken at 30 minutes, 45 minutes and 60 minutes following drink administration. Blood glucose measurements were carried out using Ultra Touch glucometer devices. Ten minutes following the drink administration, subjects viewed either the low emotional arousal or the high emotional arousal slide show. The slide show pictures were projected onto a screen at a rate of 2 seconds per picture. Free-recall memory tests were given immediately, 20 minutes and 40 minutes following the viewing of the slide show, and in each test, subjects were instructed to describe as many of the pictures as they could remember in any order using a word or a sentence. A recognition memory test including the original target pictures and 22 other distracter pictures was administered 60 minutes following

the viewing of the slide show. Subjects were asked to identify the pictures they had seen in the slide show. For the recognition test, pictures were projected onto a screen at a rate of 5 seconds per picture.

## Results

Analysis of variance using SPSS software was carried out on the data with an alpha level of 0.05. Figure 1 shows blood glucose levels of the glucose and placebo groups relative to the amount of time before and after drink consumption. No significant difference was found in the glucose and placebo groups for the baseline fasting glucose measurement [ $F(1.161) = 2.84, p > 0.05$ ]. However, group differences were found in the last three measurements following drink ingestion: 30 minute post drink [ $F(1.161) = 334.16, p < 0.05$ ], 45 minute post drink [ $F(1.152) = 234.62, p < 0.05$ ], and 60 minute post drink [ $F(1.152) = 102.21, p < 0.05$ ]. The results indicate that blood glucose levels increased significantly in subjects who ingested the glucose drink relative to the placebo group.

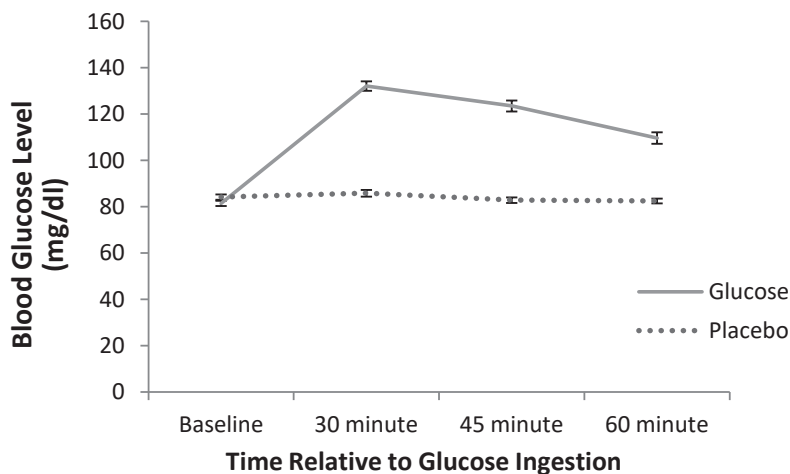


Figure 1.

Average blood glucose levels at baseline (following 8 hrs. of fasting) and at various intervals following drink ingestion. Mean  $\pm$  SE; \* $p < 0.05$ .

Source: own research.

The results of this study show that there was no effect of emotional arousal on blood glucose level for all the subjects for the 30 minute post drink [ $F(1.161) = 0.84, p > 0.05$ ], 45 minute post drink [ $F(1.152) = 0.007, p > 0.05$ ], or 60 minute post drink [ $F(1.152) = 0.18, p > 0.05$ ] blood glucose measurements. This lack of effect was also seen when comparing low emotional arousal to high emotional arousal in the placebo group only: 30 minute post drink [ $F(1.77) = 0.36, p > 0.05$ ], 45 minute post drink [ $F(1.75) = 0.75, p > 0.05$ ], and 60 minute post drink [ $F(1.75) = 0.58, p > 0.05$ ].

As shown in Figure 2, relative to placebo, glucose ingestion resulted in a marginally significant enhancement of memory in the immediate free recall test only, in all subjects [ $F(1.142) = 2.93, p = 0.089$ ]. When females were analyzed separately from males, glucose administration improved memory also selectively for immediate recall [ $F(1.102) = 3.98, p < 0.05$ ], but no such effect was found in males [ $F(1.35) = 0.01, p > 0.05$ ].

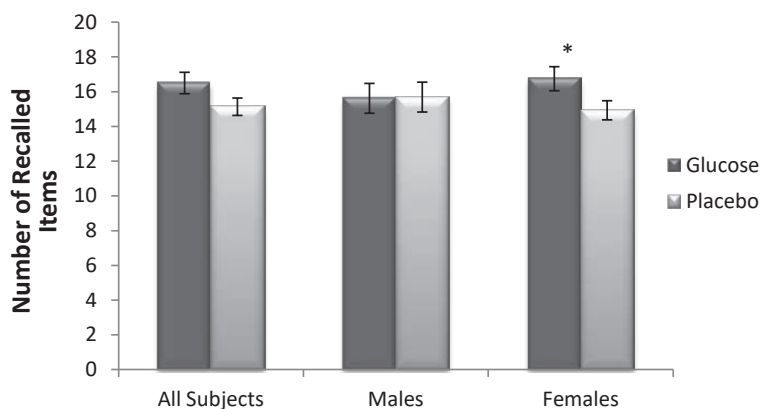


Figure 2.

Effect of glucose on number of items recalled by all subjects, males alone and females alone, immediately following presentation of images. Mean  $\pm$  SE; \* $p < 0.05$ .

Source: own research.

High emotional arousal resulted in enhanced free recall immediately following viewing of the pictures and also at various delays following viewing of the pictures, as shown in Figure 3: immediate [ $F(1.142) = 13.36, p < 0.05$ ], 20-minute delayed [ $F(1.154) = 9.01, p < 0.05$ ], and 40-minute delayed [ $F(1.146) = 15.12, p < 0.05$ ].

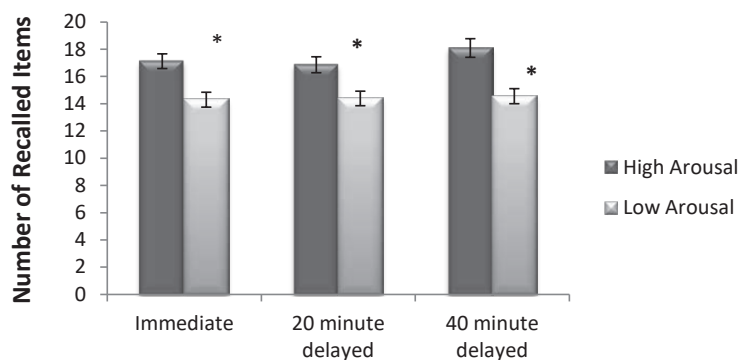


Figure 3.

Effect of emotional arousal on number of items recalled by all subjects immediately, 20 min and 40 min following presentation of images. Mean  $\pm$  SE; \* $p < 0.05$ .

Source: own research.

When males alone are considered, emotional arousal enhanced free recall immediately following viewing of the pictures [ $F(1.35) = 4.95$ ,  $p < 0.05$ ], at a 20-minute delay [ $F(1.35) = 6.20$ ,  $p < 0.05$ ], and at a 40-minute delay [ $F(1.34) = 6.67$ ,  $p < 0.05$ ], as shown in Figure 4.

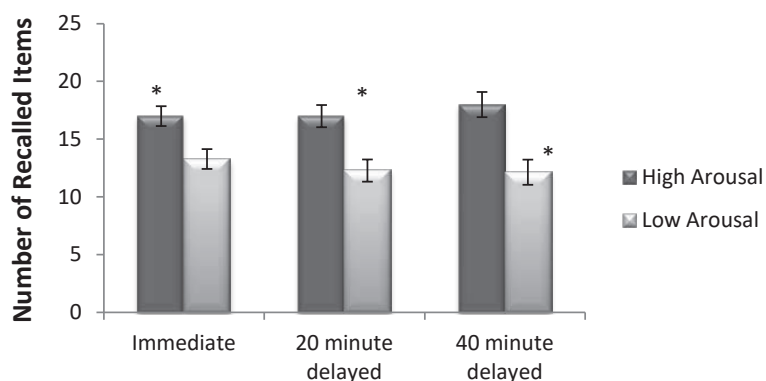


Figure 4.

Effect of emotional arousal on number of items recalled by males immediately, 20 min and 40 min following presentation of images. Mean  $\pm$  SE; \* $p < 0.05$ .

Source: own research.

When females alone are considered, emotional arousal also enhanced free recall immediately following viewing of the pictures [ $F(1.102) = 8.27, p < 0.05$ ], at a 20-minute delay [ $F(1.114) = 3.88, p = 0.05$ ], and at a 40-minute delay [ $F(1.107) = 8.30, p < 0.05$ ], as shown in Figure 5. For the recognition test, Figure 6 shows that emotional arousal enhanced recognition memory for males [ $F(1.34) = 4.63, p < 0.05$ ] but not for females [ $F(1.99) = 0.77, p > 0.05$ ].

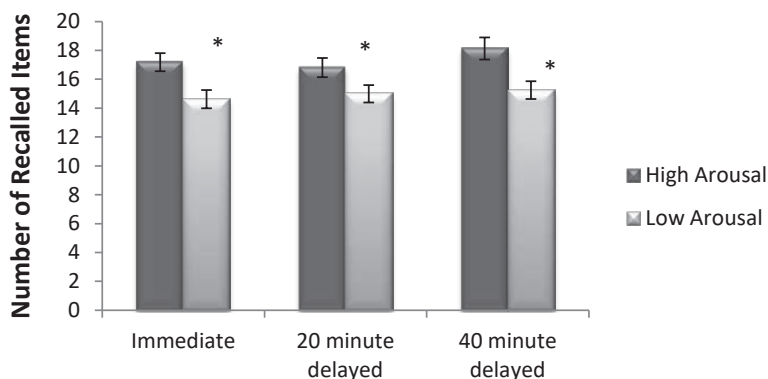


Figure 5.

Effect of emotional arousal on number of items recalled by females immediately, 20 min and 40 min following presentation of images. Mean  $\pm$  SE; \* $p < 0.05$ .

Source: own research.

No interaction was found between type of drink, levels of emotional arousal and sex of subjects for any of the immediate [ $F(1.119) = 0.14, p > 0.05$ ], 20-minute delayed [ $F(1.119) = 0.00, p > 0.05$ ], or 40-minute delayed [ $F(1.119) = 0.55, p > 0.05$ ] free recall tests. However, an interaction was found between emotional arousal and sex of subjects for the recognition test [ $F(1.119) = 5.11, p < 0.05$ ]. As shown in Figure 6, males performed better than females in recognition [ $F(1.137) = 8.10, p < 0.05$ ] and this sex-related difference was only true for highly emotional material.



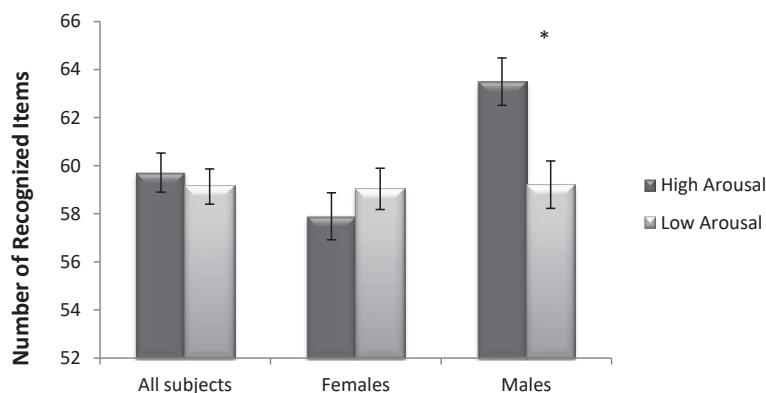


Figure 6.

Effect of emotional arousal on number of items recognized by all subjects, females alone and males alone. Mean  $\pm$  SE; \* $p < 0.05$ .

Source: own research.

## Discussion

Our hypotheses were only partly confirmed when all subjects were considered. Glucose had a marginally significant memory-enhancing effect on the free recall test immediately following the viewing of the pictures. However, contrary to our hypothesis, glucose did not affect the delayed free recall tests. Emotional arousal enhanced memory for all free recall tests but not for the recognition test, also contrary to our hypothesis.

When analyzing our findings from the perspective of the entire group (males and females combined), glucose improved memory of immediate free recall but only at a marginally significant level. However, when males are analyzed separately from females, the results indicated that glucose enhanced immediate recall for female subjects but not for male subjects. Craft et al. (1994) similarly reported that male and female participants were affected differently by glucose administration, suggesting sex-differences in glucose regulation processes. Specific sex-related factors that Craft et al. offer involve differences in glucose-related processing mechanisms. These elements include the oxidation process of glucose, which is higher in males than in females, and the relatively higher rates that males have for glucose utilization at similar plasma levels. These differences in glucose-related processing mechanisms could have accounted for

the sex-related differences in the effect of glucose on memory that was found in the present study. Research findings on sex-differences in glucose regulation, however, remain equivocal (Foster, Lidder & Sünram-Lea, 1998). In the present sample, we administered the same quantity of glucose to all participants, regardless of their sex and weight. While this procedure constitutes standard administration protocol for the majority of research in this area, the effects of administering uniform dosages may have, in fact, become a moderating variable that influenced the study's outcomes. Specifically, because our sample consisted of males and females, the same dosage of glucose may have affected males in quantitatively different capacities than how the same dosages affect females, considering that females have, on average, a relatively lower body weight. Further research is needed in this area to better clarify the facilitative effects of glucose on memory in order to determine whether males or females are more responsive to the effects of glucose and to discover the mechanisms behind the apparent differences in glucose-facilitating processes.

Glucose had no effect on memory in the male subjects and no effect on the delayed recalls as well as the recognition test. Although the effect of glucose on memory was assessed separately in males and females, the purpose of this analysis is not to compare males to females but rather to dissect the effect of glucose on memory in light of the sex of the subjects. Comparing males to females in this study would not be valid because there was a great discrepancy in the number of males and females participating in it. In agreement with our results, other previous studies also found no facilitatory relationship between glucose and memory (Azari, 1991; Brandt et al., 2006; Ford et al., 2002; Scholey, Sünram-Lea, Greer, Elliot & Kennedy, 2009). Scholey et al. examined males and females and reported that, while tracking memory was facilitated through the presence of glucose, recognition memory was not. These findings suggest that glucose administration does not enhance memory performance in all conditions. Accordingly, one study proposes that reliable effects of glucose on memory may be limited to populations that already possess pre-existing memory deficits (Azari, 1991).

Researchers have linked the effects of glucose on memory with the effects of emotional arousal on memory through findings that indicate emotional arousal both enhances memory and may sometimes result in relatively elevated blood glucose levels (Blake et al., 2001; Ford et al., 2002). Blake et al. specifically offer that the memory-enhancing effects of emotional arousal likely result from the release of peripheral epinephrine which, in turn, enhances

memory through increasing subjects' circulating blood glucose levels. While our research affirmed previous research findings that arousal tends to enhance memory (Blake et al., 2001; Bradley et al., 1992; Knight & Mather, 2009; Mather & Nesmith, 2008), the subjects in our study did not experience an increase in glucose levels from emotional arousal. As mentioned previously, though a few previous studies have demonstrated a pattern of elevated glucose levels in the presence of arousal, other studies have been in accordance with our present findings and did not find such an effect (Gore, 2002; Gore et al., 2006). The latter studies suggested that changes in blood glucose levels are not necessary for arousal to enhance memory. Specifically, results indicated that emotional arousal did enhance memory, but arousal had no effect on subjects' glucose or salivary cortisol levels. In conjunction with the above studies, findings from our present research seemingly support the conclusion that the facilitative effects of arousal on memory are not necessarily dependent on a rise in blood glucose level.

The present study assessed the combined effects of glucose and emotional arousal on memory. Prior research has shown that glucose ingestion did not affect memory performance for participants on material that already possessed other memory advantages, such as high arousal (Brandt et al., 2006; Ford et al., 2002), or prevented the emotional arousal-induced memory enhancement (Mohanty & Flint, 2001; Parent et al., 1999). Brandt et al. specifically reported that high blood glucose levels may, in fact, hinder memory performance for emotionally arousing items, while improving memory for neutral items. Their research findings further indicate potential connections between emotional arousal, the activation of the amygdala, and glucose – specifically, the role glucose might play in the potential amygdala-hippocampal interaction generated by beta-adrenergic-dependent activation. Our results agree with previous studies (Brandt et al., 2006; Ford et al., 2002) in finding no additive effect of glucose and emotional arousal on memory. No interaction between type of drink and level of arousal was found for recall or recognition.

The results of our present study, however, reveal an interaction between the effects of sex and emotional arousal on recognition memory. Emotional arousal enhanced free recall in all subjects but enhanced recognition memory only in the male subjects. Furthermore, male subjects performed higher on recognition tests than did females, and this sex-related difference was only true under the condition of high emotional arousal. While the amygdala is the brain's center for processing emotion-related information, sex-related

differences may involve lateralization in the involvement of the amygdala in emotional arousal (Cahill, Dray & Coderre, 1998). Cahill et al. suggested that in males, emotional arousal activates the right amygdala and in females, such arousal triggers the left amygdala. For males, when the right amygdala is triggered, better recall of central information is experienced. Females, in contrast, generally excel in the recall of peripheral (or detail-related) information in relation to activation of the left amygdala (Cahill, Prins, Weber & McGaugh, 1994). Our study concentrated entirely on central information processing in both recall and recognition, especially the latter. Since males are better at recall of central information of emotional stimuli, it might explain why males did better than females on recognition under the high emotional arousal condition and why emotional arousal enhanced recognition in males only. As mentioned earlier, one main weakness of this study is the discrepancy in the number of male and female subjects. Therefore, dissecting the effect of emotional arousal on memory in relation to sex of the subjects has to be interpreted carefully.

Future research is warranted in this area in order to further investigate the facilitative effects of glucose as well as the mechanisms that underlie these relationships between glucose, arousal, and memory. While the present findings confirm the facilitatory effects of glucose and emotional arousal on memory, they simultaneously stimulate more questions on the differences in the effect of these two factors on memory in males versus females.

## References

- Awad, N., Gagnon, M., Desrochers, A., Tsiakas, M. & Messier, C. (2002). Impact of peripheral glucoregulation on memory. *Behavioral Neuroscience*, 116(4), 691–702.
- Azari, N. (1991). Effect of glucose on memory processes in young adults. *Psychopharmacology* 105(4), 521–524.
- Beavers, K.M., Leng, I., Rapp, S.R., Miller, M.E., Houston, D.K., Marsh, A.P. & Kritchevsky, S.B. (2017). Effects of Longitudinal Glucose Exposure on Cognitive and Physical Function. Results from the Action for Health in Diabetes Movement and Memory Study. *Journal of the American Geriatrics Society*, 65(1), 137–145.
- Benton, D. & Owens, D.S. (1993). Blood glucose and human memory. *Psychopharmacology*, 113, 83–88.
- Blake, T.M., Varnhagen, C.K. & Parent, M.B. (2001). Emotionally arousing pictures increase blood glucose levels and enhance recall. *Neurobiology of Learning and Memory*, 75(3), 262–273.

- Bradley, M.M., Greenwald, M.K. & Petry, M.C. (1992). Remembering pictures. Pleasure and arousal in memory. *Journal of Experimental Psychology: Learning, Memory, and Cognition*, 18, 379–390.
- Brandt, K.R., Sünram-Lea, S.I. & Qualtrough, K. (2006). The effect of glucose administration on the emotional enhancement effect in recognition memory. *Biological Psychology*, 73, 199–208.
- Cahill, C.M., Dray, A. &Coderre, T.J. (1998). Priming enhances endotoxin-induced thermal hyperalgesia and mechanical allodynia in rats. *Brain Research*, 808, 13–22.
- Cahill, L., Prins, B., Weber, M. & McGaugh, J.L. (1994). Beta-adrenergic activation and memory for emotional events. *Nature*, 37, 702–704.
- Craft, S., Murphy, C.G. & Wemstrom, J. (1994). Glucose effects on complex memory and nonmemory tasks. The influence of age, sex, and glucoregulatory response. *Psychobiology*, 22(2), 95–105.
- Flint, R.W. & Riccio, D. (1999). Post-training glucose administration attenuates forgetting of passive-avoidance conditioning in 18-year-old rats. *Neurobiology of Learning and Memory*, 72, 62–67.
- Ford, C.E., Scholey, A.B., Ayre, G. & Wesnes, K. (2002). The effect of glucose administration and the emotional content of words on heart rate and memory. *Journal of Psychopharmacology*, 16(3), 241–244.
- Foster, J.K., Lidder, P.G. & Sunram, S.I. (1998). Glucose and memory. Fractionation of enhancement effects? *Psychopharmacology*, 37, 259–270.
- Gore, J.B., Krebs, D.L. & Parent, M.B. (2006). Changes in blood glucose and salivary cortisol are not necessary for arousal to enhance memory in young or older adults. *Psychoneuroendocrinology*, 31(5), 589–600.
- Gore, J.B. (2002). The effects of emotional arousal on recall, blood glucose, and salivary cortisol levels in young and older adults. ProQuest Information & Learning, US. *Dissertation Abstracts International: Section B: The Sciences and Engineering*, 63(6), 3059.
- Hall, J.L et al. (1989). Glucose enhancement of performance on memory tests in young and aged humans. *Neuropsychologia*, 27(9), 1129–1138.
- Kennedy, D.O. & Scholey, A.B. (2000). Glucose administration, heart rate and cognitive performance. Effects of increasing mental effort. *Psychopharmacology*, 149(1), 63–71.
- Knight, M. & Mather, M. (2009). Reconciling findings of emotion-induced memory enhancement and impairment of preceding items. *Emotion*, 9, 763–781.
- Knott, V.J., Messier, C., Mahoney, C. & Gagnon, M. (2001). Glucose and glucoregulatory modulation of memory scanning, event-related potentials and EEG in elderly subjects. *Neuropsychobiology*, 44(3), 156–166.
- Lang, P.J. (1980). Behavioral treatment and bio-behavioral assessment. Computer applications. In: J.B. Sidowski, J.H. Johnson & T.A. Williams (eds.), *Technology in mental health care delivery systems* (pp. 119–137). Norwood, NJ: Ablex.

- Lang, P.J., Bradley, M.M. & Cuthbert, B.N. (1997). International affective picture system (IAPS): Technical Manual and Affective Ratings. Gainesville, FL. The Center for Research in Psychophysiology, University of Florida.
- Macpherson, H., Robertson, B., Sünram-Lea, S., Stough, C., Kennedy, D. & Scholey, A. (2015). Glucose administration and cognitive function: differential effects of age and effort during a dual task paradigm in younger and older adults. *Psychopharmacology*, 232(6), 1135–1142.
- Manning, C.A., Hall, J.L. & Gold, P.E. (1990). Glucose effects on memory and other neuropsychological tests in elderly humans. *Psychological Science*, 1(5), 307–311.
- Martin, P.Y. & Benton, D. (1999). The influence of a glucose drink on a demanding working memory task. *Physiology & Behavior*, 67(1), 69–74.
- Mather, M. & Nesmith, K. (2008). Arousal-enhanced location memory for pictures. *Journal of Memory and Language*, 58, 449–464.
- Meikle, A., Riby, L.M. & Stollery, B. (2004). The impact of glucose ingestion and glucose-regulatory control on cognitive performance: A comparison of younger and middle aged adults. *Human Psychopharmacology: Clinical and Experimental*, 19(8), 523–535.
- Messier, C. (2004). Glucose improvement of memory: A review. *European Journal of Pharmacology*, 490, 33–57.
- Messier, C., Gagnon, M. & Knott, V. (1997). Effect of glucose and peripheral glucose regulation on memory in the elderly. *Neurobiology of Aging*, 18(3), 297–304.
- Messier, C., Desrochers, A. & Gagnon, M. (1999). Effect of glucose, glucose regulation, and word imagery value on human memory. *Behavioral Neuroscience*, 113(3), 431–438.
- Messier, C. & Gagnon, M. (1996). Glucose regulation and cognitive functions: Relation to Alzheimer's disease and diabetes. *Behavioural Brain Research*, 75(1–2), 1–11.
- Messier, C., Pierre, J., Desrochers, A. & Gravel, M. (1998). Dose-dependent action of glucose on memory processes in women: Effect on serial position and recall priority. *Cognitive Brain Research*, 7(2), 221–233.
- Messier, C., Tsiakas, M., Gagnon, M., Desrochers, A. & Awad, N. (2003). Effect of age and glucoregulation on cognitive performance. *Neurobiology of Aging*, 24(7), 985–1003.
- Metzger, M.M. (2000). Glucose enhancement of a facial recognition task in young adults. *Physiology & Behavior*, 68(4), 549–553.
- Mohanty, A. & Flint, R.W. (2001). Differential effects of glucose on modulation of emotional and nonemotional spatial memory tasks. *Cognitive, Affective & Behavioral Neuroscience*, 1(1), 90–95.
- Morris, N. (2008). Elevating blood glucose level increases the retention of information from a public safety video. *Biological Psychology*, 78(2), 188–190.

- Owens, D.S. & Benton, D. (1994). The impact of raising blood glucose on reaction time. *Neuropsychobiology*, 30(2–3), 106–113.
- Parent, M.B., Varnhagen, C. & Gold, P.E. (1999). A memory-enhancing emotionally arousing narrative increases blood glucose levels in human subjects. *Psychobiology*, 27(3), 386–396.
- Scholey, A.B. & Fowles, K.A. (2002). Retrograde enhancement of kinesthetic memory by alcohol and by glucose. *Neurobiology of Learning and Memory*, 78(2), 477–483.
- Scholey, A.B., Harper, S. & Kennedy, D.O. (2001). Cognitive demand and blood glucose. *Physiology & Behavior*, 73(4), 585–592.
- Scholey, A.B., Laing, S. & Kennedy, D.O. (2006). Blood glucose changes and memory: Effects of manipulating emotionality and mental effort. *Biological Psychology*, 71(1), 12–19.
- Scholey, A.B., Sünram-Lea, S.I., Greer, J., Elliott, J. & Kennedy, D. (2009). Glucose administration prior to a divided attention task improves tracking performance but not word recognition: Evidence against differential memory enhancement? *Psychopharmacology*, 20, 549–558.
- Sieber, F.E. & Traystman, R.J. (1992). Special issues: Glucose and the brain. *Critical Care Medicine*, 20(1), 104–114.
- Stollery, B. & Christian, L. (2015). Glucose, relational memory, and the hippocampus. *Psychopharmacology*, 232(12), 2113–2125.
- Sünram-Lea, S., Dewhurst, S.A. & Foster, J.K. (2008). The effect of glucose administration on the recollection and familiarity components of recognition memory. *Biological Psychology*, 77(1), 69–75.
- Sünram-Lea, S., Foster, J.K., Durlach, P. & Perez, C. (2001). Glucose facilitation of cognitive performance in healthy young adults: Examination of the influence of fast-duration, time of day and pre-consumption plasma glucose levels. *Psychopharmacology*, 157(1), 46–54.
- Sünram-Lea, S., Foster, J.K., Durlach, P. & Perez, C. (2002a). The effect of retrograde and anterograde glucose administration on memory performance in healthy young adults. *Behavioural Brain Research*, 134(1–2), 505–516.
- Sünram-Lea, S., Foster, J.K., Durlach, P. & Perez, C. (2002b). Investigation into the significance of task difficulty and divided allocation of resources on the glucose memory facilitation effect. *Psychopharmacology*, 160(4), 387–397.



Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 27–51  
DOI: 10.19265/KP.2019.11227



## ORIGINAL ARTICLE

Received: 29.02.2019

Accepted: 16.03.2019

Katarzyna Ożańska-Ponikwia

ORCID iD: 0000-0003-4896-0521

University of Bielsko-Biala, Poland

kponikwia@ath.bielsko.pl

Beata Webb

ORCID iD: 0000-0002-7177-9440

Bond University, Gold Coast, Australia

bwebb@bond.edu.au

## EMOTIONS AND COMMUNICATION IN SECOND/ ADDITIONAL LANGUAGE: GETTING STUDENTS READY FOR AN INTERNATIONAL EXPERIENCE

EMOCJE A KOMUNIKACJA W JĘZYKU OBCYM:  
PRZYGOTOWANIE STUDENTÓW DO UDZIAŁU  
W WYMIANACH MIĘDZYNARODOWYCH

### Keywords

emotions, SLA,  
SL/FL classroom,  
immersion,  
expression of emo-  
tions, perception  
of emotions

**Summary:** Internationalisation of education is a global phenomenon which highlights the importance of successful communication processes on an unprecedented scale. Yet, there is little explicit information on the most effective ways of preparing students for the international educational experience of studying in another country. Research demonstrates that international students regularly report difficulties not just with the local language but using language in contexts and understanding the local culture of communication. This paper addresses the vital but often neglected notion of emotions and

---

\* This work is the result of collaboration between two researchers:  
Dr Katarzyna Ożańska-Ponikwia, University of Bielsko-Biala, Poland,




**Słowa kluczowe**  
emocje,  
przyswajanie języka  
drugiego,  
immersja językowa,  
wyrażanie i postrze-  
ganie emocji w języku  
obcym

their importance in the communication process. It focuses on different aspects concerning the perception and expression of emotions in the second language, and on possible ways of incorporating them into the Second/Additional Language curriculum and bilingual education. The paper presents the results of a quantitative study examining the possible influence of the immersion in the L2 language and culture on the recognition and expression of emotions in that language. Research results suggest that even a very short stay in an L2 country can significantly enhance the ability to encode the expression and decode perception of emotions in the L2. The paper proposes that the ability to recognize and express emotions in second/additional languages is a critical skill that augments learners' communication. Consequently, the paper postulates the inclusion of teaching the recognition and expression of emotions in a target language into second/additional language education curriculum.

**Streszczenie:** Umieędzynarodowienie edukacji jest zjawiskiem globalnym. Jednocześnie niewiele informacji jest dostępnych na temat skutecznych sposobów przygotowania studentów do studiowania w za granicą. Badania pokazują, że studenci biorący udział w wymianach międzynarodowych regularnie zgłaszają trudności związane z posługiwaniem się językiem obcym, także w kontekście procesów socjolingwistycznych. Niniejszy artykuł dotyczy istotnego, ale często zaniedbywanego pojęcia emocji i ich znaczenia w procesie komunikacji. Koncentruje się na różnych aspektach dotyczących postrzegania

---

Bielsko-Biala, Poland, and Dr Beata Webb, Bond University, Gold Coast, Australia. We work at different universities, in different countries and on different continents and share a professional passion for international education. Our dialogue, which resulted in this paper, intersects the fields of the internationalisation of education, student experience and affectivity in language learning. This collaboration was made possible through the platform of Study Abroad from the European Perspective (SAREP) Project, initiated by the European Commission of Science and Technology. Dr Katarzyna Ożańska-Ponikwia is a SAREP member representing Poland and Dr Beata Webb is an observer representing Australia. The SAREP project provided us with a unique platform for cross-institutional discussion on the ways educators can maximise the success of their students in Study Abroad contexts. This on-going cross-institutional collaboration would not have been possible without the SAREP Project, chaired by Dr Martin Howard, University College Cork, and our SAREP colleagues from universities across the globe.



i wyrażania emocji w języku obcym oraz na potencjalnych sposobach włączenia tychże do programu nauczania języków obcych. Artykuł przedstawia wyniki badania ilościowego skupiającego się na możliwym wpływie zanurzenia w kulturze i języku obcym na rozpoznawanie i wyrażanie emocji w tymże języku. Wyniki badań sugerują, że nawet bardzo krótki pobyt zagraniczny może znacznie zwiększyć zdolność wyrażania i rozpoznawania emocji w języku obcym. Proponuje się, aby umiejętność rozpoznawania i wyrażania emocji w języku drugim/obcym była postrzegana jako umiejętność kluczowa, która może znacznie wpłynąć na procesy komunikacyjne podczas wymian międzynarodowych, i tym samym została włączona do programów nauczania języków obcych.

## Introduction

Internationalisation of education is a global phenomenon which highlights the critical importance of successful communication processes. Making a decision to study in another country has far-reaching implications on the life of a person making this decision, typically affecting their friends, family and their future. International students participating in short- and long-term study abroad programs face many challenges and experience various difficulties in the host country. One of the challenges reported regularly by international students is the difficulty with understanding not just the local language but also the way this language is used in a sociocultural context, that is, the different ways of interpreting the message and the difficulty of understanding what the interlocutors “really mean” (Malczewska-Webb, 2014; Ryan & Carroll, 2005; Webb, 2014; 2015a; 2015b).

In order to take such learner needs into consideration, language educators must address the essential question of what can be done to ensure the best possible preparation of students for communicating successfully during their international educational experience. However, literature is rarely explicit on what aspects of language and culture must be included in the syllabus in order to maximise students’ successful communication during their international experience while they organise their new life in the new country.

This study examines difficulties second language (L2) learners experience with the recognition and expression of emotions in the L2. It is hoped that the research results will contribute to designing programs addressing the needs of international students to develop more effective communication skills through improving L2 emotional awareness. This paper, therefore, intersects two fields of enquiry within the international education and language acquisition contexts, emotional awareness and students' difficulties with communication. It also proposes the inclusion of the affective goal focusing on the notion of emotions into L2 language and culture education curriculum as a means of addressing the difficulties experienced by international students.

Accordingly, the paper addresses the vital but often neglected notion of emotions and their importance in the communication process. It focuses on the perception and expression of emotions in the second language and on possible ways of incorporating the elements of emotions education into the classroom setting and bilingual education. Section 1 outlines the background of the literature review. Next, Section 2 focuses on the expression and perception of emotions in the second/additional language, and Section 3 deals with emotions in the language curricula. Section 4 describes the research methodology employed for the purposes of the study. It outlines research questions and hypotheses, the participant sample, research instruments, the data presentation and analysis. The last two sections of the paper, 5 and 6, include the analysis and interpretation of the results, followed by their implications for teaching and the conclusions of the research.

## **1. International students and Emotions: A brief literature overview**

Emotions constitute a vital part of life as they enable people to function effectively in the language, culture and society they are part of. The globalized world "has brought about unprecedented access to information, global conversations and relationships" (Liddicoat & Scarino, 2013, p. 8). According to the UNESCO Institute for Statistics (<https://en.unesco.org>), the number of students participating in transnational education has jumped from 0.8 million students in 1975, to a staggering 4.1 million students in 2013. As the UNESCO data are six years old, we can assume a much larger number today, especially when we consider the growth of individual countries. Australia, with its dynamic story of transnational education, provides a very interesting example of this progression. In 2018, there were 693,750 students on a student

visa in Australia – 10.7% more than were registered in 2017. The largest group (46%) included 399,078 students enrolled at Australian universities. This increase is consistent with the average 10.1% annual growth noted over the last ten years ([internationaleducation.gov.au](http://internationaleducation.gov.au)). Study abroad programs offer increasing opportunities for communication between students with different linguistic and cultural backgrounds. Often, this communication takes place between interlocutors who do not share the same first language (L1) or the same first culture (C1) (Stavans & Hoffman, 2014). Lorette & Dewaele (2015, p. 62) note that:

both the expression of one's own emotional state and the comprehension of others' emotional states appear to be less intuitive when the communication occurs in a foreign language (LX) than when the communication occurs in an L1.

On the one hand, it is important to point out that the ability to understand the emotional state of one's interlocutor is critical for interpreting the content of that interlocutor's utterances. On the other hand, the proposition expressed by a speaker could be interpreted very differently depending on the speaker's affective orientation regarding this proposition (Ochs & Schieffelin, 1989; Lorette & Dewaele, 2015, p. 62). The fact that languages differ significantly in terms of both emotional expression and in cultural scripts suggesting how people should feel or express their emotions is central for successful communication (Wierzbicka, 1999, p. 240). Consequently, in order to successfully communicate in the second/additional language, learners should master not only linguistic competence but also a sociolinguistic and sociocultural one. Regan, Howard & Lemée (2009, p. 3) support this idea with the following statement:

In our globalized multicultural/multilingual world, communities are constantly shifting and individuals move in and out of them. People need to adapt to that constant shift in communities and find their own place in the speech community which they currently inhabit. Knowledge of grammatical and structural elements of the L2 is only a part of the skills and competencies which are necessary for this process of adaptation; sociolinguistic and sociocultural competences are equally important. These competences condition the L2 speakers' view of themselves in the L2 speech community, their view of their own community as well as the way they are perceived by the L2 community in turn, and this consequently affects the place they occupy in that community or communities and their progress through it.

As pointed out by Regan et al. (2009), the competences necessary for being a successful member of any speech community cannot be limited to the knowledge of the grammatical and structural elements. Successful speech community members must, therefore, develop sociolinguistic and sociocultural competences which go beyond the knowledge of grammar or vocabulary. Learner knowledge limited to formal language concepts is insufficient, as learners must develop skills allowing them to negotiate meanings across languages and cultures in order to position themselves within a speech community (Liddicoat & Scarino, 2013, p. 8; Malczewska-Webb, 2014).

Emotions form an intrinsic part of these sociolinguistic and sociocultural competencies, as researchers suggest that emotions are influenced and shaped by language and culture (Frijda, 1986; Lutz 1988; Matsumoto, 1994; 2006; Rosaldo 1984; Wierzbicka, 1999; cf. Ożańska-Ponikwia, 2012a, 2013; Malczewska-Webb, 2016). Rosaldo (1984, p. 304) states that emotions are “self-concerning, partly physical responses that are at the same time aspects of a moral and ideological attitude; emotions are feelings and cognitive constructions, linking person, action, and sociological milieu.” This suggests that emotions are not isolated mental states but that they are deeply rooted in language and culture (Ożańska-Ponikwia, 2013; Malczewska-Webb, 2016). In line with Rosaldo, Wierzbicka (2004, p. 98) wrote that “different languages are linked with different ways of thinking as well as different ways of feeling; they are linked with different attitudes, different ways of relating to people, different ways of expressing one’s feelings.” Additionally, Matsumoto (2006, p. 422) stressed the importance of the relationship between culture and emotions, as culture shapes the perception and the expression of emotions through the social constructions of reality:

Because cultural worldviews can differ across cultures, they can help to construct different self-concepts in people of different cultures. Like the concept of the self (Markus, 1977), which is also a social construction, cultural worldviews are ideological belief systems that individuals use as guidelines to explain their and others’ behaviors. When reappraising events, therefore, it is likely that individuals will tap into these cultural and personal ideologies to retrieve guidelines for ways in which they should evaluate or appraise emotion-eliciting situations.

Research on the relationship between perceiving and expressing emotions across cultures is complex, however, in its interpretations. While the studies

presented above underline the strength of the relationship between the users of the specific culture and the emotions they express and perceive, other studies examine the common ground across the users of different cultures. Accordingly, Moore, Romney, Hsia & Rush (1999) and Romney, Moore & Rush (1997) have demonstrated the commonly shared emotional knowledge across typologically distant languages. This suggests a shared cognitive cultural structure of all languages and important similarities in the perception of the emotion terms in dissimilar languages. Pavlenko (2008) provides a further interpretation of these similarities:

To say that emotion concepts vary does not imply that speakers of different languages have distinct physiological experiences. Rather, it means that they may have somewhat different vantage points from which to evaluate and interpret their own and others' emotional experiences (p. 150).

According to Pavlenko (2008), the reason for differences between the users of different cultures and the way they express or perceive emotions is not the result of different physiological or experiential conditioning. In other words, on the one hand, Pavlenko (2008) acknowledges the cultural intersection or a universal overlap in the way emotions are interpreted. On the other hand, however, Pavlenko (2008) also recognizes the different outcomes of these interpretations between the users of different cultures. These different outcomes stem from the different vantage points, the conceptual points of departure for their expression or interpretation of emotions. Starting from a different point of departure determined by a specific culture will determine a different trajectory of the interpretations of emotions.

The discussion outlined above demonstrates the shared view of the impact of culture on the ability to express and interpret emotions. Some researchers conclude that emotions are dependent and determined by specific culture. Others, while recognizing shared cognitive structure even between distant languages, also acknowledge the differences in interpreting emotions between the users of different cultures. As far as the role of this ability in communication is concerned, the interlocutors' recognition of emotions will either contribute to or hinder successful communication. Despite the fact that researchers agree on the importance of the skills in recognizing and expressing emotions for successful communication in a second/additional language, the development of these abilities is very often neglected in second/additional language curricula.

## 2. Expression and perception of emotions in the foreign language

Expressing emotions in a foreign language has been addressed in a number of studies which advocate a range of variables as potentially influencing emotional expression in a non-native language (Dewaele, 2009; 2010; Dewaele & Pavlenko, 2002; Ożańska-Ponikwia, 2012b; 2015; Pavlenko, 2004). These variables include learner background, language proficiency, gender, age, or sociocultural competence. First, the study undertaken by Dewaele & Pavlenko (2002) considered the impact of L2 proficiency, gender, and extraversion on the use of emotion words. The project involved Dutch L2 users of French and the potential influence of gender and sociocultural competence in their speech. It also examined the type of linguistic material on the use of emotion vocabulary among Russian L2 users of English. The reported results suggested that gender, level of proficiency and extraversion could predict the number of emotion lemmas and word tokens in participants' speech. The statistical analysis of the study of Russian L2 users of English showed that gender and type of linguistic material influenced the production of emotion lemmas. As far as sociocultural competence is concerned, Russian L2 users of English, when speaking both English and Russian, followed the linguistic pattern of monolingual Americans favouring the adjectival (typical for English), rather than the verbal (typical for Russian and other Slavonic languages) pattern of expressing emotions (Dewaele & Pavlenko, 2002). This suggests that L2 users might change their linguistic patterns of expressing emotions, shifting from the patterns predominant in their L1 to the patterns typical of the L2 users following their immersion in the L2 culture. Interestingly, this change relates also to their use of the mother tongue, where they also followed the L2 patterns of expressing emotions.

Furthermore, Ożańska-Ponikwia's (2012b) study on Polish L2 users of English examined factors influencing emotional expression in a foreign language. The statistical analysis of the responses to an online questionnaire measuring the expression of emotions in a second/additional language established the link between (1) the L2 use, self-perceived L2 proficiency and frequent contact with the L2, and (2) the expression of emotions in a foreign language. Ożańska-Ponikwia's (2015) next study, involving a similar group of informants, showed a correlation between expressing emotions in the L2 and the length of stay in the UK and/or Ireland. The participants who lived in the UK and/or Ireland for a shorter period of time were expressing emotions in the L2 to

a lesser degree than informants who had resided in those countries longer. These differences were not affected by other examined factors, as both groups declared positive attitudes towards the L2 and a similar level of self-perceived L2 proficiency. These results suggest that emotional expression in a non-native language is linked to a number of sociocultural and sociolinguistic factors and is not simply a matter of a well-developed linguistic competence in a specific language (Ożańska-Ponikwia, 2015, p. 38).

Regarding perception of emotions in a foreign language, researchers have investigated a number of factors related to learners' background and linguistic performance (Rintell, 1984; Graham, Hamblin & Feldstein, 2001; Scherer, Banse & Wallboot, 2001; Lorette & Dewaele, 2015). In her pioneering work, Rintell (1984) asked Arabic, Chinese and Spanish informants to listen to the taped conversations in their L2 (English), to identify the emotions expressed on the tape and to rate their intensity. The results of the study determined that L2 proficiency and native language had a strong effect on the perception of emotions in the L2. Similar results were reported by Graham et al. (2001), who found that the users' first language, particularly when it is typologically similar to L2, facilitates perception and understanding of emotions in a foreign language. Lorette and Dewaele (2015) supported these findings, as their results confirmed a significant positive relationship between L2 proficiency and the ability to recognize emotions. In addition, a significant effect of L1 culture was also found in the scores of the ability for recognizing emotions, with Asian L2 users of English scoring significantly lower than European English L2 users (Lorette & Dewaele, 2015). Furthermore, Scherer et al.'s (2001) research on vocal emotion recognition confirmed that the country of origin influenced emotion recognition rate. Graham et al. (2001) also discovered that L2 learners of English enrolled in English as a Foreign Language (EFL) courses had difficulty in identifying and interpreting vocal emotional cues in L2 speech. These studies substantiate the view that perceptions of emotions in another language are influenced by the speaker's linguistic and cultural background and by their L2 proficiency.

Other research outcomes suggest that learning an additional language may have an impact on emotion recognition ability (Dromey, Silveira & Sandor, 2005; Lorette & Dewaele, 2015). Accordingly, in the Dromey et al. (2005) study, two cohorts – L2 English users and monolingual L1 English speakers – achieved similar results in the recognition of affective prosody. The authors established that being a first language user does not guarantee higher scores



on the emotion recognition ability in that language when compared to the L2 users of that language. In fact, they concluded that the high results in the L2 user group were influenced by this group having studied an additional language/additional languages. They suggested that learning a second/additional language reinforces sensitivity to certain aspects of speech, which, in turn, could facilitate the ability to improve the recognition of general emotions. The results of Lorette and Dewaele's (2015) research also support this view. In their study, participants were asked to identify six basic emotions – anger, sadness, disgust, surprise, fear and happiness – presented by a native English-speaking actress in audiovisual clips. Despite the L2 users achieving lower proficiency scores, both the English L1 users and the English L2 users' scores of the ability for emotion recognition exhibited strong similarities. Similarly to the previous study, the L2 users had studied more languages than the English L1 users, which might have influenced their abilities to recognize emotions in a second/additional language.

Reiterating Lorette and Dewaele's (2015, p. 62) conclusions, "it thus seems that audiovisual input allows advanced LX users to recognize emotions in LX as well as L1 users. That said, LX proficiency and L1 culture do have an effect on emotion recognition ability." The research outcomes outlined above suggest that the ability to express and interpret emotions in a second/additional language is influenced by many factors, including speakers' linguistic and cultural background, L2 proficiency, gender, age and sociocultural competence. These factors are also associated with the speakers' length of stay in the country where the target language is spoken as the main language. To recapitulate, many factors influence the expression and perception of emotion, such as second/additional language proficiency and speakers' linguistic and cultural background. These factors may diminish language learners' socioculturally appropriate recognition and expression of emotions, which, in turn, may erode successful communication. However, research outcomes also demonstrate that with adequate exposure to the target language and culture, preferably in the naturalistic setting, the ability to recognize emotions in the second/additional language might be developed to the first language users' standards.

### **3. Emotions in the Second/Additional Language education syllabus**

The decision concerning the selection of appropriate elements necessary to design a language program addressing the needs of international students

is a difficult one. Language educators have consistently attempted to define the elements of language education which would equip learners with the knowledge and skills necessary for successful communication in the second/additional language (Baker, 2001; van Ek, 1986; 1987; Swain, 1986; Young, 1999). These definitions, which have continued to evolve over time, have determined the educational goals set for language curricula. Linguists have focused on various aspects of what language learners need to study in order to achieve the overall goal of being able to communicate in the target language. This section examines different aspects and models of language competence which could provide a framework for including the elements of affective domain, specifically, emotion education, into the target language program for students planning to participate in Study Abroad programs.

In the work on communicative competence developed in the 1980s, van Ek's (1986; 1987) concept specified six different forms of language competence, the acquisition of which was perceived as essential for successful communication. The model included the following competences: linguistic competence, which involved following the rules of the language; sociolinguistic competence, which covered the awareness of choosing the right forms depending on the context of use; discourse competence, which was defined as an ability to use appropriate strategies in the construction of texts, for example, the ability to initiate and participate in sustained conversations. Strategic competence, the fourth, referred to communication strategies employed during difficulties with communication, while the fifth – socio-cultural competence – involved the “awareness of the sociocultural context in which the language concerned is used by native speakers and the ways in which this context affects the choice and the communicative effect of particular language forms” (van Ek, 1987, p. 8; cf. Baker, 2001). The sixth – social competence – pertained to the ability to use particular social strategies to achieve communicative goals.

The competences defined by van Ek (1987) as necessary for successful communication in the second/additional language focus to a large extent on linguistic competence. However, affective elements must be included in at least some of these competences in order for the learner to achieve successful communication. For example, in the discourse competence, appropriate strategies must take into consideration the expression and recognition of emotions. Also, communication strategies in the strategic and sociocultural competences require emotional awareness in the target language in order to ensure L2 learners' successful communication.

Interestingly, as early as in 1986, Swain (1986) suggested that it is crucial to give students a chance to engage in meaningful oral interactions, either in the classroom setting or outside of it. Exposing learners to realistic conversations in a foreign language and getting them to participate would give them an opportunity to develop all the competences necessary for communication in a non-native language. On the one hand, van Ek (1987) provides a model for the possible inclusion of emotional awareness into the goals-setting stage of the language curriculum suitable for international students studying in the second/additional language. On the other hand, Swain (1986) suggests oral interactions in and out of the classroom as a strategy for their development.

Other researchers also promote the inclusion of the elements of emotional awareness education in language curricula. Already in 1999, Young (1999) noted a consistent interest in sociocultural aspects of SLA in such domains as pragmatics, FL/SL classroom, or face-to-face communication. Since then, many educators have investigated Vygotsky's sociocultural theories of language acquisition, and the interest in his work has been burgeoning. His beliefs that any human behaviour is mediated by language and that each human action can be interpreted in multiple ways have been explored for their applications to teaching (Eun & Lim, 2009). Also, his emphasis on meaning and mediation (Vygotsky, 1987; 1997) has strong implications for teaching (Eun & Lim, 2009). Moreover, the ability to recognize emotions and express them appropriately in a target language forms one of the key tools in interpreting and delivering accurate and effective messages. This model, therefore, provides a possible theoretical basis for including the theme of emotion awareness in the goals and practices of language programs.

Furthermore, Regan et al. (2009, p. 6) suggested that:

Sociocultural competence broadens the knowledge of cultural and social norms present in every society and as a result facilitates the communication process, but also enlarges the emotional repertoire by means of which the acquisition of new concepts takes place, a crucial factor when we take the expression of emotions in a foreign language into account.

In the quote above, Regan et al. (2009) explicitly state that the development of learners' emotional repertoire addresses one of the goals of sociocultural competence. Indeed, Vygotsky (1987) emphasized the importance of learning different speech modes due to the lack of direct correspondence between form and meaning and the fact that understanding the message depends on the

context and the purpose of the interlocutors. Vygotsky (1987), in fact, stated that this knowledge should be explicitly taught to L2 learners. Eun & Lim (2009) validate Vygotsky's theory, and their research confirms the effectiveness of explicit teaching of the pragmatics of language to L2 learners. The teaching of speech codes included the teaching of emotional awareness of the target language and culture explicitly. Therefore, emotional awareness as one of the aspects of speech pragmatics can be taught as a combination of explicit teaching in meaningful and simulated-authentic classroom interactions.

The usefulness and effectiveness of authentic interactions in teaching learners emotional awareness was also demonstrated by Lorette and Dewaele (2015) decades after Vygotsky proposed it in the early 20<sup>th</sup> century. According to Lorette and Dewaele (2015, p. 81), high proficiency L2 users of English who were experienced in authentic interactions were able to recognize basic emotions in English speech as accurately as L1 users of English even though the L2 users' levels of proficiency were much lower. L2 users' proficiency in English was related to emotion recognition ability in English, so "these findings suggest that the threshold for the successful recognition of basic emotions in an LX is probably lower than has been assumed so far: one does not need to be fully proficient in order to be able to accurately infer the emotional state of an interlocutor, at least in the case of basic emotions" (Lorette & Dewaele, 2015, p. 81).

Research presented in this section bears important implications for the introduction of emotion awareness into the goals and the practices of language programs for international students who intend to study in the target language and culture. To sum up this section, the practices promoting the affective aspect of communication – emotional awareness – can be promoted with strategies based on sociocultural theory of language acquisition. These strategies should include the introduction of meaningful and realistic conversations connected to learners' real lives and their real world into the second/additional language classes. The behaviour and speech modes in those conversations should also be taught explicitly. Additionally, the use of the authentic materials including videos or audio recordings might facilitate emotion recognition ability in the second/additional language learners at lower levels of proficiency than it was previously believed.

## 4. Study description

**4.1. Research questions and hypothesis.** The literature review demonstrated that some variables such as L2 proficiency, culture or gender can influence emotion recognition ability in the L2. Additionally, some L2 users with authentic exposure to the target language and culture through living in the target language country demonstrated the ability to recognize emotions in the L2 at a level equal to the users of the first language and culture. Self-perceived L2 proficiency, the degree of L2 use, gender and sociolinguistic competence were related to the expression of emotions in the second/additional language. Motivated by these findings, a quantitative study was designed in order to investigate the influence of immersion in the L2 language and culture on self-reported ability to recognize and express emotions in the target language.

The study aims to address the following research questions:

1. What is the level of self-reported ability to recognize and express emotions in L2 by Polish L2 users of English who had been immersed in the L2 language and culture?
2. What is the level of self-reported ability to recognize and express emotions in the L2 by Polish L2 users of English who had not been immersed in the L2 language and culture?
3. Is there a difference in self-reported ability to recognize and express emotions in the L2 between Polish L2 users of English who had been immersed in the L2 language and culture and those who had not been immersed?

It is hypothesized that informants who were immersed in the L2 language and culture will report significantly fewer problems with the ability to recognize and express emotions in the L2 in comparison to the non-immersion group.

**4.2. Participants.** The participants of the present study included seventy-one (71) Polish L2 users of English who were further divided into two groups according to the length of immersion in the L2 language and culture. Dividing the informants into two groups allowed for a study of the possible differences between (1) thirty-five (35) Polish participants who had never lived outside Poland and (2) the second group of thirty-six (36) participants who had lived in England and had been immersed in the L2 culture. While the first cohort had not had the experience of interactions with L1 users of English, the second cohort experienced authentic interactions with the L1 users of English

during their stays in the UK of between one and six months. Further details characterizing both groups are presented below.

**4.2.1. The non-immersion group.** The “non-immersion” group consisted of 35 informants who had never lived in an English-speaking country. Females represented 70% of the sample ( $n = 24$ ). Their age varied from 20 to 57, with 60% ( $n = 21$ ) of the participants in their twenties, 34% ( $n = 12$ ) of the sample in their thirties and the remaining 6% ( $n = 2$ ) of the participants either in their forties or fifties (Mean = 28.1, SD = 7.1). As far as their educational level was concerned, 20% ( $n=7$ ) of the sample had vocational education, 25% ( $n = 9$ ) of the sample reported completing secondary education, 49% ( $n =17$ ) had a Bachelor of Arts degree, and the remaining 6% ( $n = 2$ ) completed primary education (Mean = 3.2, SD = .9). Their self-perceived L2 proficiency varied from the beginner level (11%) to high proficiency (52%), with 25% ( $n = 9$ ) rating themselves as pre-intermediate and the remaining 12% ( $n = 4$ ) as upper-intermediate (Mean = 4.2, SD = 1.3).

**4.2.2. The immersion group.** The “immersion” group consisted of 36 informants who had lived in the UK from one to six months. 70% ( $n = 25$ ) of the participants were females. More than half of the informants ( $n = 20$ ) inhabited the UK from one to three months, 14% ( $n = 5$ ) lived abroad from three to four months and the remaining 30% ( $n = 11$ ) from five to six months (Mean = 3.76, SD = 1.23). The participants’ ages were between 17 and 49 years old, with 70% ( $n = 25$ ) of the participants in their twenties, 24% ( $n = 9$ ) in their thirties and the remaining 6% ( $n = 2$ ) in their forties (Mean = 27.19, SD = 6.34). As far as their level of education was concerned, 36% ( $n = 13$ ) of the sample obtained vocational education, 8% ( $n = 3$ ) reported the completion of the secondary education, 53% ( $n = 19$ ) completed a Bachelor of Arts degree and the remaining person, 3% ( $n = 1$ ), completed a Master of Arts degree (Mean = 3.17, SD = 1.10). Their self-perceived L2 proficiency varied from the beginner level, 3% ( $n = 1$ ), to the advanced level, 47% ( $n = 16$ ), with more than one-third (36%;  $n = 14$ ) rating themselves as upper-intermediate and the remaining 14% ( $n = 5$ ) as pre-intermediate (Mean = 4.28, SD = .85) (Ożańska-Ponikwia, 2017).

A detailed comparison between both groups is presented in Table 1.

Table 1  
*"Non-immersion" group and "Immersion" group- comparison*

	"non-immersion" group	"immersion" group
Gender	70% females, 30% males	70% females, 30% males
Age	Mean = 28.1, SD = 7.1	Mean = 27.1, SD = 6.3
Self-perceived L2 proficiency	Mean = 4.2, SD = 1.3	Mean = 4.2, SD = .8
Educational level	Mean = 3.2, SD = .9	Mean = 3.1, SD = 1
Emotional intelligence	Mean = 4.5, SD = .4	Mean = 4.6, SD = .6

Source: own data source.

It is important to note, as is demonstrated in the table above, that both groups exhibited very similar characteristics as far as their number and all other measured variables were concerned. The only significant difference between the researched groups was the immersion in the L2 language and culture or the lack of it.

**4.3. Research instruments.** This study employed the following three research instruments: two questionnaires (Personal background questionnaire; Trait Emotional Intelligence questionnaire-TEIQue) and the answers to two questions concerning difficulties in perception and expression of emotions in the foreign language. The first questionnaire used in the study was the personal background questionnaire, which comprised 10 questions measuring age, gender, educational level, overall self-perceived L2 proficiency and the length of stay in an ESC (Ożańska-Ponikwia, 2013).

The second questionnaire employed for the purpose of the study was the Trait Emotional Intelligence questionnaire-TEIQue. The Trait Emotional Intelligence questionnaire (Petrides & Furnham, 2003) consisted of 153 items rated on a seven-point Likert scale. This questionnaire was included in order to verify the level of emotional intelligence of the informants as a factor potentially influencing the results. It was used in the Polish adaptation developed by Wytykowska and Petrides (2007).

The third research instrument included two questions about difficulties in the perception and expression of emotions in the L2 scale. This was adapted from Ożańska-Ponikwia (2013, p. 66). It was based on the feedback to two statements: "I find it difficult to express emotions in English" and "I find it

difficult to understand emotions in English.” Informants were to choose an answer from five options: 1 – Strongly disagree; 2 – Disagree; 3 – Neutral; 4 – Agree; and 5 – Strongly Agree.

## 5. Data analysis and interpretation

The main research question of this study concerned a possible difference in self-reported ability to recognize and express emotions in L2 between Polish L2 users of English who had been immersed in the L2 language and culture and those who had not been immersed. In order to determine the answer to this research question, a t-test analysis was performed, the results of which are presented in Table 2.

Table 2

*Difficulties in expression and perception of emotions in the L2 (t-test)*

Variable	Length of stay	Mean	SD	t	df	p-value
Expression of emotions	Non-immersion	2.57	1.199	2.476	69	.016
	Immersion	1.28	1.132			
Perception of emotions	Non-immersion	2.52	1.151	2.391	69	.023
	Immersion	1.85	1.131			

Source: own data source.

The data obtained suggests statistically significant differences between the two cohorts. As far as the self-reported perception of emotions is concerned, the mean for the non-immersion cohort was 2.52, and 1.85 for the immersion cohort. This shows that the non-immersion group experienced more self-reported difficulties with the recognition of emotions in L2. The results of the t-test analysis, with the score of 2.47 and p-value of .23, suggest the statistical difference between the two cohorts. Very similar patterns were found in the question concerning the expression of emotions, with the mean self-reported expression of emotion for the non-immersion group of 2.57 and the lower 1.28 for the immersion group. The t-test results, with the score of 2.39 and the p-value of 0.16, also demonstrated the statistical difference between the



two cohorts as far as the self-reported expression of emotions was concerned. Consequently, in the case of both questions concerning difficulties with the perception and the expression of emotions in the foreign language, the non-immersion group scored significantly higher than the immersion one. These results may indicate that the non-immersion participants experience more difficulties with expressing or recognizing emotions in the L2 than the informants in the immersion group.

Additionally, the immersion group scored significantly lower on these self-reported questions overall. This may also demonstrate that the immersion process and having engaged in authentic communicative situations, with emotional perception and expression forming an intrinsic part of authentic discourse, significantly increased their ability to express and decode emotions in the second/additional language. It was also observed that, surprisingly, the immersion group self-reported more difficulties with the recognition of emotions than with their expression. This might indicate that active participation in everyday authentic conversations improves the general ability to express and decode emotions in the foreign language. However, the emotional recognition in the non-native language causes relatively more difficulties to the L2 users of that language than the emotional expression in it.

The results of the answers to the two self-reported questions support the research hypothesis, which postulated that the informants who had been exposed to the L2 language and culture would self-report significantly fewer problems with emotional recognition and expression in L2. Indeed, the informants from the immersion group reported significantly fewer difficulties in emotional expression and recognition in the foreign language in comparison to the informants from the non-immersion group. It is important to note that the scores of the non-immersion group concerning the answers to both questions were almost identical (Mean = 2.57 and Mean = 2.52). Furthermore, the scores of the immersion group were significantly lower. These results also indicated that even if, overall, the immersion group experienced fewer problems with the emotional expression and recognition of emotions in the L2, it is the recognition of emotions that is more problematic to the participants of this group (Mean = 1.28 and Mean = 1.85).

The results of the study support previous research suggesting that the ability to identify and interpret emotions in L2 speech might be enhanced by natural exposure to the L2 in a native context (Graham et al., 2001; Lorette & Dewaele, 2015). The research project did not investigate the factors discussed in

the overview of literature including the potential influence of L2 proficiency (Dewaele & Pavlenko, 2002; Lorette & Dewaele, 2015; Ożańska-Ponikwia, 2012b), number of known languages (Dromey et al., 2005) or target language and culture on emotional recognition (Banse & Wallboot, 2001; Graham et al., 2001; Lorette & Dewaele, 2015; Rintell, 1984), as the researched sample was balanced in relation to these variables. Therefore, the study focused on the possible influence of the immersion in the L2 language and culture on emotional recognition and expression in the non-native language.

Another interesting finding concerns the amount of exposure to L2 language and culture which may influence the L2 emotional awareness. Previously presented research suggests that the natural exposure needs to be extensive in order to improve the L2 emotional awareness (Graham et al., 2001; Lorette & Dewaele, 2015). While the rule of “the more, the better” certainly applies in this context, the results of this study show that even a short (Mean = 3,76 months) immersion in the L2 culture could significantly influence and facilitate the recognition and expression of emotions in the target language.

To sum up, the current study investigated the self-reported recognition and expression of emotions in the L2 language, English, by the users of Polish as their first language. The study investigated the differences between the two cohorts, one of them having had the exposure to authentic language and culture situations while living in England and the other without the naturalistic experience. The study demonstrated statistically significant differences between the two cohorts in self-reported recognition and expression of emotions in L2. Consequently, the results indicated that the exposure to authentic language and culture situations influence the ability to recognize and express emotions in L2. Further, the length of the exposure necessary for having an impact on that ability appeared significantly shorter than the length suggested as influential in previous studies. This shows that even a short exposure to L2 language and culture may sensitise L2 users to emotion expression and recognition.

## **6. Implications for teaching and conclusions: What to teach?**

The paper advocates a number of recommendations which have implications for language teachers and language curricula, and consequently, for language learners, as some of them will inevitably become international study-abroad students. As international students regularly report difficulties using not just the target language, but using the language in sociocultural contexts, it is

essential to address the need for improving student communication skills in language programs. Defining communicative competence as the basis for language curriculum development has been debated over decades, with a gradual shift towards highlighting its complexity and the inclusion of more and more elements beyond the formal language. Ironically, this debate is neither new nor are its results systematically manifested in language programs. Nearly a century ago, Vygotsky voiced the importance of teaching L2 speech mode interpretations, already at the time pointing to the classroom teaching implications and proposing practical solutions for classroom teaching. According to the sociocultural theory, such interpretations involve the ability to interpret interlocutors' emotional messages and intentions. Moreover, as this ability plays a crucial role in successful communication, learners must, therefore, be taught this explicitly. More recent research on affectivity also stresses the link between the ability to decode and encode emotions and learners' background. In consequence, the not-so-new sociocultural theory and the recent research outcomes follow the same trajectory of the need for emotional L2 awareness in language curricula.

Following the research-based decision supporting the inclusion of the language education promoting emotional L2 awareness, further research also contributes with possible suggestions on how and when to do it. On the one hand, studies propose that L2 learners' high level of proficiency may not be as crucial as was previously believed. This validates the view that the ability to encode and decode emotions can and should be introduced to students at different levels of proficiency and not only to learners at an advanced level of proficiency. Students, consequently, should be studying the recognition of L2 emotions and their expression throughout their studies of language at different levels of proficiency. Of the two, more focus should be directed towards the development of the encoding ability as this appears to be more problematic for the learners.

Other research outcomes provide information on possible strategies employed for developing the L2 emotional awareness. Most importantly, all studies suggest that L2 learners learn L2 emotional competence through naturalistic exposure and through classroom practice. Both implicit and explicit approaches have been proposed in different educational contexts. On the one hand, explicit teaching and simulated authentic interactions in the classroom setting are proposed, such as designing an extended vocabulary repertoire referring to emotions (Dewaele, 2005). On the other hand, research, including

the results of this study, shows that the exposure to the target language and culture provide a very effective way of developing the L2 emotional awareness. The outcomes from the current study implicate that even a short stay in the country where the target language is spoken and even a brief exposure to the target culture can enhance the recognition and expression of L2 emotions. This means that any study abroad program in the target language will assist in the development of emotional awareness.

To conclude, research suggests that the ability to decode and encode L2 emotions is a very important factor in developing learners' effective communication skills. Developing communication skills beyond the formal language, while important for all language learners, is critical for international students starting a new life in another country. Conversely, the lack of attention in language programs to L2 emotional education can result in the limited ability for interpreting and encoding emotions, which, in turn, will affect and limit learners' ability to express themselves appropriately.

With the strong research-driven message promoting emotional L2 awareness for all learners and its particular significance for international students, it is negligent not to include these elements in language and culture curricula.

## References

- Baker, C. (2001). *Foundations of Bilingual Education and Bilingualism*. Clevedon: Multilingual Matters Ltd.
- Brown, H.D. (1994). *Principles of language learning and teaching*. Englewood Cliffs, NJ: Prentice Hall Regents.
- Dewaele, J.M. (2005). Investigating the psychological and emotional dimensions in instructed language learning: Obstacles and possibilities. *The Modern Language Journal*, 89(3), 367–380.
- Dewaele, J.-M. (2006). Expressing anger in multiple languages. In: A. Pavlenko (ed.), *Bilingual Minds: Emotional Experience, Expression and Representation* (pp. 118–151). Clevedon: Multilingual Matters Ltd.
- Dewaele, J.-M. (2008). The emotional weight of “I love you” in multilinguals' languages. *Journal of Pragmatics*, 40(10), 1753–1780.
- Dewaele, J.-M. (2009). The effect of age of acquisition on self-perceived proficiency and language choice among adult multilinguals. *Eurosla Yearbook*, 9, 246–269.
- Dewaele, J.-M. (2010). *Emotions in multiple languages*. Basingstoke: Palgrave-MacMillan.

- Dewaele, J.-M. & Pavlenko, A. (2002). Emotion vocabulary in interlanguage. *Language Learning*, 52(2), 265–324.
- Dromey, C., Silveira, J. & Sandor, P. (2005). Recognition of affective prosody by speakers of English as a first or foreign language. *Speech Communication*, 47, 351–359.
- Eun, B. & Lim, H.-S. (2009). A Sociocultural View of Language Learning: The Importance of Meaning-Based Instruction. *TESL Canada Journal*, 27(1), 12–26.
- Frijda, N.H. (1986). *The emotions*. Cambridge: Cambridge University Press.
- Graham, C.R., Hamblin, A.W. & Feldstein, S. (2001). Recognition of emotion in English voices by speakers of Japanese, Spanish and English. *International Review of Applied Linguistics in Language Teaching*, 39, 19–37.
- International Student Data. (2018). Australian Government, Department of Education and Training. International Student Numbers: December 2018. Retrieved January 25, 2019 from: <https://internationaleducation.gov.au/research/International-Student>.
- Liddicoat, A.J. & Scarino, A. (2013). *Intercultural language teaching and learning*. New York: Wiley & Sons.
- Lorette, P. & Dewaele, J.-M. (2015). *International Journal of Language and Culture*, 2(1), 62–86.
- Lutz, C.A. (1988). *Unnatural Emotions: Everyday Sentiments on a Micronesian Atoll and Their Challenge to Western Theory*. Chicago: University of Chicago Press.
- Malczewska-Webb, B. (2014). Cultural and Intercultural Awareness of International Students at an Australian University. In: A. Łyda, K. Szcześniak (eds.), *Awareness in Action*. Second Language Learning and Teaching. Springer, Cham.
- Malczewska-Webb, B. (2016). International Students in Australia: What Makes Them Happy? Student Data from the Positive Education Perspective. In: D. Gabryś-Barker, D. Gałajda (eds.), *Positive Psychology Perspectives on Foreign Language Learning and Teaching*. Second Language Learning and Teaching. Springer, Cham.
- Markus, H. (1977). Self-schemata and processing information about the self. *Journal of Personality and Social Psychology*, 35(2), 63–78.
- Matsumoto, D. (1994). Culture and emotion. In: L. Adler & U. Gielen (eds.), *Current perspectives in cross-cultural psychology*. New York: Praeger.
- Matsumoto, D. (2006). Are cultural differences in emotion regulation mediated by personality traits? *Journal of Cross-Cultural Psychology*, 37(4), 421–437.
- Moore, C.C., Romney, A.K., Hsia, T.L. & Rusch, C.D. (1999). The Universality of the Semantic Structure of Emotions Terms: Methods for the Study of Inter- and Intra-Cultural Variability. *American Anthropologist*, 101(3), 529–546.
- Ochs, E. & Schieffelin, B. (1989). Language has a heart. In: E. Ochs (ed.), *The Pragmatics of Affect. A Special Issue of Text* (pp. 7–25). Berlin: Mouton de Gruyter.

- Ożańska-Ponikwia, K. (2012a). What has personality and emotional intelligence to do with 'Feeling different' while using a foreign language? *International Journal of Bilingual Education and Bilingualism*, 15(2), 217–234.
- Ożańska-Ponikwia, K. (2012b). Emotional expression in a foreign language. What factors influence the choice of a non-native language while expressing emotions? *Linguistica Silesiana*, 33, 201–218.
- Ożańska-Ponikwia, K. (2013). *Emotions from a Bilingual Point of View: Personality and Emotional Intelligence in Relation to Perception and Expression of Emotions in the L1 and L2*. Newcastle: Cambridge Scholars Publishing.
- Ożańska-Ponikwia, K. (2015). Learning to express emotions in a foreign language. Is the L2 proficiency the most important factor in emotional expression in the second language? *Journal of Interdisciplinary Philology*, 1, 38–49.
- Ożańska-Ponikwia, K. (2017). Emotions and Bilingualism-Perception of *I love you* vs. *Kocham Cię* by Polish-English bilinguals. *International Journal of Bilingual Education and Bilingualism*, 22(4), 1–13.
- Panayiotou, A. (2004). Switching Codes, Switching Code: Bilinguals' Emotional Responses in English and Greek. *Journal of Multilingual and Multicultural Development*, 25(2/3), 124–139.
- Pavlenko, A. (1998). Second language learning by adults: Testimonies of bilingual writers. *Issues in Applied Linguistics*, 9(1), 3–19.
- Pavlenko, A. (2002). Bilingualism and emotions. *Multilingua*, 21, 45–78.
- Pavlenko, A. (2004). "Stop doing that, iakomuskazala! Emotions and language choice in bilingual families." *Journal of Multilingual and Multicultural Development*, 25(1, 2/3), 179–203.
- Pavlenko, A. (2006). *Bilingual minds: Emotional experience, expression, and representation*. Clevedon: Multilingual Matters.
- Pavlenko, A. (2008). Emotion and emotion-laden words in the bilingual lexicon. *Bilingualism: Language and Cognition*, 11(2), 147–164.
- Pavlenko, A. & Lantolf, J.P. (2000). Second language learning as participation and the (re) construction of selves. In: J.P. Lantolf (ed.), *Sociocultural theory and second language learning* (pp. 155–177). Oxford: Oxford University Press.
- Petrides, K.V. & Furnham, A. (2003). Trait emotional intelligence: Behavioral validation in two studies of emotion recognition and reactivity to mood induction. *European Journal of Personality*, 17, 39–57.
- Regan, V., Howard, M. & Lemée, I., (2009). *The Acquisition of Sociolinguistic Competence in a Study Abroad Context*. London: Multilingual Matters.
- Rintell, E. (1984). But how did you FEEL about that? The Learner's Perception of Emotion in Speech. *Applied Linguistics*, 5(3), 255–264.

- Romney, A.K., Moore, C.C. & Rusch, C.D. (1997). Cultural universals: Measuring the semantic structure of emotion terms in English and Japanese. *Proceedings of the National Academy of Sciences*, 94, 5489–5494.
- Rosaldo, M. (1984). Toward an anthropology of self and feeling. In: R.A. Shweder & R.A. LeVine (eds.), *Culture Theory: essays on mind, self, and emotion* (pp. 137–157). Cambridge, UK: Cambridge University Press.
- Ryan J. & Carroll, J. (2005). “Canaries in the coal-mine” international students in Western universities. In: J. Carroll & J. Ryan (eds.), *Teaching international students* (pp. 3–13). London–New York: Routledge.
- Scherer, K.R., Banse, R. & Wallbott, H.G. (2001). Emotion inferences from vocal expression correlate across languages and cultures. *Journal of Cross-Cultural Psychology*, 32(1), 76–92.
- Stavans, A. & Hoffmann, C. (2014). *Multilingualism*. Cambridge: Cambridge University Press.
- Swain, M. (1986). Communicative Competence: Some Roles of Comprehensible Input and Comprehensible Output in its Development. In: I. Cummis & M. Swain (eds.) *Bilingualism in Education* (pp. 235–253), New York: Longman.
- UNESCO Institute for Statistics. (2015). UNESCO Science Report: facts and figures. Retrieved January 25, 2019 from: [https://en.unesco.org/sites/default/files/1-4\\_growth\\_international\\_students.pdf](https://en.unesco.org/sites/default/files/1-4_growth_international_students.pdf).
- Van Ek, J.A. (1986). *Objectives for Foreign Language Learning. Volume I: Scope*. Strasbourg: Council of Europe.
- Van Ek, J.A. (1987). *Objectives for Foreign Language Learning. Volume II: Levels*. Strasbourg: Council of Europe.
- Vygotsky, L.S. (1934/1987). Thinking and speech. In: R. Rieber & A. Carton (eds.), *The collected works of L.S. Vygotsky*, trans. N. Minick, (pp. 39–285), vol. 1. New York: Plenum Press.
- Vygotsky, L.S. (1997). *Educational psychology*. Boca Raton, FL: St. Lucie Press.
- Webb, B. (2014). Academic Discourse and Self-efficacy in Diverse Settings. In: K. Warchał & A. Łyda (eds.), *Cultural Interfaces in Academic Setting and Beyond* (pp. 35–50). Katowice: University of Silesia Publishers.
- Webb, B. (2015a). Bilingualism in the classroom: European students in Australia. In: K. Ożańska-Ponikwia & B. Loranc-Paszyk (eds.), *Cross-cultural perspectives on bilingualism and bilingual education* (pp. 39–68). Bielsko-Biala: University of Bielsko-Biala Academic Publishers.
- Webb, B. (2015b). University as a Global Educational Community. The role of an institution from an international student perspective. In: K. Ożańska-Ponikwia & J. Pacuła (eds.), *W kontakcie. Język i komunikacja* (pp.78–107). Bielsko-Biala: University of Bielsko-Biala Academic Publishers.

- Wierzbicka, A. (1999). *Emotions across Languages and Cultures: Diversity and universals*. Cambridge: Cambridge University Press.
- Wierzbicka, A. (2004). Bilingual lives, bilingual experience. *Journal of Multilingual and Multicultural Development*, 25(2–3), 94–104. (Preface to the Special edition on “Bilingualism and emotions” edited by J.-M. Dewaele & A. Pavlenko).
- Wierzbicka, A. (2009). Language and metalanguage: Key issues in emotion research. *Emotion Review*, 1(1), 3–14.
- Wytykowska, A. & Petrides K.V. (2007). Inteligencja emocjonalna jako dyspozycja. Polska adaptacja skali do badania inteligencji emocjonalnej jako cechy: TEIQue Petridesa i Furnhama. *Psychologia, Edukacja i Społeczeństwo*, 4(1), 97–110.
- Young, R. (1999). Sociolinguistic approaches to SLA. *Annual Review of Applied Linguistics*, 19, 105–132.







Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 53–61  
DOI: 10.19265/KP.2019.11253



## ORIGINAL ARTICLE

Received: 18.02.2019

Accepted: 8.03.2019

Olena Sukhenko

ORCID iD: 0000-0001-6620-9278

Taras Shevchenko National University of Kyiv, Ukraine

olena.sukhenko@gmail.com

## FOSTERING LEARNER AUTONOMY: SELF-EVALUATION IN ENHANCING ENGLISH WRITING SKILLS

WSPIERANIE AUTONOMII UCZNIA:  
SAMOOCENA W DOSKONALENIU UMIEJĘTNOŚCI  
PISANIA W JĘZYKU ANGIELSKIM

### Keywords:

learners' autonomy,  
self-evaluation,  
English writing skills,  
autonomy upbringing

**Summary:** The article is dedicated to the problem of teaching learners to be responsible for their academic achievements. An independent and autonomous student is a peer partner of a teacher in the teaching and learning processes. The author suggests a self-evaluating technique which enables the learner to develop an attitude and gain experience with autonomy and investigates the role of autonomy in enhancing the English writing skills of students in Ukrainian secondary schools. The self-evaluating technique consists of three steps, with the first involving self-assessment of formal writing skills by the students themselves. The second step presupposes self-evaluating activity on enhancing English writing skills. The final step involves the self-evaluation of enhanced writing skills. According to the purpose and the outcomes of the research, the assessment-and-evaluation tasks gave students the opportunity to develop their learners' autonomy and independence. The participants

**Słowa kluczowe:**  
autonomia  
uczących się,  
samoocena,  
umiejętność pisania  
po angielsku,  
wychowanie  
autonomiczne

of the research were 4 teachers and 40 ninth-grade students from Ukrainian secondary schools.

**Streszczenie:** Artykuł poświęcony jest problemowi nauczania uczniów odpowiedzialności za swoje osiągnięcia naukowe. Niezależny i autonomiczny uczeń jest równym partnerem nauczyciela w procesach nauczania i uczenia się. Autor artykułu proponuje technikę samooceny, która pozwala uczniowi rozwinąć samodzielność i zdobyć autonomię, oraz bada rolę autonomii w poprawie umiejętności pisania w języku angielskim wśród uczniów ukraińskich szkół średnich. Zaproponowana technika samooceny składa się z trzech etapów, z których pierwszy obejmuje samoocenę formalnych umiejętności pisania przez samych uczniów. Drugi krok zakłada samoocenę w zakresie doskonalenia umiejętności pisania po angielsku. Ostatni krok obejmuje samoocenę ulepszonych umiejętności pisania. Zgodnie z celem badań, zadania związane z samooceną dały uczniom możliwość rozwijania autonomii i niezależności. Uczestnikami badania było 4 nauczycieli i 40 uczniów dziewiątej klasy ukraińskich szkół średnich.

## Introduction

An independent learner is one who critically analyzes not only the learning information and tasks, but also the outcomes of his/her cognitive efforts. A student's autonomy depends much on the maturity of such character traits and abilities as relying on intrinsic motivation, accepting responsibility for one's academic achievements and reflective self-management in learning; success in learning strengthens the student's intrinsic motivation. Autonomy, according to Henri Holec, is not an innate quality but should be developed/learned in the process of personal development as well as through formal learning (Holec, 1981, p. 3). Therefore, the skill of monitoring and evaluating one's learning achievements is the necessary goal of certain teaching strategies which aim at creating the environment for fostering a learner's autonomy and promoting autonomous and independent learning activity. Overall, learning autonomy is a multicomponential phenomenon; as suggested by Tassinari, it is

a meta-ability – “komplexe Metafähigkeit” (Tassinari, 2012, p. 13). Its evident manifestation is expressed by a competence, a skill and an act which can be implemented and shown by a learner in certain learning contexts and situations.

## Literature overview

The teaching and development of autonomy in language learning demands the involvement of several types of activities which are grounded on a number of fundamental principles: learner involvement, learner reflection, target language use (Little, 2007). Such activities include the following: teacher activity necessary for sharing with a learner the responsibility for his/her academic outcomes; mutual learner and teacher activity aimed at monitoring and evaluating the learning process; teacher participation (providing) and learner participation (using) communication in the target language. Terry Lamb emphasizes that learner autonomy seems to be the product of the efforts of both the learner and the teacher in order to learn something new, including from each other (Lamb, 2007, p. 269). Therefore, autonomy can't be viewed discretely as a separate activity of one participant of the learning process, but always as a common construct of a teacher's and learner's activities.

As a result of scientific modelling, meta-ability is seen as the unity of autonomy elements including competency and performance (Tassinari, 2010, p. 203). In the perspective of such understanding, the responsibility for a learner's autonomy belongs to both the teacher and the learner (Nasonova, 2009). The teacher's role in this respect is to appropriately choose the teaching strategy, apply certain techniques, investigate and take into account the possible dynamics of the learning process (Mackey, 2006). In the process of foreign language learning, Ernesto Macaro defines specific autonomy components: autonomy of language competence, autonomy of language learning competence, autonomy of learner choice (Macaro, 2007).

## Objective and tasks

An autonomous language learner should possess a language competence specific for his/her linguistic personality, implying the ability to independently and appropriately use certain language learning strategies. Consequently, such skills can be developed with the help of teaching strategies. Thus, this study looked at fostering and developing learners' autonomy by means of

self-evaluation. *Research tasks*, accordingly, are the following: to test the efficacy of certain self-evaluating techniques and to define the influence of self-evaluation procedures on the process of the development of the students' writing skills.

## Method

In the given research, we have substantiated and implemented the tasks related to certain steps in evaluating activity during the formative stage of teaching English. According to Tassinari (2012, p. 17), these steps are: elicitation of attitudes and experiences with learner autonomy, the selection of components and descriptors for self-assessment; self-evaluation; feedback on self-evaluation; decisions for further learning. We aimed at reaching a particular level of learner's autonomy in accomplishing the learning tasks, which imply self-evaluating for enhancing English writing skills.

The participants of our research were four (4) teachers and 40 ninth-grade students from four Ukrainian secondary schools: 1) Technical Lyceum NTUU Kiev State Polytechnic (NTUU KPI); 2) Kyiv Specialized School No.102; 3) Lyceum of politics, economics, law and foreign languages of Kyiv; 4) Private Linguistic Gymnasium, Kyiv. The chosen teachers were females with more than 5 years of working experience. All teachers had international certification on the Cambridge English Teaching Framework (one or more of the following: TKT, CELT-S, CELTA, ICALT). They provided suggested tasks for their groups and collected data from the ninth-grade students. All students met criteria for A2+/B1 level. This convenience sample comprised Ukrainians only, including 24 boys and 16 girls. Participants with current A1 or B2 levels of English were excluded from participation.

## Results and discussion

In order to understand the students' needs, we used statistical data on how often teachers assessed different types of written tasks (Figure 1).

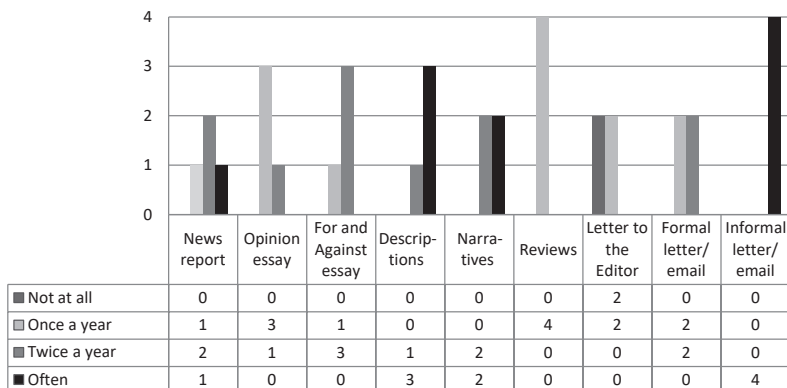


Figure 1.

Types of writing assignments teachers gave students in the 2017–2018 school year.

Source: the author's own research.

As Figure 1 suggests, among this sample of teachers, informal letters/emails were the most commonly assigned writing tasks. Three of four teachers asked their students to write descriptions more than twice a year. Another prevalent type of composition was the narrative – all students practiced writing first-person narratives at least twice a year. Letters to the Editor – along with reviews and opinion essays – were not assigned by teachers on a frequent basis but were assigned at some point at least once during the school year by half of the teachers in our sample. Thus, the least practiced were those assignments which require the students' cognitive skills, particularly, the skill of being able to express a personal opinion, and therefore representing a motivation to develop writing skills.

The teachers' results were then compared with similar answers given by the students concerning their learning needs. To promote independence in the class, we asked each student to select the type of writing tasks they wanted to improve, including some details about their choice. Thus, according to the questionnaire, the students were most interested in writing a *For and against essay*, *Review*, *Opinion essay* and *Letter to the Editor* (33 out of 40 chose these types of writing tasks).

In our research, we limited the amount of tasks, leaving those where the mutual interest from both students and teachers exhibited the feeling of a strong necessity for improving learners' skills in writing.

Self-evaluating techniques comprised three steps: self-assessing formal writing skills by students (Handout 1); self-evaluating activity on enhancing

English writing skills (Handout 2); and self-evaluating the enhancement English writing skills (Handout 3). The examples of handouts are provided below.

*Step 1. Self-evaluating formal writing skills by students (Handout 1)*

What kind of writing do you want to improve?			
opinion essay	letter to the editor	review	formal letters
Why have you chosen this type of writing?			
I think it will be easy to learn.	I think it's a difficult type of writing.	I think I need more practicing.	I don't know.
What areas do you think you need to work on?			
Task completion	Coherence	Vocabulary	Grammar
Thinking of ideas.	Organizing ideas.	Using advanced vocabulary.	Becoming more accurate.
Style.	Paragraphing.	Using more idioms/ phrasal verbs.	Using a greater range of grammar.
Including all the information.	Structuring the writing.	Using a range of vocabulary (synonyms).	Using of the passive formal constructions.
Writing more (or less).	Guiding the reader.		
Writing fluently (quickly).			
Paraphrasing and summarizing.			

This task was useful both for students to determine their weaknesses and for teachers to consider each answer and category so as to help students develop their strengths.

*Step 2. Self-evaluating activity on enhancing English writing skills (Handout 2), created according to the model Assessing Language Learning Activity (Evans, 2017, p. 15).*

Define the activities which in your opinion will help enhance your skills in writing a review, an opinion essay and a letter to the editor: very significant, significant insignificant
1. Brainstorming for ideas for the selection of written tasks
2. Reading sample texts carefully and underlining the key words.
3. Editing the composition, correcting any spelling, punctuation, grammar errors.
4. Writing the composition in the correct style.
5. Joining ideas and various writing techniques to make your piece of writing interesting.
6. Plan the layout of the writing.
7. Using appropriate vocabulary, linking words/phrases.

At the pre-writing stage, the teachers took into consideration the results of the student's self-evaluation: a set of preparatory lessons were conducted, becoming the instrument of successful autonomy development. These were followed by the tasks of writing a Review, an Opinion essay, a Letter to the editor on the topics defined in some assignments while working in class (brainstorming, conversations in classroom).

*Step 3. Self-evaluating progress in enhancing English writing skills (Handout 3)*

Define which skills you have developed while accomplishing the written tasks: to describe, to clarify, to compare, to expand the text, to follow genre requirements;  
 Assess your work for the written assignments according to the following criteria: grammatical accuracy (max 3), meeting the requirements (max 3), abundance of TL vocabulary (max 3), coherence (max 3);  
 Define what items are difficult to be assessed (very difficult, difficult, not difficult): your writing skills, the level of interest-provoking quality of the task, the usefulness of a written activity suggested by the teacher;  
 Define which skills of structuring the text of certain formats (Review/ Opinion essay/ Letter to editor) do you lack most: introduction, conclusion, discourse markers, dividing into paragraphs, grammar accuracy.

Following Benson, we used the method of measuring autonomy abilities in the natural context of learning English through written performance (Benson, 2001). The results suggest that clear progress in the development of learner's autonomy was observed in the following activities:

1. Motivating in achieving a higher level of language competence.
2. Structuring the language knowledge.
3. Planning the process of writing.
4. Choosing materials and methods in language learning.
5. Performing.
6. Cooperating.
7. Managing one's own learning.

After the implementation of the 3 steps of self-evaluating techniques, we observed positive changes in overall written production, which further were compared with the criteria of officially accepted assessment grid for overall written production (CEFR, Structured overview, p. 23). The results have shown that 34 out of 40 students displayed an increase in the number of points for written skills, with the marks being in correspondence with those suggested by the Ministry of Education of Ukraine.

Teacher observation confirmed the increase in the development of the level of students' writing skills (Tab. 1).



Table 1  
*Observation of students' English writing skills (frequency out of 40)*

Writing skills	Pre-experimental stage	Post experimental stage
Can write simple isolated phrases and sentences	40	40
Can write a series of simple phrases and sentences linked with simple connectors like "and", "but" and "because"	31	39
Can write discrete elements of text	37	40
Can write not structured text	36	40
Focus on the important information	27	39
Can write straightforward connected text	5	35
Can link a series of shorter discrete elements into a linear sequence.	3	39
Can vary the subjects related to the field of writing	6	34
Can evaluate information and arguments from a number of sources	7	37
Can expand and shorten text	12	34
Can write clear, well-structured text on complex subjects	3	31
Can express reasons and give relevant examples	8	30
Can write an appropriate conclusion	4	32
Can write complex text in an appropriate style	3	30

## Conclusion

Research results show that self-evaluating effectively serves as a tool for the development of all types of autonomy: autonomy of language competence, autonomy of language competence, autonomy of student choice. The proposed self-assessment technique helps students to analyse their own competencies and learning strategies. The self-evaluating technique has become an instrument for teachers to support students' independence.

The changes that have taken place in the general written production of students of Ukrainian secondary schools have shown that 85% of the students participating in the experiment wrote clear, smooth and logically structured texts, never previously written. We associate this fast learning with advanced autonomy skills. This can also prove the idea that students' "active participation in the learning process is not measured by the number of performed exercises and texts that are read (or written), but by the level of involving some cognitive

processes of the brain in learning a foreign language” (Morska, 2017), further stimulated by autonomous study.

When considering the links between self-evaluating in the learning process and the formation of an autonomous and independent language learner, areas which need further investigation include the clarification of components and descriptors of self-evaluation, the organization of various forms of feedback, the establishment of the influence of language learning autonomy on the students’ motivation for further education in other knowledge areas.

## References

- Benson, P. (2001). *Teaching and Researching Autonomy in Language Learning*. Harlow: Pearson Education Limited.
- Common European Framework of Reference for Languages: Learning, teaching, assessment Structured overview of all CEFR scales, <https://rm.coe.int/168045b15e> [accessed 12.05.2019].
- Evans, V. (2017). *Successful Writing. Intermediate*. London: Express Publishing.
- Holec, H. (1981). *Autonomy and foreign language learning*. Oxford: Pergamon.
- Lamb, T. (2007). Learner autonomy and teacher autonomy: Synthesising an agenda. In: T. Lamb & R. Hayo (eds.), *Learner and Teacher Autonomy: Concepts, Realities and Responses* (pp. 269–285). Amsterdam: John Benjamins Publishing.
- Little, D. (2007). Language Learner Autonomy: Some Fundamental Considerations Revisited. *Innovation in Language Learning and Teaching*, 1(1), 14–29.
- Macaro, E. (2007). The shifting dimensions of language learner autonomy. In: T. Lamb & R. Hayo (eds.), *Learner and Teacher Autonomy: Concepts, Realities and Responses* (pp. 47–63). Amsterdam: John Benjamins Publishing.
- Mackey, A. (2006). Feedback, Noticing and Instructed Second Language Learning. *Applied linguistics*, 27(3), 405–430.
- Morska, L. (2017). ESP (English For Specific Purposes) – implications for teaching, *Konteksty Pedagogiczne*, 2(9), 165–175.
- Nasonova, E. (2009). Razvitiye uchebnoy avtonomii studentov neyazykovykh vuzov pri obuchenii inoyazychnomu obshcheniyu. *Vestnik gumanitarnogo fakul'teta Ivanovskogo gosudarstvennogo khimiko-tekhnologicheskogo universiteta*, 4, 318–322.
- Tassinari, M. (2010). *Autonomes Fremdsprachenlernen: Komponenten, Kompetenzen, Strategien*. Frankfurt am Main: Lang.
- Tassinari, M. (2012). Kompetenzen für Lernerautonomie einschätzen, fördern und evaluieren. *Fremdsprachen Lehren und Lernen*, 41(1), 10–24.





Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 63–71  
DOI: 10.19265/KP.2019.11263



## ORIGINAL ARTICLE

Received: 7.02.2019

Accepted: 7.03.2019

Vitalia Primakova

ORCID ID: 0000-0002-8914-6748

Kherson Academy of Continuous Education (Ukraine)  
pran703@gmail.com

Liliya Morska

ORCID ID: 0000-0002-4916-3834

Lviv Ivan Franko National University (Ukraine)  
liliya.morska@gmail.com

## EDUCATING STUDENTS IN A SAFE EDUCATIONAL ENVIRONMENT IN SECONDARY SCHOOLS OF UKRAINE: CURRENT ISSUES AND CHALLENGES

### WYCHOWANIE OSOBY W BEZPIECZNYM ŚRODOWISKU EDUKACYJNYM W SZKOŁACH ŚREDNICH UKRAINY: AKTUALNE PROBLEMY I WYZWANIA

#### **Keywords:**

safe environment,  
educational work,  
the rights and  
freedoms of children,  
educational programs,  
bullying; prevention,  
counteracting vio-  
lence, child safety

**Summary:** The article is devoted to topical issues of the up-bringing of students and pupils, in particular, the organization of educational work in the educational institutions of Ukraine on issues of child safety and well-being. Strategic national priorities are described in the paper, among them, the implementation of the State Social Program “National Action Plan for the Implementation of the UN Convention on the Rights of the Child” for the period until 2021, and its main principles and statements, goals and objectives have been analyzed. Modern approaches to the process of counteracting violence in the school environment have been outlined; issues

**Słowa kluczowe:**  
bezpieczne  
środowisko, praca  
wychowawcza, prawa  
i wolności dzieci,  
programy wycho-  
wawcze, znęcanie  
się, zapobieganie,  
przeciwdziałanie  
przemocy,  
bezpieczeństwo  
dziecka

ensuring the rights, freedoms and interests of children that are reflected in the concepts of current educational programs have also been substantiated. In particular, the potential of the universal educational program "Personal Dignity. Life Safety. Civic Position" has been defined in the article.

**Streszczenie:** Artykuł poświęcony jest aktualnym problemom wychowania studentów i uczniów, w szczególności organizacji pracy wychowawczej w ukraińskich instytucjach edukacyjnych związanej z bezpieczeństwem dzieci i ich dobrostanem. W pracę wpisano strategiczne priorytety krajowe, w tym realizację Krajowego Programu Społecznego „Krajowy plan działania na rzecz wdrażania Konwencji ONZ o prawach dziecka” do 2021 r. – jego główne zasady i oświadczenia, cel i zadania zostały przeanalizowane. Podkreślono nowoczesne podejścia do procesu przeciwdziałania przemocy w środowisku szkolnym, jak również kwestie zapewniające prawa, wolności i interesy dzieci, które znajdują odzwierciedlenie w koncepcjach obecnych programów wychowawczych. W szczególności zdefiniowano potencjał uniwersalnego programu wychowawczego „Osobista godność, bezpieczeństwo życia, pozycja obywatelska.”

## Introduction

One of the priority-based strategic directions of the national educational policy in Ukraine is considered to be the recognition of the upbringing of the younger generation on a democratic basis which envisages the guarantee of the rights, freedoms and interests of children and youth at school. This has been stated in the Law of Ukraine "On the Protection of Childhood," under which every child is guaranteed the right to liberty, personal integrity and the protection of dignity (Article 10), the Law of Ukraine "On Education," and where even earlier there were regulations guaranteeing similar rights within families and educational and other children's institutions, which focused on the prohibition of humiliating the honor and dignity of the child.

## Statement of the research problem

Today, the spread of destructive manifestations of violent behaviour such as child aggression, bullying, cyber-bullying, etc., is becoming worrisome in our society, particularly, as it relates to schoolchildren.

It is the task of the state and society to take the necessary measures to protect pupils from such phenomena and to prevent or alleviate their negative consequences and the effects of negative factors of influence. Therefore, the need to improve the activities of public and non-governmental organizations in the area of counteracting violence and drawing attention to educational work in institutions of secondary education is becoming more and more urgent. To a greater or lesser extent, various aspects of the problem have been in the focus of a wide range of modern scholars.

Ziaziun, Kremen, Nikonov, Kuzmenko and others have addressed the issues of the humanization of education in the modern globalized world. The influence of upbringing on the development of a creative, intellectual, patriotic personality was covered in the writings of Beh, Kurylo, Lugovy and other researchers. Regarding schools, the problems of the effective functioning and design of a safe educational environment focused on upbringing have been investigated by Absaliyeva, Alekseyenko, Ożańska-Ponikwia, Piekhoty and Sysoyeva. The interconnection of numerous aspects within the problems of preventing destructive manifestations in interactions and relations between the participants in the educational process has been studied by domestic (Gubko, Panasevych, Saveliev, Stelmakh) and foreign scholars (Besag, Peligrini, Roland, Salmivalli, Hezler). They have substantiated the elements, the main statements and principles, causes and possible consequences of the phenomena analyzed. At the same time, the manifestations of violence being observed in the modern educational environment and the contradictory nature of the problems existing in the pedagogical theory and educational practice require the additional consideration of the specifics of the organization of education and upbringing in institutions of secondary education in Ukraine.

Thus, *the goal of the article* is to analyze the current state of problems in the upbringing of young people in a safe educational school environment; to consider the potential organizational perspectives of educational and upbringing work in institutions of secondary education in order to comply with the requirements of legislation on the guarantee of a safe educational space free from violence.

## Key concepts of the research and its findings

The term *school bullying* denotes a range of activities that include the systematic humiliation, persecution or harassment of students, a biased attitude in school, the harassment of students by teachers, and sometimes teachers by pupils (Vorontsova 2017). Teachers, whose main function is not only to share historical and social experience, but above all, to protect their charges' lives and health, should be appropriately prepared to timely and professionally respond to situations of school violence.

A safe educational environment is understood as being the space of safe interaction between children and adults in an educational institution where an atmosphere of physical comfort and a favourable social and psychological climate has been created, a place where all participants in the educational process are protected from violence and abuse and where every person, with due respect to his/her peculiarities, can expect support (Tsiuman & Boichuk, 2018, p. 27). Ożańska-Ponikwia (Ożańska-Ponikwia, 2017, p. 49) claims that "Implementation of the positive psychology into the classroom setting should facilitate both achievement and accomplishment among our students." Recently, more and more often, state schools have been experiencing situations that can be characterized by manifestations of the aggressive behaviour of children, a negative attitude toward each other, harassment, bullying, beating. Awareness should be raised regarding the need for decisive and reasonable actions on the part of educational institutions, the state and society to improve the situation by preventing the above-mentioned manifestations.

Large-scale work to this effect is currently being carried out in Ukraine. In particular, this has been reflected in the modernized normative-legal framework on counteracting violence and the content of the adopted national programs and corresponding strategies as applied in the activity of institutions of secondary education. We also see this in models of prevention of the above-mentioned phenomena and the implementation of a system of measures, including specially developed mechanisms for responding to violent cases, and the content of manuals with methodical instructions, information and educational data on the specified problem.

Last year, the Cabinet of Ministers of Ukraine approved the State Social Program – "National Action Plan for the Implementation of the UN Convention on the Rights of the Child" – for the period up to 2021 (Decree No. 453, dated May 30, 2018). The content of the main statements of the document clearly

outlined the purpose and the objectives of the program. The causes of negative manifestations of violence were analyzed, the forms and features of such phenomena were described and relevant statistical data were provided (Derzhavna Sotsialna Prohrama, 2018). The content and the materials of the document have been processed and disseminated to all levels of the field of education and supplemented by informational materials on the issues of the safety and welfare of the child. As a result, the essential educational and upbringing potential of the organization of upbringing work in educational institutions was analyzed through the use of methodical means for solving the defined problems.

The developers found that prior to solving the problems of counteracting school violence, thorough work in the spiritual, moral, intellectual, ethical and civic education of children and youth should be carried out, since a free, tolerant person, motivated to understand the world and encouraged to create new values, both material and spiritual, will establish a humanistic setting and world-view ideas that *a priori* make manifestations of groundless aggression and negative behavior impossible. Specialists on the issues of the upbringing of the younger generation have been advised to implement such productive forms of work with children and youth as round table discussions, debates, brainstorming sessions, essays on relevant topics, and creating and implementing social projects relating to assisting the elderly, people with disabilities, children deprived of parental care, etc. The efficiency of the upbringing efforts should also be enhanced by the use of specially created videos on related topics.

The projects based on the materials of the motivational meetings held by Nick Vuichic with adolescents, teachers and parents and then posted on the website of the Ministry of Education and Science of Ukraine could serve as an example of such educational activities (Vujchych, 2014).

Nick Vujicic (full name Nicholas James Vujicic), born without arms and legs, is a Christian preacher, motivational coach and director of the non-profit organization *Life Without Limbs* (Seon-eon Jeong, 2010). Among the main issues that he offers for discussion with the Ukrainian audience, are the following: frank conversation about values, the readiness of a person for change, sources of love for those who humiliate, a live survey on bullying, tips on combating this phenomenon in schools, the problem of suicide among adolescents, reasoning about helping oneself while rescuing others, etc. (Vujchych, 2014). Therefore, combating negative manifestations of violence in schools must begin with the understanding of the content of the analyzed phenomena, realizing the nature of key concepts and a person's attitude to them.



## Discussion

Most often, problems of violence in the school environment arise on the level of interpersonal communication, with conflicts between children, misunderstandings in child-parent relations, between friends, teachers and other people being among the main causes. A wide range of manifestations of psychological and emotional violence, such as being ignored, humiliated, threatened, experiencing abusive attitude, etc., require systematic work within the school educational space in order to prevent or timely respond to possible vulnerable situations.

According to the results of "School Violence," a study carried out in early 2000s covering four regions of Ukraine (Kyiv, Kirovograd, Vinnytsa and Cherkasy), one-third of pupils from 20 schools (ranging from 24% to 37%) suffered physical or psychological violence at school (Stelmakh, 2011, p. 432).

According to a UNICEF survey, within a three-month period in 2018, 67% of children in Ukraine aged 11 to 17 were affected by school bullying. Also, 24% of children appeared to be the victims of this phenomenon, and 48% of them did not share information about being bullied with anyone (UNICEF, 2015). The above-mentioned data indicate that bullying is fiercely spreading. Analysts have estimated that shy pupils with exemplary behaviour are the most frequent victims of bullying; pupils who are communicatively restrained for various reasons, as well as schoolchildren from low-income families can be added to this list. The dynamics of the growth of such manifestations are worrisome, thus, concrete, effective steps to improve the current condition of children should be taken immediately.

Bullying as a form of violence can be characterized by manifestations of aggressive behaviour in relation to a person or group of individuals. Usually, a person who humiliates or demonstrates dominance over others seeks physical or psychological self-affirmation (Absalamova, 2013, p. 68). The period of self-affirmation of the individual, according to data provided by developmental psychology, coincides with adolescence, sometimes with pre-adolescence, so the problem of school-based bullying among this age category has sparked the highest interest among scholars.

The pedagogical staff of institutions of secondary education should be capable of identifying, predicting and defusing dangerous situations. They should be aware of the mechanisms of response and intervention procedures, implementing them when necessary to solve problems in particularly vulnerable situations.

In such cases, it is important to act promptly, clearly distinguishing priorities in their actions in relation to a particular situation. Such actions include a general assessment of the situation, considering the consistency and feasibility of steps in solving a particular problem, understanding the causes and anticipating the consequences of the actions of each participant in a difficult situation, applying one's knowledge of the law and relevant documentation, etc. Each problem situation (conflicts between pupils, bullying, aggression from parents, guardians, teachers, etc.), if not avoided in an appropriate way, should be solved reasonably, that is, positively, to the greatest extent possible and in the shortest time possible.

### ***Possible Solutions***

To solve such issues, Ukrainian teachers have developed a universal upbringing program for adolescents and students "Personal Dignity. Life Safety. Civic Position" and a set of methodological resources.

The purpose of the program is to prevent and overcome destructive manifestations in society development and to promote the self-knowledge, self-realization, self-affirmation and self-improvement of one's personality. The tasks of the program include: the development of responsible and safe behaviour skills, such as the ability to make adequate decisions in various and difficult life situations; the development of a civic life position among children and pupils; enriching the intellectual and creative potential of pupils; the development of abilities and talents for the sake of a person and society (Osobysta Hidnist. Bezpeka Zhyttia. Hromadianska Pozytsia, 2012, p. 14). To implement the program in institutions of secondary education, special multi-stage teacher training is required.

The institutions of postgraduate education have taken responsibility to fulfil this task. Current in-service teachers go through special training in counteracting destructive manifestations of violence in the family and at school. Such training is carried out during the course of continuous professional development programs and in the intersession period by means of seminar attendance. Apart from a document certifying their preparation to carry out such instruction, teacher-trainers receive materials that are thoroughly processed during the study program. There are also electronic versions (remote, on-line courses) of methodological recommendations, curricula for forms 7–11 pupils, additional materials, etc.

Initially, the Ukrainian Child Welfare Fund presented the Program ("Personal Dignity. Safety of life. Civic Position") and methodological materials for

educational work with forms 7–11 pupils specifically for the implementation of the educational and preventive component of the project “Prevention of human trafficking through the development of social work and community mobilization” (Osobysta hidnist. Bezpeka Zhyttia. Hromadianska Pozytsia, 2012, p. 54). While being studied and applied practically by teachers, the program was acknowledged to be universal, which implies its applicability in the field of the prevention of all destructive manifestations in modern educational and social spaces. It was also mentioned that its content is oriented towards the development of pupils’ key values and necessary vital competencies.

The Program and methodical materials were approved by the Ministry of Education and Science of Ukraine and recommended for implementation in institutions of secondary education.

Information on the activities of the National Action Plan Against Violence is of vital importance today for dissemination in educational institutions. In this way, educators, children and parents have the opportunity to obtain necessary information about the signs and manifestations of violence and the rules of response to such situations. Consultations and recommendations are provided by highly skilled psychologists and social workers acting as agents of implementation of the above-mentioned Program.

## Conclusions

Consequently, modern schools should provide a safe environment for education, upbringing and personality development in which all participants of the educational process should feel physically and psychologically comfortable and where they can develop a positive attitude towards themselves and others, gain an adequate understanding of the world around them and sustainable skills for tolerant behaviour, constructive communication and solving educational and life problems. To do this, children should be taught to avoid conflicts, solve tasks creatively and find their way out of difficult life situations. In their turn, the state and society should take care of creating a safe and humane developmental environment in institutions of secondary education.

## References

- Absalamova, K.Z. (2013). Особливості соціального статусу, соціальних ролей та альтруїзму у підлітків, що використовують булінг у відносинах [Osoblyvosti sotsialnoho status, sotsialnykh rolej ta altruizmu u pidlitkiv, shcho vykorystovuyut bullying u vidnosynach]. *Соціальна психологія [Sotsialna psychologia]*, 55, 65–76.
- Derzhavna sotsialna prohrama “Natsionalny plan dij shchodo realizatsii Konventsii OON pro prava dytyny,” na period do 2021 roku (postanova #453 vid 30 travnia 2018 roku)], <http://zakon3.rada.gov.ua/laws/show/2402-14/ed20120601> [accessed: 21.12.2018].
- Osobyista hidnist. Bezpeka zhyttia. Hromadianska pozytsia. (2012). Програма виховної роботи з учнями з питань протидії торгівлі людьми [Prohrama vychovnoi roboty z uchniamy z rupan protydii torhivli liudmy; I.D. Zvierieva, Zh.V. Petrochko eds.]; наук. кер. та ред. І. Д. Звереві та Ж. В. Петрович, К.: ТОВ «Основа».
- Ożańska-Ponikwia, K. (2017). Positive psychology in the classroom setting from the point of view of the pre-service teachers, *Konteksty Pedagogiczne*, 2(9), 49–57.
- Seon-eon, J. (2010). Courage is contagious, says Vujicic. *JoongAng Daily*.
- Stelmakh, S. (2011). Булінг у школі та його наслідки [Bullying u shkoli ta yoho naslidky]. In: В.І. Сипченка (ред), *Гуманізація навчально-виховного процесу: збірник наукових праць [Humanizatsia navchalno-vychovnoho protsesu: zbirnyk naukovykh prats]*, Вип LVI. Слов'янськ: СДПУ.
- Tsiuman, T.P., Boichuk, N.I. (2018). Кодекс безпечного освітнього середовища [Kodeks bezpechnoho osvitniogo seredovyscha]: метод. посіб., Київ.
- UNICEF. (2015). Булінг – важлива проблема для дітей в Україні. ЮНІСЕФ розпочинає кампанію проти булінгу [Bullying – vazhlyva problema dla ditei v Ukraini. UNICEF rozpochynaye kampaniyu proty bulinhu], <https://unicef.org> [accessed: 20.01.2019].
- Vorontsova, E. (2017). Профілактика та подолання булінгу у закладах освіти [Profilaktyka ta podolannia bulinhu u zakladach osvity], <http://xn--d1acjtrgde.kiev.ua/2017/08/24/profilaktika-ta-podolannya-bulinguu-zakladach-osviti/> [accessed: 26.10.2018].
- Vujicic, N. (2014). Безпечна школа [Bezpechna shkola], <https://mon.gov.ua/ua/osvita/zagalna-serednya-osvita/protidiya-bulingu/bezpechna-shkola-nik-vujchich-video> [accessed: 2.02.2019].





Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 73–87  
DOI: 10.19265/KP.2019.11273



## ORIGINAL ARTICLE

Received: 8.10.2018  
Accepted: 30.10.2018

Karol Konaszewski

ORCIDiD: 0000-0003-1362-4245  
University of Białystok  
k.konaszewski@uwb.edu.pl

Sebastian Rutkowski

ORCIDiD: 0000-0002-8504-0129  
Education and Social Readaptation Youth Centre in Goniądz  
srutkowski@skryba.media.pl

Alfred Tuci

ORCIDiD: 0000-0002-6147-7422  
Maria Grzegorzewska Academy of Special Education in Warsaw  
fredi72@live.com

## IDENTIFICATION WITH SELECTED EDUCATIONAL ENVIRONMENTS AND INTENSIFICATION OF ANTISOCIAL BEHAVIORS IN THE GROUP OF JUVENILES PLACED IN YOUTH EDUCATIONAL CENTERS

IDENTYFIKACJA Z WYBRANYMI ŚRODOWISKAMI WYCHOWAWCZYMI A NASILENIE ZACHOWAŃ ANTYSPOŁECZNYCH W GRUPIE NIELETNICH UMIESZCZONYCH W MŁODZIEŻOWYCH OŚRODKACH WYCHOWAWCZYCH

**Keywords:**  
sense of identification, educational environments, youth, antisocial behaviors

**Summary:** The study was to determine the correlation between the level of antisocial behaviors and the sense of identification with selected educational environments in the group of socially maladjusted youth. A total of 481 residents of Youth Educational Centers participated in the study. The focus was on the sense of identification with the chosen educational environments in

**Słowa kluczowe**  
poczucie identyfikacji,  
środowiska  
wychowawcze,  
młodzież,  
zachowania  
antyspołeczne

the context of manifested antisocial behaviors. It turned out that, regardless of the intensity of antisocial behaviors, the sense of familial identification is always equally strong. In the case of the sense of identification with a peer group, a certain regularity can be observed. The higher the intensity level of antisocial behavior, the stronger the sense of peer identification. However, when the sense of identification with school is strong, the intensity of antisocial behaviors decreases.

**Streszczenie:** Celem badania było ustalenie związku między poziomem zachowań antyspołecznych a poczuciem identyfikacji z wybranymi środowiskami wychowawczymi w grupie młodzieży nieprzystosowanej społecznie. Ogółem przebadano 481 wychowanków młodzieżowych ośrodków wychowawczych. Skupiono się na poczuciu identyfikacji z wyróżnionymi środowiskami wychowawczymi w kontekście przejawianych zachowań antyspołecznych. Okazało się, że niezależnie od nasilenia zachowań antyspołecznych poczucie identyfikacji rodzinnej zawsze jest tak samo silne. W przypadku poczucia identyfikacji z grupą rówieśniczą można zaobserwować pewną prawidłowość. Im wyższy poziom nasilenia zachowań antyspołecznych, tym silniejsze poczucie identyfikacji rówieśniczej. Natomiast w przypadku poczucia identyfikacji szkolnej wraz z nim nasilenie zachowań antyspołecznych maleje.

## Introduction

The humanist perspective of Urie Bronfenbrenner's Ecological Systems Theory (1976a, 1979, 1988) draws attention to a specific type of system (which can be defined as an exchange) involving the individual and his or her life environment. This interaction can take place within a defined microsystem, for example, within a family, between parents and their child. The author focuses on the problems of the social and physical environment that affect human development. He observes that different theoretical approaches focus on the characteristics of the individual, and only some on the characteristics of the environment in which the individual lives. Human existence does not take place in a single environment, but in a system of different places and as

a result of many social interactions (Bańka, 2002, p. 92). Such places include, *inter alia*, one's family, peer group, school and the other environments with which the individual interacts.

In the literature on the subject, Bronfenbrenner (1976b, 1979) is seen as the creator of the theory of place, since he was the first to point out that place is a product of the mental processes occurring in the individual, social interaction processes and the physical properties of the environment. For this reason, some researchers (Kemp, Whittaker & Tracy, 1997; Dubois & Krogsrud, 1999) emphasize the importance of the environment in human life and the process of mutual adjustment of the individual and his or her environment. In order to understand human mental development, Bronfenbrenner (1979, 1988) proposes looking at the environment of human life holistically, taking into account the physical, intra-mental and socio-cultural environment. To discern the role of the environment in the process of shaping young people's behaviors, attitudes and identities, it is necessary to look at their development in the "ecological" dimension and determine what kind of relations take place among them (Brzezińska, 2000, pp. 187–188). Bronfenbrenner (1979, 1988) explains this approach with the need to present hierarchically ordered structures that contain each other and between which there are a number of different patterns of behavior. This stance suggests that the term "environment" is understood as a place with a number of physical properties, in which particular family members participate, undertaking certain types of activity and fulfilling their roles for a certain period of time. The author describes the social environment of development as a system of mutually dependent subsystems permeating and supplementing each other. This approach emphasizes the dynamism and relations between the person and his or her environment. The researcher treats the environment as a certain system, the whole of material and non-material conditions that are connected and interacting (Bronfenbrenner, 1979, 1988).

Psychology recognizes the importance of the environment where a human develops; this environment is defined as "any event outside the body that may affect the development of the body and over which the body may also have an impact" (Brzezińska, 2000, pp. 188–190). The environment of human development is described as relations between people and, in the case of the issue discussed here, the relationship between the formation of behaviors and educational environments such as the family, peer group and school. Analyzing the influence of the environment on the actions of an individual, Bronfenbrenner (1976a, 1976b, 1979) emphasizes that each person perceives and interprets



his or her environment individually, and “their reality” is defined as the space in which they undertake various actions, alone or through interaction with other people. The influence of the environment may be direct, i.e., related to what kind of interactions the individual enters into in a given place and with whom. The environment may also influence a person’s life indirectly, i.e., even though the person does not participate in certain events and situations and is not present on the spot, they are affected by them through other participants. Certain events and situations may also create conditions for both the individual and the people associated with him or her to act. In the course of their lifetime, people change the environment, take on new challenges and interact in different ways. These are the so-called ecological transitions/shifts, which – according to the author – constitute the key moments of human development.

According to the Ecological Systems Theory, the individual and his or her living environment interact bidirectionally (Izdebska, 2000, p. 26). The ecological perspective depicts the environment as a place where the individual develops and where particular intended as well as unintended influences of the family, peer group and school occur. This approach emphasizes the relationship between humans and their environment and shows its effects on individuals in different aspects of life. To a significant degree, this relationship can shape behavior, including, as in the case discussed herein – antisocial behavior. Moreover, the theory described above makes it possible to search for the sources and factors influencing antisocial behavior in particular environmental spheres and to analyze them.

### **Methodological assumptions of own research**

The aim of the study was to establish a correlation between the level of antisocial behavior and the sense of identification with selected educational environments in a group of socially maladjusted youth. It was assumed that the phenomenon of identification with a group is one of the key socio-cultural issues in adolescence, and identification, which is based on the individual’s perception of him- or herself as a member of a group, is connected with the emotional sense of belonging to a specific group. On the other hand, the question of “Who am I?” – a constitutive question for the identification of a human being – can *de facto* be more precisely answered when followed by different ones: “Where do I belong?” and “Which social groups do I identify with?” In the social dimension, finding an answer to the main question regarding one’s

identity determines the stability of the subject and the cohesion of behavior in subsequent situations as well as the integration of one's own self. Paying attention to a wider spectrum and different levels of shaping the sense of identification is dictated by the search for a possible relationship between environmental influences – the microsystem of family-home, peer groups and school – and the intensification of antisocial behavior. It seems that the approach to the formation of one's own self requires taking into account the interactions within his or her microsystem, i.e., the relationship between the individual and his or her parents, teachers, peers, as well as aspects related to their functioning in a wider social context – in this case, with manifestations of demeanor that does not comply with social norms.

The selection of the study group was partly purposive and partly accidental. The criterion for purposive sampling was the type of institutions in which the respondents were placed by the family court. The accidental sampling referred to the rehabilitation centers (Youth Educational Centers). Twelve institutions (Goniądz, Borowie, Otwock/Józefów, Puławy, Różanystok, Kolonia Ossa, Kolonia Szczerbacka, Rusinów Konecki, Wola Rowska, and centers on the following streets in Warsaw: Strażacka, Dolna, Patriotów) from all over Poland were selected for the survey. The sample was determined by the character of the population (finite) and its specificity (youth who had been placed in Youth Educational Centers by departments of family services and juvenile district courts). The necessary sample size  $n_b = 390$  was determined for the population of wards in Youth Educational Centers (when selecting the sample, only youth within the intellectual norm were taken into account) with a confidence factor of 0.90 and a maximum error of 4% (Brzeziński, 2004). Taking into account these calculations, a total of 481 wards from Youth Educational Centers were surveyed (the research included those wards who gave their consent). A small majority of the respondents were boys – 54% (258), while girls constituted 46% (218) of the respondents. Five pupils did not indicate a gender. The data obtained indicate that the age ( $M = 16.34$ ,  $SD = 0.97$ ) of the respondents was between 14 and 18. The largest group of respondents were persons aged 16 (36.4%) and 17 (36.0%), followed by 15 (13.3%). The least numerous groups were respondents aged 18 (10.0%) and 14 (4.2%). The towns and centers in which the research was conducted are presented below (Table 1).

Table 1

*Summary of the surveyed centers and percentage share of wards in each of the Youth Educational Centers*

Name of the Youth Educational Center (Młodzieżowy Ośrodek Wychowawczy)	Number of questionnaires completed	Participation in the sample
Youth Educational Center, Goniądz	49	10.2%
Youth Educational Center, Borowie	16	3.3%
Youth Educational Center, Otwock/Józefów	29	6.0%
Youth Educational Center, Kolonia Ossa	45	9.4%
Youth Educational Center, Kolonia Szczerbacka	64	13.3%
Youth Educational Center, Puławy	46	9.6%
Youth Educational Center, Różanystok	57	11.9%
Youth Educational Center, Rusinów Konecki	34	7.1%
Youth Educational Center, Wola Rowska	27	5.6%
Youth Educational Center, Warsaw, Strażacka street	35	7.2%
Youth Educational Center, Warsaw, Dolna street	15	3.1%
Youth Educational Center, Warsaw, Patriotów street	30	6.2%
ND (No Data)	34	7.1%
All	481	100%

Source: Konaszewski, 2016 and the authors' own research.

In the research, the method of diagnostic survey was applied, in which the questionnaire technique was used. According to L. Pytka, the term “social maladjustment” is a mental shortcut meaning various anti-social behaviors. Therefore, it can be assumed that these are behaviors of children and adolescents that are in conflict with the existing norms of social coexistence. These behaviors are accompanied by negative social reactions because of their demonstrable social harmfulness and involve violating ideals and legal norms, breaking moral and ethical standards or causing suffering of the social environment. In order to determine the picture of faulty social functioning, the Social Maladjustment Scale (hereinafter abbreviated as SNS according to its

Polish name, i.e., *Skala Nieprzystosowania Społecznego*) devised by L. Pytką was applied to study young people aged 13–17. The SNS consists of six subscales. The subscale used in the research was an Antisocial Behavior Scale (hereinafter abbreviated as ZA according to its Polish name, i.e., *Zachowania Antyspołeczne*). This subscale consists of 10 categories describing the characteristics of social behavior. A three-tier scale (0, 1, 2 points) is used to describe the severity of each characteristic. A 0-point value is assigned to statements describing normal, socially desirable characteristics. The 1- and 2-point values are assigned to statements describing moderate and significant degrees of intensity of negative behavioral characteristics, respectively. The basis for determining the type and level of social maladjustment is the sum of points obtained in individual partial scales.

The sense of identification has been operationalized as the processes of identifying and identifying oneself. The former is the process of self-recognition resulting from perceiving oneself as an object of cognition. The latter is the phenomenon of subjective affiliations, i.e., striving for becoming part of the community, experiencing a sense of connection with the social world. Subjective identification is the search for and feeling of community or unity (Jarymowicz, 2002, p. 110). Moreover, based on A. Kłosowska's assumptions (2012) that an individual is a member of many groups and communities, for example, the family, nation, target groups and many other communities, and that a person identifies him- or herself with various communities to a different degree, the respondents were asked to answer the following questions:

- To what extent do you identify with your family?
- To what extent do you identify with your peer group?
- To what extent do you identify with the school?

To diagnose the intensity of identification within a group, a scale from 1 – “I do not identify myself at all” – to 5 – “I identify myself to a large extent” – was used.

In order to confront the independent variable, i.e., the intensity level of antisocial behaviors with the sense of identification with educational environments, three intensity levels of antisocial behaviors were distinguished on the basis of sten scores: low ( $N = 75$ ), medium ( $N = 130$ ) and high ( $N = 276$ ); moreover, three levels of identification were distinguished: with the family (weak  $N = 21$ , medium  $N = 36$ , strong  $N = 424$ ), with the peer group (weak  $N = 43$ , medium  $N = 164$ , strong  $N = 274$ ), and the school (weak  $N = 91$ , medium  $N = 173$ , strong  $N = 217$ ). The obtained results were divided into

percentiles, namely, weak identification level – below 1.7, strong identification level – 3.4 and above, and medium identification level – from 1.7 to 3.3.

To verify the relationship between the sense of identification with selected educational environments and the intensity level of antisocial behavior, the non-parametric Chi-squared test ( $\chi^2$ ) was applied.

## Results of own research

The study was intended to establish a correlation between the level of antisocial behaviors and the sense of identification with selected educational environments in the group of socially maladjusted youth. The first attempt to determine the variables was an analysis of the disintegration of the sense of identification with the family and the intensity level of antisocial behaviors. The results are presented in Figure 1.

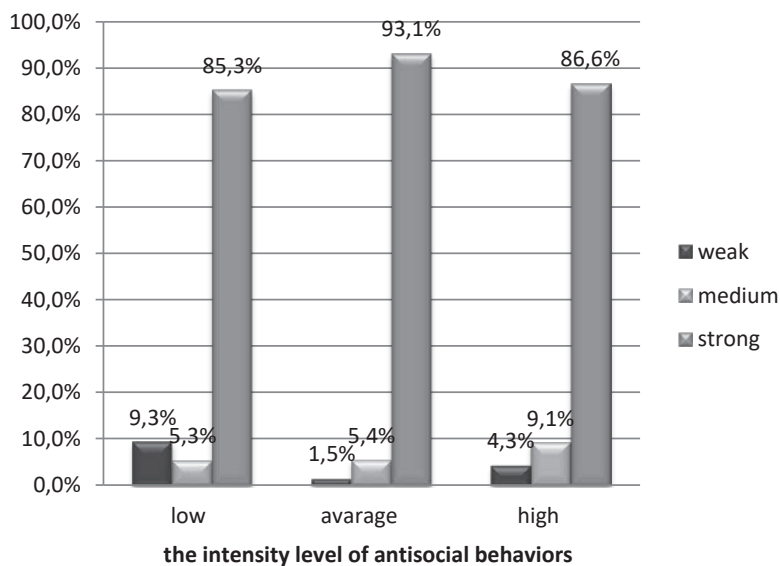


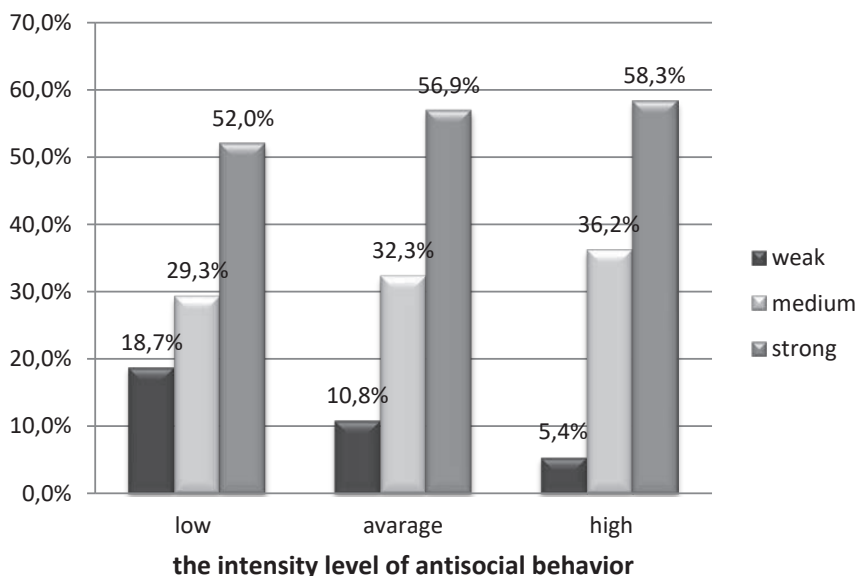
Figure 1.

Sense of identification with the family and intensification of antisocial behaviors.

Source: the authors' own research.

The obtained results show that minors with low, average and high levels of antisocial behaviors feel similarly strongly identified with the families they come from. Strong attachment was shown by over 85% of youth with a low level of antisocial behaviors, 93.1% with an average level and 86.6% with a high level. In order to verify the relationship between the sense of identification with the family and the intensity level of anti-social behavior, the Chi-squared test was used. The results turned out to be statistically insignificant  $\chi^2(4, N = 481) = 9.26; p = 0.055$ , which may indicate that the sense of identification with the family is comparable regardless of the intensity of antisocial behaviors. This means that individuals who manifest different degrees of antisocial behavior feel similar identification with their families. It should be noted that in families of maladjusted youth, one can observe: a lack of positive role models, numerous dysfunctions, unresolved problems, disturbed interpersonal communication and socio-cultural structure, poor knowledge about upbringing and defective and pathological models of parents' behaviors; all of the above factors drastically reduce the level and educational potential of the family environment and negatively affect the course and effects of the psycho-social development of youth (Bębas, 2011, p. 263). A. Bandura also pointed this out, claiming that acquiring criminal and aggressive behavior patterns takes place through direct experience or imitation (Kuć, 2010). It can therefore be concluded that the above-mentioned unfavorable family factors contribute to the emergence of antisocial behaviors, but in the declarations of minors, they do not affect the sense of identification with the family. Family attachment is high in all groups of young people who exhibit varying degrees of antisocial behaviors.

The next dependent variable, which was analyzed in the analysis of disintegration, was identification with the peer group. The results obtained in this area were presented in Figure 2.



*Figure 2.*

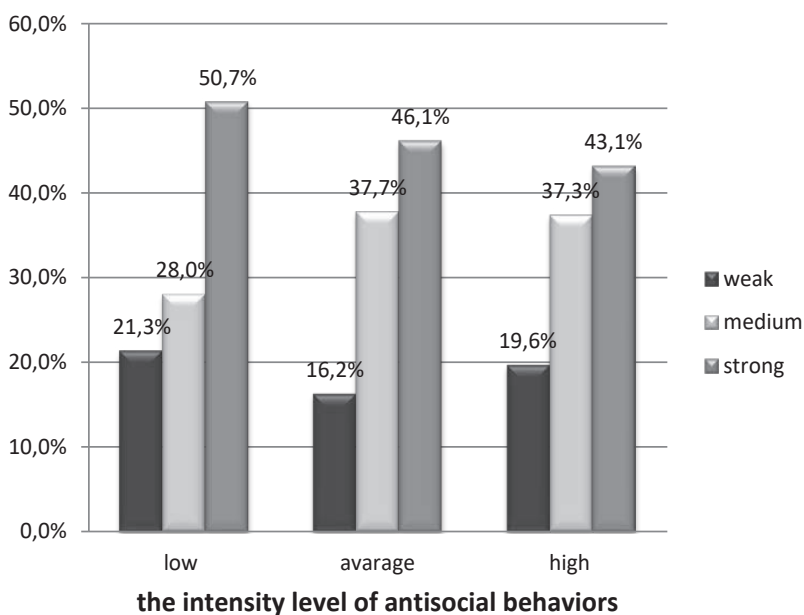
Peer identification and level of antisocial behavior.

Source: the authors' own research.

In the case of a sense of identification with the peer group, a certain regularity can be observed. The higher the intensity level of antisocial behavior, the stronger the sense of peer identification. Thus, in the case of a low intensity level of antisocial behaviors, 53% of minors strongly identify themselves with their peer group, in the case of an average intensity of socially unacceptable behaviors – 56.9%, and in the case of a high level – 58.3% of minors strongly identify themselves with their peer group. The presented relationship turned out to be statistically significant  $\chi^2 (4, N = 481) = 13.43; p < 0.05$ . Stronger peer identification, therefore, contributes to the intensification of antisocial behaviors. Emerging difficulties in the family (growing conflicts between the child and adults) as well as at school (mainly related to education) contribute to the search for acceptance in other social circles. Thus, if a young person encounters failures at school which expose him or her to the disregard and dislike of teachers and students, he or she starts to seek acceptance in an environment in which he or she can count on help and a positive assessment of his or her behavior. Then the peer group, deprived of adult control, represents an

exceptionally attractive value and becomes the environment in which young people seek contact, acceptance and recognition. Such a group is often a group with negative characteristics, and contacts with peers who do not participate in school life result in a rapid deepening of demoralization. It is therefore quite often a dangerous stage in the process of the derailment of minors (Pospiszyl & Żabczyńska, 1981, p. 110). Moreover, building interpersonal relationships in adolescence usually boils down to seeking acceptance among one's peers, often by trying to impress them in a certain way. If the reference point is an environment of peers who prefer antisocial behavioral patterns, this will be at the expense of relations with the school or other educational institutions (Payne & Cornwell, 2007).

In the subsequent stage, a dependent variable, i.e., identification with the school environment, together with an independent variable, concerning antisocial behaviors manifested, were analyzed.



*Figure 3.*

The sense of identification with the school environment and the intensity level of antisocial behavior.

Source: the authors' own research.



In order to verify the relationship between the sense of identification with school and the level of anti-social behavior, the Chi-squared test was also used. The results turned out to be statistically insignificant  $\chi^2 (4, N = 481) = 3.17$ ;  $p = 0.529$ . This may indicate that regardless of the intensity of antisocial behaviors, the sense of identification with the school is comparable. In the case of a sense of identification with the school environment, some proportionality can nevertheless be observed. The lower the level of antisocial behavior, the stronger the sense of identification with the school. Thus, in the case of low levels of antisocial behavior, 50.7% of minors identify themselves strongly with their school. When we look at antisocial behaviorst hat are of an average intensity level, 46.1% of youth are strongly attached to their school. When the level of antisocial behavior is high, the percentage of identification is reduced to 43.1. This is confirmed by research conducted, inter alia, by the Ministry of National Education, which confirms the importance of identification with the school community and the sense of security at school in countering the demoralization and delinquency of minors. At the same time, what is emphasized is the need to develop proper relations within the school environment, to build a friendly environment and encourage identification of students with school (<https://archiwum.men.gov.pl/> [accessed: 21.01.2016]). Such activities certainly help to shape the integrated identity of a young person. He or she can then creatively participate in social life, finding appropriate activities, thanks to which he or she can spend time as constructively as possible.

## Conclusions

Taking into account the sense of identification of young people with the selected environments, one should pay attention to the characteristics of the social group, strictly speaking, its components. According to J. Szczepański, a social group is a group of people (at least three) associated with the following constitutive features (components): goals (tasks), structure (authority, social roles and positions), identification (“we,” “they”) and means of concentration (values, symbols, ideas) (1970). Moreover, H. Muszyński discusses the following mechanisms by means of which the social environment exerts impact on an individual in the process of socialization: the influence of significant persons, based mainly on imitation, modelling, identification; mechanisms of internal strengthening which are secondary to already formed attitudes and habits – they consist in the active assimilation by an individual of certain

beliefs, attitudes, skills and information within the framework of his or her social role; mechanisms of social control stimulated by the general interaction of the environment with the individual and the system of positive and negative reinforcement (Muszyński, 2005, p. 66). As the authors point out, the influence of educational environments on the behavior of young people is indisputable. Therefore, the research discussed above focused on the sense of identification with the selected educational environments in the context of antisocial behaviors. It turned out that regardless of the intensity of antisocial behaviors, the sense of identification with one's family is always equally strong. In the case of the sense of identification with one's peer group, a certain regularity can be observed. The higher the intensity level of antisocial behavior, the stronger the sense of identification with one's peers. However, as far as the sense of identification with one's school is concerned, the intensity of antisocial behaviors decreases with an increased sense of this type of identification. For this reason, it seems that building good relations between students and their school environment is one of the more important tasks in providing support for young people, especially if they are facing various school difficulties or unpleasant experiences. Creating such relationships may increase the sense of identification with their school, which – in our opinion – may be a factor limiting antisocial behavior. Analyzing educational environments, it is impossible to overlook the functioning of an individual in his or her peer group. Participation in the activity of various types of groups may constitute an important value in educational work, but it may also be a cause of future antisocial behaviors (Czapów, 1993, p. 222) and result in shaping identity in a socially undesirable direction. It can be assumed that depending on the group one identifies with, such a group realizes and adopts norms, systems of values, attitudes, principles and patterns of conduct. A negative group may be one of the potential criminogenic environments, as it provides positive feelings and compensates for unpleasant experiences connected with problems at home and difficulties at school.

## References

- Bańka, A. (2002). *Spoleczna psychologia środowiskowa* [Social Environmental Psychology]. Warszawa: SCHOLAR.
- Bębas, S. (ed.). (2011). *Oblicza patologii społecznych* [The Faces of Social Pathology]. Radom: Wyższa Szkoła Handlowa.

- Bronfenbrenner, U. (1976a). *Ekologische Sozialisationsforschung* [Research on Ecological Socialisation]. Stuttgart: Klett-Cotta.
- Bronfenbrenner, U. (1976b). Ekologia rozwoju człowieka. Historia i perspektywy [The ecology of human development: History and perspectives]. *Psychologia Wychowawcza*, 5, 537–549.
- Bronfenbrenner, U. (1979). *The Ecology of Human Development*. Cambridge: Harvard University Press.
- Bronfenbrenner, U. (1988). *Dwa światy wychowania. USA i ZSRR* [Two Worlds of Childhood. U.S. and U.S.S.R.], transl. J. Banasiak. Warszawa: PWN.
- Brzezińska, A. (2000). *Spółeczna psychologia rozwoju* [Social Developmental Psychology]. Warszawa: SCHOLAR.
- Brzeziński, J. (2004). *Metodologia badań psychologicznych* [Methodology of Psychological Research]. Warszawa: PWN.
- Czapów, C. (1993). Grupy rówieśnicze [Peer groups]. In: W. Pomykało (ed.), *Encyklopedia pedagogiczna* [Pedagogical Encyclopedia] (pp. 220–223). Warszawa: Fundacja Innowacja.
- Dubois, B. & Krogstad, K.M. (1999). *Praca socjalna. Zawód, który dodaje siłę* [Social Work: An Empowering Profession], transl. K. Czekaj. Katowice: Wydawnictwo Śląsk.
- Garbarino, J. (ed.). (1992). *Children and Families in the Social Environment*. New York: Aldine de Gruyter.
- Izdebska, J. (2000). *Dziecko w rodzinie u progu XXI wieku. Niepokoje i nadzieje* [The Child in the Family at the Beginning of the 21<sup>st</sup> Century. Concerns and Hopes]. Białystok: Trans Humana.
- Jarmowicz, M. (ed.). (1994, 2002). *Poza egocentryczną perspektywą widzenia siebie i świata* [Beyond Egocentric Perspective in Self-Perception]. Warszawa: Wydawnictwo IP PAN.
- Kemp, S., Whittaker, I.K. & Tracy, E.M. (1997). *Person – environment practice. The social ecology of interpersonal helping*. New York: Aldine de Gruyter.
- Kłoskowska, A. (2012). *Kultury narodowe u korzeni* [National Cultures at the Grass-root Level]. Warszawa: PWN.
- Konaszewski, K. (2016). Tożsamość wychowanków młodzieżowych ośrodków wychowawczych [Identity of pupils of youth educational center]. Gdańsk: Katedra.
- Kuć, M. (2010). *Kryminologia* [Criminology]. Warszawa: C.H. Beck.
- Muszyński, H. (2005). *Zarys teorii wychowania* [The Theory of Upbringing. An Outline]. Warszawa: PWN.
- Payne, D. & Cornwell, B. (2007). Reconsidering Peer Influences on Delinquency: Do Less Proximate Contacts Matter? *Journal of Quantitative Criminology*, 23, 127–149.
- Pospisyl, K. & Żabczyńska, E. (1981). *Psychologia dziecka niedostosowanego społecznie* [Psychology of the Socially Maladjusted Child]. Warszawa: PWN.

- Szczepański, J. (1970). *Elementarne pojęcia socjologii* [*Elementary Concepts in Sociology*]. Warszawa: PWN.
- Theiss, W. (1996). Trudności i zagrożenia w funkcjonowaniu środowisk wychowawczych współczesnej Polski [Difficulties and threats in the functioning of educational environments in contemporary Poland]. In: K. Franczak & J. Niewęglowski (eds.), *Wychowanie wobec zachodzących przemian* [*Upbringing in the Face of Current Changes*] (pp. 8–18). Warszawa: SIWCH.





Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 89–104  
DOI: 10.19265/KP.2019.11289



## ORIGINAL ARTICLE

Received: 10.04.2019

Accepted: 27.04.2019

Małgorzata Przybysz-Zaremba

ORCID iD: 0000-0003-2542-5104

State College of Applied Sciences in Skierniewice

malgorzata.p\_z@interia.pl

## CONCERNING DEPRESSION AND SUICIDAL BEHAVIOR IN CHILDREN AND YOUTH – SELECTED ASPECTS AND RESEARCH

### WOKÓŁ DEPRESJI I ZACHOWAŃ SUICYDALNYCH DZIECI I MŁODZIEŻY – WYBRANE ASPEKTY I BADANIA

#### Keywords:

depression,  
suicidal behaviors,  
suicides,  
children, youth

**Summary:** The article presents the problem of depression and suicidal behavior among children and youth. On the basis of the review of many research studies and statistical data, it is observed that this problem is escalating. Among other things, the text also underlines the conditions, the range, and the symptoms of depressive behavior, with an emphasis on the most destructive effects of depression – suicidal behavior and suicide in children and youth.

#### Słowa kluczowe:

depresja,  
zachowania  
suicydalne,  
samobójstwa,  
dzieci, młodzież

**Streszczenie:** W artykule przedstawiono problem depresji i zachowań suicydalnych dzieci i młodzieży. Na podstawie przeglądu wielu badań i statystyk zauważa się, że problem ten eskaluje. W tekście zwrócono uwagę m.in. na uwarunkowania, skalę i symptomy zaburzeń depresyjnych, wskazując na najbardziej destrukcyjne skutki depresji, jakimi są zachowania suicydalne (samobójstwa) podejmowane przez małoletnich. Tekst kończy podsumowanie i wnioski zawierające propozycje zmian i udoskonaleń w profilaktyce.

## Introduction

The problem of depression, directly linked to the high risk of suicide attempts by children and youth, is becoming more and more visible in Western society. Numerous studies indicate that today, in fact, we are dealing with it all over the world. According to the World Health Organization (WHO), depression is developing at an extremely fast pace. It is even estimated that by 2020 it will have become the second most common cause of human disability in the world. One of the European countries with the highest number of people with anxiety disorders and depression is Spain. According to studies conducted in the country, in the general population of children, the rates of depressive disorders (including anxiety disorders) are as follows: 0.5% for children under 6 years of age; 2.5% for children from 6 to 12 years old; 6.5% for young people (Sánchez-Hernández, Méndez & Garber, 2015, pp. 63–76). It might seem that these indicators are not very high, but, bearing in mind the effects of depression and the role it plays in the behavior of a young person, they are very worrying, as depression is one of the main risk factors for attempting suicide.

Suicide is a serious problem for young people. It is currently the third most frequent cause of death, accounting for 10% of all deaths of people aged 15–19 (Wasserman, Cheng & Jiang, 2005, pp. 114–120). The suicide rate increases tenfold from preadolescence to early adulthood. According to the Japanese Vital Statistics Report, the highest number of deaths between 15–39 years of age is due to suicide. The rate of suicide committed by Japanese teenagers corresponds to the number of teenage suicides in the world. In 1990, this number was four per 100,000 population, and by 2010, it doubled (Kawabe, Horiuchi, Ochi, Oka & Ueno, 2016, p. 231). Adolescent suicides are becoming a serious public health problem, the consequences of which are felt by all of us.

This paper is of a theoretical and review nature and concerns the problem of depression and suicides undertaken by children and adolescents. Based on a thorough review of the literature on the subject, the most important determinants (risk factors) and symptoms of depression in minors are approximated, indicating its most serious effects – suicide attempts and suicides.

## From Depression to Suicidal Behavior<sup>1</sup> and Suicide<sup>2</sup> – Selected Conditions, Symptoms, and Research

Depression belongs to the group of affective disorders (i.e., mood disorders). Depending on the severity of the symptoms, a mild, moderate or severe depressive episode is diagnosed. Depressive disorders also occur in people who have not been diagnosed with an affective disorder, but, for example, with mixed anxiety-depressive disorders or adaptive disorders (depressive reaction). In the group of people with these disorders, the manifestation of depressive symptoms is associated with current difficult experiences. For children, this is very often school-related stress (excessive pressure and demands, increased competition among students, violence at school, etc.) (Turno, 2010, p. 7).

Researchers indicate that one of the most important causes of the depressive disorder may be the separation of a child from parents (or a parent) resulting from, for instance, labor migration.<sup>3</sup> From the cohort studies carried out by M. Abas, K. Tangchonlatip, S. Punpuing, T. Jirapramukpitak, N. Darawuttimaprakorn, M. Prince and C. Flach (2013, pp. 226–234), it appears that the children of migrant parents experience an increased risk of depression. Researchers say that the appearance of depressive disorders in children (adolescents) of migrant parents is also influenced by other factors directly related to the family, e.g., alcohol-related problems or violence. Integration and intensification of these factors may contribute to depression in children, which, according to psychoanalytic analyses, goes back to early childhood experiences. In addition, depressive disorders do not disappear, but are a developmental stage associated with the identification and externalization of the so-called “good object.” For children, this object may be a parent (mother or father); their

<sup>1</sup> The term “suicidal behavior” covers a wide range of behaviors (from suicide attempts, passive and active suicide threats, to suicides) manifested in various forms (suicide pacts, extended suicides, instrumental suicides, parasiticides, imitation suicides, and others). There are many different suicide classifications in the literature on the subject, taking into account the effect and/or purpose, conditions, the number of people involved in the suicide act, and the participation of third parties (Sobkowiak, 2011, p. 38).

<sup>2</sup> According to Émile Durkheim (2006, p. 51), suicide is every case of death resulting from a victim who knew that it would produce such a result. A suicide attempt is a previously determined action, with the difference that it does not lead to death.

<sup>3</sup> In addition to depressive disorder, children of migrant parents (for gainful employment) experience many emotional disorders, such as feelings of regret, injury, rejection, loneliness, depression, sadness, crying, anxiety, fear, guilt, etc. (for: Winiarczyk, 2011, pp. 71–80).



loss or “disappearance” may cause depressive disorders (Rancew-Sikora, 2012, p. 82). Reviewing a variety of different studies, J. Bomba (2009, pp. 35–42) indicates that the mechanisms of depression in children and adolescents are formed as a result of stressful life experiences, genetically conditioned susceptibility to mood disorders, poor adaptation mechanisms under stress (e.g., escape, avoidance) and inadequately negative cognitive interpretations.

The etiological dimension of depression in children and adolescents includes the concurrence of many, often complex, biological, psychological, social and environmental factors. Therefore, researchers have specified the so-called integrated biopsychosocial model, within which one can distinguish the functions that predispose, release and sustain the variety of factors that are interacting with each other (Kołodziejek, 2008, p. 17). In the group of predisposing factors, those of a personal and environmental nature are distinguished (social context at the early stage of the child’s life). The personal factors include:

- “genetic susceptibility, occurrence of mood disorders in the family, early childhood disease, depression biological reactions to stressors (eating disorders, sleep, fatigue)” (Kołodziejek, 2008, p. 17);
- “psychological characteristics associated with intellectual development, individual vulnerability to hurt, external locus of control, cognitive depressogenic information processing, poor emotional regulation, low social skills also in the field of problem solving” (Kołodziejek, 2008, p. 17).

The group of environmental factors, on the other hand, includes:

- an uncertain or disturbed type of emotional bond with parents, which is shaped, among others, as a result of the lack of availability of the parents for the child, including insufficient sensitivity to the child’s behavior and situations in which the child is ignored. This state of affairs, often in adolescents, results in a higher level of depression, distorted self-image,<sup>4</sup> and the inability to regulate affective states. Research shows

---

<sup>4</sup> According to Rogers’ theory, self-image is shaped by human interaction with the environment. The quality of experiences related to oneself in contact with others builds a positive or negative attitude towards oneself. The most important in this respect are relations with significant persons during childhood. In the case of children, they are parents/guardians with whom they stay on a daily basis. Parents accept certain behaviors of children, build a (positive) image of their self-esteem. All elements that are unfavorable or distorting as a result of satisfying the needs and acceptance of the child are removed or minimized. More on this subject: Hreciński & Uchnast, 2012, pp. 95–115.

that adolescents with parental attachment anxiety are more vulnerable to depressive disorders (Kołodziejek, 2008, p. 17).

- problems in relationships with parents (Goodman & Gotlib, 1999, pp. 458–490): inappropriate, mainly negative parental attitudes<sup>5</sup> (cold, rejecting, distanced), restrictive educational methods, and lack of help and support from the parents (Przybysz-Zaremba, 2014, pp. 144–148). According to the research, weak “parental practices,” including above all inappropriate educational methods (mainly severe discipline and inappropriate parental attitudes), are responsible for about 30–40% of aberrant (disturbed) behavior (Reinke, Splett, Robeson & Offutt, 2009, pp. 33–43) in the very early stages of a child’s life.
- disorganization of family life and unavailability of parents due to their illness (e.g., depression or severe somatic illness). Research (Cummings & Davies, 1994, pp. 73–112; Ramchandani, Stein, O’Connor, Heron, Murray & Evand, 2008, pp. 390–398) indicates that mother’s depression and father’s helplessness (the father is unable to cope with his duties which the mother has been doing so far) can cause harmful and long-lasting cognitive and socio-emotional effects in the child’s development, which later become manifest, e.g., in social maladjustment, depressive disorders and suicide attempts. Studies conducted by L. Loon, M. Ven, K. Doesum, C. Witteman and C. Hosman (2014, pp. 1201–1214) also indicate that children of parents with mental illnesses are often at high risk of developing the same mental illness. Interactions between parents with mental illness and their child/children are significantly worse compared to parents without a mental illness. The ill much less often monitor their children, which translates into a larger number of their problem/risk behaviors that adversely affect their health. Children of ill parents cannot count on their support – they are doomed to “being adult.” Research carried out in the United States by R.C. Mel-drum, G.M. Connolly, J. Flexon and R.T. Guerette (2015) indicates that the lack of proper control of parents shapes low self-control in minors, which may lead to them engaging in various criminal, as well as suicidal, behaviors.
- alcohol abuse and/or drug use by caregivers, which often constitutes a source of aggression/violence in the family. It is estimated that there are

---

<sup>5</sup> See: Plopa, 2005; Ziemska, 2009; Braun-Gałkowska, 1985.

around 6 million people abusing alcohol in Poland, and 2.5 million consume it in a way that is harmful to their health. The number of drug addicts is estimated at around 12,000 (Tkocz-Piszczek, Wolny, Kempa, Piszczek & Olcha, 2013, p. 8). Unfortunately, it is noticed more and more often that, for a better euphoric effect, drugs are washed down with alcohol and vice versa – drugs are used under the influence of alcohol. The integration of these two factors carries dangerous consequences for the whole family system and for children and adolescents in particular. In the United States, family violence annually affects more than 10 million households; 35% of the perpetrators of parental violence consumed alcohol or drugs before an incident related to violence (Assis, Oliveira, Pires, Avanci & Pesce, 2013, pp. 36–48). The presence of these factors in the family may translate into suicidal behavior on the part of minors.

- low social status of the family and poor social and living conditions can be an important determinant of the development of depressive disorders in children and adolescents. It should be noted, however, that these factors do not in and of themselves lead to depression of minors, but their integration with other environmental factors (family, social, school) may contribute to the formation of depressive disorders. An important role in this situation is also played by the personal (genetic) factors of the individuals referred to above. From the research carried out among 20,000 Danish youth who attempted suicide, it follows that the risk of attempting suicide by people living in the worst socio-economic conditions is more than five times higher (Qin, Agerbo & Mortenson, 2003, pp. 765–772) than by people living in good and very good conditions.

The group of triggering factors includes various unfavorable situations and critical events in the lives of children and adolescents. This may comprise, for example, difficulties in contact with parents (parents use impaired or no control), peers and teachers, school failures, lack of support in an educational institution, illness, use of psychoactive substances or their abuse, the use of violence, changes in the environment of residence, etc. (Kołodziejek, 2008, p. 18). In turn, the group of the so-called supporting elements are all the above-mentioned biological, cognitive, emotional, interpersonal and social components, which may be both susceptibility and risk factors for depression, as well as significant factors supporting the disorder, i.e., intensifying and preserving symptoms reinforcing the interacting factors (Kołodziejek, 2008, p. 18).

Depression in childhood and adolescence is rare in its pure form. It is often accompanied by anxiety disorders (30–75% of children with depression meet the criteria for anxiety disorders), externalizing disorders such as: behavioral disorders (CD), oppositional defiant disorder (ODD), attention deficit hyperactivity disorder (ADHD) and disorders associated with the use of psychoactive substances. Researchers indicate that girls with depressive disorders more often associate with anxiety disorders, while boys with depression tend to associate with behavioral disorders and ADHD. Differences are also observed in older and younger children. For example, in younger children manifesting depressive disorders, suicidal ideation, which may translate into suicide attempts, is less frequent (Turno, 2010, p. 9). The characteristic symptoms of depression which are visible to the naked eye include “sadness, limitation or abandonment of interests and activities that one has so far enjoyed, changes in the scope of psychomotor activity – slowing or stimulating, a sense of hopelessness, a feeling of meaninglessness, low self-esteem, an excessive sense of guilt, a sense of helplessness, recurrent thoughts of death or suicide, a drop in energy, excessive fatigability, attention deficit, increase or decrease in appetite and changes in sleep pattern (persistent difficulty falling asleep or early awakening, e.g., around four and five in the morning)” (Turno, 2010, p. 9). In the case of youth (Kępiński, 1973), feelings of helplessness, hopelessness (lack of hope) and guilt are more often observed. In addition, there may be panic attacks, obsessive-compulsive disorder, eating disorders, oppositional defiant disorder, activity disorders and attention disorders. The diagnosis of depression in adolescents should also take into account the coexistence of somatic diseases (e.g., mononucleosis, latent hypothyroidism, nutritional deficiencies, anemia, chronic pain syndromes of various etiology, etc.) (Klimaszewska et al., 2007, pp. 408–416). Statistics show that depressive disorders affect about 20% of adolescents under the age of 18 (Kołodziejwski, 2015, p. 36). They may persist for a relatively long time, even despite treatment (Klimaszewska et al., 2007, pp. 408–416).

As confirmed by research, depressive disorders can manifest very tragically among children and adolescents, i.e., through suicide attempts and suicides committed. According to the World Health Organization (WHO), in the last 45 years, the total number of all suicides in the world has increased by 60%. Suicide is one of the three leading causes of death in the population aged 15–44. It is estimated that attempts to commit suicide occur 20 times more often than suicides ending with death. The number of suicides committed by young

people is increasing. About 90% of suicides are associated with depression (Szymańska, 2012, p. 12) and the use of various substances, such as alcohol, drugs and other psychotropic substances (Gromulska, 2010, pp. 127–132). In the report entitled “Preventing Suicide. A Global Imperative,” WHO indicates that someone in the world commits suicide every 40 seconds. Among youths aged 15–29, suicide has become the second leading cause of death (WHO, 2014).

According to the WHO report, the suicide problem affects all countries. In each of them, the indicator is at a different level. In 2009, the largest number of suicides per 100,000 people in Europe was noted in Lithuania (34.1), Russia (30.1), Belarus (28.4), Hungary (24.6), Slovenia (21.9) and Ukraine (21.2). In Poland, the suicide rate is 16.9 (WHO, 2014).<sup>6</sup> In turn, Mexican studies conducted among children and adolescents in the period 1998–2011 show an increased rate of committed suicides (from 18.5 to 31.9 per 100,000) (Sánchez-Cervantes et al., 2015, pp. 379–389).

According to researchers, the most common causes of juvenile suicides are mental disorders (including depression), unfavorable family situation of the individual and social environment impacts constituting a group of integrated risk factors (Sánchez-Cervantes et al., 2015, pp. 379–389; Gary, 2005, pp. 170–211).

The problem of suicide in children and youth also applies to Poland. On the basis of the data of the Central Statistical Office, E. Napieralska (2010, p. 92) discusses in detail the characteristics of suicides of children and adolescents from 1999 to 2006. During this period, 2556 young people died of suicide. The vast majority were boys: 2181 cases, which in the age group 10–14 constituted 79.38%, while in the age group 15–19 age group, 86.09%. The author notes a proportional increase in the number of suicides and a larger percentage in subsequent years of life.

In turn, according to studies conducted by I. Pospiszyl (2009), the most suicides are committed by young people aged 15–24, and suicide attempts are more often carried out by girls than boys. In the years 2004–2014, the number of young people attempting suicide has increased. A detailed list of the data according to age is presented in Table 1.

---

<sup>6</sup> These figures include everyone (adults, children, adolescents) who has attempted suicide or committed suicide.

Table 1  
*Age and number of people attempting suicide*

Year	Up to 9 years	10–14 years	15–19 years	20–24 years
2004	2	53	372	546
2006	2	48	345	489
2008	1	53	362	476
2010	0	42	153	292
2012	0	30	343	525
2014	2	71	526	1015

Source: Wasilewska-Ostrowska, 2015, p. 154.

Analyzing the etiology of the elements leading to suicide attempts or the committing of suicide, it should be pointed out that this is a complex process consisting of several elements (i.e., suicidal thoughts, suicide attempts and suicide), which is often influenced by a number of closely integrated factors. According to B. Hołyst (2012, pp. 19–42), suicidal behavior is influenced by various reactions released in a person when suicide appears in his/her consciousness as an anticipated or desired state of affairs, and thus as a goal. Suicidal behaviors may have the form of imagined, desired, attempted and accomplished suicides. They are shaped as a result of the interaction of socio-cultural, developmental, psychological, family and environmental factors. Due to the fact that suicidal behaviors have similar conditions to the depressive disorders which were analyzed in more detail above, only the general scheme of factors contributing to the occurrence of suicidal behavior is presented below.

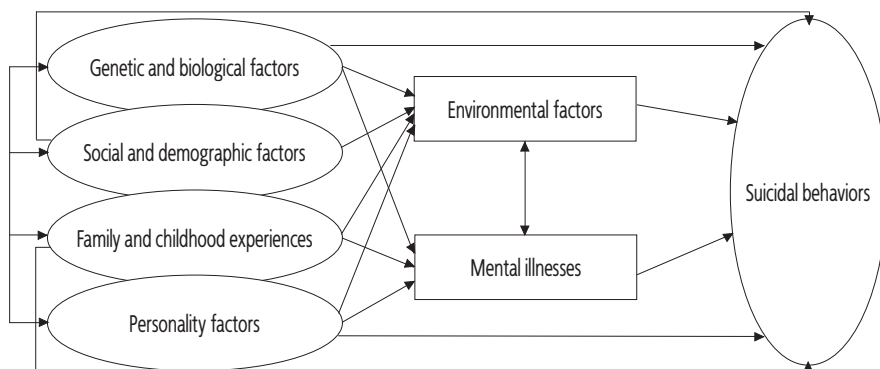


Figure 1.

Factors related to suicidal (suicide) behavior of children and adolescents.

Source: Prusik, 2015, p. 99.

It is worth stressing, however, that many studies (Załęski, 1992; Rosa, 1996; Hołyst, 2012; Szymańska, 2012; Carr, 2004, pp. 54–59; Dubois & Miley, 1996, p. 125; Braiden, McCann, Barry & Lindsay, 2009, pp. 81–93) regarding the conditions of suicidal behavior in minors indicate that the reasons for suicide attempts most often relate to the family. These include a wrong (bad) atmosphere at home, alcohol problems in the family (most often the father), conflict with father, failure in learning, conflict with siblings, abandonment by a boyfriend (girlfriend), conflict with mother, rejection by peers and loss of a loved one (e.g., death of the mother or father). Also, there are groups of risk factors for committing suicide in other areas of adolescent life (e.g., at school – poor relations with the teacher, negative atmosphere, etc., or in a peer group).

Suicide rarely happens suddenly. It is the result of a longer process during which there is an imbalance between risk factors and protective factors. The longer the risk factors predominate, the greater the risk of suicidal behavior in minors. An adolescent who finds himself/herself in a difficult situation experiences strong emotions that are revealed in fear, anger, regret, shame, humiliation and feelings of guilt and sadness, which, after some time, lead to a state of permanent emotional overload and depression. In the absence of support and help, young people consider their situation to be hopeless and search for a way out of it, for an “escape.” The activities they undertake are divided into three stages: suicidal thoughts, suicidal intentions (suicidal tendencies) and committed suicide (Szymańska, 2012, p. 15). According to the American

Association of Suicidology, 80% of people who intend to commit suicide make an attempt to inform their immediate surroundings about it in various ways (i.e., by sending various verbal and non-verbal signals) (following: Szymańska, 2012, p. 16). Unfortunately, the public is not always able to read these signals. According to the works of Alan Apter and Danuta Wasserman (2003), 25% of teenagers examined after an unsuccessful suicide attempt sought help in adults but did not receive it. The signals that minors send to the environment (adults, parents, teachers) can be divided into two groups: early warning signals and high-risk signals. They are presented in Table 2.

Table 2

*Selected symptoms (signals) of suicidal behavior (suicides) of adolescents*

Early warning signs	High threat signals
<p>Withdrawing from contacts with family and friends, turning away from them.</p> <p>Interest or even preoccupation with the theme of death.</p> <p>Clear personality changes and serious mood changes.</p> <p>Difficulties with concentration.</p> <p>Difficulties at school, a drop in the quality of work and grades.</p> <p>Change of current habits regarding food and sleep (loss of appetite or overeating, insomnia or excessive sleepiness).</p> <p>Loss of interest in entertainment.</p> <p>Frequent complaints about physical ailments, usually associated with emotions, such as headaches, stomach pains or fatigue.</p> <p>Constant boredom.</p> <p>Loss of interest in things and matters that the young person had previously cared for (e.g., refusal to take care of oneself).</p>	<p>Talking about suicide or planning it.</p> <p>Increased impulsiveness: sudden impulsive actions, such as acts of aggression and violence, rebellious or escape behaviors (resulting from enormous emotional tension).</p> <p>Sudden alcohol or drug excesses (an attempt to anesthetize suffering or a form of calling for help).</p> <p>Rejection of help, feeling that it is impossible for anybody to provide help.</p> <p>Accusation: "I am a person" or a sense of "corruption (rotting)" inside.</p> <p>Messages about the hopelessness of life, no exit, own worthlessness.</p> <p>Rejection of received praise or prizes.</p> <p>Throwing messages such as: "Soon I will stop being a problem for you," "It does not matter," "It doesn't matter anymore," or "We will not see each other anymore."</p> <p>A sudden transition from depression to the state of contentment (after a period of internal struggle, the person has already decided to escape from problems and end his/her life).</p> <p>Distributing favorite items among friends, giving away pets.</p> <p>Preparing a will.</p> <p>Using phrases emphasizing low self-esteem: "I am nothing," "Do not take care of me," "I would like to die," "I'm going to kill myself," "I should not have been born."</p>

Source: Szymańska, 2012, pp. 15–16.



Each suicide is entangled in the unique world of the individual (Pilecka, 1995, p. 9). It is an individual act. Thus, the symptoms and signals revealed are individual behaviors of a person, requiring a unique approach and the design of preventive actions taking into account these individual behaviors.

## Summary and Conclusions for Practice

From the studies and statistics quoted above, it appears that depression and suicidal behaviors (suicides) are an important and complex problem escalating in contemporary society. This requires many further studies and analyses regarding the etiology, determinants and dynamics of depression and suicidal behavior, and, above all, the implementation of effective prophylaxes. The complexity of the determinants of depression and suicide attempts undertaken by children and adolescents indicates that currently undertaken preventive measures<sup>7</sup> do not bring the expected results – the problem continues to grow. Specialists suggest that an “ecological prevention model may be effective, taking into account both the elimination or reduction of all modifiable risk factors (individual, family, school, environmental), as well as the strengthening of protective factors” (Szymańska, 2012, pp. 19–20). Preventive actions should be long-term and should be implemented at all levels of prevention. They ought to include both children and adolescents (students), as well as the people involved in their upbringing, i.e., parents, teachers, educators, etc. Prevention should be implemented already in the first institutions of the care and education of children, i.e., nurseries and kindergartens, and then fixed at school. It should be based on a reliable diagnosis of risk factors in various areas of the functioning of children and adolescents, which then become the basis for the design of preventive actions. These activities require proper preparation of primarily the educational and pedagogical staff whose knowledge, competences and skills are aimed at implementing information and education strategies among students, their parents and the local environment. In the case of prophylactic interactions addressed to children and adolescents, an important element is their active inclusion in the design and implementation of programs, taking into account their potential (interests, predispositions and competences), which is often underestimated and even “wasted.”

---

<sup>7</sup> The statement that preventive actions do not produce the desired effects was made on the basis of the referenced studies and statistics.

Contemporary prevention of depression and suicidal behavior should aim to build heterogeneous and integrated activities that take into account the three main living environments of children and young people: family, school and local community. It should teach them how to function properly in these areas and, above all, equip them with skills to deal with the difficulties and problems encountered and seek help.

## References

- Abas, M., Tangchonlatip, K., Punpuing, S., Jirapramukpitak, T., Darawuttimaprakorn, N., Prince, M. & Flach, C. (2013). Migration of Children and Impact on Depression in Older Parents in Rural Thailand, Southeast Asia. *JAMA Psychiatry*, 70(2), 226–234.
- Apter, A. & Wasserman D., (2003). Adolescent attempted suicide. In: R.A. King & A. Apter (eds.), *Suicide in Children and Adolescents* (pp. 63–85). Cambridge: Cambridge University Press.
- Assis, S., Oliveira, R., Pires, T., Avanci, J. & Pesce, R. (2013). Family, School and Community Violence and Problem Behavior in Childhood: Results from a Longitudinal Study in Brazil. *Paediatrics Today*, 1(9), 36–48.
- Bomba, J. (2009). Spojrzenie na depresję z perspektywy psychoterapii [A Look at Depression from the Perspective of Psychotherapy]. *Psychoterapia*, 148(1), 35–42.
- Braiden, H.J., McCann, M., Barry, H. & Lindsay, C. (2009). Piloting a Therapeutic Residential for Children, Young People and Families Bereaved through Suicide in Northern Ireland. *Child Care in Practice*, 15(2), 81–93.
- Braun-Gałkowska, M. (1985). *Psychologia domowa. (Małżeństwo – dzieci – rodzina)* [*Home Psychology. (Marriage – Children – Family)*]. Olsztyn: Warmińskie Wydawnictwo Diecezjalne.
- Carr, A. (2004). *Depresja i próby samobójcze młodzieży: sposoby przeciwdziałania i reagowania* [*Depression and Suicide Attempts in Adolescents: Prevention and Response Methods*], transl. J. Rybski. Gdańsk: Gdańskie Wydawnictwo Psychologiczne.
- Cummings, E.M. & Davies, P.T. (1994). Maternal Depression and Child Development. *Journal Child Psychology and Psychiatry*, 35, 73–112.
- Dubois, B. & Miley, K.K. (1996). *Praca socjalna [Social Work]*, vol. 2. Warszawa: Wydawnictwo Interart.
- Durkheim, É. (2006). *Samobójstwo [Suicide]*, trans. K. Wakar. Warszawa: Wydawnictwo Oficyna Naukowa.
- Gary, F.A. (2005). Perspectives on Suicide Prevention Among American Indian and Alaska Native Children and Adolescents: A Call for Help. *Journal of Issues in Nursing*, 2(10), 170–211.

- Goodman, S.H. & Gotlib, I.H. (1999). Risk for Psychopathology in the Children of Depressed Mothers: a Developmental Model for Understanding Mechanisms of Transmission. *Psychological Review*, 106, 458–490.
- Gromulska, L. (2010). Zdrowie psychiczne w świetle dokumentów światowej organizacji zdrowia [Mental Health in the Light of the WHO documents]. *Przegląd Epidemiologiczny* [Epidemiological Review], 64, 127–132.
- Hołyst, B. (2012). Motywacje samobójstw nieletnich [Youth Suicide Motivation]. *Probacja* [Probation], 3, 19–42.
- Hreciński, P. & Uchnast, Z. (2012). Typy charakteru a obraz siebie [Character Types and Self-Image]. *Roczniki Psychologiczne* [Psychological Annals], 15(4), 95–115.
- Kawabe, K., Horiuchi, F., Ochi, M., Oka, Y. & Ueno, S. (2016). Suicidal Ideation in Adolescents and their Caregivers: a Cross Sectional Survey in Japan. *BMC Psychiatry*, 16, 231.
- Kepiński, A. (1973). *Psychopatologia nerwic* [The Psychopathology of Neuroses]. Warszawa: PZWL.
- Klimaszewska, K. et al. (2007). Rola edukacyjna pielęgniarki w zakresie postępowania z chorym na depresję [The Educational Role of a Nurse in Dealing with Depression Patients]. *Problemy Higieny i Epidemiologii* [Problems of Hygiene and Epidemiology], 4(88), 408–416.
- Kołodziejek, M. (2008). Depresja u dzieci i młodzieży: podstawy teoretyczne, psychoterapia poznawczo-behawioralna [Depression in Children and Adolescents: Theoretical Foundations, Cognitive-Behavioral Psychotherapy]. *Psychoterapia* [Psychotherapy], 145(2), 15–33.
- Kołodziejski, M. (2015). Terapia muzyką i profilaktyce i leczeniu depresji i agresja u dzieci i młodzieży [Music therapy and prevention and treatment of depression and aggression in children and adolescents]. In: M. Przybysz-Zaremba (ed.), *Zachowania ryzykowne dzieci i młodzieży. Heterogeniczny wymiar oddziaływań profilaktycznych. Wybrane aspekty* [Risky Behavior of Children and Adolescents. The Heterogeneous Dimension of Preventive Actions. Selected Aspects] (pp. 27–43). Olsztyn: Wydawnictwo Prospekt PR.
- Loon, L., Ven, M., Doesum, K., Witteman, C. & Hosman, C. (2014). The Relation Between Parental Mental Illness and Adolescent Mental Health: The Role of Family Factors. *Journal of Child & Family Studies*, 23, 1201–1214.
- Meldrum, R.C., Connolly, G.M., Flexon, J. & Guerette, R.T. (2015). Parental Low Self-Control, Family Environments, and Juvenile Delinquency. *International Journal of Offender Therapy and Comparative Criminology*, 5, 1623–1644.
- Napieralska, E., Kułaga, Z., Gurzkowska, B. & Grajda, A. (2010). Epidemiologia zgonów dzieci i młodzieży z powodu samobójstw w Polsce w latach 1999–2006 [The Epidemiology of Suicidal Deaths of Children and Adolescents in Poland in

- the Years 1999–2006]. *Problemy Higieny i Epidemiologii* [Problems of Hygiene and Epidemiology], 91, 92–98.
- Pilecka, B. (1995). *Wybrane problemy samobójstw młodzieży* [Selected Problems of Youth Suicide]. Lublin: Pracownia Wydawnicza Fundacji “Masz Szansę.”
- Plopa, M. (2005). *Psychologia rodziny: teoria i badania* [Family Psychology: Theory and Research]. Kraków: Oficyna Wydawnicza Impuls.
- Pospiszyl, I. (2009). *Patologie społeczne* [Social Pathologies]. Warszawa: Wydawnictwo Naukowe PWN.
- Prusik, A. (2015). Profilaktyka zachowań suicydalnych dzieci i młodzieży – wybrane oddziały działań [Prevention of Suicidal Behavior of Children and Youth – Selected Fields of Activities]. In: M. Przybysz-Zaremba (ed.), *Zachowania ryzykowne dzieci i młodzieży. Heterogeniczny wymiar oddziaływań profilaktycznych. Wybrane aspekty* [Risky Behavior of Children and Adolescents. The Heterogeneous Dimension of Preventive Actions. Selected Aspects] (pp. 95–110). Olsztyn: Wydawnictwo Prospekt PR.
- Przybysz-Zaremba, M. (ed.) (2015). *Zachowania ryzykowne dzieci i młodzieży. Heterogeniczny wymiar oddziaływań profilaktycznych. Wybrane aspekty* [Risky Behavior of Children and Adolescents. The Heterogeneous Dimension of Preventive Actions. Selected Aspects]. Olsztyn: Wydawnictwo Prospekt PR.
- Przybysz-Zaremba, M. (2014). Parental Attitudes of Mothers Who Are Educationally Active. *Studium Vilnense, A*, 11, 144–148.
- Qin, P., Agerbo, E. & Mortenson, P.B. (2003). Suicide Risk in Relation to Socioeconomic, Demographic, Psychiatric, and Familial Risk Factors: A National Register-Based Study of All Suicides in Denmark, 1981–1997. *American Journal of Psychiatry*, 160, 765–772.
- Radziwiłowicz, W. & Sumiła, A. (eds.) (1997). *Psychopatologia okresu dorastania. Wybrane zagadnienia* [Psychopathology of Adolescence. Selected Aspects]. Kraków: Oficyna Wydawnicza Impuls.
- Ramchandani, P.G., Stein, A., O'Connor, T.G., Heron, J., Murray, K. & Evand, J. (2008). Depression in Men in the Postnatal Period and Later Child Psychopathology: a population cohort study. *Journal of the American Academy of Child and Adolescent Psychiatry*, 47, 390–398.
- Rancew-Sikora, D. (2012). W poszukiwaniu społecznej koncepcji depresji [In Search of the Social Concept of Depression]. *Studia Socjologiczne* [Sociological Studies], 3(206), 81–104.
- Reinke, W.M., Splett, J.D., Robeson, E.N. & Offutt, Ch.A. (2009). Combining School and Family Interventions for the Prevention and Early Intervention of Disruptive Behavior Problems in Children: A Public Health Perspective. *Psychology in the Schools*, 1(46), 33–43.
- Rosa, K. (1996). *Próby samobójcze* [Suicide Attempts]. Łódź: Instytut Medycyny Pracy.

- Sánchez-Cervantes, F.S., Serrano-González, R.E. & Márquez-Caraveo, M.E. (2015). Suicide in Children Less than 20 Years. Mexico 1998–2011. *Salud Mental*, 5(38), 379–389.
- Sobkowiak, M. (2011). *Przeciwdziałanie zachowaniom suicydalnym w pracy socjalnej* [Counteracting Suicidal Behavior in Social Work]. Gorzów Wielkopolski.
- Sołtysiak, T. (ed.) (1995). *Zjawiska patologii społecznej. Uwarunkowania, rozmiary, profilaktyka, prognozy* [The Phenomena of Social Pathology. Conditions, Scope, Prevention, Forecasts]. Bydgoszcz: Wydawnictwo Uczelniane WSP.
- Szymańska, J. (2012). *Zapobieganie samobójstwom dzieci i młodzieży* [Suicide Prevention for Children and Adolescents]. Warszawa: Ośrodek Rozwoju Edukacji. Wydanie III.
- Tkocz-Piszczek, E., Wolny, Z., Kempa, A., Piszczek, R. & Olcha, B. (2013). *Diagnoza problemów uzależnień oraz zjawiska przemocy w rodzinie. Raport końcowy z badań* [The Diagnosis of Addiction Problems and the Phenomenon of Domestic Violence. A Final Report on the Research.]. Gliwice: Biostat.
- Turno, M. (2010). *One są wśród nas. Dziecko z depresją w szkole i przedszkolu. Informacje dla pedagogów i opiekunów* [They Are Among Us. A Depressed Child in School and Kindergarten. Information for Educators and Guardians.]. Warszawa: Ośrodek Rozwoju Edukacji.
- Wasilewska-Ostrowska, K. (2015). Profilaktyka zachowań suicydalnych wśród młodzieży [Prevention of Suicidal Behavior Among Young People]. *Dziecko Krzywdzone. Teoria, badania, praktyka* [An Abused Child. Theory, Research, Practice.], 3(14), 152–164.
- Wasserman, D., Cheng, Q. & Jiang, G.X. (2005). Global Suicide Rates Among Young People Aged 15–19. *World Psychiatry*, 4, 114–120.
- Winiarczyk, A. (2011). Migracje zarobkowe jedną z przyczyn niepełności rodziny [Economic Migration is One of the Reasons for Family Incompleteness]. *Pedagogika Rodziny* [Family Pedagogy], 1(2), 71–80.
- World Health Organization (2014). *Preventing Suicide. A Global Imperative*, [http://apps.who.int/iris/bitstream/10665/131056/1/9789241564779\\_eng.pdf?ua=1&ua=1](http://apps.who.int/iris/bitstream/10665/131056/1/9789241564779_eng.pdf?ua=1&ua=1) (accessed: 4.05.2017).
- Załęski, J. (1992). Obraz rodziców u młodzieży dokonującej próby samobójczej [Parental Image in Adolescents Attempting Suicide]. *Zdrowie Psychiczne* [Mental Health], 1–2, 186–190.
- Ziemska, M. (2009). *Postawy rodzicielskie* [Parental Attitudes]. Warszawa: Wiedza Powszechna.



Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 105–119  
DOI: 10.19265/KP.2019.112105



## ORIGINAL ARTICLE

Received: 14.12.2018

Accepted: 17.01.2019

Agnieszka Szczelina-Szczotka

ORCID iD: 0000-0002-3392-2832

Kindergarten No. 55, Bielsko-Biala

agnieszkaszczelina@gmail.com

# ART THERAPY AS AN EDUCATIONAL INTERVENTION FOCUSED ON SOCIAL RELATIONS OF CHILDREN AT A YOUNGER SCHOOL AGE

## ARTETERAPIA JAKO INTERWENCJA WYCHOWAWCZA UKIERUNKOWANA NA RELACJE SPOŁECZNE DZIECI W MŁODSZYM WIEKU SZKOLNYM

### Keywords:

art therapy, peer  
relations, educa-  
tional innovations,  
stimulation of the  
emotional and social  
development, early  
age education

**Summary:** At their first stage of education, children face the intensified process of acquiring emotional and social competence, as well as developing interpersonal relations. It is of crucial value to make this process go smoothly and be well stimulated. In this era of modern threats, this process poses a challenge for teachers, forcing them to seek innovational and attractive educational methods which will enable them to have a gentle impact on the personal motivation of a young learner in his or her emotional and social abilities of interpersonal peer relations. This text is a description of research in the area of the use of art therapy in early learner education in the scope of their interpersonal relations. The author tries to demonstrate that art therapy can become a major key in resolving educational obstacles and can have a positive impact on interpersonal relations of children in their early education.

**Słowa kluczowe:**  
terapia sztuką,  
relacje rówieśnicze,  
nowe rozwiązania  
wychowawcze,  
stymulowanie rozwoju  
emocjonalno-  
-społecznego,  
edukacja elementarna

**Streszczenie:** Dzieci w młodszym wieku szkolnym przechodzą okres wzmożonego nabywania kompetencji emocjonalno-społecznych, a także zawiązywania pierwszych relacji interpersonalnych. Ważne jest, by proces ten przebiegał harmonijnie i był właściwie stymulowany. W dobie współczesnych zagrożeń jest to wyzwanie dla pedagogów, które zmusza do poszukiwania nowych, atrakcyjnych, a zarazem prostych dla dzieci metod oddziaływania wychowawczego – by mało inwazyjnie, dyskretnie i subtelnie wpływać na młodego człowieka oraz jego motywacje w obszarze umiejętności emocjonalno-społecznych z zakresu relacji rówieśniczych. Niniejszy tekst jest opisem badań nad wykorzystaniem metod arteterapeutycznych w pracy z dziećmi w młodszym wieku szkolnym w obszarze relacji rówieśniczych. Autorka stara się dowiedzieć, że arteterapia może stać się odpowiedzią na współczesne wyzwania wychowawcze i wpływać na relacje rówieśnicze dzieci w młodszym wieku szkolnym.

## Introduction

School is one of the most important learning environments, since it is school that forms the correct patterns of social behavior, builds motivation to create interactions and affects sensitivity and openness to other people. In order to achieve these goals, it is necessary for schools to implement an educational method which would influence young people and their motivations in the area of emotional and social skills in a low-impact, discreet and subtle way; shaping young learners' personality, it would also give them the freedoms of action, self-creation and self-discovery.

The non-medical approach to the subject of art therapy, which is increasingly common in Poland and other countries, is based on the idea of supporting the development of an individual to the full and harmonious growth of their personality and predispositions (Chmielnicka-Plaskota, Łoza & Szulc, 2014). Importantly, art therapy does not have to be addressed exclusively to the sick (Janicki, 1990). It can also be perceived as an educational intervention that supports and stimulates development through the therapeutic impact of art (Florczykiewicz, 2015).

It is worth analyzing the wealth of methods, techniques and means of artistic expression proposed by art therapy in a broad sense. Properly introduced to educational institutions, it can be a response to the emerging needs of present and future generations, as well as an aid for teachers in the educational process. Art therapy gives one the opportunity to meet one's emotions and experiences with the help of artistic expression and activity (Szabelska, 2012). Aesthetic and emotional experiences triggered during the process of creation can help one in coping with reality and building a system of values, which influences the valorization of experience and finding one's place in the world (Malinowska & Jabłońska, 2016). Various means of artistic expression give children the opportunity to communicate on a new level that creates a sense of security. Art offers them the opportunity to manifest themselves and their views, and the outcomes of the process can, but do not have to, become a line of mutual understanding and discussion (Kuciapiński, 2013). Artistic activities create the right conditions for the participants to get to know each other and can strengthen cooperation in a social group while maintaining individuality and barriers that are safe for children (Pikała & Sasin, 2016).

In his publication, A. Gilroy (2009) introduces the need to conduct research on the phenomenon of art therapy. The analysis of the materials and conclusions from the research collected by the author show that art therapy has a positive effect on children and youth and can become one of the means of influence in the education and upbringing of children and adolescents.

The possibility of using art therapy in working with children of early school age with the goal of strengthening peer relations is, therefore, the subject of this article which summarizes research on this area. However, it is likewise worth paying attention to research on related topics. In one of her publications, for instance, J. Gładyszewska-Cylko (2011) focused on the possibilities of using art therapy in early childhood education. She noticed that after classes with elements of art therapy, the process of class integration was accelerated and strengthened. Subsequent studies by the same author indicate an increase in the activity and openness of shy children, an improvement of their ability to deal with emotions and a development of their positive self-image through artistic interactions which also affect relationships with peers (Gładyszewska-Cylulko, 2007).

Research conducted by D. Gulińska-Grzeluska (2011) proves that the therapeutic impact of music supports the process of leveling aggression and modeling social behavior. As a result, it shapes the relationships of children with their surroundings and peers.



Studies by A. Glińska-Lachowicz (2010), in turn, do not concern children in early school age, but students of resocialization. They show that according to 78% of students, participation in art therapy classes positively affected their relationship with the environment. During free conversations with the author, the respondents also claimed that the opportunity to participate in art therapies in a broad sense influenced their private lives, shaping better reactions to situations, resistance to stress, relaxation and coping with emotions.

Citing the view of J. Florczykiewicz (2015), one can say that attempts to systematize knowledge in the field of art therapy lie at the core of its theoretical assumptions and provoke discussion on the possibilities of its application. It can therefore be assumed that the growing interest in art therapy in the social or pedagogical perspective may contribute to the development of research in the field of art therapy in the contemporary education and upbringing process.

## **Methodology and Description of My Research**

The subject of the research that I carried out in 2016–2017 was the use of art therapy as an educational intervention to improve peer relations in a class group. The needs of pedagogical practice have made me think that this area is becoming an important reference point in search for new solutions in the era of contemporary educational threats related to social relations.

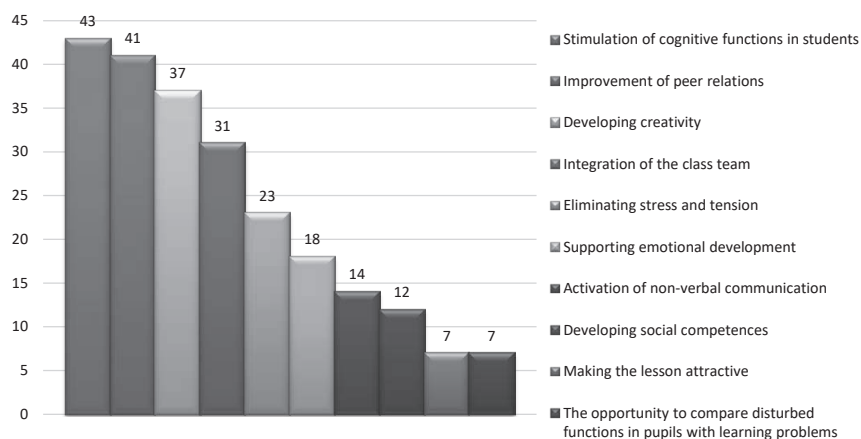
The aim of this research was to investigate the importance of using art therapy as an educational intervention in working with children at a younger school age to improve peer relations in a class group by getting to know teachers' opinions on the use of the chosen methods and children's views on their participation in art therapy classes, as well as the impact these have had on their relationships in the group.

I tried to find answers to the research problems which took the form of the following questions:

1. Can art-therapy methods become an educational intervention in working with children at a younger school age in the area of improving the quality of social relations in a given group? If yes, what is the extent of their influence?
2. Does art therapy affect the peer relationships of children at a younger school age? If yes, what is the extent of its influence?

In order to collect the necessary data, I conducted a series of classes with the use of elements of art-therapy. Before and immediately after the end of the classes, I carried out a sociometric test to check the relationships of children in a given class. I also used a direct group interview with children who took part in the classes and a survey for teachers of early school education in which I asked about their opinions on the above topic. The basis of the educational actions aimed at improving emotional and social skills conditioning peer relations was the use of various types of art therapy. The recipients of the classes were 74 children from the area of the Śląskie Voivodeship taking part in the interview. The sociometric test was carried out in one of the classes participating in the activities, which consisted of 15 people. The opinion survey included 74 early school education teachers from all over Poland.

According to 70 (95%) of the surveyed teachers of early school education, it is possible to apply art therapy in working with children at early school age. Four respondents (5%) were of a different opinion; three of them are, however, professionally inactive. In the question about the possibility of using art therapy in the field of early school education, 79% of respondents considered this therapy effective and functional. Respondents were free to formulate their own answers. Their summary is shown in Figure 1.



*Figure 1.*

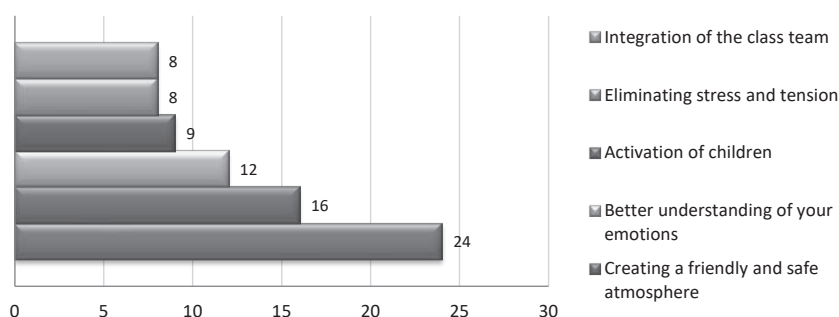
Objectives of art therapy for working with children at a younger school age.

Source: own research.

According to the respondents, the aims of art therapy can be stimulation of cognitive functions (43 people, 58%), improvement of peer relations (41 people, 55%), as well as stimulation of creativity (37 people, 50%). Teachers also indicated that art therapy could be used to integrate the class team (31 people, 41%), eliminate tensions (23 people, 31%), support emotional development (18 people, 24%), support non-verbal communication (14 people, 19%) and support the development of social competences (12 people, 16%). Seven people (10%) chose the opportunity to compare disturbed functions in pupils with learning problems and the use of art therapy to increase the attractiveness of the lesson. Most of the answers concerned improving the functioning of the socio-emotional area, which is directly conditioned by the social relations of children at a younger school age. The integration of the class team is closely related to improving relationships in a given group. Removing stress and tensions becomes the foundation for building a sense of security, and thus, for establishing and maintaining relationships in an atmosphere that fosters mutual respect and understanding. By supporting children's emotional development, they can be made sensitive to the situations and perspectives of others; one can also teach them appropriate patterns of coping with their own emotional states. Supporting non-verbal communication allows for a better reading of the reactions of others and the transmission of important impulses in the process of communication between peers. Therefore, it can be acknowledged that all these elements become important when strengthening ties and relations between not only children but also adults.

Only 40 (54%) of teachers actively employ the elements of art therapy in their work. In general, these were teachers of a younger age. Other teachers who indicated the possibility of using art therapy in early school education did not, in fact, use it in practice.

Only few respondents in the age group above 41 use art therapy, while 34 (46%) do not use it at all. People declaring the use of art-therapy elements were asked to indicate the results they achieved thanks to them. Only 28 (70%) people from the 40 (100%) shared their insights in the questionnaire. It may be considered surprising that the teachers who admitted to the use of art therapy could not or did not want to indicate the results that these activities brought.



*Figure 2.*

Results of the use of art-therapy methods in working with children by teachers of early school education.

Source: own research.

The chart shows that thanks to art therapy 42 (57%) teachers observed improvement in peer relations, 16 (22%) saw improvement of the atmosphere in class, 12 (16%) noted a better understanding of their emotions by their pupils, 9 (12%) said that the classes helped in the activation of the group, 8 (11%) indicated the elimination of stress and tensions, and 8 (11%) asserted that the class was better integrated. Particular attention should be paid to disproportions in the opinions of teachers who only theoretically know the art-therapy method and those who apply it in their work. In the opinion of respondents actively using art therapy, its impact occurs in the socio-emotional sphere, while in the theoretical approach, the respondents also focus on the possibilities of interaction in the cognitive sphere.

What arouses enthusiasm is the fact that as many as 64 (86%) of the respondents showed an interest and willingness to use elements of art therapy at work in order to improve the quality of social life of the children in their class. Only 10 (14%) of the respondents were not interested in this solution – most of them were characterized by a negative approach to the subject of this research while filling out the questionnaire or had not had contact with art therapy. People wanting to use elements of art therapy indicate its attractiveness (34 people, 53%), interest in its effectiveness (29 people, 45%), its innovative approach to the subject of peer relationships (17 people, 23%) and the need to look for new solutions to social problems which appear nowadays (8 people, 12%).

In the eyes of the teachers, it is possible to apply art therapy to improve socio-emotional relations in children at a younger school age. Are classes with art-therapy elements interesting and attractive for children? Do they motivate them to be active in social integration with others? Can they be an alternative to improving and acquiring communication skills and emotional intuition? Answers to these questions can be found in the opinions and views of the children about the classes using art-therapy methods. They were given such opportunity in the cycle of classes during which art therapy allowed them to manifest themselves and their views using various fields of art. They could thus establish relationships with their peers and compare their experiences and views with the opinions of others.

During the activities designed and carried out by me, I noticed an increased activity of children and their interest in a new form and principles of work. The group interview showed that 62 children (84%) assessed participation in classes positively, 2 students (3%) said that they did not like them – that they were boring and required cooperation with people they did not like, while 10 children (35%) did not voice their opinions in the conversation. The students' statements about the classes are presented in Table 1.

Table 1

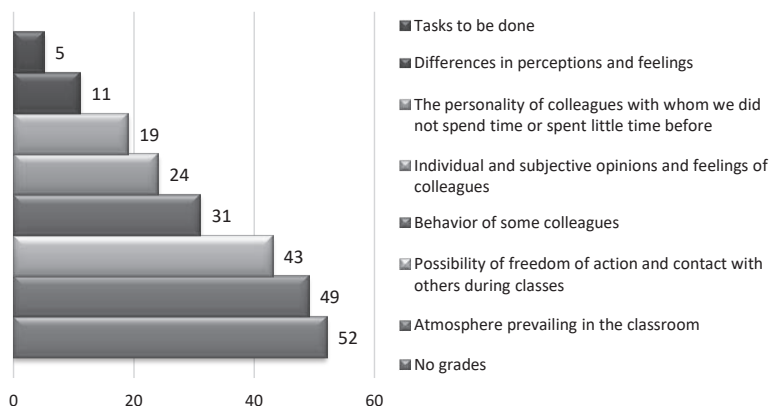
*Argumentation of the statements about the children's attitude to participation in the art-therapy classes*

	Argumentation	Number of people
1.	The classes were interesting and attractive	49 (66%)
2.	We were not graded and there were no imposed standards	28 (38%)
3.	We could find out some interesting things about ourselves	13 (18%)
4.	We had a lot of freedom	12 (16%)
5.	Very interesting and surprising works were created	10 (35%)
6.	The classes were weird and boring	2 (3%)

Source: own research.

The children recognized that the classes were interesting and attractive. They also noticed that they were not graded and that they were able to use various means of expression freely – without any barriers to the assignment of jobs, tools, or instructions. During the interview, children often expressed their surprise at the fact that others may perceive things differently than they do,

or the fact that working with a different friend/colleague than usual is really “cool.” These answers coincide with the ones presented in chart 3 which summarizes the answers to the question of what surprised children in their classes. They could have spoken on this topic during the interview.



*Figure 3.*  
Elements surprising children during classes.  
Source: own research.

The children were the most surprised that they were not graded – their work was not exposed to criticism or comparison to the work of others, which sometimes makes them sad; 52 students (70%) expressed this opinion. Forty-nine participants (66%) were surprised by many positive comments about their work and ideas, which gave them great pleasure, and 43 (58%) stated that it was nice to talk freely and walk around the classroom during classes. Nineteen children (26%), in turn, did not expect that a colleague with whom they had not cooperated before could be so interesting and nice. At the same time, they declared their willingness to get to know each other and have fun together. This is also related to the fact that the behavior of peers was different than usual, as indicated by 31 pupils (42%). Children openly admitted that they were surprised by the reaction, positive actions and approach to cooperation of individual colleagues who usually behave slightly differently. This argumentation concerned mainly the behavior of children who are often withdrawn and shy or vice versa – those who are often aggressive or tease others. This is also confirmed by the observation that these children tried to cooperate and were

very keen on the final result of their work. For many pupils, a big surprise was the difference in perception that could be noticed during the class. Eleven children (15%) commented on the diametric differences in the perception and assessment of themselves and their colleagues. Interestingly, 5 children (7%) brought attention to the fact that the classes in which they participated were significantly different from their standard school lessons. This probably results from the observations noted and described above.

The positive reception of classes with the use of art-therapy elements was also indicated by the children's questions about whether and when the next such classes will take place. The interview also gave them the opportunity to say whether or not they would like them to take place more often. All children were asked to answer this question. Sixty-four students (85% of those taking part in the classes) declared that they would eagerly participate in the next classes; 7 children (10%) did not specify their opinion; and 4 students (5%) acknowledged that they did not want to participate in such activities. Having given their answers, the children had the opportunity to provide arguments supporting their views. Not everyone, however, wanted to share their insights on this topic. Arguments that demonstrate the children's attitude to continuing the classes are presented in Table 2.

Table 2

*Arguments regarding the attitude of children to the continuation of classes with elements of art therapy*

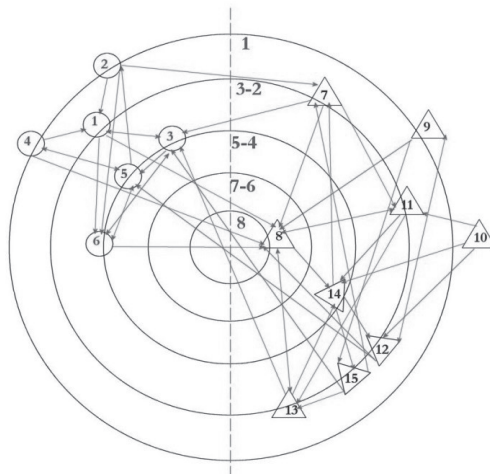
	Argumentation	Number of people
1.	The classes were fun	54 (73%)
2.	We did not have lessons	18 (24%)
3.	We could find out some interesting things about each other	17 (23%)
4.	We like art classes	12 (16%)
5.	We can create something cool	12 (16%)
6.	The classes were weird and boring.	3 (4%)

Source: own research.

The children's statements about their willingness to continue the classes were often laconic. As the table shows, for most of them (54 children, 73%), the classes were attractive and interesting; they were described as "cool," and the pupils would like to take part in them more often. Eighteen participants (24%)

also pointed out that it would be beneficial if the classes were held during normal lessons. Interestingly, classes without grades and without imposed hard structures were not treated as “normal” lessons. Seventeen children (23%) noticed that, thanks to these classes, they could get to know each other better. For 12 children (16%), it was important to create something important and interesting. The same number of respondents indicated that they liked artistic activities, which is why they would like to continue to participate in them. Three students (4%), showing passive and negative attitudes during the whole cycle of classes, indicated that the classes were strange and boring for them. However, it can be assumed that the classes seemed difficult and incomprehensible because they touched some problematic areas.

Analyzing the changes taking place in children's relations and the impact of their participation in the cycle of activities, it is worth looking at the results of the sociometric tests of one of the classes participating in the research. They best illustrate whether participation in classes changed the social structure of the class and allowed peer relations to strengthen between the members of the class group. The first sociometric test was carried out before the beginning of the cycle of classes. It shows the original structure of the class; the second shows the state of peer relations after the end of the cycle of classes.

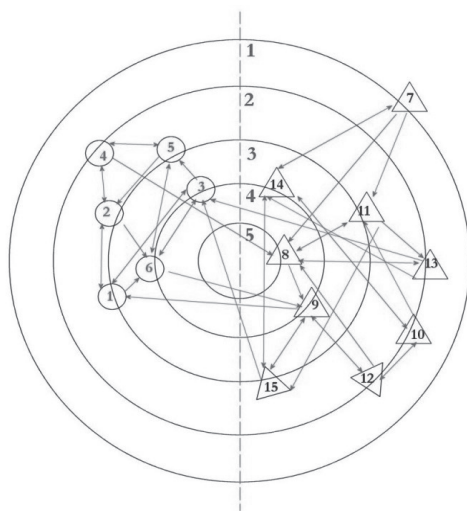


*Figure 4.*

Results of the first sociometric test carried out in the third class.

Source: own research.





*Figure 5.*

The results of the second sociometric test carried out in the third class.

Source: own research.

In the discussed class, the highest number of positive indications was given to the boy with the number 8 – he was selected by 8 colleagues. Among the students there was one person – a boy with the number 10 – who in the first study was not picked up once. The graph depicting the original structure of the class does not indicate the existence of closed class groups; one can notice a clear but frequent division by gender in this age. After the classes using art therapy methods, one can see a difference between the graphs. The results of the second test indicate that the person initially rejected in the class obtained 2 votes. Among girls, there was also an increase in typing, that is, the social position of some students improved. This can be seen in the case of girl No. 2; in the first study, she received only one positive indication, while after the participation in the cycle of classes, she received three votes from her colleagues. A big social promotion was also given to the boy with number 9, who in the first study received only one positive indication, and in the next, four. The changes in the children's choices are also noticeable – some of them indicated different children during the second examination than they indicated during the first one. This may be evidence of an emerging openness towards others and the blurring of barriers encountered in the course of the

first classes. It is also possible to lower the disproportion between the person with the highest number of indications and the rest of the class visible on the first chart. However, this does not necessarily indicate a decline in the social attractiveness of the “sociometric star,” but rather a change in the distribution of peer relationships in a given class and the establishment and improvement of relations between some members of the class group.

The sociogram shows the children's relations in the period shortly following their participation in classes. It is not possible to determine whether these relations remained similar in the longer run. It should also be taken into account that other factors may have influenced the test results, and that the class is a dynamic structure. Nevertheless, participation in art therapy classes stimulated the integration of the class group, which can be considered one of the most important factors conditioning the presented changes.

## Conclusion

Several conclusions can be drawn based on the results of the research. First of all, the use of art therapy in the context of peer relations of children at a younger school age is largely possible. It can be used to stimulate many areas of social life. According to the children taking part in this research, as well as the teachers, it is an attractive method of work that is an interesting way for children to convey important content related to their upbringing and, consequently, supports and shapes positive social relations in a class group. It is also important that during classes with elements of art therapy, a safe space for free expression and interaction between members of a given group is created. Eliminating the stress and negative tensions associated with the grading and structuring process encourages students to be active and allows them to share their work without the fear of criticism from the teacher and others. The use of art-therapy elements supports the development of communication between participants of the course. Thanks to this, pupils and students can get to know themselves and others, as well as communicate freely.

The influence of art therapy on the peer relations of children at a younger school age is confirmed by the teachers' opinions and the results contained in the sociogram, which indicate positive changes in peer relations after participation in the classes. It gave them the opportunity to get to know themselves and their colleagues better during targeted activities, which contributed to the stimulation and improvement of their peer relationships.

The healing power of art has been known to researchers for many years. It affects many spheres of human life. The possibilities offered by this field create new horizons for the use and adaptation of art therapy methods to the specifics of working with children in early school age. Art therapy can help in creating and strengthening children's social skills. Properly used by pedagogues, it can affect children's peer relationships and their functioning in the community.

Participation in activities with elements of art therapy gives pupils the opportunity to open themselves up and express their inner experiences and emotions. This is very important, because today's children prefer to move away from reality, losing their personality in virtual realities. Such a created world and its vision become a barrier for real interpersonal contacts and a threat to shaping systems of values and to building correct reactions to everyday situations.

Perhaps art therapy will be the answer to the widening educational crisis and socio-emotional difficulties in the world of a small child. It is important to bring the methods, techniques and means of art therapy to teachers so that they can use them properly in their work. It should be remembered that when using art therapy, the tasks must be graded properly, and the art forms and tools should be selected wisely and responsibly. It is optimistic that the respondents' declarations voice their willingness to use art therapy. However, it should be remembered that it is important to educate teachers and build their art-therapy awareness, so that the means of artistic expression used bring full-sized benefits.

## References

- Chmielniecka-Płaskota, A., Łoza, B. & Szulc, W. (2014). Podstawy arteterapii [The Basics of Art Therapy]. In: A. Chmielniecka-Płaskota & B. Łoza (eds.), *Arteterapia* [Art Therapy], part 1 (pp. 13–20). Warszawa: Difin.
- Florczykiewicz, J. (2015). Interdyscyplinarność arteterapii – sztuka jako przestrzeń działania arteterapeutycznego. Student niepełnosprawny [The Interdisciplinarity of Art Therapy – Art as a Therapeutic Space. A Disabled Student]. *Szkice i Rozprawy* [Sketches and Dissertations], 15(8), 25–42.
- Gilroy, A. (2009). *Arteterapia – badania i praktyka* [Art Therapy – Research and Practice]. Łódź: Wydawnictwo Akademii Humanistyczno-Ekonomicznej w Łodzi.
- Glińska-Lachowicz, A. (2010). Arteterapia w warsztacie pedagoga resocjalizacyjnego – opinie studentów (doniesienie z badań własnych) [Art Therapy in the Work of a Rehabilitation Pedagogue – Student Opinions (A Report from Own Research)].

- In: W. Szulc (ed.), *Arteterapia jako dyscyplina akademicka w krajach europejskich* [*Art Therapy as an Academic Discipline in European Countries*] (pp. 151–164). Wrocław: Wydawnictwo Uniwersytetu Wrocławskiego.
- Gładyszewska-Cylulko, J. (2007). *Wspomaganie rozwoju dzieci nieśmiałych poprzez wizualizację i inne techniki arteterapii* [*Supporting the Development of Shy Children through Visualization and Other Art Therapy Techniques*]. Kraków: Impuls.
- Gładyszewska-Cylulko, J. (2011). *Arteterapia w pracy pedagoga* [*Art Therapy in the Work of a Teacher*]. Kraków: Impuls.
- Gulińska-Grzeluska, D. (2011). *Muzykoterapia dzieci agresywnych* [*Music Therapy for Aggressive Children*]. Łódź: Wydawnictwo Akademii Techniczno-Humanistycznej w Łodzi.
- Janicki, A. (1990). Arteterapia [Art. Therapy]. In: L. Hanek & M. Passella (eds.), *Arteterapia* [*Art Therapy*] (pp. 14–22). Wrocław: Akademia Muzyczna im. Karola Lipińskiego we Wrocławiu.
- Kuciapiński, M.J. (2013). Wpływ arteterapii na rozwój osobowy dzieci w wieku przedszkolnym [The Impact of Art Therapy on the Personal Development of Preschool Children]. *Pedagogika Rodziny* [*Family Pedagogy*], 3(3), 17–35.
- Malinowska, J. & Jabłońska, M. (2016). Przez edukację artystyczną i środowiskową do zrównoważonego rozwoju [Through Artistic and Environmental Education to Sustainable Development]. *Konteksty Pedagogiczne* [*Pedagogical Contexts*], 1(6), 67–85.
- Pikała, A. & Sasin, M. (2016). *Arteterapia, scenariusze zajęć* [*Art Therapy, Class Scenarios*]. Łódź: Wydawnictwo Uniwersytetu Łódzkiego.
- Szabelska, G. (2012). Diagnostyczna funkcja terapii sztuką: zastosowanie analizy rysunku rodziny w procesie wczesnego rozpoznawania dziecka krzywdzonego w środowisku rodzinnym [The Diagnostic Function of Art Therapy: the Use of Family Drawing Analysis in the Process of Early Recognition of Child Abuse in Family Environment]. In: B. Kaczorowska & W. Karolak (eds.), *Arteterapia. Od rozważań nad teorią do zastosowań praktycznych* [*Art Therapy. From Theoretical Considerations to Practical Applications*] (pp. 297–314). Łódź: Wydawnictwo Akademii Humanistyczno-Ekonomicznej w Łodzi.





Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 121-146  
DOI: 10.19265/KP.2019.112121



## ORIGINAL ARTICLE

Received: 28.04.2019

Accepted: 10.05.2019

Olympia Gogolin

ORCID iD: 0000-0002-0969-5123

Municipal Public Library in Gliwice

olimpia.gogolin@onet.eu

Eugeniusz Szymik

ORCID iD: 0000-0001-9142-2484

University of Silesia in Katowice

eugeniusz.szymik@us.edu.pl

## THE ROLE OF DRAMA IN DEVELOPING COMMUNICATION COMPETENCIES OF EARLY PRIMARY SCHOOL STUDENTS

ROLA DRAMY W ROZWIJANIU KOMPETENCJI  
KOMUNIKACYJNYCH UCZNIÓW EDUKACJI  
WCZESNOSZKOLNEJ

### Keywords:

communication  
competences,  
key competences,  
drama, early child-  
hood education

**Summary:** The article is an attempt to answer the question of what role drama plays in the development of competences among early childhood education pupils. The theoretical part presents the concepts of competences and key competences in the context of linguistic, cognitive and social processes. Next, the authors briefly discuss the method of drama by presenting the classification of G. Bolton's drama techniques. The practical part discusses the results of tests carried out among teachers (posttest) and among pupils (pretest, posttest, and language proficiency test).

**Słowa kluczowe:**

kompetencje  
komunikacyjne,  
kompetencje  
kluczowe, drama,  
edukacja wczesno  
szkolna

**Streszczenie:** Artykuł stanowi próbę odpowiedzi na pytanie, jaką rolę odgrywa drama w rozwoju kompetencji komunikacyjnych uczniów edukacji wczesnoszkolnej. W części teoretycznej zostały przybliżone pojęcia: kompetencji, kompetencji kluczowych w kontekście procesów językowych, poznawczych i społecznych. Następnie autorzy omawiają pokrótce metodę dramy, eksponując klasyfikację technik dramowych autorstwa G. Boltona. W części praktycznej omówione są wyniki badań przeprowadzonych wśród nauczycieli (ankieta posttest) oraz uczniów (ankieta pretest i posttest oraz test kompetencji językowych).

## Introduction

Nowadays – in the era of globalization and civilization changes – the broadly understood term “competence” is of key importance. The term originates from Latin, in which *competentia* means “correspondence” and “compatibility,” and the root *competere* means “to get together, agree, be suitable for, compete” (Kopaliński, 1975, p. 510), as well as “to occupy a certain position” (Męczkowska, 2003, p. 693). The term has a wide range of meaning. In pedagogy, it can be defined as “the ability for self-fulfillment, which is mainly the result of effective learning; in the colloquial sense – the skills, qualifications and powers to perform tasks in a specific field” (Kupisiewicz & Kupisiewicz, 2009, p. 82).

Competence development begins in the first months of life. The following article emphasizes the competences taught in the early childhood education process, because, as L. Wołoszynowa points out, “the school performs the function of educating young generations, preparing them for life and work, as well as caring for them, which is why it has to be seen as a powerful development factor” (1982, p. 522). Bearing in mind the above, the goal of our work is to determine the influence of drama on the communicative competence of Polish students in the early years of their education.

While discussing the competences of an individual, we focus on the areas of change within key competences in the process of lifelong learning, identified by the European Union.<sup>1</sup> When selecting the key competences, we paid

---

<sup>1</sup> The analysis of these competences is annexed to the Council Recommendation of 22 May 2018 on key competences for lifelong learning.

attention to communication aspects. Therefore, we can point out “competence in understanding and creating information” and “personal, social and learning skills.” In the case of the former, the language and cognitive competences become more and more important, which is why it is the focus of two out of the three specific research problems we discuss. The third detailed research problem oscillates between personal and social competences.

Before we proceed to the analysis of key competences, it is worth introducing the concept of communication competence. In the PWN *New Lexicon*, it is defined as “the ability to use language according to the social situation and the characteristics of the recipient; together with language competence, i.e., the ability to use a given language, communicative competence creates human language knowledge” (*Nowy leksykon PWN*, 1998, p. 823). Thus, it becomes a condition for social behavior.

D. Hymes pointed out four aspects of this competence. The first is systemic potential, and, therefore, the ability to express something through language. The second is correspondence, or the effectiveness of expression. The third is occurrence, associated with the social implementation of statements. The fourth – feasibility – refers to the social and psychological conditions of the speaking individual.

## Key Competences

In the annex to *Official Gazette* No. C/189, the European Union defines key competences as a combination of knowledge, skills, and attitudes.

Competences in the field of understanding and creating information are understood as the individual’s skills concerning the recognition, understanding, expression, formulation, and interpretation of concepts, opinions, phenomena and feelings in oral and written form. Having these skills is a prerequisite for effective communication with the environment, which also provides the basis for further education.

These competences include the ability to read and write, and correctly understand written information, and thus require knowledge of vocabulary, functional grammar, and language functions [...], [and] the ability to distinguish and use sources of various types, to search, collect and process information, to use appropriate help, and to formulate and express one’s arguments in speech and writing in a convincing manner, according to the context. (*Załącznik. Kompetencje kluczowe... [Appendix. Key competences...]*, 2018, p. 8)



Writing about competence, W. Kopaliński weaves the language aspect into the definition: “in the theory of language, [competence] is an intuitive knowledge of the language that everyone who speaks in the mother tongue from the age of 6 to 8 has a command of, enabling him/her to correctly express himself/herself and distinguish between correct and incorrect sentences” (Kopaliński, 1975, p. 510).

The concept of “linguistic competence” was created by N. Chomsky. In his understanding, the term meant implicit mental knowledge related to the use of the language system.

I. Kurcz, the author of *Psychology of Language and Communication*, considers language competence to be the ability of homo sapiens to acquire language, i.e., the rules for the combination (putting together) of language signs (sound or sign language) into sentences. These rules are different in different languages.

In his model of language knowledge, Kurcz distinguishes communicative competence – the ability to use language according to the interlocutor and the social situation<sup>2</sup> – apart from strictly linguistic competence. The basic components of the communication competence model are, therefore, knowledge, motivation and skills (Morreale, Spitzberg & Barge, 2007, p. 80).

From our point of view, the concept of strictly linguistic competence can be understood very narrowly. Fully linguistic competence (in pure form) is related only with the ability to acquire language, i.e., the innate ability to form sentences in a language. This means that the language user assimilates the vocabulary and basic syntactic rules but is unable to understand metaphors or allusions.

In combination with communicative competence, language competence covers a whole range of human behaviors<sup>3</sup> and emotions, and the attitude towards the people one meets. Communication competence is, in turn, related to the human psychical sphere. These competences contribute to pupils’ linguistic knowledge and their ability to use language.

---

<sup>2</sup> The concept of communication competence was introduced by D. Hymes (1980, pp. 41–82). In turn, U. Żydek-Bednarczuk (2009, p. 57) writes that “communication competence concerns the degree to which desirable goals are achieved through communication in a manner appropriate to the context.” See also: Nęcki, 1996, p. 192.

<sup>3</sup> The pupil’s linguistic behavior will depend on both competences, i.e., linguistic competence and communication competence.

The semantics of the notion of language competence and communicative competence can be broadly understood. We assume that an important principle that a teacher should follow when working with students at the level of early childhood education in the Polish language is the following: "One understands what one feels." We devoted our research to the changes in the area of communicative competences experienced by students in connection with their participation in drama classes, both in their own opinion and in the opinion of the surveyed teachers.

By cognitive development, we understand the development of skills in the perception, memorization and processing of stimuli reaching an individual from the outside world. The concept of cognitive development is inseparably connected with cognitive processes, which include receiving impressions, perception, thinking and memory. Receiving sensations and perception enable one to learn certain information about the world and other individuals. Thinking is a higher form, while memory processes are designed to store and recall previously obtained information.

From the moment of birth until the second year of life, a child goes through a sensorimotor period, which is characterized by the fact that the child interacts with the environment with the help of the senses. This is why children love to take everything into their mouths and try everything. That is how they learn about objects and their properties.

From the second year of life, children begin to associate the subject with its name. They enter the period of preoperational development. As the child has not yet fully developed her/his speech skills, she or he thinks through action. As toddlers, children make decisions based on their own perception of the world, develop perceptions and spatial imaginations that are self-centered. This property disappears in the fifth year of life, when children begin to realize that their ideas do not necessarily reflect reality, and that their beliefs may differ from the beliefs of other people.

In early childhood, toddlers acquire "the ability to recall absent things and phenomena by means of symbols and signs that Piaget called a symbolic function" (Strelau, 2007, p. 300). At the end of this period, they begin to notice the differences between objects; they can also group them on the basis of their similarity.

In the pre-school period, children develop recent memory and long-term memory. Egocentric thinking turns into intuitive thinking. During this period,

“the development of children’s theories of the mind” also takes place (Kielar-Turska, 2000, p. 104).

From the age of seven, children enter the concrete operational stage.<sup>4</sup> When making decisions, not only do they follow their perception of the world, but they also try to verify the correctness of their own observations. This leads to the formation of logical memory, which, in turn, facilitates learning. From the perspective of schooling, the key function is also auditory and visual sensitivity, conducive to the acquisition of reading and writing skills.

According to J. Piaget, cognitive development ends in adolescence, and therefore, at around 11–12 years of age. Young people then enter the formal operational stage which Piaget describes in the following way:

[...] in the period of 11–12 years there is [...] in the child’s thinking a fundamental change, which is the culmination of the operations constructed during the second childhood: the transition from concrete thinking to “formal” thinking, or “hypothetical-deductive” thinking. (Piaget, 2006, p. 60)

To sum up, it is worth noting that in the didactic and educational process, one way to stimulate the senses which are the basis of cognitive development is the use of the drama method. This method helps to develop memory, imagination, thought and speech.

By social development, we understand changes in a person that contribute to the fact that she or he consciously participates in life and social activities. As A. Matczak emphasizes, “the beginnings of social development are marked by the time the child begins to distinguish people from things and behave differently to them” (Matczak, 2003, p. 155). Social development contributes to the socialization of individuals and the changes related to their relationship with the environment, as well as their knowledge about themselves. Social development is also associated with emotional development and moral development.

Infants are already learning to recognize voices, make eye contact and smile. They also begin to establish emotional ties with a guardian who “becomes a safe base” enabling the child to explore the immediate environment, including his/her own body, and to gradually become independent (Czub, 2015, p. 49).

---

<sup>4</sup> In the phase of operations, “they are able to assemble, reverse, and combine the same elements within a given whole, and express the same material from different points of view” (Przetacznikowa & Makiełło-Jarza, 1980, p. 137).

In toddlers, signs of positive social feelings are visible. Although children are not yet able to organize their own fun, they are happy to be in the company of other children.

Another opportunity to make new friends appears when a child goes to kindergarten. It helps to build relationships full of harmonious coexistence and cooperation. It should be emphasized, however, that these relations are not yet permanent and are based primarily on fun. "Particularly important are role games that allow one to discover rules related to a given role. Thanks to this, a child can learn the essence of a given role" (Harwas-Napierała & Trempała, 2000, p. 113).

It is possible to talk about the formation of friendships in the case of slightly older children from around the age of seven. The foundation of friendship is mutual trust, help and respect.

"By entering school, a child reaches a certain level of social and emotional maturity, allowing him/her to adapt to the school situation" (Przetacznikowa & Makięło-Jarża, 1980, p. 137). At school, children become part of a formal group (school class). Their contacts depend on acquired communication skills.

Peers continue to play a key role for adolescents. "Membership in a group of peers, friendships and intimate relationships give one a chance to get to know better the behaviors and expectations of others [...]. Besides, they are an opportunity to improve the ability to adapt to another person's otherness" (Bardziejewska, 2015, p. 359).

Referring to the key competences in the lifelong learning process published in the *Official Journal of the European Union*, it should be noted that "personal, social and learning skills competences" are understood as "the ability to reflect upon oneself, effectively manage time and information, work with others in a constructive way, remain resilient and manage one's own learning and career" (*Załącznik. Kompetencje kluczowe... [Appendix. Key competences...]*, 2018, p. 10). This requires the ability to effectively communicate in different environments, as well as cooperation, assertiveness, empathy, tolerance and looking at a given problem from different perspectives, abilities that can be taught by the drama method. Drama, in fact, allows students to put themselves in the situation of someone else, and thus allows for a better understanding of someone's attitudes and behavior.

## Drama and Its Multi-Faceted Dimension

Teaching by experience is an essential element of the drama method. Drama is a didactic and educational method with a multifaceted dimension; it is a way

of learning through experience and acting based on a fictional situation. This method contributes to the development of imagination, it shapes empathic, verbal and non-verbal communication skills and cooperation. What is more, the techniques of improvisation and “entering the role” used during drama classes make it easier to build a model of life and interpersonal relations.

The precursor of the drama method was B. Way, the author of the most famous work on this method, i.e., *Development Through Drama*. The most famous theoreticians and practitioners of drama in Europe were G. Bolton, L. Chancerel, H. Caldwell Cook, C. Desinan, D. Heathcote and P. Slade.

Drama appeared in Poland over three decades ago. On the 12–15<sup>th</sup> of April 1985, five English experts in drama, also actors and educators, visited the Warsaw Ochota Theater. The visitors from the Greenwich Young People’s Theater Company conducted drama workshops. The addressees of these classes were teachers, theater instructors and actors. During the workshops, the Britons focused primarily on social drama, which was intended to prepare young people for social roles.

First, drama was mainly used by teachers of early childhood education. There it took the form of quasi-games. In older classes, drama primarily served as a friendly and attractive interpretation of literary works for students.

In the early 1990s, drama began to enter schools at various levels of education, care and education centers, as well as cultural centers. At the end of the century, it was introduced to the core curriculum in all types of schools as one of the methods for activating students in the didactic and educational process.

In the field of working with children in Polish language education, various drama techniques are used, such as: building individual and group monuments, creating sculptures and vivid pictures, pantomime etudes, “entering the role,” mini-stories, improvised scenes or stagings, drawings and stop-frames, along with the strategy of “five levels of consciousness,” and others.

## Methodological Assumptions of Own Research

The main goal of the research was to determine the influence of drama on the communicative competence of students of early childhood education in the Polish language. The main research goal was to try to answer the following question: What types of changes in the field of communication skills occur among students of early school education in connection with their participation in drama classes, both in the opinion of the students themselves, as well as the teachers surveyed?

This problem is further elaborated by the following research questions:

1. What changes in language competence in relation to participation in the Polish drama lessons were noticed by the students and by their teachers?
2. What cognitive changes were noticed by the students and by their teachers?
3. What changes in the social sphere were noticed by the students and by their teachers?

In the study, as a dependent variable, we adopted changes taking place in students participating in classes using drama. Its indicator is changes in the scope of language, cognitive, and social competences. The gender and the place of origin represented independent variables.

## Test Methods

In the context of our goals, the following research methods were considered the most useful:

1. A diagnostic survey based on a survey technique using a questionnaire as a research tool for early primary school students. We conducted the survey twice – for the first time, in September 2017, i.e., at the beginning of the school year (pretest). At the time, we asked the students about two issues. The first one concerned the opinion of the respondents on the lessons in the field of Polish language education in which they took part; the second related to the self-assessment of the respondents. We carried out the research for the second time in June 2018 (post-test). The survey questionnaire referred to three issues. The first two concerned the participation in drama lessons and their evaluation by the students, the third, the changes that the students saw in themselves thanks to their participation in the drama classes.
2. A language competence test, carried out both at the beginning (pretest) and at the end (posttest) of the school year. The test was to demonstrate whether participation in the drama classes increases the scope of knowledge and skills of the students in the linguistic sphere.

## Description and Analysis of Own Research Results

The study covered students from grades I to III of primary schools located in Gliwice, Czerwionka-Leszczynach, Stanowice and Dębick (Śląskie

Voivodship). In this way, opinions were obtained from people living both in the city and in the countryside.

The research group included representatives of two environments. The first of them were students – a total of 155 children, the second were teachers – a total of 15 people. Among the teachers surveyed, there were only women living in cities.

Greater diversity can be seen in the group of pupils examined. Boys predominated here (50.97% vs. 49.03% girls), as well as people living in the countryside (54.19%, as opposed to 45.81% urban residents). Details are presented in Tables 1 and 2.

Table 1  
*Gender*

Gender	Numerical Value	Percent
Girls	76	49.03
Boys	79	50.97

Source: own research.

Table 2  
*Place of Origin*

The Place of Origin	Numerical Value	Percent
City	71	45.81
Countryside	84	54.19

Source: own research.

The first question in the questionnaire was: “What lessons do you like the most?” Students had to mark at least one answer. The boys declared that the classes they liked the most were the ones during which they performed various physical exercises (78.95% from the countryside and 82.93% from the city); cooperated with other colleagues (60.53% from the countryside and 34.15% from the city); took part in shows/games (65.85% from the city, with only 15.79% of the boys from the countryside).

The girls appreciated the lessons during which they worked with colleagues or friends (69.70% from the countryside and 34.88% from the city); performed various physical exercises (66.67% from the countryside and 51.16% from the city); took part in shows/games (53.49% from the city and 27.27% from the countryside); played fairy-tale scenes (53.49% from the city and 36.36% from the countryside).

Detailed data are presented in the tables below.

Table 3  
*Elements of Polish language classes preferred by students<sup>5</sup>*

Elements of Polish language classes	Countryside			
	Girls		Boys	
	Numerical value	Percent	Numerical value	Percent
I was able to take part in a performance/game	9	27.27	6	15.79
We played scenes from fairy tales	12	36.36	6	15.79
I was able to watch my friends play	15	45.46	19	50.00
I was a literary hero (e.g., Ducky Lucky <sup>5</sup> )	6	18.18	3	7.90
I cooperated with other colleagues in the group	23	69.70	23	60.53
I could draw my favorite literary hero	7	21.21	5	13.16
We drew the verses of the poem	9	27.27	3	7.90
I could imitate the voices of animals	13	39.39	10	26.32
I recognized the sounds I heard from the corridor	4	12.12	2	5.26
I could change the ending of the story	6	18.18	2	5.26
I could finish the story	8	24.24	3	7.90
I created the story myself	17	51.51	15	39.47
We did various physical exercises	22	66.67	30	78.95
I played with an object I had imagined	5	15.15	3	7.90
We drew the correct word in the air	3	9.09	2	5.26

Source: own research.

<sup>5</sup> "Kaczka Dziwaczka" – a character from a famous Polish poem for children by Jan Brzechwa.



Table 4  
*Elements of Polish studies preferred by students*

Elements of Polish language classes	City			
	Girls		Boys	
	Numerical value	Percent	Numerical value	Percent
I was able to take part in a performance/game	23	53.49	27	65.85
We played scenes from fairy tales	23	53.49	19	46.34
I was able to watch my friends play	7	16.28	10	24.39
I was a literary hero (e.g., Ducky Lucky)	3	6.98	6	14.63
I cooperated with other colleagues in the group	15	34.88	14	34.15
I could draw my favorite literary hero	11	25.58	8	19.51
We drew the verses of the poem	10	23.26	2	4.88
I could imitate the voices of animals	4	9.30	2	4.88
I recognized the sounds I heard from the corridor	2	4.65	3	7.32
I could change the ending of the story	7	16.28	4	9.76
I could finish the story	12	27.91	1	2.44
I created the story myself	8	18.61	6	14.63
We did various physical exercises	22	51.16	34	82.93
I played with an object I had imagined	6	13.95	3	7.32
We drew the correct word in the air	5	11.63	1	2.44

Source: own research.

In the second task, the respondents were to finish the following sentence: "I believe that I am a person who ...". Eleven skills were indicated to the respondents, to which the students were to assign one of three options: "Well," "So-So," "Poorly."

Looking at the answers given by boys coming from the city, it can be noticed that they feel best when dealing with the explanation of their point of view (70.73%), but that they find it difficult to empathize with other people (36.59%).

Pupils living in the countryside feel well in situations where they have the opportunity to use their imagination (63.16%), and poorly in those in which they are forced to pay attention to other people's gestures (60.53%).

Looking at the answers of girls, it should be emphasized that students living in a city highly appreciate their ability to use their imagination (44.19%) but feel worse about skills related to making observations (32.56%).

Girls living in the countryside highly evaluate their skills of working in a group (48.49%) and their use of imagination (also 48.49%). Among their weaknesses, they mention paying attention to human gestures (60.61%) and memorizing the content of literary works (57.58%).

Detailed data are presented in the tables below.

Table 5

*I am a person who...*

I am a person who...	Countryside					
	Girls					
	Well		So-so		Poorly	
	Numerical Value	Percent	Numerical Value	Percent	Numerical Value	Percent
uses imagination	16	48.49	9	27.27	8	24.24
speaks out	12	36.36	16	48.49	5	15.15
learns new words	3	9.09	20	60.61	10	30.30
is observant	8	24.24	19	57.58	6	18.18
can explain my point of view	3	9.09	27	81.82	3	9.09
cooperates with others in a group	16	48.49	8	24.24	9	27.27
distinguishes good from evil	5	15.15	24	72.73	5	15.15
remembers the plot of literary works	1	3.03	11	33.33	19	57.58
makes discoveries	2	6.06	14	42.42	13	39.39
pays attention to other people's gestures	3	9.09	10	30.30	20	60.61
empathizes with other people	6	18.18	19	57.58	8	24.24

Source: own research.

Table 6

*I am a person who...*

I am a person who..	Countryside					
	Boys					
	Well		So-so		Poorly	
	Numerical Value	Percent	Numerical Value	Percent	Numerical Value	Percent
uses imagination	24	63.16	10	26.32	4	10.53
speaks out	8	21.05	25	65.79	5	13.16
learns new words	1	2.63	25	65.79	12	31.58
is observant	11	28.95	22	57.90	4	10.53
can explain my point of view	0	0	24	63.16	14	36.84
cooperates with others in a group	20	52.63	10	26.32	8	21.05
distinguishes good from evil	11	28.95	23	60.53	4	10.53
remembers the plot of literary works	10	26.32	13	34.21	15	39.47
makes discoveries	16	42.11	3	7.90	12	31.58
pays attention to other people's gestures	5	13.16	10	26.32	23	60.53
empathizes with other people	5	13.16	21	55.26	12	31.58

Source: own research.

Table 7  
*I am a person who...*

I am a person who..	City					
	Girls					
	Well		So-so		Poorly	
	Numerical Value	Percent	Numerical Value	Percent	Numerical Value	Percent
uses imagination	19	44.19	18	41.86	6	13.95
speaks out	7	16.28	32	74.42	5	11.63
learns new words	4	9.30	33	76.74	6	13.95
is observant	13	30.23	19	44.19	14	32.56
can explain my point of view	3	6.98	28	65.12	11	25.58
cooperates with others in a group	14	32.56	24	55.81	7	16.28
distinguishes good from evil	15	34.88	23	53.49	5	11.63
remembers the plot of literary works	9	20.93	27	62.79	9	20.93
makes discoveries	14	32.56	19	44.19	7	16.28
pays attention to other people's gestures	13	30.23	19	44.19	11	25.58
empathizes with other people	16	37.21	19	44.19	8	18.61

Source: own research.

Table 8

*I am a person who...*

I am a person who..	Countryside					
	Boys					
	Well		So-so		Poorly	
	Numerical Value	Percent	Numerical Value	Percent	Numerical Value	Percent
uses imagination	13	31.71	23	56.10	5	12.20
speaks out	14	34.15	21	51.22	6	14.63
learns new words	12	29.27	21	51.22	7	17.07
is observant	17	41.46	18	43.90	6	14.63
can explain my point of view	29	70.73	26	63.42	5	12.20
cooperates with others in a group	20	48.78	14	34.15	5	12.20
distinguishes good from evil	12	29.27	23	56.10	5	12.20
remembers the plot of literary works	7	17.07	26	63.42	8	19.51
makes discoveries	11	26.83	24	58.54	6	14.63
pays attention to other people's gestures	9	21.95	20	48.78	12	29.27
empathizes with other people	7	17.07	19	46.34	15	36.59

Source: own research.

As one can see, what the majority of questionnaire students value, regardless of gender and place of origin, is the ability to use imagination. This is important in drama lessons, where imagination is the key to success.

Skills that students assess the lowest vary depending on their place of residence. The respondents from the city have problems with making observations (this concerns girls) and getting into the situation of others (mainly boys), whereas the respondents coming from the countryside have problems with reading gestures of other people, and thus with non-verbal communication. The drama method can have a significant impact on raising these competences, as the results of the posttest show.

At the end of the school year, we conducted the second survey. The questionnaire concerned three issues. The first of these was the participation of students in the drama classes. As expected, all respondents answered positively.

Table 9  
*Participation of respondents in drama classes*

Participation in drama classes	Countryside			
	Girls		Boys	
	Numerical Value	Percent	Numerical Value	Percent
Yes	33	100	38	100
No	0	0	0	0

Source: own research.

Table 10  
*Participation of respondents in drama classes*

Participation in drama lessons	City			
	Girls		Boys	
	Numerical Value	Percent	Numerical Value	Percent
Yes	43	100	41	100
No	0	0	0	0

Source: own research.

The next question in the questionnaire was: "How do you rate your participation in drama classes?" The answers show that regardless of gender and place of residence, the respondents readily took part in drama lessons (63.64% girls and 52.63% boys from the countryside, as well as 76.74% of girls and 82.93% of boys from the city). The second most frequently chosen option by the respondents living in the countryside was the answer "I liked to participate in these classes." It was indicated by 39.39% of girls and 44.74% of boys. This option was also the most popular among the respondents from the city: 100% girls and 95.12% boys.

Respondents from the city – both girls (83.72%) and boys (70.73%) – equally willingly declared their active participation in the drama classes.

Detailed data are presented in the tables below.

Table 11

*Evaluation of one's participation in drama lessons*

Evaluation of one's participation in the drama lessons	Countryside			
	Girls		Boys	
	Numerical Value	Percent	Numerical Value	Percent
I liked to participate in these activities	13	39.39	17	44.74
I was happy to participate in them	21	63.64	20	52.63
I actively participated in these classes	6	18.18	7	18.42
I came up with ideas during these classes	5	15.15	6	15.79
I had fun during these classes	11	33.33	12	31.58
I acted spontaneously	4	12.12	4	10.53
I felt confident	15	45.46	11	28.95

Source: own research.

Table 12

*Evaluation of one's participation in drama lessons*

Evaluation of one's participation in drama lessons	City			
	Girls		Boys	
	Numerical Value	Percent	Numerical Value	Percent
I liked to participate in these activities	43	100	39	95,12
I was happy to participate in them	33	76,74	34	82,93
I actively participated in these classes	36	83,72	29	70,73
I came up with ideas during these classes	27	62,79	21	51,22
I had fun during these classes	25	58,14	24	58,54
I acted spontaneously	29	67,44	23	56,10
I felt confident	26	60,47	28	68,29

Source: own research.

The last issue raised concerned the changes observed in the participants of the drama classes. The task of the respondents was to finish the sentence: "In this school year, I have noticed the following changes...". The study proved that regardless of gender and place of residence, the students did not feel bored (countryside: 69.70% girls and 60.53% boys; city: 65.12% girls and 63.42% boys).

The respondents also appreciated another advantage of the drama classes, namely, breaking the interpersonal barrier on the teacher-student and student-student levels. This is evidenced by the answer "I'm not afraid of the teacher, I like talking to my friends." This option was chosen by 72.73% of the girls and 55.26% of the boys coming from the countryside, and 55.81% of the girls and 51.22% of the boys from the city.

It is also noteworthy that the drama lessons aroused in the students, especially those coming from the city, a willingness to help others – as declared by 46.5% of the girls and 63.42% of the boys.

Detailed data are presented in tables 13 and 14.

Table 13  
*Changes observed by students*

Changes observed by students	Countryside			
	Girls		Boys	
	Numerical Value	Percent	Numerical Value	Percent
I have become more sensitive	4	12.12	3	7.90
I am not bored during lessons	23	69.70	23	60.53
I am less nervous	9	27.27	9	23.68
I can rejoice and grieve with others	17	51.52	10	26.32
I want to help others	2	6.06	2	5.26
I have become more confident	10	30.30	8	21.05
I know what I can do, what I like, and what I do not like	14	42.42	20	52.63
I'm not afraid of my teacher, I like talking to friends	24	72.73	21	55.26
I feel important	4	12.12	4	10.53

Source: own research.



Table 13  
*Changes observed by students*

Changes observed by students	City			
	Girls		Boys	
	Numerical Value	Percent	Numerical Value	Percent
I have become more sensitive	13	30.23	9	21.95
I am not bored during lessons	28	65.12	26	63.42
I am less nervous	15	34.88	16	39.02
I can rejoice and grieve with others	13	30.23	10	24.39
I want to help others	20	46.51	26	63.42
I have become more confident	15	34.88	22	53.66
I know what I can do, what I like, and what I do not like	20	46.51	23	56.10
I'm not afraid of my teacher, I like talking to friends	24	55.81	21	51.22
I feel important	13	30.23	16	39.02

Source: own research.

The obtained results allow us to state that the students liked the drama lessons and were willing to take part in them. What is more, they see the changes they underwent. Drama increases the level of empathy of the pupils and also has a positive effect on their interpersonal relations, even at the teacher-student level. Breaking schematics and monotony, it increases the students' interest in the discussed topic and, consequently, fully activates them in the didactic and educational process.

In order to assess the influence of drama on the communicative competences of pupils outside the survey, we also conducted a language competence test. The starting point was a short text created by us: "Marek and Jacek are twins. They go to the third grade. Marek has long dark hair and brown eyes. Jacek has short blond hair and green eyes. The brothers like to learn." Based on the text, the level of linguistic awareness of the studied students in the fields of phonetics, inflection, syntax, and phraseology was verified.

Due to the nature of the analysis of the obtained results, we provide detailed data in the final part of the article in the form of summary tables.

When making a comparative analysis of the response test given to the first question, it should be noted that students – regardless of gender and place of origin – made slight progress in the division of words into syllables. The indicator of correct answers in the posttest has moved approximately by 10 percentage points in relation to the pretest.

Some improvement can also be seen in the field of inflection. This is especially visible in the responses of students coming from the city. A surprising change can be seen in the case of the boys living in the city. While in the pretest, 14.63% of the respondents correctly answered the question assessing inflection, in the posttest, 36.59% answered it correctly.

The third question of the test verified syntactic competence. Also here, you can see the students' progress. The improvement is independent of the place of residence, but different in regard to the gender of the respondents. A greater improvement was observed in girls (about 9%) than in boys (about 4%).

The last issue examined was phraseology. The results of girls and boys are similar, while the differences are in the place of origin. The respondents living in the city show slightly better skills in understanding the phraseological relationships than their peers from the countryside.

Table 15

*Indicators of correct and incorrect pretest answers*

Tasks	Countryside							
	Girls				Boys			
	Correct answers		Incorrect answers		Correct answers		Incorrect answers	
	Numerical value	Percent	Numerical value	Percent	Numerical value	Percent	Numerical value	Percent
1	25	75.76	8	24.24	33	86.84	5	13.16
2	29	87.88	4	12.12	31	81.58	7	18.42
3	26	78.79	7	21.21	36	94.74	2	5.26
4	18	54.55	15	45.45	24	63.16	14	36.84
5	17	51.52	16	48.48	24	63.16	14	36.84
6	25	75.76	8	24.24	30	78.95	8	21.05
7	18	54.55	15	45.45	21	55.26	17	44.74

Source: own research.

Table 16  
*Indicators of correct and incorrect pre-test answers*

Tasks	City							
	Girls				Boys			
	Correct answers		Incorrect answers		Correct answers		Incorrect answers	
	Numerical value	Percent	Numerical value	Percent	Numerical value	Percent	Numerical value	Percent
1	25	58.14	18	41.86	28	68.29	13	31.71
2	25	58.14	18	41.86	27	65.85	14	34.15
3	29	67.44	14	32.56	32	78.05	9	21.95
4	24	55.81	19	44.19	26	63.41	15	36.59
5	10	23.26	33	76.74	17	41.46	24	58.54
6	33	76.74	10	23.26	33	80.49	8	19.51
7	16	37.21	27	62.79	6	14.63	25	60.97

Source: own research.

Table 17  
*Indicators of correct and incorrect posttest answers*

Tasks	Countryside							
	Girls				Boys			
	Correct answers		Incorrect answers		Correct answers		Incorrect answers	
	Numerical value	Percent	Numerical value	Percent	Numerical value	Percent	Numerical value	Percent
1	28	84.85	5	15.15	33	86.84	5	13.16
2	30	90.91	3	9.09	32	84.21	6	15.79
3	29	87.88	4	12.12	37	97.37	1	2.63
4	21	63.64	12	36.36	27	71.05	11	28.95
5	19	57.58	14	42.42	26	68.42	12	31.58
6	28	84.85	5	15.15	31	81.58	7	18.42
7	24	72.73	9	27.27	26	68.42	12	31.58

Source: own research.

Table 18  
*Indicators of correct and incorrect posttest answers*

Tasks	City							
	Girls – 43				Boys – 41			
	Correct answers		Incorrect answers		Correct answers		Incorrect answers	
	Numerical value	Percent	Numerical value	Percent	Numerical value	Percent	Numerical value	Percent
1	30	69.77	13	30.23	31	75.61	10	24.39
2	35	81.40	8	18.60	33	80.49	8	19.51
3	33	76.74	10	23.26	34	82.93	7	17.07
4	31	72.09	12	27.91	29	70.73	12	29.27
5	16	37.21	27	62.79	21	51.22	20	48.78
6	40	93.02	3	6.98	37	90.24	4	9.76
7	23	53.49	20	46.51	15	36.59	26	63.41

Source: own research.

The study has shown that drama increases learners' language awareness, but one cannot talk about significant progress. Perhaps this is because, as a rule, no language training classes are given for a full 45 minutes. In addition, it is difficult to write a language lesson in which only the drama method would be used.

## Conclusion

In this article, we paid special attention to competences developed in the process of early childhood education in the Polish language with the use of various drama techniques. We placed emphasis on communication competence, referring to two of the eight key competences identified by the European Union. Within communication competences, we took a closer look at linguistic, cognitive and social competences.

Our research shows that drama as a method of teaching and education contributes to increasing the communication skills of early childhood education students. In the area of language competences, one can notice positive

changes in the field of phonetics, inflection, syntax and phraseology. One can, therefore, be tempted to say that the acquired skills will bring positive results in successive stages of education.

The greatest merits of drama can be seen in the field of social competence. This method not only breaks the shyness of pupils, but also induces them to actively participate in lessons, elicits spontaneity and influences their interpersonal relations. The changes are visible not only on the student-student plane, but also on the teacher-student level. Thanks to this, students feel more appreciated; it is easier for them to discover their creative possibilities and their level of empathy is increased.

The mentioned values are indicative of the popularity of drama and of the fact that it still remains one of the best activating methods in the didactic and educational process.

## References

- Bardziejewska, M. (2015). Okres dorastania. Jak rozpoznać potencjał nastolatków [Adolescence. How to Recognize the Potential of Teenagers]. In: A.I. Brzezińska (ed.), *Psychologiczne portrety człowieka* [Psychological Portraits of a Human Being] (pp. 345–377). Gdańsk: Gdańskie Wydawnictwo Psychologiczne.
- Czub, M. (2015). Wiek niemowlęcy. Jak rozpoznać potencjał dziecka? [Infancy. How to Recognize the Potential of Teenagers]. In: A.I. Brzezińska (ed.), *Psychologiczne portrety człowieka* [Psychological Portraits of a Human Being] (pp. 41–66). Gdańsk: Gdańskie Wydawnictwo Psychologiczne.
- Filipiak, E. (2002). *Konteksty rozwoju aktywności językowej dzieci w wieku wczesnoszkolnym* [Contexts for the Development of Language Activity of Early Childhood Education Children]. Bydgoszcz: Wydawnictwo Akademii Bydgoskiej im. Kazimierza Wielkiego.
- Hymes, D. (1980). Socjolingwistyka i etnografia mówienia [Interactional Sociolinguistics and Ethnography of Communication]. In: M. Głowiński (ed.), *Język i społeczeństwo* [Language and Society] (pp. 41–82). Warszawa: Czytelnik.
- Kielar-Turska, M. (2000). Średnie dzieciństwo. Wiek przedszkolny [Middle Childhood. Preschool Age]. In: B. Harwas-Napierała & J. Trempała (eds.), *Psychologia rozwoju człowieka. Charakterystyka okresów życia człowieka* [Psychology of Human Development. Characteristics of Different Periods in Human Life], vol. 2 (pp. 83–129). Warszawa: Wydawnictwo Naukowe PWN.
- Kopaliński, W. (1975). *Słownik wyrazów obcych i zwrotów obcojęzycznych* [Dictionary of Foreign Words and Phrases]. Warszawa: Wiedza Powszechna.

- Kupisiewicz, C. & Kupisiewicz, M. (2009). *Słownik pedagogiczny* [Pedagogical Dictionary]. Warszawa: Wydawnictwo Naukowe PWN.
- Kurcz, I. (2000). Język i komunikacja [Language and Communication]. In: J. Strelau (ed.), *Psychologia. Podręcznik akademicki* [Psychology. A Textbook for University Students], Vol. 2. *Psychologia ogólna* [General Psychology] (pp. 231–274). Gdańsk: Gdańskie Wydawnictwo Psychologiczne.
- Matczak, A. (2003). *Zarys psychologii rozwoju. Podręcznik dla nauczycieli* [An Outline of Developmental Psychology. A Handbook for Teachers]. Warszawa: Wydawnictwo Akademickie Żak.
- Męczowska, A. (2003). Kompetencja [Competence]. In: T. Pilch (ed.), *Encyklopedia pedagogiczna XXI wieku* [Pedagogical Encyclopedia of the 21st Century], Vol. 2 (p. 693). Warszawa: Wydawnictwo Akademickie Żak.
- Morreale, S.P., Spitzberg, H. & Barge, J.K. (2007). *Komunikacja między ludźmi. Motywacja, wiedza i umiejętności* [Human Communication: Motivation, Knowledge, and Skills]. Warszawa: Wydawnictwo Naukowe PWN.
- Nęcki, Z. (1996). *Komunikacja międzyludzka* [Interpersonal Communication]. Kraków: Wydawnictwo Profesjonalnej Szkoły Biznesu.
- Nowy leksykon PWN* [The New PWN Lexicon] (1998). Warszawa: Wydawnictwo Naukowe PWN.
- Ogłóza, E., Polański, E. & Szymik, E. (1997). *Drama na lekcjach języka polskiego w klasach IV–VIII* [Drama Techniques in Polish Language Classes of 6<sup>th</sup>–8<sup>th</sup> Graders]. Kielce: Wydawnictwo Pedagogiczne ZNP.
- Piaget, J. (2006). *Studia z psychologii dziecka* [Six Psychological Studies]. Warszawa: Wydawnictwo Naukowe PWN.
- Pilch, T. (ed.) (2003). *Encyklopedia pedagogiczna XXI wieku* [Pedagogical Encyclopedia of the 21st Century], Vol. 2. Warszawa: Wydawnictwo Akademickie Żak.
- Przetacznikowa, M. & Makiełło-Jarża, G. (1980). *Psychologia rozwojowa* [Developmental Psychology]. Warszawa: Wydawnictwa Szkolne i Pedagogiczne.
- Strelau, J. (ed.) (2007). *Psychologia. Podręcznik akademicki*, Vol. 1. *Podstawy psychologii* [Psychology. A Textbook for University Students, Vol. 1. The Basics of Psychology]. Gdańsk: Gdańskie Wydawnictwo Psychologiczne.
- Wołoszynowa, L. (1982). Młodszy wiek szkolny [Early School Age]. In: M. Żebrowska (ed.), *Psychologia rozwojowa dzieci i młodzieży* [Developmental Psychology of Children and Youth] (pp. 522–663). Warszawa: Państwowe Wydawnictwo Naukowe.
- Załącznik. Kompetencje kluczowe w procesie uczenia się przez całe życie. Europejskie ramy odniesienia [Appendix. Key Competences for Lifelong Learning. European Reference Framework]. Dziennik Urzędowy UE [Official Journal of the EU] No. C/189 from 4.06.2018.

Żydek-Bednarczuk, U. (2009). Nowe aspekty kompetencji komunikacyjnej [New Aspects of Communication Competence]. In: A. Janus-Sitarz (ed.), *W trosce o dobrą edukację. Prace dedykowane Profesor Jadwidze Koralikowej z okazji 40-lecia pracy naukowej* [In the Interest of Good Education. Works Dedicated to Professor Jadwiga Koralikowa on the Occasion of the 40th Anniversary of her Academic Work] (pp. 51–62). Kraków: Wydawnictwo Universitas.



Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 147–159  
DOI: 10.19265/KP.2019.112147



## ORIGINAL ARTICLE

Received: 24.03.2019

Accepted: 10.04.2019

Łucja Reczek-Zymróż

ORCID iD: 0000-0003-2487-7707

Jan Grodek State Vocational Academy in Sanok

lucja.reczek@gmail.com

# EDUCATIONAL METHODS, FORMS AND AIDS APPLIED IN POLISH AND HUNGARIAN SCHOOLS AT THE LEVEL OF EARLY CHILDHOOD EDUCATION. RESEARCH REPORT

METODY, FORMY ORAZ ŚRODKI DYDAKTYCZNE  
STOSOWANE W SZKOŁACH POLSKICH  
I WĘGERSKICH NA POZIOMIE EDUKACJI  
WCZESNOSZKOLNEJ. KOMUNIKAT Z BADAŃ

### Keywords:

educational methods,  
forms of class  
organization,  
teaching aids,  
early childhood  
education

**Summary:** The article analyses issues connected with the educational methods, forms of class organization as well as teaching aids applied by teachers of early childhood education. It also evaluates the effectiveness of the above-mentioned factors since, to a large extent, they determine the success of educational processes. The article aims at examining the content related to the aforementioned issues based on the research conducted in 2016 among 200 early childhood education teachers from Poland (Tarnów and the Tarnów district) and 200 teachers from Hungary (Kaposvári, Sárospatak).



**Słowa kluczowe:**  
metody kształcenia,  
formy organizacji  
zajęć, środki  
dydaktyczne,  
edukacja  
wczesnoszkolna

**Streszczenie:** Tematem artykułu jest analiza problematyki stosowania przez nauczycieli edukacji wczesnoszkolnej metod kształcenia, form organizacji zajęć, środków dydaktycznych oraz ocena ich efektywności. Powyższe czynniki w istotnym stopniu warunkują powodzenie procesu dydaktycznego. Celem artykułu jest analiza treści dotyczących wskazanej problematyki na podstawie badań przeprowadzonych w 2016 roku wśród 200 nauczycieli edukacji wczesnoszkolnej z Polski (Tarnów i powiat tarnowski) oraz 200 nauczycieli z Węgier (Kaposvári, Sárospatak).

## Introduction

Expectations regarding education in modern schools are increasing and concern mainly the ability to search for and evaluate information that can be used in practice to solve problems and help in understanding the world around us. As a learning and motivating environment for unrestricted development, schools should provide opportunities through multi-sensory experiences and exploration of the environment, giving students autonomy and fostering a sense of competence and relations with others (Michalak, 2016). Technological progress, ethical and cultural changes require adapting methods of working with children, forms of class organization and educational resources to the learning school, i.e., the school in the state of creation (Hajdukiewicz & Wysocka, 2015). Contemporary education – not only early childhood education, but the process as a whole – has ceased to rely solely on providing children with content from the core curriculum and programs. Now, it is mainly based on arranging various educational situations and creating conditions conducive to forming important notions and logical schemes in the minds of students, which shall later serve as the foundation for their knowledge (Semadeni, 2016). Child-friendly early education should trigger the child's activity. This is facilitated, inter alia, by the proper organization of integrated classes in a suitably prepared space, allowing for the use of effective educational methods and various forms of activity. A targeted selection of didactic aids, taking into account both their traditional presentation and the possibility of designing and creating them from raw materials, complements this activity (Kędra & Zatorska, 2014).

## **Educational methods, forms and aids – factors determining the effectiveness of the early childhood education process**

A school functioning as a “construction site” should surprise and intrigue students. This happens, *inter alia*, thanks to teamwork, reference to the student’s personal knowledge, respect expressed in the choice of working methods and didactic aids that take into account the different competences and learning styles of children (Kędra & Zatorska, 2014). Stimulated in this way, their cognitive curiosity exploits the strengths of the brain, combines knowledge with emotions and allows children to look for solutions to various problems and tasks independently (Stańdo & Szałowska-Murmyło, 2017). What also conditions effective learning is an understanding of how our memory functions and the rules that govern remembering. In order to conduct classes well, it is worth considering what methods and forms of organization should be used to make the process of remembering, in which conscious memory plays a significant role, operate at a high level (Smolińska & Szychowski, 2011).

The main objectives of education aimed at supporting the child’s comprehensive development involve: forming appropriate cognitive patterns in his or her mind and developing operational thinking; helping the child collect experiences necessary for his or her functioning on a daily basis, stimulating reasoning, independent thinking and criticism; developing the ability to apply the acquired knowledge in specific life situations (Semadeni, 2016). This is to be achieved through, *inter alia*, alternative methods of work, which include: project work, information and communication technologies (ICT), textbook-free teaching, activating methods and techniques, games, recreational activities, drama techniques, elements of the Dalton Plan, the Maria Montessori system (Wydział Rozwoju Szkół i Placówek [Department of School and Educational Centre Development], 2016, p. 12). Activating methods give the opportunity to experiment, develop content and recognize the originality of thought, performance and creation. They allow for mistakes to be made, provide an opportunity to learn in an environment full of challenges and let the student make decisions regarding his or her own development. At the same time, however, they can also prove to be difficult in terms of the organization of space, preparation of aids, time management and involvement of all team members (Fechner-Sędzicka, Ochmańska & Odrobina, 2012). Lack of balance in the choice of methods (activating and expository) may, over time, discourage children from participation or cause the dominance of controlled activity, so

that the position of the student will change from the object to the subject of education (Skura & Lisicki, 2012). These opinions are confirmed by a survey conducted in Hungary. According to a report prepared therefrom, measures to modernize education include support for those teaching methods that increase engagement. What also serves to increase effectiveness is strengthening partnerships with those research centers which constitute a source of progress, as well as undertaking specific activities at the level of higher education to prepare staff for the teaching profession (Berács, Derényi, Kováts, Polónyi & Temesi, 2015).

Another element that determines educational success is connected with the use of diverse forms of class organization that allow children to be more sensitive to the needs of others, develop the habit of caring for the weak, teach cooperation and the performance of various functions in a group, encourage mediation and discussion, improve communication skills and respect the accepted principles of co-responsibility. While working in teams, children take on different roles, e.g., as teamwork organizers or regular members, which is good preparation for functioning not only in the school community, but also outside it (Kędra & Zatorska, 2014). During the classes, the teacher assigns the role of an assistant, who runs parts of the class, the role of a tutor, who explains certain issues to other students, and the role of a leader, who encourages the team to prepare tasks and provides the opportunity to present their achievements to the class (Fechner-Sędzicka et al., 2012). Working in groups prevents stigmatization of an individual, allows discovery of one's strengths and weaknesses, promotes activation, mutual inspiration and unification of the verbal and non-verbal messages communicated by children. The group activities should be preceded by work in pairs, which is supposed to teach children how to support each other and how to search for information. Once all the students in the class have successfully completed this stage of work, larger groups of students can be organized, with focus on the natural processes of communication and reflection sharing. Too little diversity in organizational forms and a longer period of using them in classes with children result in a natural tendency to systematize structures. Therefore, it is worth changing the composition of groups and their number and also, to plan them well to be able to estimate how much work is contributed by each individual team member (Skura & Lisicki, 2012).

The use of diverse didactic material can inspire and motivate children to act and take up challenges as well as to solve problems, becoming an important

element of the educational process. It can awaken and deepen the child's interests and natural curiosity about the world, open the child to the environment, prepare him or her for independent explorations of various fields of science and everyday life. It can also provide an opportunity to confront knowledge with practice, at the same time triggering many experiences and impressions in children (Fechner-Sędzicka et al., 2012). Creating work corners (based on Freinet's techniques of work), i.e., a well-stocked work library, source material archive, poetry corners, places with raw materials (clay, sand, stones), laboratories for research/simple experiments, spaces for presenting students' work, is a challenge but it also strengthens children's activity. The classroom should be a workshop – a space for the authentic work of both students and teachers – one which contains both the most modern and traditional materials that are accessible and safe to use by children (Kędra & Zatorska, 2014).

### **Methodological assumptions of own research**

The results presented below constitute a fragment of broader research conducted in 2016 in Poland (Tarnów district) and Hungary (Kaposvári, Sárospatak) on the functioning of teachers in modern primary schools.

In the presented study, an attempt was made to answer questions concerning the teaching methods, forms of organizing classes and didactic aids used by early primary school teachers in selected areas.

The method used in the research was a diagnostic survey, which involved a questionnaire and interviews among teachers as research tools. Questions included in the questionnaire were semi-open with the application of scales. The research sample consisted of 200 teachers from public primary schools in Poland and 200 from Hungary. The choice of the research area and research groups was dictated by the comparable (proportional to the number of inhabitants in both countries) level of urbanization of these places.

### **Results of own research**

The research results (Table 1) concerning the methods of working with early school age children and the assessment of their efficiency show that Polish teachers most often use the methods of independent acquisition of knowledge (77.5%) and practical methods (70.0%). The respondents are departing from verbal methods based on the assimilation of knowledge which remains mainly

in short-term memory (46.0%) in favor of the problem-solving approach to acquiring knowledge by children. However, what may cause concern is the fact that valorization methods (both impressionistic and expressive ones) are losing popularity in the educational process (43%), whereas they might otherwise constitute an interesting variant of work with children, who have a natural need for expression. The above-mentioned group of methods allows the spontaneous activity of children to be channeled. Additionally, demonstration-based methods prove to be an unattractive form of education for the Polish group. The respondents use activities from this sphere (35.5%) the least frequently, forgetting that the image for the young generation, the so-called "Google generation" or "Post-Millennials," serves as an important source of knowledge. It is difficult to establish a correlation between the respondents' educational background and the methods they use, as the number of teachers with higher vocational education is negligible, while the majority of respondents have a master's degree. On the other hand, there is a clear correlation between the length of work experience of the surveyed teachers and the chosen teaching methods. Contrary to the common belief that young teachers who are full of fresh and innovative ideas implement activating methods, it is the respondents with the relatively shortest work experience that favor traditional methods, i.e., verbal instruction. The research results indicate that precisely those Polish respondents who have the longest work experience most often use methods stimulating the independent acquisition of knowledge. These methods generate divergent thinking, desirable in modern education, which is exactly the argument used by the surveyed teachers when assessing the effectiveness of the methods applied in classes with children at early school age (72.5%). However, there are disproportions in the use of practical methods (71%) and the evaluation of their effectiveness (47%) by teachers. According to the interviewed teachers, the relatively low assessment of effectiveness may be due to insufficient time spent on practical activities. In this situation, one may ask whether the working time during classes has been properly managed by teachers and whether the number of students participating in the classes, which undoubtedly determines the use of practical activities by students, has been adequate. The Polish group of the surveyed teachers rarely uses valorization methods and assesses their effectiveness as poor (27.5%); they fail to notice their advantages connected with evoking children's emotions that are conducive to learning.

Table 1  
*Methods of working with children used by Polish and Hungarian teachers in early childhood education*

[illegible]

Source: own research.

The Hungarian teachers express fundamentally different opinions than the Polish ones. They prefer word-based methods in working with children (78%), though they use practical methods (64.5%) whose effectiveness they perceive as average (35.5%) as frequently as the Polish respondents. Therefore, one can ask about the conditions of implementing practical methods, since they are so poorly rated by the Hungarian respondents. Demonstration-based methods are more popular among the Hungarian group (49%), but teachers rate their effectiveness relatively low (21%). Perhaps the form and content of the shows are not suitable for a generation who find 3D/4D screenings attractive and who do not treat conventional images as an object of interest. It is worth pointing out that methods of independent knowledge acquisition (42.5%) and valorization methods (22.5%) are not included in the mainstream of methods applied while working with children in the group under study. This may be due, as the research results show, to the very low evaluation of their effectiveness (6.5% – methods of independent knowledge acquisition; 5.0% – valorization methods). In contrast to the Polish group of respondents, methods of knowledge assimilation that are assessed in the modern education system as ineffective are preferred by the Hungarian respondents with higher vocational educational background and the longest work experience. This may follow from the system of teachers' vocational training, which favors traditional methods.

The forms of work used by the Polish respondents (Table 2) concentrate mainly on individual work (63%), whose effectiveness is still assessed as average (45%), and group work (68%), which is highly valued. The Hungarian respondents, on the other hand, divide working time with children in a very proportional way between individual (58.0%), group (55.0%), collective (50.5%) and pair work (41.0%), indicating the effectiveness of all these forms. All forms of class organization are preferred by Polish teachers with the longest work experience. In the Hungarian group, work experience also determines the use of various forms of student work organization; the longer a teacher works in the profession, the greater his or her awareness in this respect. The Polish respondents with the longest work experience rated the effectiveness of group work the highest and work with the entire class the lowest, which corresponds to the modern concept of work in schools. This indicates a reversal of the transmission form of material presentation in favor of working in smaller teams.

Table 2  
*Forms of class organization used by Polish and Hungarian teachers in early childhood education*

Type of answer	Total :N = No. of respondents	Educational background		Length of work experience										
		master's degree	higher vocational	1–5 years	6–12 years	13–20 years	over 20 years							
a) individual work	126	116	123	37	3	79	31	8	27	11	21	25	47	72
		Poland N = 200	Poland N = 196	Hungary N = 79	Poland N = 4	Hungary N = 121	Poland N = 44	Hungary N = 11	Poland N = 46	Hungary N = 25	Poland N = 50	Hungary N = 41	Poland N = 60	Hungary N = 123
in percent	63.0	58.0	62.7	46.8	75.0	65.2	70.4	72.7	58.6	44.0	42.0	60.9	78.3	58.5
b) group work	137	110	135	28	2	82	28	3	37	14	25	26	47	67
in percent	68.5	55.0	68.8	35.4	50.0	67.7	63.6	27.2	80.4	56.0	50.0	63.4	78.3	54.4
c) collective work	94	101	94	40	–	61	12	6	14	11	27	23	41	61
in percent	47.0	50.5	47.9	50.6	–	50.4	27.2	54.5	30.4	44.0	54.0	56.0	68.3	49.5
d) binary work – in pairs	80	82	80	27	–	55	15	2	16	7	17	15	32	58
in percent	40.0	41.0	40.8	34.1	–	45.4	34.0	18.1	34.7	28.0	34.0	36.5	53.3	47.1

Source: own research.



The teaching aids used by early childhood education teachers (Table 3) are another issue that was analyzed. The most useful for both groups are visual aids (Poland – 74.0%; Hungary – 65.0%). Equally important for the Polish respondents were audio-visual aids (78.5%), i.e., equipment such as multimedia boards and computer programs, which are rarely used by the Hungarian group. The Hungarian respondents mentioned mainly the use of traditional didactic aids (65.0%) which do not require large financial resources. The results concerning the use of computers/tablets by both studied groups seem to be interesting. Both the Polish (27.5%) and Hungarian (18.5%) respondents indicate that these aids are not used on a daily basis. In the case of Hungarian respondents, traditional aids are the domain of the youngest teachers, while computer programs are used mainly by respondents with more than 13 years of work experience. In the Polish group, teachers with the longest work experience most often use diverse aids in classes with children of early school age. When asked about the effectiveness of the aids used, the vast majority of teachers from both countries declared their level of usefulness as low. Therefore, it can be concluded that raw materials are considered most appropriate as they offer the possibility of processing, thus becoming more effective since children are at least involved in the process of creating the aids.

Table 3  
*Teaching aids used by Polish and Hungarian teachers in early childhood education*

Type of answer	Total	Educational background			Length of work experience					
	N = No. of respondents	master's degree	higher vocational		1–5 years	6–12 years	13–20 years	over 20 years		
								</		

Source: own research.

## Conclusions

1. The group of Polish respondents prefer practical methods and independent knowledge acquisition in working with children of early school age, justifying their choice with their relatively high effectiveness. The Hungarian respondents rated the verbal methods of knowledge assimilation, which in Polish early school education play a supportive rather than a dominating role.
2. Both groups of respondents prefer individual and group forms of work with children to transmission of knowledge addressing the entire class.
3. The Polish teachers most often use modern multimedia as teaching aids in early childhood education, while the Hungarian respondents participating in the survey value traditional aids for their high effectiveness. The former indicate that the potential of resources available at schools is being exhausted and new solutions are being sought, which can result in a renewed interest in raw materials intended for processing.

## References

- A kisgyermekkori nevelés és gondozás irányelvei – Magyarországi Országjelentés [Early Childhood Education and Care Policy. Country Report for Hungary] (2005). Szerk. OECD Oktatási Igazgatóság. Budapest: OKI, NCSSZI, Corvinus Kiadó.
- Berács, J., Derényi, A., Kováts, G., Polónyi, I. & Temesi, J. (2015). *Stratégiai helyzetértékelés [Hungarian Higher Education 2014 – Strategic Analysis]*. Budapest: Budapesti Corvinus Egyetem Nemzetköz, Felsőoktatási Kutatások Központja.
- Fechner-Sędzicka, I., Ochmańska, B. & Odrobina, W. (2012). *Rozwijanie zainteresowań i zdolności matematycznych uczniów klas I–III szkoły podstawowej [Developing Mathematical Interests and Skills of Primary School Students in Grades I–III]*. Warszawa: ORE.
- Hajdukiewicz, M. & Wysocka, J. (2015). *Nauczyciel w szkole uczącej się. Informacje o nowym systemie wspomagania [Teacher in a Learning School. Information About a New Support System]*. Warszawa: ORE.
- Kędra, M. & Zatorska, M. (2014). *Razem z dzieckiem [Together with the Child]*. Warszawa: ORE.
- Michalak, R. (2016). Edukacja najmłodszych kontekstem kształtowania motywacji do uczenia się. Ogląd zjawiska w badaniach własnych [Education of the youngest children in the context of shaping their motivation to learn. An overview of the phenomenon in own research]. *Konteksty Pedagogiczne*, 2(7), 81–95.

- Semadeni, Z. (2016). *Podejście konstruktywistyczne do matematycznej edukacji wczesnoszkolnej* [A Constructivist Approach to Early Childhood Education in Mathematics]. Warszawa: ORE.
- Skura, M. & Lisicki, M. (2012). *Na progu. Ile w dziecku ucznia, a w nauczycielu mistrza? O cochodzi w pierwszej klasie?* [On the Threshold. How Much of a Student Is There in a Child and How Much of a Master Is in a Teacher? What Is the Point of the First Grade?]. Warszawa: ORE.
- Smolińska, J. & Szychowski, Ł. (2011). *Techniki efektywnego uczenia się* [Effective Learning Techniques]. Kraków: ELITMAT.
- Stańdo, J. & Spławska-Murmyło, M. (2017). *Metody aktywizujące w edukacji przedszkolnej i wczesnoszkolnej* [Activating Methods in Pre-School and Early School Education]. Warszawa: ORE.
- Wydział Rozwoju Szkół i Placówek (2016). *Pakiet do samokształcenia dla nauczycieli edukacji wczesnoszkolnej* [Self-education Package for Early Childhood Teachers]. Warszawa: ORE.





Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 161–176  
DOI: 10.19265/KP.2019.112161



## ORIGINAL ARTICLE

Received: 12.04.2019

Accepted: 10.05.2019

Ewa Jędrzejowska

ORCID iD: 0000-0003-0669-152X

University of Opole

ejedrzej@uni.opole.pl

## SOCIAL SELF-RELIANCE OF PRESCHOOL CHILDREN

### SAMODZIELNOŚĆ SPOŁECZNA DZIECI W WIEKU PRZEDSZKOLNYM

#### Keywords:

self-reliance,  
social self-reliance,  
preschool child,  
preschool education

**Summary:** Apart from practical and mental autonomy, the social self-reliance of preschool children constitutes an important aspect of an individual's attaining independence and school maturity. According to the author, contemporary children sometimes present an insufficient level of social self-reliance, which may hinder them from taking actions and implementing future life roles, especially that of a student, as well as from developing independence and a sense of success. In consequence, this may contribute to lower self-esteem and difficulties in the social functioning of the child. The author supplements theoretical considerations with the results of her own research conducted in preschool education institutions in the Opole region in 2018. An analysis of 530 questionnaires from the observation of five and six-year-old children indicated that most of them attained social self-reliance in the studied areas. There were, however, also children who scored low or very low in the area and who require particular support on their way towards self-reliance. The children had the best results in their engagement and perseverance while performing jobs for others, and the poorest – in the sphere of taking decisions or co-deciding.

**Słowa kluczowe:**

samodzielność,  
samodzielność  
społeczna,  
dziecko w wieku  
przedszkolnym,  
edukacja  
przedszkolna

**Streszczenie:** Samodzielność społeczna dzieci w wieku przedszkolnym obok samodzielności praktycznej i umysłowej jest ważnym aspektem w osiąganiu niezależności jednostki oraz jej dojrzałości szkolnej. Zdaniem autorki współczesne dzieci reprezentują czasami niewystarczający poziom samodzielności społecznej, co może utrudniać im podejmowanie działań i realizację przyszłych ról życiowych, z podkreśleniem roli ucznia, a także rozwój niezależności i poczucia sukcesu, przyczyniając się do słabszej samooceny i trudności w społecznym funkcjonowaniu dziecka. Rozważania teoretyczne autorka uzupełniła wynikami badań własnych przeprowadzonych w 2018 roku w placówkach wychowania przedszkolnego na terenie Opolszczyzny. Analiza 530 arkuszy obserwacji dzieci 5- i 6-letnich dowiodła, że większość dzieci 5- i 6-letnich osiągnęło samodzielność społeczną w badanych obszarach. Są jednak i takie, które oceniono nisko lub bardzo nisko. Te dzieci należy szczególnie wspierać w ich drodze do samodzielności. Najlepiej dzieci wypadły w ocenie zaangażowania i wytrwałości podczas wykonywania prac dla innych, najsłabiej w ocenie umiejętności w zakresie podejmowania decyzji lub współdecydowania.

*Children are exactly what we let them become.*

(Waloszek, 2006, p. 53)

## Introduction

In the pedagogical discourse on education nowadays, what is perceived and emphasized as necessary and desirable, and not merely a hollow declaration, is a change in our thinking about the student, teacher and school in general. According to the theory of constructivism, today a child should be commonly seen as a scientist, constructor and creator, whereas an adult should not only accept this, but also create appropriate conditions. Many scholars believe (inter alia, J. Bruner, H.R. Schaffer, D. Waloszek or D. Klus-Stańska) that preschool or school teachers should strive towards the development of children's self-reliance, support their creativity, encourage discussion, appreciate a different point of view and create a climate favoring such actions and attitudes. Is this kind of thinking about children commonplace and visible in the real world, or does it, perhaps, still remain a mere declaration?

In my opinion, an affirmative answer to the second question is more likely, since, following A. Olczak, “we are not going to develop the self-reliance, originality, creativity or courage of students in a traditionally-oriented school – with the superior role of the infallible teacher, the curriculum to be completed and schoolbook to be taught” (2010, p. 195). Unfortunately, such an image of school is not yet part of the past. What is worse, the traditional approach to the role of the teacher (as a person transferring knowledge, nearly infallible, put on the pedestal or at least behind a desk creating a barrier from the students) still seems to be the dominating one. Similarly, the image of the child/student remains to be that of a person who is immature and weak, requiring and expecting help from adults, a person who needs explanations and knowledge readily submitted. According to D. Waloszek, “we are convinced about the mission of teaching them [children] all, because somewhat subconsciously there is in us the archetype of a guardian” (2006, p. 54). A. Olczak demonstrated that future teachers of small children present a similar image of their pupils. Only less than 13% of the students she asked described a pupil in the categories of scientist-constructor-explorer. Other respondents evoked the image of a child as a *tabula rasa* (someone defenseless, helpless, someone to be taught and brought up by the adult, writing subsequent life cards) or as a natural, spontaneous, “noble savage” (2010, pp. 196–197). Such an attitude, which D. Waloszek refers to as “child management” (2006, p. 8), impedes structuring education that aims at developing the activity and self-reliance of children. According to A. Olczak, this will not change “unless the manner of perceiving the child changes in Polish society” (2010, p. 199) from an attitude dominated by infantilism to a more democratic one, in which we trust the child and his or her curiosity to learn about the world and construct knowledge about it.

According to A. Olczak, an important prerequisite for considerations about the social self-reliance of children is the impoverishment of social relations so visible in the world nowadays. Their development is one of the main aims of early education. More self-reliance of the child in all its spheres creates an opportunity for more developed abilities to cooperate with others, build good social relations, make decisions and share responsibility for actions undertaken together. The aim of this article is to attempt a theoretical and empirical approach to looking at the self-reliance of preschool children, emphasizing its social aspect.



## The essence and development of social self-reliance of the child

Social self-reliance is an important constituent of what is widely understood to be self-reliance of the child. Self-reliance is defined in different ways in the literature – it is mainly referred to in terms of independence, being able to cope with problems without the help of others, not being subjected to anybody's power or being able to manage on one's own (Dubisz, 2003, p. 1135). In many definitions of self-reliance, the factor related to social competence is emphasized. Therefore, according to K. Kuszak, self-reliance means primarily obtaining independence from the social environment, some level of social maturity and a capability of self-management and self-actualization (2006a, p. 11). J. Andrzejewska perceives the problem similarly, understanding self-reliance as a personality trait and simultaneously a target to reach, linking it also with independence, self-determination, social maturity, autonomy, the ability of self-actualization and self-improvement, as well as with life competence (2013, p. 49).

Social self-reliance is rooted in self-maintenance, as well as, more widely speaking, in practical self-reliance. At the same time, the child develops mental self-reliance. While these three aspects of self-reliance – practical, mental and social – are referred to most commonly, in the literature on the subject, we can find a further variety of self-reliance areas. One of the most comprehensive studies of self-reliance indicates its following areas: motor skills, self-maintenance, self-reliance in terms of cognition, speech, thought, actions, psychological self-reliance, self-reliance in using various tools, self-reliance in social contacts and moral assessment and emotional control (Kuszak, 2006a, p. 35).

Various aspects of self-reliance intersect with each other and are interdependent. As a need, the developmental self-reliance “is not granted from birth, but it is a process of gaining control over factors determining action” (Andrzejewska, 2015, p. 5). The process of the development of self-reliance is complex, stretched in time and subject to a multitude of factors. The most significant among them include the factors that originate from a single individual, i.e., endogenous ones, such as the level of psychological and motor development, personality, emotionality, social development and self-assessment skills, and exogenous ones, particularly the family and preschool environments. Due to the multitude and complexity of these factors, each particular child presents an individual image of particularly shaped, autonomous and unique self-reliance.

Self-reliance is a condition for proper social relations, being a foundation of individual competencies in this regard. The ability to be self-reliant, which is expressed in a certain degree of independence from the environment (not only in the practical sense), is an important factor of the school maturity of the child. At the beginning of school education, the social ability of the student, as it relates to their ability to make friends, cope well with a new situation, make decisions and be involved and persistent, constitutes a key factor for success at school, as well as a vital factor of the sense of one's value and self-assessment.

The development of the area of social self-reliance leads to the formation of "socialized self-reliance" (Kuszak, 2006a, p. 33), which means that a person is capable of establishing social contacts, undertaking tasks responsibly, making decisions alone or with others, collaborating, being involved and persistent at work for the benefit of others, understanding and accepting social norms and adhering to them. Most certainly, preschool age is the crucial and the most appropriate time to build what is referred to as social self-reliance.

### **The state of research on the problem**

The issue of self-reliance has been notable in child education considerations for many years. An analysis of the literature on the subject demonstrates that many scholars consider the issue of self-reliance as fundamental, emphasizing the matter of the development of a child's need to be independent. Although there is a lack of more extensive research on the social self-reliance of preschool children, it is worth taking a look at studies performed by other authors, which, even though they do not allow a direct comparison with my research results, they do let one reach certain conclusions.

The pro-social readiness of children in kindergartens in Lublin, Poland, was researched by S. Guz (1987). The results of her work led her to the conclusion that children who are in the facility for a longer time present a higher level of readiness for pro-social behaviors. Unfortunately, this does not refer to being ready to be self-reliant, which was more characteristic of children who attended the kindergarten for a shorter time.

S. Wilczyńska (2018) reached similar conclusions, having considered self-reliance to be understood as relieving others, which in her opinion is an important expression of pro-social behavior. Based on the conducted research, she tried to assess the self-reliance of children in traditional and alternative educational systems. The results she published prove that although "the researched

group of students from the traditional school declared being ready to be self-reliant to a higher degree than the researched group from a democratic school, in the actual task situation, the children subjected to the alternative educational system showed they are 100% ready” (p. 176). This may indicate that the alternative school coped better with the practical implementation of the call for children’s self-reliance. This thesis can also be confirmed by the conclusions drawn by J. Andrzejewska from her analysis of experiencing self-reliance in various systems and concepts of education, such as the Reggio Emilia approach, the Montessori or Celestin Freinet systems, or the Dalton Plan educational concept (Andrzejewska, 2015), which only confirms that nowadays, the contemporary traditional school and classical kindergarten might apply a number of ideas from the experience of alternative education.

K. Kuszak, in turn, analyzed the self-reliance of the preschool child as a result of taking over behaviors and social pressure, with particular emphasis put on the family environment closest to the child (2002). She also did research on the self-reliance of 185 four-year-olds from Poznań kindergartens, observing them both in self-maintenance situations and while performing tasks. The results she presents confirm the results of earlier research conducted by H. Kulas (1998) in a group of early-school children, which proved that internal control is more difficult and fails in situations which are new for the child. Also, the results of K. Kuszak’s study indicate that “four-year-olds are already capable of keeping elementary internal control over their own actions. This refers, however, to situations they are familiar with. In new situations, children asked for help more frequently and demonstrated their independence to a lesser degree” (Kuszak, 2006b, p. 13). Other interesting results are that the children participating in the research refused to get help in the family environment (more than 75%) more often than in kindergarten (55.4%), which, as the researcher explains, is the case because “in the kindergarten situation, children were more subjected [to authority] as they had no choice other than to accept the offered help,” and therefore, “most probably in kindergarten, children were expected to be submissive and such behaviors were reinforced” (Kuszak, 2006b, p. 10).

K. Kuszak researched also verbal and non-verbal means of displaying self-reliance by children. She reached the conclusion that “not all the verbal behaviors expressing self-reliance were a reflection of the actual researched abilities. Some of them were merely a declaration and a kind of boasting” (Kuszak, 2006b, p. 12), particularly in the case of putting toys in order. Generally speaking, however, children were rather cautious in expressing their independence in an

unknown situation, while demonstrating it in a well-known situation which they had experienced many times (Kuszał, 2006b, p. 13).

Many considerations in the literature on the subject refer to the self-reliance of students in preschool education viewed in the context of their ability to learn – for example, the work of M. Żmudzka (1995), B. Dudzińska (2002) or J. Karbowniczek (2015).

### **Methodological assumptions of the research**

The reasons for undertaking empirical research on the issue of the social self-reliance of preschool children were observations and reflections that allowed me to put forward the following thesis: contemporary five and six-year-old children sometimes present an insufficient level of social self-reliance, which may hinder them from taking actions and fulfilling their future life roles, especially the role of a student, as well as developing independence and a sense of success.

The subject of the research was the social self-reliance of five and six-year-old children in the assessment of pre-school teachers, whereas the purpose of the research was an attempt to assess the social aspect of the self-reliance of five and six-year-old children attending kindergarten. The question of the level of social self-reliance of five and six-year-old children enrolled in traditional pre-school education constituted the research problem. Due to the diagnostic nature of the research, no hypotheses were made.

### **Results of the research**

The author's own research was conducted in 2018 in pre-school education institutions in the Opole region. They consisted of the analysis of 530 observation sheets of five and six-year-old children. The records were the result of a systematic and continuous observation of children in kindergartens conducted by teachers in natural everyday situations. Table 1 shows data on the study population.

Table 1  
*The study population including age and sex difference*

Age \ Sex	Girls		Boys		All	
	N	%	N	%	N	%
5 years	129	48.9	118	44.4	247	46.6
6 years	135	51.1	148	55.6	283	53.4
Total	264	49.8	266	50.2	530	100

Source: own research.

In the research sample, there were slightly more six-year-olds (53.4%) than five-year-olds (46.6%) and almost as many girls (49.8%) as boys (50.2%). Among the observed children, preschoolers from the urban environment clearly dominated in numbers (86.8%), compared to children from rural kindergartens (13.2%). This is why the environment variable was not included in the analysis of individual research issues.

According to R. Schaffer's thesis, a child is capable of achieving an ever-higher level of development through interaction and cooperation with others (2005, p. 225). That is why the first indicator of a child's social self-reliance that I decided to study was his or her ability to cooperate with other children.

Table 2  
*Teachers' assessment of the cooperation of five and six-year-old children with other children, by gender, N = 530*

Assessment \ Sex	Girls		Boys		All	
	N	%	N	%	N	%
Very good	116	43.9	82	30.8	198	37.4
Good	121	45.8	123	46.2	244	46.0
Rather poor	22	8.4	46	17.3	68	12.8
Very poor	5	1.9	15	5.7	20	3.8
Total	264	100	266	100	530	100

Source: own research.

The data in Table 2 allow us to conclude that the vast majority (83.4%) of children under observation have no problems with cooperation (very good or good), according to the teachers' assessment. Certainly, the children gained social experience in interactions with others during previous education in the kindergarten – in younger groups. However, over 16% of the children are not good at cooperating (poor or very poor).

Considering the impact of the sex variable on the obtained research results, one can notice a clear advantage of girls, since their skills were assessed as very good more frequently than the boys' skills, while less frequently as poor or very poor.

The age variable – including five and six-year-old children – turned out to be less significant, although a subtle difference in results was seen in favor of the older children. The obtained results in both examined groups are similar, probably because the age diversity was not large.

Preschool children, due to their low level of socialization, sometimes make contacts with adults easier than with their peers. The results of the studies presented in Tables 3 and 4 prove that the interactions of children in a group of peers whom they know does not constitute a problem. On the other hand, it is more difficult for the studied children to make contacts with new persons, which is illustrated by the results in Table 5.

Table 3

*Teachers' assessment of the cooperation of five and six-year-old children with the teacher, by gender, N = 530*

Assessment \ Sex	Girls		Boys		All	
	N	%	N	%	N	%
Very good	140	53.0	80	30.1	220	41.5
Good	101	38.3	117	44.0	218	41.1
Rather poor	17	6.4	58	21.8	75	14.2
Very poor	6	2.3	11	4.1	17	3.2
Total	264	100	266	100	530	100

Source: own research.

Table 4

*Teachers' assessment of children's cooperation with the teacher, by age, N = 530*

Assessment \ Age	5 years		6 years		All	
	N	%	N	%	N	%
Very good	92	37.2	128	45.2	220	41.5
Good	108	43.7	110	38.9	218	41.1
Rather poor	36	14.6	39	13.8	75	14.2
Very poor	11	4.5	6	2.1	17	3.2
Total	247	100	283	100	530	100

Source: own research.

The analysis of indicators included in Table 3 proves that, as before, the sex of the child is important in assessing their ability to cooperate with the teacher. Again, girls are assessed better (above all, the advantage is visible when assessed as very good). Taking into account the second variable – the age of children – there was a slight advantage of the six-year-old children over the five-year-old children regarding their skills (Table 4), which logically indicates that children's social skills increase with age.

Table 5

*Teachers' assessment of the children's ability to make contact with new people, by gender, N = 530*

Assessment \ Sex	Girls		Boys		All	
	N	%	N	%	N	%
Very good	94	35.6	66	24.8	160	30.2
Good	110	41.7	124	46.6	234	44.1
Rather poor	50	18.9	59	22.2	109	20.6
Very poor	10	3.8	17	6.4	27	5.1
Total	264	100	266	100	530	100

Source: own research.

Another analyzed research aspect concerned the assessment of the children's social self-reliance in terms of their ability to make contacts with new persons. The results of the research presented in Table 5 indicate that these children's skills were rated lower than the previous ones (more than a quarter of the study population were classified at a low level). Again, girls have higher skills in the assessed area. Due to the lack of significant differences in results among five and six-year-old children, the data according to age was excluded here – it was also not included in the subsequent analyzed aspects. The tendency shown here is consistent with the results of K. Kuszak's research, which demonstrated that the fewest manifestations of children's autonomy were observed in new situations (Kuszak, 2006b, p. 13).

An important determinant of children's social self-reliance are decision-making and co-deciding skills. Like the previous ones, these skills turned out to be rather poor in more than a quarter of the group of studied children, with slightly higher scores given to girls than to boys (Table 6).

Table 6

*Teachers' assessment of children's ability to make decisions or co-decide, by gender, N = 530*

Assessment \ Sex	Girls		Boys		All	
	N	%	N	%	N	%
Very good	105	39.8	73	27.4	178	33.6
Good	114	43.2	93	35.0	207	39.0
Rather poor	37	14.0	88	33.1	125	23.6
Very poor	8	3.0	12	4.5	20	3.8
Total	264	100	266	100	530	100

Source: own research.

Other important constituents in the assessment of children's social self-reliance are responsibility, commitment and perseverance in performing tasks. Tables 7 and 8 present data on these issues. In the vast majority of studied children (82.4%), commitment and perseverance while performing work for others were assessed as very good or good (Table 7). The differences in the assessment of girls and boys turned out to be small and insignificant.



Table 7

*Teachers' assessment of children's commitment and perseverance while performing work for others, by gender, N = 530*

Assessment \ Sex	Girls		Boys		All	
	N	%	N	%	N	%
Very good	127	48.1	92	34.6	219	41.3
Good	113	42.8	105	39.5	218	41.1
Rather poor	19	7.2	61	22.9	80	15.1
Very poor	5	1.9	8	3.0	13	2.5
Total	264	100	266	100	530	100

Source: own research.

Table 8

*Teachers' assessment of children's sense of responsibility when entrusted with a task to perform, by gender, N = 530*

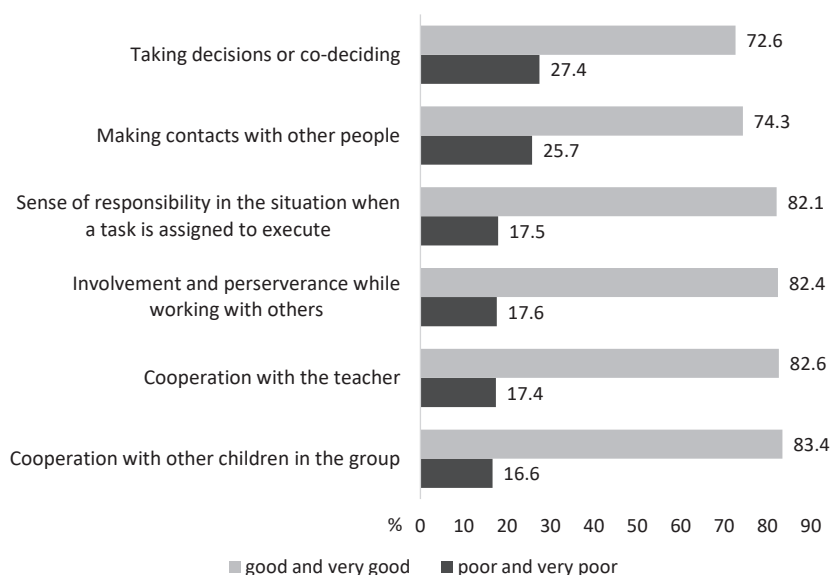
Assessment \ Sex	Girls		Boys		All	
	N	%	N	%	N	%
Very high	125	47.3	72	27.1	197	37.2
Rather high	115	43.6	123	46.2	238	44.9
Rather low	22	8.3	61	22.9	83	15.6
Very low	2	0.8	10	3.8	12	2.3
Total	264	100	266	100	530	100

Source: own research.

Five and six-year-old children generally present a responsible attitude toward the duties entrusted to them (82.1%). However, there is a group of 17.9% of them who, according to their teachers, show a low level of responsibility.

The results of the analyses can be considered rather optimistic. They prove that the majority of five and six-year-old children – in the opinion of their teachers – achieved autonomy (at a good and very good level) in the assessed

areas. However, there are also children whose skills were rated low or very low. They should be particularly supported on their way to self-reliance. The following summary (Figure 1) shows rating-based aspects of social self-reliance, indicating those that deserve special attention.



*Figure 1.*

Comparison of assessed aspects of social self-reliance – rating-based approach.

Source: own analysis.

## Conclusions

According to D. Waloszek, few adult researchers take the search for the roots of adult competences in childhood seriously (Waloszek, 2006, p. 52). It seems that the reason for many educational and life failures may be a low level of independence, preventing the individual from developing autonomy, as well as creativity, self-confidence, a sense of competence and self-reliance.

The literature on the subject extensively emphasizes the issue of children's independence in practical terms, less attention is paid to mental autonomy and social self-reliance, which are necessary components of broadly understood independence. Social self-reliance is based on practical autonomy. Low levels of children's skills, helplessness and inefficiency in self-service and clean-up

activities are transferred to task situations, intellectual activity and social attitudes. Consequently, self-reliance should be promoted in all its aspects.

Therefore, it would be worthwhile to conduct research showing the self-reliance of the child in all its aspects and, in addition to practical autonomy, to examine social self-reliance and mental autonomy in a broader dimension and in various institutions.

Although the results of my research do not give grounds for broader generalizations due to the small size of the sample, they do indicate that the commitment and perseverance of children when performing work for others were assessed the highest, while their skills in making decisions and co-deciding, as well as in making contacts with new persons, obtained the lowest scores (Figure 1). This is in line with the results previously presented by other researchers of the issue. Therefore, when working with children, it is worth organizing educational situations that develop their social self-reliance, encourage them to make decisions and act on their own, regardless of the environment. It is worth withdrawing assistance in time, giving children a chance for independence. It is important, as J. Skibska writes, to support the child's development, which should result from the sensitivity and vigilance of the teacher who puts the child-student in the first place in order to strengthen his or her development potential and teach independent thinking and action (2018, p. 7). An important task of adults is also to help a child build self-esteem, because – as S. Wilczyńska writes – without a positive self-image, it is difficult to develop pro-social readiness (2018 p. 176).

The task of teachers is also to initiate and organize various forms of cooperation with parents aimed at making them aware of the need to develop and support their child's autonomy, not only in practical but also in intellectual and social terms. It should be remembered that the most important condition for the development of a child's autonomy is his or her sense of security, because only a child who feels safe is able to take the risk that something may go wrong.

In conclusion, it is hard to resist reflection that children who go to school from pre-school education (especially the traditional school, which – as S. Wilczyńska showed – immobilizes the student at the desk, limiting his or her freedom of speech and action) are not learning in a good atmosphere to develop autonomy (see Wilczyńska 2018, p. 172). Therefore, it seems advisable that teachers, both in pre-school and early school education, should reach for the tried and true upbringing concepts developed by their predecessors which largely propose solutions for the development of children's self-reliance.

In addition, it is worth looking once again at existing alternative education institutions in Poland, where one can find inspiration for change and encouragement to trust children and give them greater freedom in action and thinking, which creates a climate conducive to the development of self-reliance, including social self-reliance.

## References

- Andrzejewska, J. (2013). *Zróżnicowanie modeli edukacyjnych w przedszkolu a funkcjonowanie psychospołeczne dzieci* [Diversification of Educational Models in Kindergarten and Psychosocial Functioning of Children]. Lublin: Wydawnictwo Marii Curie-Skłodowskiej.
- Andrzejewska, J. (2015). Doświadczenie przez dziecko samodzielności [The Child's Experience of Autonomy]. *Przedszkolne ABC. Magazyn dla Wychowawców i Rodziców*, 7, 4–10.
- Dubisz, S. (ed.). (2003). *Uniwersalny słownik języka polskiego* [The Universal Dictionary of the Polish Language]. Warszawa: PWN.
- Dudzińska, B. (2002). Samodzielność zdobywana w szkole [Self-reliance Gained at School]. *Nauczyciel i Szkoła*, 1–2, 152–157.
- Guz, S. (1987). *Rozwój i kształtowanie osobowości dzieci w wieku wczesnoszkolnym* [Development and Shaping of Child's Personality at the Preschool Age]. Warszawa: WSiP.
- Jędrzejewska, E. (2017). Samodzielność dzieci w wieku przedszkolnym [Self-reliance of Pre-school Children]. *Pedagogika Przedszkolna i Wczesnoszkolna*, 2(10), 355–366.
- Karbowniczek, J. (2015). Samodzielność dziecka i jego naturalność w odkrywaniu świata źródłem wewnętrznej motywacji do nauki oraz szansą osiągania sukcesu w świetle koncepcji inteligencji sprzyjającej powodzeniu życiowemu R. Sternberga [The child's independence and simplicity in discovering the world as a source of intrinsic motivation to learn and a chance to succeed in the light of the concept of successful intelligence by R. Sternberg]. *Edukacja Elementarna*, 37, 159–166.
- Kulas, H. (1998). Rozwój poczucia kontroli u dzieci w wieku szkolnym [Developing a Sense of Control in Schoolchildren]. *Psychologia Wychowawcza*, 3, 219–230.
- Kuszek, K. (2002). Postawa samodzielności dziecka przedszkolnego jako wynik przejmowania zachowań (cz. I II) [The Self-reliant Attitude of a Pre-school Child as a Result of Behavioral Adoption (Part I and II)]. *Wychowanie na co Dzień*, 2–3; 4–5, 24–26; 29–34.
- Kuszek, K. (2006a). *Dynamika rozwoju samodzielności dziecka w wieku przedszkolnym* [Dynamics of Self-reliance Development of a Pre-school Child]. Poznań: Wydawnictwo WAM.
- Kuszek, K. (2006b). Formy samodzielności dzieci [Forms of Child Autonomy]. *Wychowanie w Przedszkolu*, 4, 9–13.

- Lipowska, I. (2013). Jak uczyć dziecko samodzielności w rozwiązywaniu problemów [How to Teach a Child to Be Independent in Problem Solving]. *Blżej Przedszkola*, 1, 16–17.
- Olczak, A. (2010). Obraz ucznia w wypowiedziach przyszłych nauczycieli edukacji wczesnoszkolnej [The Image of a Pupil According to the Future Early Childhood Education Teachers]. In: M. Kowalski, A. Pawlak & A. Famuła-Jurczak (eds.), *Prze-strzeń edukacyjna – dylematy, doświadczenia i oczekiwania społeczne* [Educational Space – Dilemmas, Experiences and Social Expectations] (pp. 189–199). Kraków: Oficyna Wydawnicza Impuls.
- Schaffer, H.R. (2005). *Psychologia dziecka* [Introducing Child Psychology], transl. A. Wojciechowski. Warszawa: PWN.
- Skibska, J. (2018). Słowo wstępne [A Word of Introduction]. *Konteksty Pedagogiczne*, 1(10), 25–36.
- Waloszek, D. (2006). *Pedagogika przedszkolna. Metamorfoza statusu i przedmiotu badań* [Pre-school Pedagogy. Metamorphosis of the Status and Research Subject]. Kraków: Wydawnictwo Naukowe Akademii Pedagogicznej.
- Wilczyńska S. (2018). Samodzielność dzieci w systemie edukacji tradycyjnej i alternatywnej na przykładzie badań własnych [Children's Self-reliance in the System of Traditional and Alternative Education. A Case Study of Author's Own Research]. *Zeszyty Naukowe Wyższej Szkoły Humanitas. Pedagogika*, 16, 169–179.
- Żmudzka, M. (1995). Samodzielność jako czynnik kształtowania umiejętności uczenia się uczniów klas początkowych [Self-reliance as a Factor in the Shaping of Learning Skills of Initial Classes Students]. *Zeszyty Naukowe Wyższej Szkoły Pedagogicznej w Bydgoszczy. Studia Pedagogiczne*, 20, 41–49.



Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 177–190  
DOI: 10.19265/KP.2019.112177



## ORIGINAL ARTICLE

Received: 15.03.2019

Accepted: 3.04.2019

Ondřej Šimik

ORCID iD: D-7302-2014

University Ostrava, Czech Republic

ondrej.simik@osu.cz

## TYPES OF EXERCISES IN PRIMARY SCHOOL HISTORY TEXTBOOKS

### RODZAJE ĆWICZEŃ W PODRĘCZNIKACH DO HISTORII W SZKOLE PODSTAWOWEJ

#### Keywords:

learning exercise,  
primary school  
history textbook,  
People and Time,  
primary school,  
research

**Summary:** The article deals with an analysis of grade 4 and 5 textbook exercises related to the topic of People and Time according to their type. We categorize the method of content analysis (the type of learning exercise was the specific transformation) and compare the types of learning exercises in the textbooks issued by six publishers. A revision of Bloom's Taxonomy is used for categorizing the learning exercises. The research sample consists of 2101 learning exercises related to history lessons. The results show that the majority of the exercises are related to memory (over 50% of all exercises). Conversely, learning exercises of a higher cognitive difficulty (creative, analytical, or synthetic) only appear sporadically in the textbooks. This trend is similar for the textbooks of all the researched publishers.

---

\* The article was created within research project SGS17/PdF/2017-18 "Subjective Interpretation of the Meaning of Supporting Pupils' Learning as a Contribution to Conceptualization of Instructional Scaffolding."

**Słowa kluczowe:**  
ćwiczenia edukacyjne,  
podręcznik historii  
w szkole podstawowej,  
ludzie i czas, szkoła  
podstawowa, badania

**Streszczenie:** Artykuł dotyczy analizy ćwiczeń z podręczników klasy 4 i 5 związanych z tematem „Ludzie i czas”, według ich rodzaju. Metoda analizy treści została podzielona na kategorie (typem ćwiczenia była konkretna transformacja), a następnie porównano rodzaje ćwiczeń w podręcznikach wydanych przez sześciu wydawców. Uaktualniona wersja taksonomii Blooma stała się podstawą kategoryzacji ćwiczeń edukacyjnych. Próbką badawcza składa się z 2101 ćwiczeń edukacyjnych wykorzystywanych na lekcjach historii. Wyniki pokazują, że większość (ponad 50%) ćwiczeń dotyczy zapamiętywania treści. Ćwiczenia o wyższym stopniu trudności poznawczych (kreatywne, analityczne lub syntetyczne) pojawiają się w podręcznikach sporadycznie. Ten trend widoczny jest w podręcznikach wszystkich badanych wydawców.

## Introduction

A textbook learning exercise, as one of the forms of the operational project curriculum (Průcha, 2009, pp. 117–121), can specifically induce a learning situation if the teacher more or less follows it, thereby activating the pupil. This is especially true with learning exercises that serve to connect the learning content in the textbook and the learning activities of the pupil (in addition to the difficulty of the explanatory text to which we have devoted research attention earlier – see Šimik, 2017).

A learning exercise is one of the key building blocks in the educational process because by means of learning exercises, the pupil approaches the educational material, interacts with it and gets closer to fulfilling the educational targets. A learning exercise has potential for activation, making the educational process dynamic and keeping the pupil actively involved. The role of learning exercises in textbooks is important because it also guides the pupil's learning. A learning exercise can be defined as, “[...] every educational situation which is created so that it ensures that the pupil achieves a specific educational target” (Průcha, Walterová & Mareš, 2003, p. 258). Vaculová, Trna and Janík understand the learning exercise as, “a specific group of requirements placed on the pupil's learning” (2008, p. 35).

## Methodology

**Research Problem.** Learning exercises can be researched from several different angles, especially in relation to the teacher (who uses the learning exercises, e.g., Sikorová & Červenková, 2014, p. 75). Stará and Krčmářová (2014, p. 106) discovered that teachers use textbooks as a basic source in preparing lessons and that teachers particularly use textbooks to obtain topics for the pupils' activity. Vránová (2012, p. 30–44) investigated the difficulty of biology textbook exercises. Investigating the character of learning exercises appears to be important because if teachers follow textbooks, then they also introduce the learning exercises into their lessons. Salamonová (2011, p. 54) deals with research on learning exercises in science textbooks. The author discovered that the majority (80–90%) of learning exercises are related to remembering and understanding, where more than two-thirds of these exercises focus on remembering. Martincová (2011, p. 158) found similar results, given that almost 50% of all learning exercises fell into the remembering category and around 40% dealt with understanding. It seems that regardless of the grade, learning exercises focus on lower cognitive operation. In relation to the curriculum reform and the establishment of the General Educational Program for primary school education (hereinafter referred to as GEP), the new textbooks (including science textbooks) were mostly published by large publishing companies in the Czech Republic. The GEP emphasizes the category of the pupils' expected results, so the character of the textbook exercises is primarily based on skills and the application of knowledge. This should potentially also change the ratio of types of learning exercises at the expense of the cognitively easier ones. In the research, we have formulated two research targets:

- a) to categorize learning exercises that appear in selected textbooks (or parts of them) for grades 4 and 5, intended for the topic of People and Time in relation to the educational targets according to Bloom's revised taxonomy;
- b) to compare the frequency of individual types of learning exercises that appear in the selected science textbooks (or parts of them) for grades 4 and 5, intended for the topic of People and Time among textbooks of the individual publishers.

**Research Method.** The main research method for finding out the required data was the content analysis of text in selected textbooks. We used Bloom's revised taxonomy of cognitive targets (Krathwohl, 2002, pp. 212–218) for



the categorization of learning exercises because we considered the fact that the learning exercises are related to the educational targets. The dimensions of cognitive processes are suitable for learning exercises because the exercises always require a certain cognitive process on the part of the pupil or a certain level of difficulty which is also related to the pupil's activity.

The quantitative unit of the content analysis was the sentence containing a learning exercise. In order to record the individual learning exercises, we used Microsoft Excel, in which we first performed a transcription of all the learning exercises. Then, we categorized the individual learning exercises according to their type – the type of the learning exercise was the specific transformation of the content analysis. The active verb, which was contained in the given learning exercises was key for classifying the learning exercises into their individual types. A number was assigned to every type of exercise (learning exercise based on: 1 – remembering, 2 – understanding, 3 – application, 4 – analysis, 5 – synthesis, 6 – creation and 99-finding<sup>1</sup>) in order for quantification (nominal measuring) to be possible. We used central tendency rates (arithmetic average, median) and box plots to compare the data. We used the independence test (chi-square) and Pearson's Coefficient of Sequence Correlation for statistically processing the data.

**Research Group.** The research group was made up of all learning exercises (including questions) from the researched sample of textbooks, that is, those parts related to the history curriculum (topic: People and Time). This included learning exercises graphically separated from interpreted text and learning exercises contained directly in the interpreted (basic) or additional text of the relevant textbooks. Learning exercises were generated from 11 textbooks for grades 4 and 5 history lessons published by six publishers between 2008–2014. We defined 4 criteria for selecting textbooks: a) they had to contain the history curriculum – educational content related to the topic of People and Time; b) they had to be written in accordance with the General Educational Program for primary education in the area of the People and their World; c) the existence of textbooks for the whole second period of education within the scope of People and their World (for grades 4 and 5); d) the presence of a valid approval clause by the Ministry of Education (up to the beginning of 2015).

---

<sup>1</sup> This category is not part of Bloom's Taxonomy – it was purposefully created with regard to the tangible content of learning exercises – searching for information from external sources.

**Research Results.** The summary results showing the frequency and the distribution of learning exercises in comparison to the textbooks of all publishers are illustrated in Figure 1.<sup>2</sup> The results show that exercises focused on remembering and understanding prevail in the researched textbooks. Other types of learning exercises only appear seldom or do not appear at all. This shows that history textbooks for primary schools contain learning exercises rather focused on cognitive difficulty.

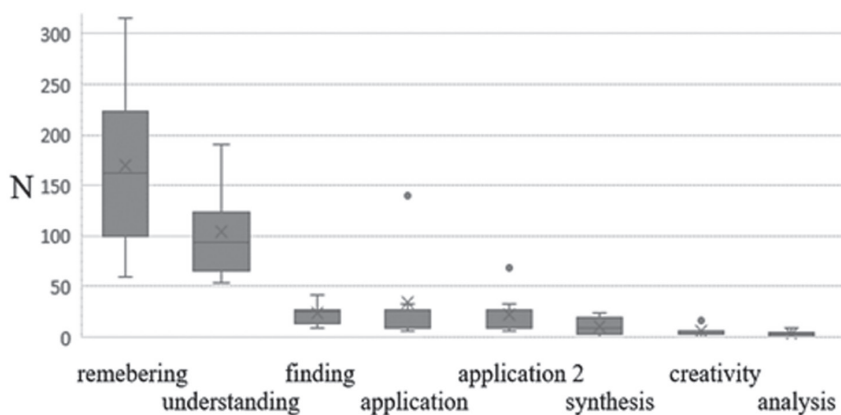


Figure 1.

The distribution of learning exercises according to the type (overall comparison).

Source: the author's own research.

Here, we can also see relatively significant differences in the frequency of the learning exercises in the textbooks of the individual publishers. It is hereby very easy to compare which types of learning exercises prevail and how the individual frequency of the given types of learning exercises are distributed.

<sup>2</sup> Explanation to figure 1: X = arithmetic average, box contains 50% of the data and is a median (horizontal line) divided into two parts. The bottom part of the box is intended for the lower (first) quartile with a relative frequency of 0.25 and the upper part for the third quartile, which corresponds to the value with a cumulative relative frequency of 0.75. Antennas: illustrate the lowest and the highest value, which is not remotely observed. The dots illustrate the extreme values (values higher than triple the length of the box). Application 2 – without learning exercises on a timeline axis for Nová škola textbooks.

More detailed results, where it is possible to compare the individual publishers with each other are illustrated in figures 2 and 3. The X curve represents the arithmetic average and the horizontal line, separating the box into two halves, is then the median. In this way, it is possible to monitor, which textbook of the specific publisher contains an above-average or below-average number of learning exercises in relation to the specific type.

Learning exercises focused on analysis, creativity or synthesis appear much less often. This shows that learning exercises mostly prompt pupils to remembering and remembering partial information. Frequent learning exercises focused on understanding were noted only in the Prodos textbooks. In terms of their character, only learning exercise units could be classified into the “analysis” category.

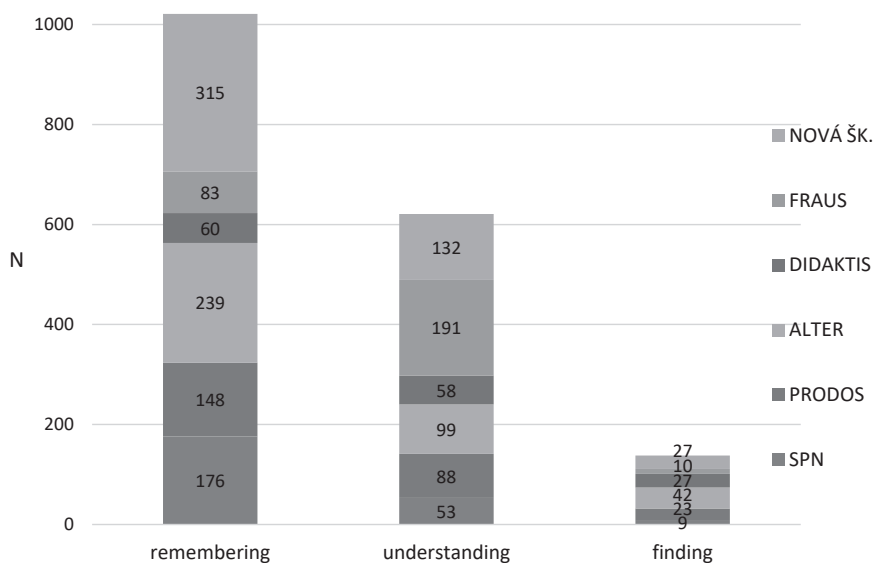


Figure 2.

Comparing the frequency of learning exercises focused on remembering, understanding and finding, according to the publisher.

Source: the author's own research.

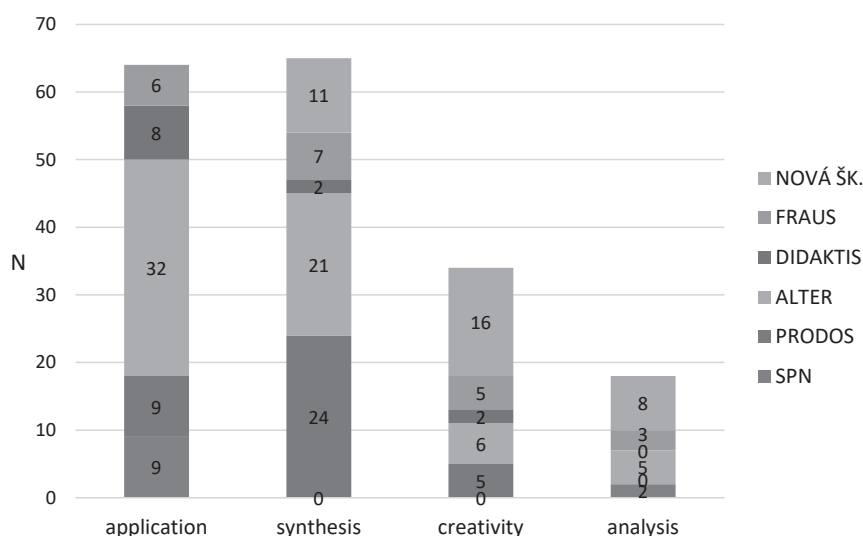


Figure 3.

Comparing the frequency of learning exercises focused on application, synthesis, creativity and analysis, according to the publisher.

Source: the author's own research.

We compared the differences in the frequency of individual types of learning exercises among the publishers using a statistic chi square test. Here, we found very significant differences ( $p = 0.000$ ) in all partial types of learning exercises.

We also statistically compared whether and what differences there are in the frequency of the given type of learning exercises in the textbooks of the individual publishers with regard to the median calculated as the average value of all researched textbooks in the given type of learning exercise.<sup>3</sup>

<sup>3</sup> + = significantly higher frequency, - = significantly lower frequency. The number of signs indicates the relevant level of significance;  $\alpha = 0.001$  (three); 0.01 (two) and 0.05 (one).

Table 1.

*Comparing the frequency with regard to the median of the textbooks of all the publishers, according to the type of learning exercises*

	remembering	understanding	application	analysis	synthesis	creativity	finding
<b>Median</b>	<b>162</b>	<b>94</b>	<b>9</b>	<b>3</b>	<b>9</b>	<b>5</b>	<b>25</b>
<b>SPN</b>	0.120	<b>0.000</b> (- - -)	1.000	<b>0.046</b> (-)	<b>0.000</b> (- - -)	<b>0.002</b> (- -)	<b>0.000</b> (- - -)
<b>PRODOS</b>	<b>0.003</b> (- -)	0.381	<b>0.000</b> (- - -)	<b>0.003</b> (- -)	<b>0.000</b> (+++)	1.000	0.572
<b>ALTER</b>	<b>0.000</b> (+++)	0.466	0.637	<b>0.046</b> (-)	<b>0.000</b> (+++)	0.527	<b>0.000</b> (+++)
<b>DIDAKTIS</b>	<b>0.000</b> (- - -)	<b>0.000</b> (- - -)	0.157	0.317	0.001	0.058	0.572
<b>FRAUS</b>	<b>0.000</b> (- - -)	<b>0.000</b> (+++)	<b>0.000</b> (- - -)	<b>0.000</b> (+++)	0.346	1.000	<b>0.000</b> (- - -)
<b>NOVÁ ŠKOLA</b>	<b>0.000</b> (+++)	<b>0.000</b> (+++)	1.000	0.317	0.346	<b>0.000</b> (+++)	0.572

Source: the author's own research.

The easiest types of learning exercises (median 162) that lead to remembering are most frequently represented in textbooks of almost all the researched publishers except Fraus, where the dominating category making up the learning exercises develops the pupil's understanding. In the textbooks of the five remaining publishers, the understanding category is the second most frequently represented (median 94). Learning exercises of an application character (9)<sup>4</sup> are almost three times less frequently represented in the investigated textbooks. Learning exercises focused on analysis are represented only sporadically, and in no textbook of the researched publishers does the number exceed ten (median 3), which, given the total amount, represents less than 1% (0.85%) of all the learning exercises. We found out that more learning exercises focused on synthesis (median 9) than on analysis, although there are more significant differences among the individual publishers. However, in the context of the frequency of all learning exercises, exercises focused on synthesis only made up a very small part (approx. 3%). Also, learning exercises supporting the pupil's creativity, which are considered the highest type of learning exercise in terms of cognitive difficulty, were represented in very low numbers (median 5) in our sample of textbooks for the topic of People and Time. While even this category proved a high variability of data (0–16 learning exercises per publisher), the total number of creative learning exercises made up only less than 2% of all learning exercises. Apart from the above-mentioned categories, we specifically

<sup>4</sup> We do not include exercises where the pupil should identify a specific history event on a timeline into the application exercises. This was the domain for Nová škola textbooks. The results would be greatly influenced by the extreme value – see Figure 3 application vs. application 2. With regard to their frequency, these exercises are becoming rather mechanic.

allocated the “finding” category, or learning exercises that would lead the pupil to search for information. With regard to the last four types of learning exercises, their frequency is relatively high (6.5%, or 138 of all exercises), with numbers ranging from 10 to 42 in the textbooks of the individual publishers, which also clearly represents a high degree of variability.

A comparison according to the structure of the learning exercises in the textbooks of the individual publishers is illustrated in the Table 2.<sup>5</sup>

Table 2.

*Comparing the relative frequency of partial types of learning exercises according to the individual publishers*

Publisher	1	2	3	4	5	6	7
SPN	R (70%)	U (21%)	F (4%) / App (4%)		<b>Ans (1%)</b>	S (0%) / C (0%)	
Nová škola	R (49%)	<b>App (22%)</b>	U (20%)	F (4%)	<b>C (2%)</b>	S (2%)	Ans (1%)
Alter	R (55%)	U (22%)	F (9%)	App (7%)	S (5%)	C (1%)	Ans (1%)
Didaktis	R (38%)	U (37%)	<b>F (17%)</b>	App (5%)	S (1%) / C (1%)		Ans (0%)
Prodos	R (50%)	U (30%)	<b>S (8%)</b>	F (8%)	App (3%)	C (1%)	Ans (0%)
Fraus	<b>U (63%)</b>	R (27%)	F (3%)	S (2%)	App (2%)	C (2%)	Ans (1%)

Source: the author's own research.

If we compare the relative representation of individual types of learning exercises overall, it can be expressed using the following scheme:

remembering (53%) – understanding (30%) – finding (8%) – application (3%) – synthesis (3%) – creativity (2%) – analysis (1%)

This scheme illustrates the distribution of learning exercises according to their frequency for all publishers – from the highest to the lowest.

An interesting view of the results appears when we compare the **relative numbers of individual types of learning exercises** (the sum of relative frequencies for one publisher is always 100%).

<sup>5</sup> 1 – appear most frequently, 7 – appear least frequently; R = remembering, U = understanding, F = finding, App = application, Ans = Analysis, S = Synthesis, C = Creativity.

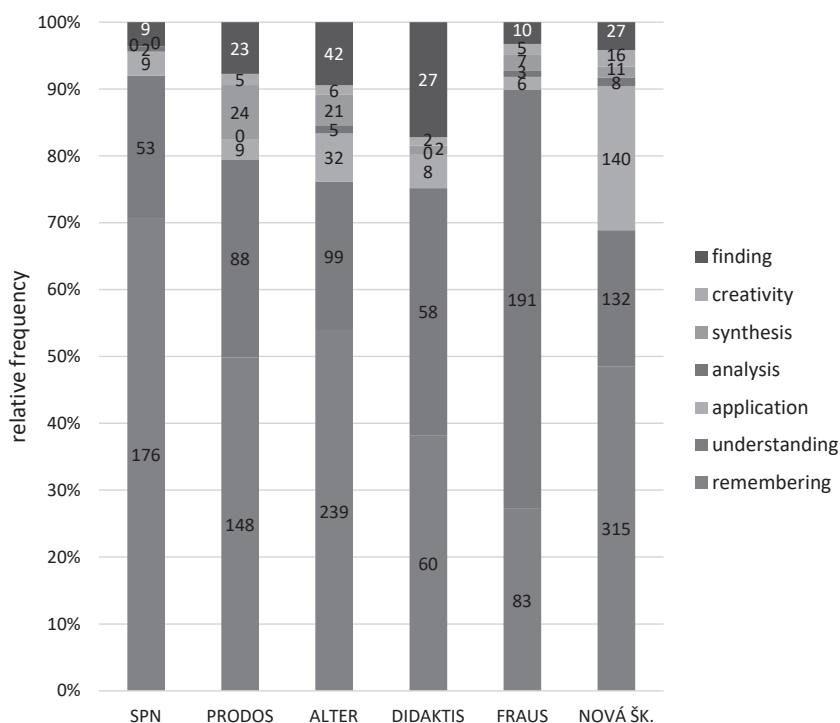


Figure 4.

Comparing the relative frequency of learning exercises within textbooks of the given publisher.

Source: the author's own research.

This comparison eliminates the influence of the absolute values, so we obtain a more accurate comparison of how the individual types of learning exercises in textbooks of the individual publishers are distributed. From Figure 4, it is clear that learning exercises that prompt the pupil to remember prevail in almost all of the textbooks of the researched publishers. If we take the extent of the core value, then the learning exercises that lead pupils to recollect are about 50% of all learning exercises. Comprehension exercises make up about 30% of all exercises for the given publisher. Fraus (almost 63%) is included in the overall average and this publisher has a very high frequency of these types of learning exercises. Other types of learning exercises are not represented as frequently (only in 10–20% of the examples). The results show that learning exercises of a higher cognitive difficulty are seldom found in history textbooks for the

topic of People and Time, especially if they deal with analysis (i.e., exercises focused on telling something, structuring, attributing), where the relative frequency for all textbooks of the researched publishers ranged in single digit percentages or they weren't represented at all (Prodos, Didaktis). Learning exercises that develop the pupil's creativity are similarly poorly represented (not represented at all in SPN textbooks, while in other textbooks, they only make up a maximum of 4%).

It is relatively easy to observe that the overall structure (distribution among the individual types) of learning exercises is (very) similar in all textbooks of the examined publishers. We also verified this fact statistically using Pearson's correlation of coefficients (Table 3). The values of the Pearson coefficient exceed 0.800 in most of the cases, which is considered to be a high correlation.

Table 3.

*Comparing the structure of the learning exercises (according to the individual publishers) – Pearson's Correlation Test*

r (Pearson)	SPN	PRODOS	ALTER	DIDAKTIS	FRAUS	NOVÁ ŠKOLA
SPN	X	0.965	0.982	0.863	0.669	0.909
PRODOS		X	0.971	0.917	0.746	0.853
ALTER			X	0.886	0.679	0.916
DIDAKTIS				X	0.728	0.797
FRAUS					X	0.609
NOVÁ ŠKOLA						X

Source: the autor's own research.

## Discussion and Conclusion

The results of the research show that there is a tendency to use easier learning exercises in the researched textbooks, particularly, learning exercises focused on memory (50%). If we compare the overall individual types of learning exercises according to their median, then "the average" textbook most frequently contains learning exercises focused on memory (N = 162; 52%). We discovered by correlation analysis that the structure of the textbooks regarding the distribution of exercises according to their types is very similar in the



textbooks of all the publishers ( $r$  values usually exceed 0.800). The biggest differences are seen in Fraus textbooks, thanks to a larger number of learning exercises focused on understanding/comprehension. The results correspond with other research, for example, Salamonová (2011, pp. 60–61) or Martincová (2011, p. 155). Our previous research of learning exercises in science textbooks (Šimik, 2014, p. 108) showed that learning exercises focused on knowledge made up 46% of all learning exercises (understanding/comprehension only 15%). In this context, science textbooks (their history section) show a higher percentage of exercises focused on understanding/comprehension (on average 30% – see comparison with Figure 4) even though this is at the expense of cognitively more difficult exercises (application, analysis, synthesis). The reason may be a higher extent of abstract history in the curriculum. The absence of learning exercises of a higher cognitive difficulty, which, as a rule of thumb relate to work with historical sources is explained by the fact that original historical sources (or their copies) only appear very rarely in the textbooks, so the teachers do not have any experience with them (for example, research by Demircioglu, 2010, pp. 71–80). Klapko (2006, p. 46) states that teachers who are starting out work with textbooks more frequently. If they do not have a workbook available, it is likely that they primarily take exercises from textbooks. We have found out that learning exercises in the history part of science textbooks mainly focus on supporting memory learning. They also partially focus on understanding exercises. The trend in textbooks clearly seems to be toward lower cognitive difficulty at the expense of learning exercises focused on creativity, application or evaluation, regardless of the publisher. It is clear that learning exercises focused on recollection/memory are important and essential for higher types of learning exercises. However, we find their ratio in relation to analytic-synthetic or creative exercises to be problematic (approximately 50:1).

Learning exercises are a very effective means of verifying the fulfillment of the defined learning targets. The question of the interconnectivity of the learning exercises and the GEP arises. In other words, what are the expected results? Such results should be achievable and measurable (Jeřábek & Tupý, 2017, p. 14). Knecht and Lokajčková (2013, p. 169) discovered that the most important criteria for Czech teachers in selecting textbooks is the presence of the approval of the Ministry of Education and not, for example, the quality of the learning exercises and their interconnectivity with the targets of the GEP. These targets (expected results) are mostly activities that oftentimes require

application, analysis, creativity or searching for information. We agree with Klapko (2006, p. 50) that pupils need room for their own opinion, for their subjective interpretation to perceive the world, and the requirement to defend their own claims, and thus for example, the importance of learning exercises focused on evaluation and synthesis. However, these types of learning exercises were only found very rarely in the researched textbooks.

This raises the question of the coherence of the learning exercises with the targets defined by the GEP, although, with the introduction of the new curriculum reform, publishers took the opportunity to create new textbooks relatively quickly, declaring that they were written in accordance with the GEP. Yet, in terms of learning exercises, based on our findings regarding the structure of the learning exercises according to their types, we see the new textbooks as problematic because the exercises are usually related to (remembering) knowledge of terms and facts. This trend is the same for the textbooks of all the researched publishers. Only Fraus textbooks place the most emphasis on learning exercises focused on understanding as opposed to simply remembering.

Although the target of the newly created didactic text (which also means the target of the new textbooks) should take into consideration the concept of acquiring new knowledge and adopting adequate attitudes and values (see Klapko, 2006, p. 50), the focus of learning exercises in the history part of the current primary school science textbooks does not correspond much with this trend (of active learning). There is a relatively considerable lack of learning exercises of a higher cognitive difficulty that would develop the pupil's ability to analyze, evaluate or create.

For the future, we recommend that authors of primary school history textbooks include more learning exercises of a higher cognitive difficulty so that the overall distribution of exercises is more balanced. The formulation of expected results (which are of an active character) to which the individual learning exercises should be directly linked, may be inspirational. A more frequent inclusion of original history sources into the text of the textbooks should also be helpful. These sources have the potential to lead the pupil to think, compare, evaluate or stimulate their own creativity.

## References

- Demircioglu, I.H. (2010). Turkish History Teachers' Perceptions of Primary Sources in History Textbooks. *The New Educational Review*, 21(2), 71–80.
- Klapko, D. (2006). Evaluate učebnic jako cesta k optimalizaci výchovně-vzdělávacího procesu. [Evaluation of textbooks as a way to optimize the educational process]. In: J. Maňák & D. Klapko (eds.), *Učebnice pod lupou* (pp. 45–51). Brno: Paido.
- Knecht, P. & Lokajíčková, V. (2013). Učební úlohy jako příležitosti k rozvíjení a dosahování očekávaných výstupů: analýza koherence učebnic a RVP ZV. [Learning exercises as opportunities to develop and achieve expected outcomes: textbook coherence analysis and GEP]. *Pedagogika*, 63(2), 167–181.
- Krathwohl, D.R. (2002). A revision of Bloom's taxonomy: An overview. *Theory into practice*, 41(4), 212–218.
- Martincová, J. (2011). *Analýza učebních úloh z vlastivědy*. [Analysis of learning exercises from national history and geography]. Dissertation. Brno: Masarykova univerzita.
- Průcha, J. (ed.). (2009). *Pedagogická encyklopedie*. [Pedagogical Encyclopedia]. Praha: Portál.
- Průcha, J., Walterová, E. & Mareš, J. (2003). *Pedagogický slovník*. [Pedagogical Dictionary]. Praha: Portál.
- Jeřábek, J. & Tupý, J. (2017). *General Educational Program for primary school education*. Praha: VÚP.
- Salamonová, H. (2011). *Učební úlohy ve vybraných učebnicích vlastivědy na ZŠ*. [Learning exercises in selected textbooks of national history and geography at primary school]. Brno: Masarykova univerzita.
- Sikorová, Z. & Červenká, I. (2014). Styles of Textbook Use. *The New Educational Review*, 35(1), 112–122.
- Stará, J. & Krčmářová, T. (2014). Užívání nových učebnicových materiálů učiteli 1. stupně ZŠ [Primary School Teachers' Use of the Latest Textbooks]. *Pedagogická orientace*, 24(1), 77–110.
- Šimik, O. (2014). *Učebnice přírodovědy pohledem pedagogického výzkumu*. [Elementary science textbooks from pedagogic research point of view]. Ostrava: Ostravská univerzita v Ostravě.
- Šimik, O. (2017). Syntactic and semantic difficulty of text in the history part of textbooks for the educational field of the “human and his world”. *Konteksty Pedagogiczne*, 1(8) 183–201.
- Vaculová, I., Trna, J. & Janík, T. (2008). Učební úlohy ve výuce fyziky na 2. stupni základní školy: vybrané výsledky CPV videostudie fyziky. [Learning exercises in teaching physics at elementary school: selected ECR results of the video study of physics]. *Pedagogická orientace*, 18(4), 35–56.
- Vránová, O. (2012). Difficult Learning Tasks in Biology Curriculum. *The New Educational Review*, 30(4), 30–44.



Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 191–203  
DOI: 10.19265/KP.2019.112191



## ORIGINAL ARTICLE

Received: 25.04.2019

Accepted: 5.05.2019

Sebastian Skalski

ORCID: 0000-0002-6336-7251

Polish Academy of Sciences, Warszawa

sebastian.skalski@sd.psych.pan.pl

# THE SITUATIONAL MOTIVATION SCALE (SMS-15) FOR CHILDREN: DESIGN AND PRELIMINARY PSYCHOMETRIC PROPERTIES ASSESSMENT

SKALA MOTYWACJI SYTUACYJNEJ SMS-15  
DLA DZIECI: KONSTRUKCJA I WSTĘPNA OCENA  
WŁAŚCIWOŚCI PSYCHOMETRYCZNYCH

### Keywords:

motivation in  
children, Situ-  
ational Motivation  
Scale, SMS-15,  
Self-Determination  
Theory, measurement  
of motivation

**Summary:** The aim of the article is to present the design and carry out a preliminary assessment of the psychometric properties of the Situational Motivation Scale SMS-15 for children based on Deci and Ryan's Self-determination Theory. Three hundred children aged 11–15 (178 girls and 122 boys) took part in the validation study. The SMS-15 scale has satisfactory theoretical accuracy, internal consistency and reliability. Cronbach's  $\alpha$  coefficient equals .84 for the subscales of introjected motivation and regulation by identification; whereas for the subscales of intrinsic motivation, external regulation and amotivation it equals .82.

**Słowa kluczowe:**  
motywacja u dzieci,  
Skala Motywacji  
Sytuacyjnej, SMS-15,  
teoria autodetermina-  
cji, pomiar motywacji

**Streszczenie:** Celem artykułu jest przedstawienie konstrukcji oraz wstępna ocena właściwości psychometrycznych Skali Motywacji Sytuacyjnej SMS-15 dla dzieci w oparciu o teorię autodeterminacji Deciego i Ryana. W badaniu walidacyjnym wzięło udział 300 dzieci w wieku 11–15 lat (178 dziewczyn i 122 chłopaków). Skala SMS-15 ma zadowalającą trafność teoretyczną, spójność wewnętrzną oraz rzetelność. Współczynnik  $\alpha$  Cronbacha wynosi .84 dla podskal: motywacji introjektowanej oraz regulacji przez identyfikację, a także .82 dla podskal: motywacji wewnętrznej, regulacji zewnętrznej i amotywacji.

## Introduction

Motivation is a theoretical construct that explains the behavior of individuals, their direction and duration (Brophy, 2002). The psychodynamic theory of motivation assumes that all activity is determined, and its source is mental energy. What motivates human behavior are drives (Lichtenberg, Lachmann & Fosshage, 2016). In terms of behavioral psychology, motivation is associated with positive reinforcement (rewards) and negative reinforcement (punishments). Behavioral patterns are instrumental in nature, and reinforcements constitute the basic tools employed to change them (Kozielecki, 1998). In the cognitive approach, motivation results from learning characteristics and the individual construction of the world in which cognitive needs, such as development needs, play a key role (Janeiro, 2010). In the analysis of various motivational constructs, attention should be paid to the theory of self-determination (SDT) as presented by Deci and Ryan (1975).

The theory of self-determination is a contemporary concept of human activity in the mainstream of humanistic psychology. The approach takes into account the key role of motivational processes in the functioning of individuals. Deci and Ryan (1975, 2000) distinguish three basic (universal) needs in human life: autonomy, competence and social relations. The first concerns the sense of causality and the perception of activity as intrinsic to personal desires. It is connected with the possibility of choice and does not exclude dependence on other people. The second refers to one's own effectiveness in their environment as well as to the purpose of behavior exhibited by them. Thanks to the need for competence, an individual is willing to learn and is

open to new experiences. The last one is a sense of attachment and care expressed by others. The consequence of the need for social relations is building and maintaining interpersonal contacts as well as a willingness to help others. Fulfilling these main needs has a positive impact on life satisfaction and gives one a sense of well-being, whereas the lack of possibility to satisfy them leads to negative emotions, passivity or social isolation (Ryan, Huta & Deci, 2008; Huta & Ryan, 2010; Lekes et al., 2010). Human activity is undertaken on a voluntary basis to satisfy needs and pleasures.

Deci and Ryan (1975; 2000) distinguished three statuses of motivation: intrinsic motivation, extrinsic motivation and amotivation. The first one allows us to explain the spontaneous interests of individuals, the exploration of new issues and the need to achieve mastery in action (Mageau et al., 2009). Activity determined by intrinsic motivation is considered to be self-determined, immanent and triggered by emotions. Extrinsic motivation is an opposite type to intrinsic motivation. It plays an instrumental role and takes into account the consequences of actions. Adequate extrinsic motivation creates a continuum of internally and externally regulated states of varying intensity: external regulation, introjected regulation, regulation by identification and integrated regulation (Deci & Ryan, 2008). The term amotivation describes the state of non-autonomous activity with no regulation. It is associated with a sense of incompetence and a lack of situational control. In the literature on the subject, it is often compared to the concept of learned helplessness by Seligman (Vallerand & Ratelle, 2002; Deci & Vansteenkiste, 2004).

Accordingly, the above-mentioned authors identified four regulatory styles that influence the level of self-determination and relate to the concept of internalization (Deci & Ryan, 2000). Internalization assumes that the recognition of activity that complies with social norms as one's own takes place under the influence of external motivators. The first style is *external regulation*, which stems from the desire to obtain a reward or to avoid punishment. The activity is undertaken independently, but only under the pressure of external stimuli. The second style is *introjected regulation*, which also initiates behavior because of possible rewards or sanctions. In this case, however, there is an internal localization of pressure and the activity is undertaken to feel proud, avoid guilt or reduce anxiety. *Identified regulation* consists in self-acceptance of behavior and the attribution of personal meaning to it. Such activity is considered to be more autonomous than behavior under the influence of internal pressures but is still identified as a means to an end rather than a goal. Integrated regulation

is similar to intrinsic motivation. In this case, activity is undertaken in accordance with one's own values and a coherent sense of self. Behavior is fully tailored to the individual's goals.

The theory of self-determination makes it possible to unify thinking about human activity based on engagement (Meyer & Gagne, 2008).

## Measurement of motivation in children

The literature on the subject provides several tools for measuring motivation in children and youth, including the *Ja i moja szkoła* [Me and My School] questionnaire (Zwierzńska & Matuszewski, 2002), *Kwestionariusz Motywacji Szkolnej Gimnazjalisty* [The School Motivation Questionnaire for Junior High School Students] (Sterczyński et al., 2010) and *Kwestionariusz motywacji do nauki* [The Motivation for Learning Questionnaire] (Gózdź, 2015). All available questionnaires focus exclusively on the child's educational motivation. There is no tool to measure motivation in non-school settings, for example, during sports or therapeutic activities. Therefore, it was decided to construct a short and universal Situational Motivation Scale SMS-15 for children based on the Self-determination Theory (SDT) according to Deci and Ryan (1975). The questionnaire concerns: intrinsic motivation, external regulation, regulation by identification, introjected regulation and amotivation. Integrated regulation was not included in the questionnaire because of its similarity and strong links to internal motivation.

## Methodological assumptions of own research

**Research objective.** The aim of own research was to design a Situational Motivation Scale (SMS-15) for children and carry out a preliminary assessment of its psychometric values.

**Materials and methods.** The research was conducted in the spring of 2019. Participation was anonymous and voluntary. The experimental study (Test A) involved 70 children from primary schools in Kraków aged 11–15 ( $M = 13.27$ ,  $SD = 1.34$ ). Sixty percent (60%) of the participants were girls ( $N = 45$ ) and 40% of the participants were boys ( $N = 25$ ). The validation study (Test B) involved 300 primary school children from Kraków, Warsaw and Sosnowiec aged 11–15 ( $M = 14.10$ ,  $SD = 1.23$ ). Of these participants, 59% were girls ( $N = 178$ ) and 41% were boys ( $N = 122$ ).

Apart from the SMS-15, the tool's validity was assessed using *Kwestionariusz motywacji do nauki* [The Motivation for Learning Questionnaire] (Gózdź, 2015) in the form of a self-description. The tool consists of 30 items arranged in five scales: external motivation (Cronbach's  $\alpha = .75$ ), introjected motivation ( $\alpha = .88$ ), identification-based motivation ( $\alpha = .96$ ), intrinsic motivation ( $\alpha = .93$ ) and amotivation ( $\alpha = .89$ ). The examined person expresses his/her attitude on the five-point Likert scale, where 1 is the answer "I completely disagree" and 5 – "I completely agree."

**Statistical analyses applied.** Data analysis was performed using the program SPSS version 25 and Amos version 25. The normality of distribution was assessed by means of the Kolmogorov-Smirnov test. To verify the homogeneity of variance, the Levene test was applied. The obtained results allowed for the application of parametric tests. To determine the significance of differences, the Student's t-test, one-way ANOVA variance analysis and MANOVA analysis (multivariate ANOVA) were used. In order to determine the relationships between the variables, the r-Pearson correlation coefficient was applied. In order to reduce the dimensions, exploratory factor analysis (EFA) and confirmatory factor analysis (CFA) were applied.

## Own research results

**Study 1.** The experimental version of the SMS-15 scale included 25 items (5 for each dimension). The experimental version was tested on 70 children (Test A). As a result of the analyses, three items with the strongest discriminating power for each of the measured aspects (15 items in total) were distinguished. All items which were included in a given dimension correlated with its overall result at a level above .50. The final version of the SMS-15 scale was subjected to further validation works.

**Study 2.** The final version of the SMS-15 scale was tested on 300 children (Test B). Motivation was measured on the basis of different activities, i.e., mathematics (N = 100), participation in sports activities (N = 100) and participation in theatre activities (N = 100). The average total results are presented in Table 1.



Table 1  
*Average results on the SMS-15 scale (N=300)*

SMS-15	Min	Max	M	SD
MWE	3	20	16.00	4.29
RZE	3	21	11.84	5.17
IDE	3	21	17.83	4.06
INR	3	21	13.73	5.03
AMO	3	21	9.49	4.65

MWE – intrinsic motivation, RZE – external regulation, IDE – regulation by identification, INR – introjected regulation, AMO – amotivation, M – mean, SD – standard deviation

Source: designed by the Author.

The MANOVA analysis of variance showed multidimensional differences in the level of motivation among mathematics students, young athletes and participants of theatre classes,  $F(10.586) = 8.81$ ;  $p < .001$ ;  $\eta^2 = .13$  (based on the Lambda Wilks test). Homogeneous F-tests showed significant differences in the activity of the dependent variables: intrinsic motivation,  $F(2.297) = 20.62$ ;  $p < .001$ ,  $\eta^2 = .12$ , external regulation,  $F(2.297) = 15.43$ ;  $p < .001$ ,  $\eta^2 = .09$ , regulation by identification,  $F(2.297) = 9.73$ ;  $p < .001$ ,  $\eta^2 = .06$  and amotivation,  $F(2.297) = 35.45$ ;  $p < .001$ ,  $\eta^2 = .19$ . Differences in the scope of introjected regulation proved to be statistically insignificant. *Post hoc* comparisons using Turkey's test method were used to assess the differences. Young athletes ( $M = 17.38$ ,  $SD = 3.15$ ) and theatre class participants ( $M = 16.70$ ,  $SD = 3.22$ ) achieved significantly higher results in terms of intrinsic motivation than mathematics students ( $M = 13.71$ ,  $SD = 5.35$ ). Young sportsmen ( $M = 9.84$ ,  $SD = 4.45$ ) achieved significantly lower results in terms of external regulation than the other groups, i.e., participants of theatre classes ( $M = 11.97$ ,  $SD = 5.30$ ) and mathematics students ( $M = 13.71$ ,  $SD = 5.02$ ). The differences between the last two groups proved to be statistically significant. Young athletes ( $M = 18.22$ ,  $SD = 3.49$ ) and theatre class participants ( $M = 18.82$ ,  $SD = 2.60$ ) scored significantly higher in terms of regulation by identification than mathematics students ( $M = 16.45$ ,  $SD = 5.28$ ). Young athletes ( $M = 7.45$ ,  $SD = 3.27$ ) and theatre students ( $M = 8.74$ ,  $SD = 4.35$ ) declared a significantly lower level of amotivation than mathematics students ( $M = 12.27$ ,  $SD = 4.80$ ).

In this study, age and sex did not differentiate the results in a statistically significant way.

## Validity

The SMS-15 scale was evaluated by competent judges (9 psychologists) in order to verify the validity of the content according to Lawshe's method (1975). The CVR (content validity ratio) for each item exceeded the required value of .75.

In order to assess the theoretical validity, exploratory factor analysis using the main axes with Oblimin diagonal rotation and Kaiser normalization was applied. The obtained results suggested a 5-factor model, which explained 68.5% of the variance in total. Table 2 shows the factor loadings for each dimension of the SMS-15 scale after rotation. All the loadings obtained a value greater than or equal to .50.

Table 2

*Factor loadings for individual items of the SMS-15 scale after rotation (N = 300)*

Items	Factor				
	I	II	III	IV	V
1.				.73	
2.			.78		
3.				.68	
4.		.50			
5.					.62
6.	.75				
7.		.82			
8.			.76		
9.					.81
10.			.71		
11.	.81				
12.				.55	
13.		.79			

Items	Factor				
	I	II	III	IV	V
14.	.80				
15.					.51
Eigenvalue	2.25	2.20	2.17	1.94	1.72
Explained variance	15.01%	14.64%	14.47%	12.3%	11.45%
Cronbach's $\alpha$	.84	.84	.82	.82	.82

Source: designed by the Author.

The 5-factor model (Fig. 1) was also verified by means of confirmatory factor analysis with estimation by the method of generalized least squares. All the relationships between the factorial results and the assessments of individual items obtained a value greater than .70. The adjustment was based on:  $X^2/df$  indicator, GFI (goodness of fit index), AGFI (adjusted GFI), RMSEA (root mean square error of approximation), TLI (Tucker-Lewis index), CFI (confirmatory fit index). In the case of  $X^2/df$  indicator, a value less than or equal to 2 was required. In the case of GFI, AGFI, TLI, CFI, CFI, a value greater than or equal to .90 was required. In the case of RMSEA, a value less than or equal to .05 was required (Schreiber et al., 2006; Byrne, 2010; Bedyńska & Książek, 2012). The 5-factor model met all the criteria for data adjustment. The values of goodness of fit index are presented in Table 3.

Table 3

*Adjustment indicators for 5-factor SMS-15 scale model in CFA (N = 300)*

$X^2$	df	p	$X^2/df$	GFI	AGFI	RMSEA	TLI	CFI
138.84	89	.14 (ni)	1,56	.97	.94	.05	.93	.96

Source: designed by the Author.

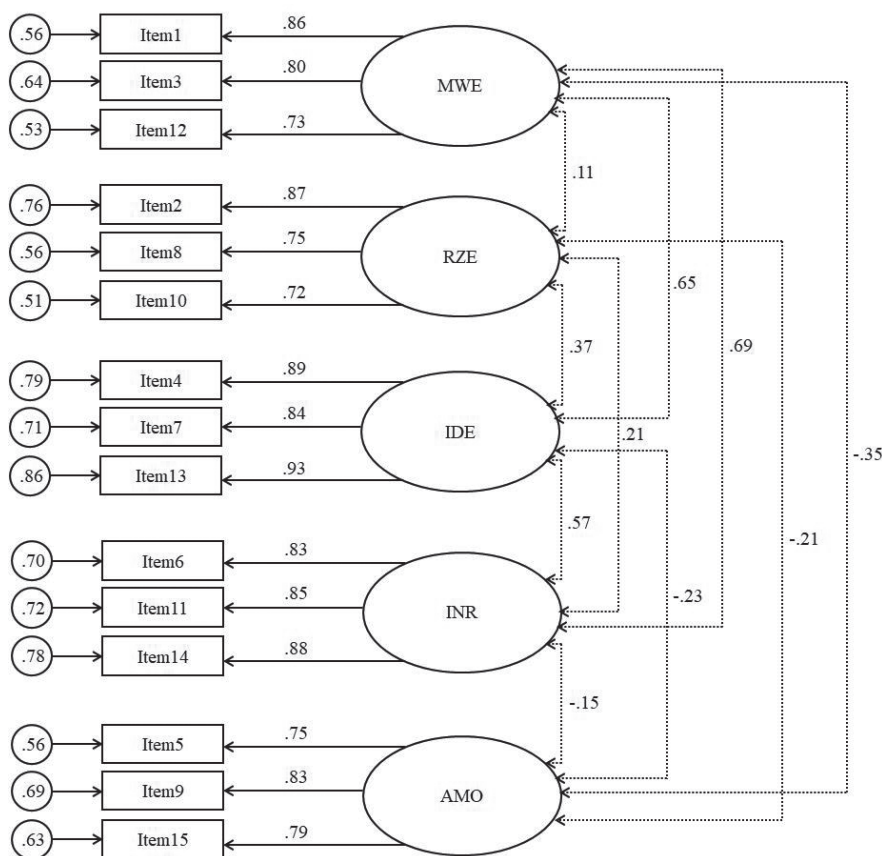


Figure 1.

A five-factor model of the SMS-15 scale in CFA.

Explanation of abbreviations for subscales: see Table 1.

Source: designed by the Author.

In order to determine the convergence and discrimination validity, the correlation between the results of the SMS-15 scale and the Motivation for Learning Questionnaire (Gózdź, 2015) was analyzed on the example of mathematics students ( $N = 100$ ). The obtained results confirmed the existence of strong, positive relationships between identical dimensions in both questionnaires (convergent validity) and significantly lower or insignificant relationships between divergent dimensions in both questionnaires (discriminant validity).

Correlation coefficients between the dimensions of the SMS-15 scale and the Motivation for Learning Questionnaire are presented in Table 4.

Table 4

*Correlation coefficient between the dimensions of the SMS-15 scale and the Motivation for Learning Questionnaire (N = 100)*

	The Motivation for Learning Questionnaire				
SMS-15	MWE	RZE	IDE	INR	AMO
MWE	.61***	.04	.22*	.37***	-.28**
RZE	.05	.51***	.15	.08	-.10
IDE	.27**	.11	.58***	.22*	-.29**
INR	.35***	.09	.30**	.56***	-.06
AMO	-.23*	-.07	-.27**	-.08	.67***

\* $p < .05$ , \*\* $p < .01$ , \*\*\* $p < .001$

Explanation of abbreviations for subscales: see Table 1.

Source: designed by the Author.

## Reliability

Intrinsic reliability was estimated on the basis of Cronbach's  $\alpha$  coefficients for the SMS-15 subscales. Cronbach's  $\alpha$  coefficient was .84 for the subscales of introjected motivation and regulation by identification, and .82 for the subscales of intrinsic motivation, external regulation and amotivation.

The absolute stability measurement was performed using the test-retest method at an interval of three weeks using the example of the motivation of students to learn mathematics (N = 100). The Student's t-test ( $t = 1.78$ ,  $p = .08$ ) confirmed the fulfilment of the assumption of equal averages for the whole questionnaire in both measurements (Jankowski & Zajenkowski, 2009). The assumption was also fulfilled for each of the subscales. The correlation coefficient between the two measurements distant in time was  $r = .73$  for the whole SMS-15 scale,  $r = .79$  for the intrinsic motivation subscale,  $r = .76$  for the external regulation subscale,  $r = .73$  for the regulation by identification subscale,  $r = .71$  for the introjected regulation subscale and  $r = .67$  for the amotivation subscale. In each case the correlation proved to

be statistically significant ( $p < .001$ ). The obtained results confirmed the stability of the test.

## Test procedure

The task of the respondent is to answer each of the statements (appendix) according to the 7-point Likert scale, where 1 is the answer “I definitely disagree” and 7 is “I definitely agree.” Results for a particular subscale should be summed up. The dimension of intrinsic motivation is formed by the items: 1, 3, 12; external regulation: 2, 8, 10; regulation by identification: 4, 7, 13; introjected regulation: 6, 11, 14; and amotivation: 5, 9, 15.

## Conclusions

Summarizing the presented data analyses, it can be stated that the Situational Motivation Scale SMS-15 for children has satisfactory psychometric values. The questionnaire meets the basic requirements for validity and reliability. SMS-15 can be used by psychologists and pedagogues to evaluate intrinsic motivation, external regulation, regulation by identification, introjected regulation and amotivation in children. The short formula of the scale allows for its application in various clinical groups (inter alia, among children with ADHD/ADD) or in wider scientific research, where a large amount of data is required.

## References

- Bedyńska, S. & Książek, M. (2012). *Statystyczny drogowskaz: praktyczny przewodnik wykorzystania modeli regresji oraz równań strukturalnych* [Statistical Signpost: A Practical Guide to the Use of Regression Models and Structural Equations]. Warszawa: Wydawnictwo Akademickie Sedno.
- Brophy, J. (2002). *Motywowanie uczniów do nauki* [Motivating Students to Learn], transl. K. Kruszewski. Warszawa: Wydawnictwo Naukowe PWN.
- Byrne, B. (2010). *Structural equation modeling with AMOS: basic concepts, applications, and programming (multivariate applications series)*. New York: Taylor & Francis Group.
- Deci, E. & Ryan, R. (1975). *Intrinsic motivation*. New York: Plenum Press.
- Deci, E. & Ryan, R. (2000). The “What” and “Why” of Goal Pursuits: Human Needs and the Self-Determination of Behavior. *Psychological Inquiry*, 11(4), 227–268.

- Deci, E. & Ryan, R. (2008). Self-Determination Theory: A Macrotheory of Human Motivation, Development, and Health. *Canadian Psychology*, 49, 182–185.
- Deci, E. & Vansteenkiste, M. (2004). Self-determination theory and basic need satisfaction: Understanding human development in positive psychology. *Ricerche di Psicologia*, 27, 23–40.
- Góźdz, J. (2015). Konstrukcja kwestionariusza motywacji do nauki w oparciu o koncepcję Self-Determination Theory E. Deciego, R.M. Ryana [The Construction of a Questionnaire on Motivation in Education on the Basis of the Self-Determination Theory of E. Deci and R.M. Ryan]. *Przegląd Pedagogiczny*, 1(29), 263–270.
- Huta, V. & Ryan, R. (2010). Pursuing pleasure or virtue: The differential and overlapping well-being benefits of hedonic and eudaimonic motives. *Journal of Happiness Studies*, 11(6), 735–762.
- Janeiro, I. (2010). Motivational dynamics in the development of career attitudes among adolescents. *Journal of Vocational Behavior*, 76(2), 170–177.
- Jankowski, K. & Zajenkowski, M. (2009). Jakich informacji o teście dostarcza testowanie? [What Information Does Testing Provide About the Test?]. In: K. Fronczyk (ed.), *Psychometria. Podstawowe zagadnienia* (pp. 84–110). Warszawa: Wyższa Szkoła Finansów i Zarządzania w Warszawie.
- Kozielecki, J. (1998). *Koncepcje psychologiczne człowieka [Psychological Concepts of a Human Being]*. Warszawa: Wydawnictwo Akademickie Żak.
- Lawshe, C. (1975). A quantitative approach to content validity. *Personnel Psychology*, 28, 563–575.
- Lekes, N., Gingras, I., Philippe, F., Koestner, R. & Fang, J. (2010). Parental Autonomy Support, Intrinsic Life Goals, and Well-Being Among Adolescents in China and North America. *Journal of Youth and Adolescence*, 39(8), 858–869.
- Lichtenberg, J., Lachmann, F. & Fosshage, J. (2016). *Self and motivational systems: Towards a theory of psychoanalytic technique*. New York: Routledge.
- Mageau, G., Vallerand, R., Charest, J., Salvy, S., Lacaille, N., Bouffard, T. & Koestner, R. (2009). On the development of harmonious and obsessive passion: The role of autonomy support, activity specialization, and identification with the activity. *Journal of Personality*, 77, 601–646.
- Meyer, J. & Gagne, M. (2008). Employee engagement from a self-determination theory perspective. *Industrial and Organizational Psychology*, 1, 60–62.
- Ryan, R., Huta, V. & Deci, E. (2008). Living well: A self-determination theory perspective on eudaimonia. *Journal of Happiness Studies*, 9(1), 139–170.
- Schreiber, J., Nora, A., Stage, F., Barlow, E. & King, J. (2006). Reporting structural equation modeling and confirmatory factor analysis results: A review. *The Journal of Educational Research*, 99(6), 323–338.

- Sterczyński, R., Burczyk, P., Tucholska, K., Konwińska, M., Gmińska, B., Bławat, K., Kutajczyk, T. & Przychodzeń, B. (2010). Kwestionariusz Motywacji Szkolnej Gimnazjalisty [The School Motivation Questionnaire for Junior High School Students]. In: B. Niemierko & M. Szmigiel (eds.), *Teraźniejszość i przyszłość oceniania szkolnego: XVI Konferencja Diagnostyki Edukacyjnej* [Present and future of school grading: 16th Conference of Educational Diagnostics] (pp. 140–152). Toruń: Grupa Tomami.
- Vallerand, R. & Ratelle, C. (2002). Intrinsic and extrinsic motivation: A hierarchical model. *Handbook of Self-determination Research*, 128, 37–63.
- Zwierzynska, E. & Matuszewski, A. (2002). *Kwestionariusz Ja i moja szkoła* [The “Me and My School” Questionnaire]. Warszawa: CMPPP.

## Appendix

### Appendix 1: Test items in the SMS-15 Scale

Why are you doing this activity?

1. Because this activity is interesting.
2. Because my relatives (e.g., parents) expect it.
3. Because I enjoy this activity.
4. I do it for my own good.
5. I don't know. Personally, I am not convinced that it is worth doing.
6. Because I can prove to myself that I can work harder than others.
7. Because this activity develops my abilities.
8. Because I am counting on receiving a reward.
9. Personally, I am not convinced that I need it.
10. Because I want to avoid punishment.
11. Because I can prove to myself that I am better than others.
12. Because this activity gives me satisfaction.
13. Because this activity is important to me.
14. Because I can prove to myself that I can be more successful than others.
15. I think this activity is a waste of my time.







Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 205–223  
DOI: 10.19265/KP.2019.112205



## ORIGINAL ARTICLE

Received: 14.01.2019

Accepted: 8.02.2019

Joanna Poziemska

ORCID iD: 0000-0003-4464-4214

The University of Casimir the Great in Bydgoszcz

consilis@wp.pl

## CONSTRUCTION OF A SCALE OF THE LOCUS OF CONTROL IN SCHOOL SITUATIONS

### KONSTRUKCJA SKALI POZUCIA UMIEJSCOWIENIA KONTROLI ZDARZEŃ SZKOLNYCH

#### Keywords:

pedagogy, diagnosis,  
sense of location  
of control,  
school situation,  
pupil

**Summary:** In many studies it has been shown that the activity of individuals depends on such constructs as self-efficacy, self-esteem, motivation, learned helplessness, or relationships with the environment. These, in turn, are closely related to the placement of a sense of control. Because it is shaped by experience, past events are important in this process, so in the case of a student, special attention should be paid to school situations. As there is a lack of tools that pedagogues could use to study and diagnose the sense of the locus of control of students, an attempt was made to construct one. The research sample consisted of 449 students of the second grade of upper secondary schools in Bydgoszcz. The reliability of the tool was verified by the internal consistency and the split-half coefficient, and accuracy by examining the relationship with the selected variables. The tool can be considered accurate. In terms of the scale of failures, it has achieved satisfactory reliability, while the scale of successes needs to be refined.

**Słowa kluczowe:**  
pedagogika, diagnoza,  
poczucie umiejscowienia kontroli,  
sytuacja szkolna,  
uczeń

**Streszczenie:** W wielu badaniach wykazano, że aktywność jednostek zależy m.in. od takich konstruktów jak poczucie własnej skuteczności, samoocena, motywacja, wyuczona bezradność czy relacje z otoczeniem. Te z kolei pozostają w ścisłym związku z ułożeniem poczucia kontroli. Ponieważ kształtuje się ono pod wpływem doświadczeń, istotne w tym procesie są przeszłe zdarzenia, w przypadku ucznia należy więc zwrócić szczególną uwagę na zdarzenia szkolne. Jako że brakuje narzędzia, które pedagogzy mogliby stosować do badania i diagnozy poczucia umiejscowienia kontroli zdarzeń szkolnych u uczniów, podjęto próbę skonstruowania go. Próbę badawczą stanowiło 449 uczniów drugich klas bydgoskich szkół ponadgimnazjalnych. Rzeczność narzędzia weryfikowano współczynnikiem zgodności wewnętrznej oraz metodą połówkową, a trafność przez zbadanie związku z wybranymi zmiennymi. Narzędzie można uznać za trafne. W zakresie skali porażek uzyskało zadowalającą rzeczność, natomiast skala sukcesów wymaga dopracowania.



## The Concept of the Sense of Location of Control and Its Importance for Explaining Behavior

Intense changes in the labor market have led to a redefinition of the strategic goals set for education systems. Particular emphasis is placed on equipping students with key competences that enable lifelong learning (OECD, 2008). The effectiveness of this process depends on one's personality traits, attitudes and beliefs. Research also indicates a significant impact of the sense of location of control on one's functioning in self-education.

The sense of locus of control (LOC) is a relatively persistent feature of human personality, which is a generalized expectation related to one's subjectively perceived agency in life events. According to J.B. Rotter's theory of social learning, during their lives people learn to believe that they either manage their lives themselves or are driven by factors independent of them (Drwal, 1995). This allows one to describe people with a sense of internal control, i.e., convinced that events depend on their behavior, and those with a sense of external control – convinced that the results of their behavior are not influenced by them and depend on their destiny, fate or other people (Rotter, 1966 ).

Many studies indicate the decisive role of past experiences in the development of control perception (Bandura, 1977; Rotter, 1966; Seligman, Peterson, Kaslow, Tanenbaum, Alloy & Abramson, 1984). What is important is not so much the objective features of a given situation (event control), but the way people perceive it (sense of control) (Averill, 1973; Drwal, 1995; Kofta, 2001). As a result of repeated sequences of events, certain expectations are perpetuated and can be treated as a relatively persistent personality trait (Lumberjack, 1995; Forsterling, 2005; Krasowicz & Kurzyp-Wojnarska, 1990; Wong & Weiner, 1981).

According to the achievement motivation theory, people analyze the causes of events, and the belief that they had an influence on the obtained effect builds motivation, which manifests itself in a positive correlation between internal LOC and motivation (Weiner, 1985). It is also closely associated with the belief that they are able to realize their goals and, therefore, with the perception of their own effectiveness (Bandura, 1977). However, as a result of the feeling of having no control over events (external LOC), learned helplessness arises (Abramson, Seligman & Teasdale, 1978; Duckworth & Seligman 2017; Meier & Seligman, 1976).

It has also been shown that people with an inner sense of control have higher self-acceptance and self-esteem, thanks to which they are better adapted emotionally and socially (for: Dzwonkowska et al., 2007). A review of research (Baumeister et al., 2003) indicates that someone with high self-esteem perceives themselves in a better light, which results from the internal locus of control. Therefore, people with an external LOC, who feel that what is happening in their lives is the result of the actions of others, do not establish close and cordial relationships or are not satisfied with the relationships already established. This is confirmed by the positive correlation between a sense of loneliness and the external sense of control (Dykstra et al., 2011; Hojat, 1982; Yinghua & Lin, 2015).

Students with internal LOC are more persistent in solving puzzles and experimental tasks (Crandall et al., 1965), devote more time to homework (Rotter, 1966) and have higher self-esteem (Nowicki & Strickland, 1973) and a more real picture of themselves (Maqsud, 1980); they can postpone gratification thanks to the belief that with time they can obtain more valuable prizes (Drwal, 1978). Importantly, research (Klein & Wasserstein-Warnet, 2000; Skinner, Zimmer-Gembeck, Connell, Eccles & Wellborn, 1998) indicates the possibility of shifting the locus of control. In order to prepare children and

young people for functioning in a knowledge-based society, it is necessary to support students in building the belief that they are able to influence the results of their activities (Hejnicka-Bezwińska, 2008; Maciag, 2018; Wojnar, 2000).

## LOC Measurement Tools

According to the idea of a generalized sense of control, many tools for measuring this feature treat it as one-dimensional, i.e., they combine the beliefs of the respondents related to different spheres of life.

A popular tool for measuring LOC is the Rotter Locus of Control Scale, used for adults (Internal-External Control Scale; I-E) with the measured accuracy of Cronbach's  $\alpha$  at the level of 0.69–0.73 (Rotter, 1966). In the original version based on factor analysis, LOC was treated as a one-dimensional construct. Subsequent analyses of the Rotter I-E scale, however, showed that the sense of control measured by this scale is not one-dimensional (Drwal, 1995).

One-factor tools (concerning generalized LOC) include:

- a tool developed by S. Nowicki and B.R. Strickland (1973), constructed in versions for different age groups (<9 years, 9–18, 18 <), whose reliability, determined with the use of the split-half method, is estimated from 0.63 to 0.81;
- Delta questionnaire, with measurement reliability from 0.38 to 0.83, depending on the method and group of respondents (Drwal, 1995).

The LOC test for children and adolescents (grades III to XII), which, apart from providing the overall result, distinguishes the results for successes (I+) and for failures (I-), is the IAR (Intellectual Achievement Responsibility Questionnaire) by V. Crandall and colleagues (1965). Its reliability measured by the split-half method in the sample of students ranged from 0.54 to 0.60.

A Polish questionnaire, or the Questionnaire for the Study of the Feeling of Control for youth aged 13–17, explores LOC in four areas: school, peer group, parents and others. The reliability of the test, measured by Cronbach's  $\alpha$  coefficient is 0.54 for failures, 0.40 for successes and 0.62 for the whole scale. It was created in 1983 on the basis of research from 1981 (Krasowicz & Kurzyp-Wojnarska, 1990).

The revised version of the tool consists of 43 items, including 38 diagnostics (15 success subscales, 10 failure subscales and 13 not subscribed to any of the subscales). The tool, like the original version, refers to four spheres of functioning: school (14 items), parents (9 items), colleagues (7 items) and

“non-specific” (9 items). The reliability of the revised version of the questionnaire (Krasowicz-Kupis & Wojnarska, 2017) amounted to 0.80 (girls) and 0.86 (boys) for the overall score, with 0.63 for the success subscale and 0.64 for the failure subscale. The authors do not provide the reliability of individual spheres of functioning. However, due to the number of questions in individual spheres and the properties of the Cronbach's  $\alpha$  coefficient, it should be concluded that the reliability of detailed scales is lower than the subscales of failures and successes.

Bearing in mind that the majority of existing tools were constructed in other cultures or socio-economic conditions, and that the latest Polish tool accepts  $\alpha$  values authorizing research and diagnosis only at the highest level of aggregation, an attempt to construct a new tool has been made for examining students' sense of locus of control in specific school situations.

## Method

The study<sup>1</sup> was attended by 506 pupils (including 45.0% girls) from the second grade of upper secondary schools in Bydgoszcz, aged 17–19. The sampling was based on MOEN data for upper secondary schools in the city of Bydgoszcz and classes in these schools. The sample was collected distinguishing three layers (school type: high school, technical secondary school, basic vocational school). In each stratum, schools and then classes were drawn. However, not all participants responded in the right way (e.g., they did not mark any answer in a given question or marked two different ones). In the end, 449 people were analyzed (214 from high schools, 169 from technical secondary schools and 66 students from basic vocational schools), in which the percentage of correct answers exceeded 80.

The students filled out standardized psychological questionnaires on their own effectiveness, self-esteem, loneliness, school helplessness and motivation, as well as a questionnaire constructed for the use of research to measure the sense of location of control in school situations.

The sense of efficacy was examined by the General Self-Efficacy Scale (GSES) in the adaptation of Juczyński (2001; Schwarzer, 1998), whose reliability measured by Cronbach's  $\alpha$  is 0.84. The empirical coefficient of the sense of

---

<sup>1</sup> The study was conducted under the leadership of Barbara Ciżkowicz, in cooperation with the Municipal Teacher Education Center in Bydgoszcz in the first quarter of 2015.

efficacy ranges from 10 to 40 points (the higher the score, the higher the self-efficacy of the subject).

The sense of loneliness was measured by De Jong Gierveld's Loneliness Scale (DJGLS) in the Polish adaptation of Grygiel and colleagues (2013). The result ranges from 11 to 55 points. The higher the score on the scale, the worse the testimony of the respondents is. The internal consistency of the scale position is high (Cronbach's  $\alpha = 0.89$ ).

Rosenberg's Self-Esteem Scale (SES), in the Polish adaptation of Dzwonkowska and colleagues (2007), was used to measure self-esteem. The higher the score, which takes values from 10 to 40 points, the higher the self-esteem. The internal consistency of the scale position is high (Cronbach's  $\alpha = 0.84$ ).

The sense of helplessness was measured by the School Helplessness Scale (SBS) by Ciżkowicz (2009). The reliability of the measurement estimated by the internal consistency method is high (Cronbach's  $\alpha = 0.84$ ). The helplessness rate is in the range of 20–100 points, (the higher it is, the higher the helplessness).

The motivation to learn was studied with the use of the Statistics Learning Scale (Ciżkowicz, 1999). The level of motivation to learn so measured can take values from 38–190; the higher the score, the higher the motivation to learn. The consistency of the scale is at the level of 0.91.

## **The Scale of the Sense of Locus of Control in School Situations**

In the construction of the tool, previous studies were taken into account, in which factor analyses indicated that people have different explanations in relation to different spheres of life. Because the tool was constructed to be used for the diagnosis of a student's locus of control that could be carried out in school conditions, the focus was on the most common school-related events, i.e., situations experienced by a student in the course of learning directly related to the school environment.

The second important aspect in the design of the tool was that people perceive and explain situations differently, depending on whether the effect of the event is positive or negative (Abramson et al., 1978; Crandall et al., 1965). Therefore, the questionnaire consists of two subscales: the location of control in the case of successes and failures.

The first version of the questionnaire consisted of 20 sentences describing school situations (10 positive and 10 negative events) conditionally constructed.

Each of the sentences ended with an internal or external explanation (randomly assigned to letters A or B). The respondents were able to choose which reasons in their opinion are more frequent. A sample question was as follows:

If I did not understand the lesson, it is usually because:						
A: I did not listen carefully enough	Much more often A	More often A	I do not know	More often B	More often B	B: The teacher could not explain the material well

The empirical coefficient of locating the sense of control of failures or successes is the average of the points obtained for the respective positions (the higher the score, the stronger the internal LOC).

The basic criteria that must be met by research tools in social sciences include reliability and accuracy (Brzeziński, 2004). Reliability, defined as the degree to which test results can be attributed to the impact of systematic sources of variance (APA, 2007), was evaluated using the method based on the analysis of test item properties (Brzeziński, 2004), based on Cronbach's  $\alpha$  (1951) reliability coefficient. The reliability analysis was conducted separately for the failure subscales and success subscales.

Table 1  
*The results of the analysis of the reliability of the failure subscale*

Question	All items included		Selected items included	
	r	$\alpha$	r	$\alpha$
1P If I did not understand the lesson, it was mostly because: A: I did not listen carefully enough B: The teacher could not explain it well	0.46	0.61	0.43	0.64
3P If I wrote the test poorly, it was mostly because: A: it was too difficult B: I did not prepare enough for it	0.42	0.62	0.46	0.63
4P If I did not know the answer to the teacher's question, it is mostly because: A: I did not pay attention to the lesson B: it was too difficult	0.41	0.62	0.40	0.65



Question	All items included		Selected items included	
	r	$\alpha$	r	$\alpha$
6P If I'm late for the lesson, it's mostly because: A: I left too late B: I missed the bus <sup>2</sup>	0.22	0.66	–	–
8P If the teacher reprimanded me, it was mostly because: A: he does not like me B: I did not behave as I should	0.25	0.65	0.28	0.68
13P If I did not do my homework, it's mostly because: A: I had more important matters B: There was not enough time for that	0.16	0.67	–	–
15P If I got a bad grade, it's mostly because: A: the teacher was unfair B: I have not prepared myself well enough	0.38	0.63	0.44	0.64
16P If the project in which I participated was not successful, it is mostly because: A: I did not adapt to the group's work B: other members of the project group did not do what they should do	0.16	0.67	–	–
18P If I did not do the exercises correctly, it's mostly because: A: I did not listen to the teacher's explanations enough B: the teacher did not explain the task in a way that is understandable to me	0.38	0.63	0.35	0.66
20P If I did not remember the material, it's mostly because: A: it was too complicated B: I did not spend enough time on it	0.41	0.62	0.42	0.65
Cronbach's $\alpha$	0.66		0.72	
Spearman-Brown coefficient	0.67		0.71	

r – correlation between a given position and the rest of the scale

$\alpha$  – Cronbach's  $\alpha$  after removing the item from the scale

Positions selected based on Cronbach's  $\alpha$ . reliability coefficient

Source: own research.

<sup>2</sup> In Polish, literally, "the bus escaped me."

Table 2  
*Results of the reliability analysis of the success subscale*

Question	All items included		Selected items included	
	r	$\alpha$	r	$\alpha$
2S If I was active in the lesson, it's mostly because: A: the lessons were interesting B: I knew the answers to the questions	0.04	0.34	–	–
5S If the teacher praised me, it's mostly because: A: he just likes me B: I deserve praise	0.16	0.28	0.24	0.49
7S If I remember correctly what was in the lesson, it's mostly because: A: I listened carefully and understood a lot B: the teacher explained it well	0.03	0.34	–	–
9S If I could do my homework with ease, it's mostly because: A: I was careful and that's why I knew how to do it B: it was easy	0.09	0.31	–	–
10S If I got a good grade, it's mostly because: A: I was lucky B: I learned	0.25	0.24	0.34	0.42
11S If I succeeded in the undertaking in which I participated, it is mostly because: A: others did what they needed B: the whole team worked effectively	0.12	0.29	0.27	0.47
12S If I answered a teacher's question correctly, it's mostly because: A: I was lucky B: I had enough knowledge	0.29	0.22	0.38	0.40
14S If I have understood the issue well, it is mostly because: A: it coincides with my interests B: I studied on my own	0.11	0.30	–	–
17S If a friend asked me for help, it's mostly because: A: common learning is more effective B: he knows I can help him	0.18	0.27	0.20	0.51
19S If I solved the task correctly, it's mostly because: A: it was well explained by the teacher B: I prepared for it in advance	–0.04	0.37	–	–
Cronbach's $\alpha$ of the subscale	0.32		0.55	
Spearman-Brown coefficient	0.36		0.51	

r – correlation between a given position and the rest of the scale

a – Cronbach's  $\alpha$  after removing the item from the scale

Positions selected based on Cronbach's  $\alpha$ . reliability coefficient

Source: own research.

As a result of the analysis of the differentiating power of the scale position (table 1 for the failure subscale, and table 2 for the success subscale), three questions from the failure subscale and five questions from the success subscale were rejected. The value of Cronbach's  $\alpha$  for failures (7 items) was 0.72, and for successes (5 items) 0.55. This means that the success subscale should be refined and re-examined.

Cronbach's  $\alpha$  coefficient for the whole tool is 0.81, whereas the Spearman-Brown formula is 0.78.

In order to verify the analysis and select the best test items, an exploratory factor analysis was carried out (Zakrzewska, 1994). The fulfillment of the data reduction assumptions using factor analysis was confirmed by Bartlett's test for sphericity ( $c2 = 921.86$ ,  $df = 190$ ,  $p < 0.01$ ), and the Kaiser-Meyer-Olkin index (0.734). On the basis of the above results, one can reject the hypothesis that the correlation coefficient matrix is a unit matrix and conclude that the expected reduction will be significant, which proves the appropriateness of the analysis.

The factors were extracted using the varimax rotation method. On the basis of the Kaiser criterion, two factors were determined which, considering all items, explain 65% of the total variance (first scale 37%, second 28%), while taking into account the positions selected on the basis of Cronbach's reliability coefficient – they explain 72% of the total variance (the first scale 41%, and the second 31%).

Taking into account all items of the questionnaire, eight of them (PK2, PK6, PK7, PK9, PK13, PK14, PK19), those whose removal from the scale was associated with an increase in Cronbach's value, did not load any of the factors at a satisfactory level (above 0, 4). This confirmed the need to remove these items from the scale. One position (PK 15) more heavily loaded onto the opposite factor to its subscale. Taking into account only items left in the scale, all items load onto the factor loaded by other questions from the given subscale. This confirms both the legitimacy of including these questions in the tool, and the division into the subscales of failures and successes.

Table 3  
*Factor loads*

Question number	Failure/ success	All items included		Included items selected on the basis of Cronbach's $\alpha$ -reliability coefficient	
		Factor 1	Factor 2	Factor 1	Factor 2
PK1	P	0.06	0.69	0.68	-0.19
PK2	S	-0.08	-0.11		
PK3	P	0.35	0.49	0.63	0.16
PK4	P	0.24	0.52	0.61	0.006
PK5	S	0.45	-0.08	0.05	0.45
PK6	P	-0.06	0.39		
PK7	S	-0.11	0.24		
PK8	P	0.35	0.46	0.44	0.21
PK9	S	0.37	0.08		
PK10	S	0.52	-0.25	-0.07	0.63
PK11	S	0.52	-0.09	0.06	0.55
PK12	S	0.52	-0.19	-0.01	0.61
PK13	P	-0.04	0.32		
PK14	S	0.08	-0.15		
PK15	P	0.61	0.33	0.53	0.46
PK16	P	-0.217	0.41		
PK17	S	0.42	-0.21	-0.05	0.48
PK18	P	<0.001	0.63	0.61	-0.22
PK19	S	-0.33	-0.09		
PK20	P	0.34	0.5	0.59	0.18

Source: own research.

The accuracy of the tool allows one to determine how faithfully the measurement results reflect the examined feature (APA, 2007). On the basis of the literature on the subject, it can be expected that people with internal LOC will be characterized by high global self-assessment (SES), motivation to learn (MOTYW), high self-efficacy (GSES), low helplessness (SBS), and low sense of loneliness (DJGLS).

Table 4 presents descriptive statistics of all quantitative variables included in the analysis and the value of the Shapiro-Wilk test.

Table 4

*Descriptive statistics and values of the Shapiro-Wilk test (N = 449)*

Variables	M	SD	Min.	Max.	W	p
LOC failures	3.2	0.71	1.0	5.0	0.990	0.005
LOC successes	3.7	0.67	1.4	5.0	0.979	<0.001
DJGLS	23.6	8.25	11	52	0.959	<0.001
GSES	30.3	4.65	10	40	0.981	<0.001
SES	29.7	6.00	10	40	0.977	<0.001
SBS	53.3	10.29	24	87	0.996	0.356
MOTYW	125.4	19.56	57	179	0.992	0.016

Source: own research.

The relevancy analysis was carried out in two ways: by verifying the correlation between the analyzed variable and the criterion variables, and by varying the level of the criterion variables by the variable analyzed. Because almost all analyzed variables (except for helplessness) were characterized by a different than normal distribution (see Table 4), non-parametric tests (Spearman's rank correlation and the U Mann-Whitney U test) were used for the analysis of validity.

The average score on the scale of failures (see table 4) was lower than on the scale of successes (more strongly externally oriented). In statements concerning successes, only 20.5% of respondents (i.e., 92 people) were in the external LOC group and 79.5% (357 people) in the internal LOC group. In contrast, in sentences concerning failures, as many as 182 people (or 40.5% of respondents) explain them by referring to external causes. In order to confirm criterion validity, correlations between particular variables were calculated (Table 5).

Table 5  
*The values of the Spearman rank correlation coefficient*

Variables	LOC successes	DJGLS	GSES	SES	SBS	MOTYW
LOC failures	0.12*	-0.14**	0.04	0.06	-0.09	0.12**
LOC successes	1.00	-0.04	0.17***	0.12*	-0.33***	0.51***
DJGLS		1.00	-0.34***	-0.47***	0.26***	-0.10*
GSES			1.00	0.51***	-0.39***	0.24***
SES				1.00	-0.45***	0.19***
SBS					1.00	-0.61***

Source: own research.

The above results show that the stronger the internal explanation of failures, the less lonely and the more motivated the respondents feel. The more successes they attribute to themselves, the more they feel effective, and the better they perceive their own self. They are also more strongly motivated and less helpless. The directions of dependencies between variables are therefore in line with expectations.

The criterion validity test was carried out, additionally checking whether the criterion variables differ in the groups with internal and external LOC. To this end, the LOC variable was dichotomized (both in terms of failures and successes), the value of which is the average of the points obtained for positions concerning failures or successes. The criterion for the division was the value of 3, according to the accepted scale of responses: respondents whose result was below 3 were classified as external LOC (182 people for the scale of failures and 92 people for the scale of successes), and subjects with a score above 3 – as persons with internal LOC. In the given scope (267 people for the scale of failures and 357 for the scale of successes), there were no people who obtained the result equal to 3.

The analysis of differences in the level of criterion variables between persons with internal and external LOC was carried out with the Mann-Whitney U test (Table 6 and 7).

Table 6  
*Direction of explaining failures and criterion variables*

Variables	LOC failures	N	Me	M	SD	Rank average	U	Z	p
DJGLS	ext.	182	24	25.2	9.20	203.34	20354	-2.92	0.003
	int.	267	21	22.4	7.34	239.77			
GSES	ext.	182	30	30.0	5.21	220.30	23441	-0.64	0.525
	int.	267	30	30.5	4.21	228.21			
SES	ext.	182	29	28.9	6.43	209.74	21519	-2.06	0.039
	int.	267	31	30.1	5.64	235.40			
SBS	ext.	182	54	54.7	10.60	239.81	21601	-2.00	0.046
	int.	267	52	52.4	9.97	214.90			
MOTYW	ext.	182	119	122.1	20.69	203.14	20318	-0.23	0.003
	int.	267	127	127.5	18.46	239.90			

Source: own research.

People explaining failure internally feel significantly less lonely than people explaining failures externally. People explaining failures with internal causes have a higher sense of effectiveness, but the difference in relation to people explaining defeat by external causes is not statistically significant. The analysis shows that people who take an internal direction of explaining failures have significantly higher self-esteem than those who take the outside direction. Higher helplessness characterizes people choosing external explanations; lower helplessness characterizes people choosing internal explanations. On the basis of the conducted research, it is possible to say with the probability of 0.3% error that persons accepting the responsibility for their failures are more motivated.

Table 7  
*Direction of explaining successes and criterion variables*

Variables	LOC successes	N	Me	M	SD	Average rank	U	Z	p
DJGLS	ext.	92	23	24.2	7.88	210.61	15098.5	-1.19	0.233
	int.	357	22	23.4	8.34	228.71			
GSES	ext.	92	29	2.9	0.55	190.98	13292.5	-2.83	0.005
	int.	357	31	3.0	0.43	233.77			
SES	ext.	92	30	2.8	0.59	205.47	14625.5	-1.62	0.105
	int.	357	31	2.9	0.60	230.03			
SBS	ext.	92	57	2.8	0.50	281.84	11192.5	-4.71	<0.001
	int.	357	52	2.6	0.50	210.35			
MOTYW	ext.	92	114	2.9	0.45	140.05	8606.5	-7.04	<0.001
	int.	357	128	2.9	0.45	246.89			

Source: own research.

External success interpreters are less satisfied with their relationships, but the differences are not statistically significant. An analogous relationship occurs in the case of self-evaluation. However, in relation to the sense of efficacy, this difference is highly significant – people assigning success to themselves feel much more effective than those who do not. The same direction is taken by the difference between persons who explain success in a different way – those who give control to the outside are more helpless. Also, those who attribute success to themselves are significantly more motivated than those who do not. The above dependencies are in line with expectations.

## Conclusion

A structured tool for examining the sense of locus of control in school situations is considered to be useful in the daily work of the pedagogue, allowing for an efficient diagnosis of LOC in school situations. Therefore, the large percentage (11%) of respondents who did not complete the scale correctly is worrying, especially since this does not apply to other scales used for validity testing. This may be due to the unusual scale construction, or location at the end of the tool (decreasing involvement of respondents). However, this requires further research.



The advantages of the tool include the fact that it applies only to school situations, is suited to the 17–19 age group and is short, so it can be easily used in the efficient diagnosis of students' beliefs.

The reliability of the entire tool and the scale of failures is satisfactory. The accuracy of the measurement with the scale of successes is worse. Although this is an imperfection not limited to the constructed scale (low reliability of this subscale also applies to other LOC measurement tools), it is necessary to continue research on the improvement of the scale.

People accepting responsibility for failures are more satisfied with interpersonal relationships, have higher self-esteem, feel less helpless and more motivated, and respondents who attribute successes to themselves believe that they are more effective, less helpless, and more motivated. Based on the above analysis, it can be said that the reported relationships were in line with expectations, but not all of them proved to be statistically significant.

Thus, it can be assumed that the tool is accurate, although due to psychometric parameters it needs to be refined. Most probably, this will entail the simplification of the way of providing answers, so that youth from all social groups and attending all types of schools would understand its construction and be able to correctly complete it, as well as the clarification of some of the questions and answers, especially on the scale of successes.

## References

- Abramson, L.Y., Seligman, M.E.P. & Teasdale, J. (1978). Learned Helplessness in Humans: Critique and Reformulation. *Journal of Abnormal Psychology*, 87, 49–74.
- American Psychological Association (2007). *Standardy dla testów stosowanych w psychologii i pedagogice* [The Standards for Educational and Psychological Testing], trans. E. Hornowska. Gdańsk: Gdańskie Wydawnictwo Psychologiczne.
- Averill, J. (1973). Personal Control over Aversive Stimuli and Its Relationship to Stress. *Psychological Bulletin*, 4, 286–303.
- Bandura, A. (1977). Self-Efficacy: Toward a Unifying Theory of Behavioral Change. *Psychological Review*, 2, 191–215.
- Baumeister, R.F. et al. (2003). Does High Self-Esteem Cause Better Performance, Interpersonal Success, Happiness, or Healthier Lifestyles? *Psychological Science in the Public Interest* (Wiley-Blackwell), 4(1), 1–44.
- Brzeziński, J. (2004). *Metodologia badań psychologicznych* [The Methodology of Psychological Research]. Warszawa: PWN.

- Ciżkowicz, B. (1999). *Motywacja do uczenia się statystyki [The Motivation to Learn Statistics]*. Bydgoszcz: Wydawnictwo Uczelniane WSP.
- Ciżkowicz, B. (2009). *Wyuczona bezradność młodzieży [Learned Helplessness in Young Adults]*. Bydgoszcz: Wydawnictwo Uniwersytetu Kazimierza Wielkiego.
- Crandall, V. et al. (1965). Children's Beliefs in Their Own Control of Reinforcements in Intellectual-Academic Achievement Situations. *Child Development*, 1, 91–109.
- Cronbach, L.J. (1951). Coefficient Alpha and the Internal Structure of Tests. *Psychometrika*, 16, 297–334.
- Drwal, R.Ł. (1978). Poczucie kontroli jako wymiar osobowości – podstawy teoretyczne, techniki badawcze i wyniki badań [A Sense of Control as a Personality Trait – Theoretical Foundations, Research Techniques and Research Results]. In: L. Wołoszynowa (ed.), *Materiały do nauczania psychologii [Materials for Teaching Psychology]*, series III, Vol. 3 (pp. 307–345). Warszawa: PWN.
- Drwal, R.Ł. (1995). *Adaptacja kwestionariuszy osobowości: wybrane zagadnienia i techniki [Adaptation of Personality Questionnaires: Selected Issues and Techniques]*. Warszawa: PWN.
- Duckworth, A.L. & Seligman, M.E.P. (2017). The Science and Practice of Self-Control. *Perspectives on Psychological Science*, 12(5), 715–718.
- Dykstra, P.A. et al. (2011). Cross-National Differences in Older Adult Loneliness. *The Journal Of Psychology*, 146(1–2), 201–228.
- Dzwonkowska, I. et al. (2007). Skala samooceny SES Morrisa Rosenberga – polska adaptacja metody [Morris Rosenberg's SES – Polish Adaptation of the Method]. *Psychologia Społeczna [Social Psychology]*, 2(4), 164–176.
- Forsterling, F. (2005). *Atrybucje. Podstawowe teorie, badania i zastosowanie [Attribution: Introduction to Theories, Research, and Applications]*, trans. J. Radzicki. Gdańsk: Gdańskie Wydawnictwo Psychologiczne.
- Grygiel, P. et al. (2013). Validating the Polish Adaptation of the 11-item De Jong Gierveld Loneliness Scale. *European Journal of Psychological Assessment*, 29(2), 129–139.
- Hejnicka-Bezwińska, T. (2008). *Pedagogika ogólna [General Pedagogy]*. Warszawa: Wydawnictwa Akademickie i Profesjonalne.
- Hojat, M. (1982). Loneliness as a Function of Selected Personality Variables. *Journal of Clinical Psychology*, 38, 137–141.
- Juczyński, Z. (2001). *Narzędzia pomiaru w promocji i psychologii zdrowia [Measurement Tools in Health Promotion and Health Psychology]*. Warszawa: Pracownia Testów Psychologicznych.
- Klein, J. & Wasserstein-Warnet, M. (2000). Predictive Validity of the Locus of Control Test in Selection of School Administrators. *Journal of Educational Administration*, 38(1), 7–24.

- Kofta, M. (2001). Poczucie kontroli, złudzenia na temat siebie, a adaptacja psychologiczna [A Sense of Control, Delusions about Oneself, and Psychological Adaptation]. In: M. Kofta & T. Szustrowa (eds.), *Złudzenia, które pozwalają żyć [Illusions that Let You Live]* (pp. 199–225). Warszawa: PWN.
- Krasowicz, G. & Kurzyp-Wojnarska, A. (1990). *Kwestionariusz do Badania Poczucia Kontroli. Podręcznik [A Sense of Control Questionnaire. A Manual]*. Warszawa: Polskie Towarzystwo Psychologiczne.
- Krasowicz-Kupis, G. & Wojnarska, A. (2017). *Kwestionariusz do Badania Poczucia Kontroli. Wersja zrewidowana [A Sense of Control Questionnaire. Revised]*. Warszawa: Pracownia Testów Psychologicznych Polskiego Towarzystwa Psychologicznego.
- Maciag, J. (2018). Konstruktywistyczna perspektywa wspierania dziecka w procesie uczenia się [The Constructivist Perspective on Supporting a Child in the Learning Process]. *Konteksty Pedagogiczne [Pedagogical Contexts]*, 1(10), 25–36.
- Maqsud, M. (1980). The Relationship of Sense of Powerlessness of Antisocial Behavior and School Achievement. *The Journal of Psychology*, 105, 147–150.
- Meier, S.F. & Seligman, M. (1976). Learned Helplessness: Theory and Evidence. *Journal of Experimental Psychology: General*, 1, 3–46.
- Nowicki, S. Jr & Strickland, B.R. (1973). A Locus of Control Scale for Children. *Journal of Consulting and Clinical Psychology*, 1, 148–154.
- “Organization for Economic Co-operation and Development” (2008). *Education at a Glance*.
- Rotter, J.B. (1966). Generalized Expectancies for Internal versus External Control of Reinforcement. *Psychological Monographs: General and Applied*, 609, 1–28.
- Schwarzer, R. (1998). *General Perceived Self-Efficacy in 14 Cultures*, <http://userpage.fu-berlin.de/health/world14.htm> (accessed: 3.07.2017).
- Seligman, M., Peterson, C., Kaslow, N., Tanenbaum, R., Alloy, L. & Abramson, L. (1984). Attributional Style and Depressive Symptoms Among Children. *Journal of Abnormal Psychology*, 93, 235–238.
- Skinner, E.A., Zimmer-Gembeck, M.J., Connell, J.P., Eccles, J.S. & Wellborn, J.G. (1998). Individual Differences and the Development of Perceived Control. *Monographs of the Society for Research in Child Development*, 63(2/3).
- Weiner, B. (1985). An Attributional Theory of Achievement Motivation and Emotion. *Psychological Review*, 4, 548–573.
- Wojnar, I. (2000). *Humanistyczne intencje edukacji [The Humanistic Intentions of Education]*. Warszawa: Wydawnictwo Akademickie Żak.
- Wong, P.T.P. & Weiner, B. (1981). When People Ask “Why” Questions and the Heuristics of Attributional Search. *Journal of Personality and Social Psychology*, 4, 650–663.

- Yinghua, Y. & Lin, L. (2015). Examining Relations Between Locus of Control, Loneliness, Subjective Well-Being, and Preference for Online Social Interaction. *Psychological Reports: Mental & Physical Health*, 1, 164–175.
- Zakrzewska, M. (1994). *Analiza czynnikowa w budowaniu i sprawdzaniu modeli psychologicznych* [Factor Analysis in Building and Checking Psychological Models]. Poznań: Wydawnictwo Naukowe UAM.





Pedagogical Contexts 2019, No. 1(12)  
www.kontekstypedagogiczne.pl  
ISSN 2300-6471  
pp. 225–240  
DOI: 10.19265/KP.2019.112225



## ORIGINAL ARTICLE

Received: 5.03.2019

Accepted: 3.04.2019

Barbara Superson

ORCID 0000-0001-6476-8308

Jagiellonian University  
br.superson@gmail.com

# CULTURE-RELATED CRITERIA OF INTELLIGENCE AND THE SOCIO-ECONOMIC SITUATION OF CHILDREN WITH DISABILITIES IN BURUNDI. SURVEY REPORT

ZRELATYWIZOWANE KULTUROWO KRYTERIA  
INTELIGENCJI A SYTUACJA SPOŁECZNO-  
-EDUKACYJNA DZIECI Z NIEPEŁNOSPRAWNOŚCIAMI  
W BURUNDI. KOMUNIKAT Z BADAŃ

### Keywords:

children with dis-  
abilities, education,  
intelligence

**Summary:** The article presents the social and educational situation of Burundian children with psychological and physical disabilities. The aim of the presented research is to answer the question of what features dominate in the perception of intelligent people by Burundian children and to look at how the social and educational status of children with disabilities is positioned in this context. The results of the research carried out among Burundian youth from the Integrated Primary School in Bujumbura and among social activists working in the environment of children with disabilities and at risk of social exclusion were subject to qualitative analysis. The analysis of the research showed that there are four main characteristics that the pupils describe as intelligent: serious, hard-working, brave and polite.

**Słowa kluczowe:**  
dzieci z niepełno-  
sprawnościami,  
edukacja, inteligencja

**Streszczenie:** Artykuł prezentuje sytuację społeczno-edukacyjną burundyjskich dzieci dotkniętych niepełnosprawnościami, zarówno natury psychicznej, jak i fizycznej. Przedstawione badania odpowiadają na pytanie, jakie cechy dominują w postrzeganiu przez burundyjskie dzieci osób inteligentnych i jak w tym kontekście pozycjonuje się status społeczny i edukacyjny dzieci z niepełnosprawnościami. Analizie jakościowej poddane zostały wyniki badań przeprowadzonych wśród burundyjskiej młodzieży z Integracyjnej Szkoły Podstawowej w Bużumburze oraz społecznych aktywistów działających na rzecz środowiska dzieci niepełnosprawnych i zagrożonych wykluczeniem społecznym. Analiza badań wykazała istnienie czterech głównych cech, którymi uczniowie opisują osobę inteligentną: poważna, pracowita, dzielna i grzeczna.

## Introduction

Burundi is a small country in East Africa with an area of 27,834 square kilometers (Institut de Statistiques et d'Etudes Economiques du Burundi, 2018) – for the sake of comparison, the Lublin Voivodeship currently covers 25,122 square kilometers (Statistical Office in Lublin, 2018). The country is inhabited by over 10 million people, and it is worth noting that the population census of 1990 estimated slightly over 5 million inhabitants (Institut de Statistiques et d'Etudes Economiques du Burundi, 2018). According to the UNDP report, it is the fifth poorest country in the world. It is ranked 185<sup>th</sup> out of 189 countries in the report in terms of the Human Development Index (HDI).<sup>1</sup> Demographically, it is a very young society with an average age of only 17.6 years. The 2018 data presented below (UNDP, 2018a) show the extremely difficult socio-economic situation in which Burundians live:

- life expectancy: 57.9 years;
- illiteracy rate (adults and young people over 15): 61.6%;

<sup>1</sup> The Human Development Index (HDI) focuses on three main dimensions:  
– the ability to lead a long and healthy life – measured by life expectancy at birth;  
– the ability to acquire knowledge – measured in terms of average years of schooling;  
– the ability to achieve a decent standard of living – measured by the value of gross national income per capita.

- average period of schooling: 2.7 years (women) and 3.7 years (men);
- mortality rate of children under 5 years of age (per 1000 live births): 71.7%.

Given the level of poverty, the political situation and health problems of the Burundian population, it can be concluded that the majority of minors living in Burundi are at risk of social exclusion. Children with disabilities are in a particularly difficult situation, as they are often socially rejected and neglected because of their condition. According to a report by the Minister of Education, only 9,676 (Institut de Statistiques et d'Etudes Economiques du Burundi, 2018) disabled students attend schools.<sup>2</sup> In the countryside, where traditions related to folk beliefs and religious practices are very strong, disability is sometimes seen as a sign of a curse, which often determines the rejection and stigmatization of a disabled person (Janus, 2013).

It is precisely to this social group that I have dedicated my volunteering and research activities. The research presented in the present article was carried out at the Integrated Primary School in Bujumbura (Kamenge district) and was supplemented by interviews with three Burundian social activists: a female teacher in an integrated school; a pastor, the president of the Network of Centers for Persons with Disabilities (RCPHB) and vice-president of the Association of Mothers of Disabled Children AMEH Indemesho (Fr. Association des Mères ayant des Enfants Handicapés – A.M.E.H. – INDEMESHU); and a male teacher, the president of the AJGA Teachers' Association (Association des Jeunes de Gakungwe – AJGA).

## The sociopolitical background

Burundi has three ethnic groups: Hutu (85%), Tutsi (14%) and Twa Pygmies (1%). Similarly, to the Rwandans, the Burundians have been struggling with bloody ethnic battles between the Hutu and Tutsi for several years, starting in 1993. Recent years have brought new socio-political perturbations. A political crisis related to the violation of human rights, which began in Burundi in April 2015, caused chaos in the country (HRW, 2018). Its source was that

---

<sup>2</sup> In Burundi, there are no statistical data confirming the exact number of children with disabilities. Taking into account the statistics proposed by WHO – the number of all disabled people oscillates around 15 per 1000 people, which, with the total number of inhabitants, means about 150 thousand people with disabilities (without division into children and adults).



President Pierre Nkurunziza had again taken power by force and that, in breach of the constitution, he had not left office at the end of his second term (Czarnecki, 2015). Street protests led to bloody fights, and hundreds of thousands of Burundians fled to neighboring countries in search of security. Over 394,000 people left the country due to repression and a series of anti-government protests (UNHCR, 2018).

As a result of the crisis that swept through Burundi, hundreds of people died or were injured in street fighting, and the country fell into even greater poverty, worsening the economic situation of its people. Almost all non-governmental organizations and UN institutions have ended their humanitarian and development-oriented projects. Due to the undemocratic and anti-constitutional behavior of the ruling party, most of the countries supporting projects implemented in Burundi withdrew their subsidies. Such a decision was also made in 2015 by the Polish Ministry of Foreign Affairs. How dangerous this region of Africa has become is also evidenced by warning announcements issued by the Polish Ministry of Foreign Affairs, the last one dated August 16, 2018 (Ministry of Foreign Affairs, 2018).<sup>3</sup>

### **Social and educational situation of children with disabilities in Burundi**

It is clear that education plays a key role in the social and intellectual development of the young generation. Unfortunately, the majority of disabled children in Burundi, especially those with mental disabilities, are excluded from the education system. Article 26 of the Universal Declaration of Human Rights states: "Everyone has the right to education. Education shall be free, at least in the elementary and fundamental stages. Elementary education shall be compulsory." In Burundi, this postulate is not implemented. A child cannot

---

<sup>3</sup> The Ministry of Foreign Affairs advises against all travel to: Cibitoke and Bubanza provinces, in particular along the border with the Democratic Republic of Congo and Rwanda; the northern part of Kayanza province; the north-eastern part of Bujumbura Rural province, along the border with the DRC; Kibira National Park. We recommend that travelers should not make any unnecessary journeys to the other parts of Burundi, either, including the capital, Bujumbura. The political situation in Burundi remains tense and a sudden escalation cannot be ruled out. In the recent past, there were bloody riots and violent confrontations with the armed forces in Burundi. In the border areas with the Democratic Republic of Congo and partly with Rwanda, there may be armed conflicts with rebels and smugglers. In the past, military operations took place in the national parks. Robbery can occur throughout the country.

go to school if the parents cannot afford a uniform, the cost of which is about 12–15 thousand Burundian francs (BIF) or about 7–9 dollars (USD). Given the widespread tendency to have many children and the fact that 89.5% of the working population in Burundi live on less than USD 3.1 a day (according to purchasing power parity)<sup>4</sup> and 71.7% in extreme poverty (less than USD 1.9 a day), a large number of parents cannot afford to send their child to school, and what is more, there is no legal regulation in Burundian law that would oblige them to do so. No one requires or verifies this.

One of the Millennium Goals proclaimed by the UN in 2000 is to: “achieve universal primary education by ensuring that all boys and girls complete a full course of primary schooling” (Polish Aid, 2018). In Burundi – in the case of children with disabilities due to motor or intellectual dysfunctions – it is extremely difficult, if not impossible, to achieve this goal. The reasons for this, apart from poverty, include the lack of infrastructure for children in wheelchairs and the lack of qualified personnel in schools and centers. As a result, people with disabilities who have been neglected and excluded from social life are passive and often fall into extreme poverty.

Many Burundians believe that disability is the result of a curse or of conflicts between people or between humans and invisible forces – that disability is rooted in jealousy and misunderstandings between members of a social group or in the anger of ancestors and spirits against the disabled person. It may be the result of his or her violation of a traditional ritual or rash involvement in the world of magic and mystical practices (Devlieger & Nieme, 2011; Janus, 2013). The belief that it is necessary to expel evil spirits from the disabled is still alive in society.

Burundians often keep people with disabilities at a great distance and fear them, believing that they are a harbinger of misfortune, “bad news” (Nieme, 2011, pp. 69–80) for a given community and its future fate. A pregnant woman who steals, can bring a curse upon herself and give birth to a disabled child; a person who causes problems to others can draw a curse and become involved in an accident, becoming disabled for life (Nieme, 2011; Janus, 2013) – such theories are not uncommon in this country. One Burundian teacher describes the situation of mentally disabled women in this way: “Most Burundians think that children with disabilities are stupid. For example, for children with mental health problems, who sometimes do unwise things, there

---

<sup>4</sup> Percentage of total number of employed persons aged 15 and over.

is no place in the local community, they just need a good beating as they have chosen their own disability themselves.”

Such thinking refers to the phenomenon of the so-called belief in a “just world,” described in social psychology, which consists in attributing merit or guilt to people experiencing unfortunate or happy situations in their lives (Aronson, 2009). We can treat this phenomenon as a cognitive error based on the belief that the world is a safe and just place, and so, if something happens to someone, it depends on the person him- or herself (Moskowitz, 2009). Believing in curses cast on people with disabilities can give the Burundian community a false sense of security, predictability and control. Therefore, disabled children and their closest relatives are considered to be the cause of their own misfortune – “they are guilty of their own destiny, so they should also manage on their own.”

Although Burundi has the Network of Centers for Persons with Disabilities (RCPHB)<sup>5</sup> consisting of 14 facilities, the Burundian government provides them with only a very basic level of assistance in terms of health, rehabilitation and educational needs. An important role in the care of people with disabilities is played by the Catholic Church,<sup>6</sup> which helps international organizations such as Handicap International.

### Understanding of the term “intelligence” in the literature on the subject

The functioning of elementary and complex cognitive processes is the subject of much research in the field of cognitive psychology. However, there is still no consensus on a uniform and universally accepted definition of intelligence,

<sup>5</sup> The network has been operating at the grassroots level for many years and was officially registered on 4 July 2007 by the Ministry of National Solidarity, Refugee Repatriation and Social Reintegration. The offered system provides space for information exchange and consultation in order to find solutions to problems common to all centers, improve the quality of services provided and promote them as beneficiaries of various types of assistance. As part of its project for the social rehabilitation of children in the suburbs of Bujumbura (“Réhabilitation à Base communautaire”, i.e., “Community-Based Rehabilitation”), the Emmanuel Church in Burundi, one of the members of the RCPHB, inspired the creation of the Association of Mothers of Disabled Children AMEH Indemesho, which at the moment brings together around 300 children with disabilities in three locations.

<sup>6</sup> In 1965, for example, the first centre for children with disabilities in Burundi, the Saint Kizito Institute of Bujumbura, was established at the initiative of the Bishop of Bujumbura, Michel Ntuyahaga. Due to their disability, the children had not been admitted to school and were begging on the streets of the capital. The centre successfully operates to this day.

especially in the context of intercultural research: “Only a few concepts in psychology have been given equal attention and only a few have been able to resist explanation equally effectively” (Reber, 2000, pp. 272–273). Intelligence can be understood as:

- “the ability or group of abilities to think, learn, reason and solve problems” (Nęcka, 1994, pp. 13–16);
- a “theoretical construct which refers to the relatively constant intrinsic conditions of a human which are formed as a result of a unit-specific interaction between genotype and environment” (Strelau, 2002, pp. 62–89);
- “a particular instance of biological adaptation [...] its function is to structure the universe [...]” (Piaget, 1966, pp. 11–24);
- the “ability to adapt and function adequately in a particular social context” (Reber, 2000, pp. 272–273).

The last of the definitions seems to be the most accurate in light of the research presented in this text. Each culture celebrates and rewards a different repertoire of abilities (Anastasi, 1984, after: Szustrowa & Jaworowska, 1992; Janus, 2013). Consistent with Richard Nisbett (2009), who with his research undermines the thesis of the universal nature of human thinking, I make the assumption that “people use cognitive tools that seem to make sense – given the sense they make of the world” (Nisbett, 2009). The differences in perception and thinking between Europeans and Burundians should therefore be viewed from the perspective of cultural relativism. The way in which the former organizes the world will, to a large extent, differ from the way the latter perceive it, but this difference cannot be subject to evaluation.

The postulate of refraining from making judgements in terms of culture does not mean that the researcher should not compare cultures and organize them according to, e.g., complexity and wealth, type of recognized ethical and aesthetic values. It does not mean, moreover, that a social activist and practitioner should be neutral towards cultural phenomena and renounce their hierarchy and selection. (Kłoskowska, 1980, p. 41)

Numerous intercultural studies demonstrate the presence of intercultural differences in thinking, focus of attention and visual perception (Masuda, 2001; Chiu, 1972, after: Nisbett, 2009; Janus, 2013). For example, research has shown that children in North America tend to categorize objects and learn nouns more quickly, while their Chinese counterparts tend to connect objects

because of their relationships, for example, a cow and grass match because “cows eat grass” (Superson, 2017b). Research on the cognitive functioning of children in Burundi (Janus, 2013) also pointed to the difficulty of classifying objects – they order the world mainly by means of relationships, not by individual categories. Differences in thinking arise as a result of how individuals function in different ecological conditions which are shaped by different social practices. Gardner’s Multiple Intelligence Theory (Gardner, 2002; Kopik, 2016) may also be helpful in explaining intercultural differences in cognitive functioning. According to the creator of this concept, every human being has a different biopsychological potential expressed in the existence of eight types of abilities. The dominant type of intelligence is determined by biological and cultural inclinations (Kopik, 2016).

The consequence here is a difference in the categorization of objects, various attributions, the perception of others and communication (Peng & Nisbett, 2000; Masuda & Nisbett, 2001; Nisbett, 2009; Kwiatkowska, 2014).

### **Methodological assumptions of own research**

Fieldwork conducted in East Africa by a European researcher is very difficult because of the many constraints, ranging from geographical and economic ones (such as distance, travel and research costs) to cultural ones (different language, customs, traditions, beliefs and others). In the case of psychological research carried out in Burundi, one finds scarce information regarding social phenomena in the literature on the subject. In my research, I adopted cultural relativism as my approach and interpretative paradigm. The main direction of development and interpretation of the research results was determined by the methodology of the well-established theory and directives of cultural relativism. The initial preconceptualisation of research when analyzing the functioning of people with disabilities in Burundi carries a risk of cultural attribution error and of stereotyping and unconscious narrowing of observation. Specific “preconceptions” have a direct impact on the research activities undertaken, acting as certain cognitive schemes (Leung & van de Vijve, after: Kwiatkowska, 2000, p. 15).

According to the guidelines of grounded theory methodology, the study should begin with a thorough examination of data that may intuitively reveal a general hypothesis (Babbie, 2008), and this was also the purpose of the pilot studies presented in this article. Moreover, according to the assumptions of cultural relativism, “the reality of an object does not determine any specific

theoretical approach, but – on the contrary – in an attempt at cognitive understanding and mastering of this reality, everyone applies interpretative formulas which dominate in his or her environment and which he or she unconsciously (though sometimes also deliberately) internalized, assuming that they are the only, proper, true, etc.” (Majcherek, 1995, p. 17). The relativistic approach assumes that human behavior is culturally determined and can only be explained by referring to meanings shared by people belonging to the given culture (Kwiatkowska, 2014).

This article aims to present the features that dominate the perception of intelligent people by Burundian children as well as how the social and educational status of children with disabilities is shaped in this context. However, it is necessary to stipulate that an objective understanding of the Burundian reality by a European researcher is, in the understanding of cultural relativism, virtually impossible. Despite a tangible world of artifacts which asserts itself with its autonomous presence, a European's perception will always be entangled in the subjectivism of linguistic and cultural ethnocentrism. Thus, the research objective may be – only and as much as – to understand the ways in which autochthons act and think, while at the same time discovering and respecting the symbols, values, meanings and specific rules inherent in this community.

This article analyses the statements of 65 students (including 20 boys and 45 girls) from grade 8eC at the ECOFO MIRANGO I Integrated Elementary School in Bujumbura (Kamenge district)<sup>7</sup> and the interviews given by three Burundian social activists: a female teacher at an integrated school; a male teacher, the president of the AJGA Teachers' Association; and a pastor, the president of the Network of Centers for Persons with Disabilities (RCPHB) and vice-president of the Association of Mothers of Disabled Children AMEH Indemesho.

The students answered three questions in writing: What does it mean to “be intelligent?” What qualities does an intelligent person have? Can a person with a disability (physical or psychological) be intelligent? According to the data triangulation method, the analysis of interviews was complemented by data from participatory observation and field research notes which I conducted myself in Burundi during the implementation of projects for the environment of people with disabilities.

---

<sup>7</sup> After the education reform in 2013 in Burundi, the course of primary school cycle, the so-called *L'Ecole fondamentale*, lasts nine years.

## Results of own research

Qualitative data analysis with the application of open coding method showed that in the interviews given by the Burundian youth, there are four characteristics which pupils use to describe an intelligent person:

- *sérieux(-euse)* – an adjective denoting a serious, solid, reliable person on whom one can count, reasonable, diligent (Larousse. French-Polish Dictionary, p. 1109) – 22% of the statements referred to this character trait;
- *courageux(-euse)* – 20% of the respondents see the intelligence criterion in being brave, bold and enthusiastic (Larousse. French-Polish Dictionary, p. 271);
- *travailleur(-euse)* is an adjective describing a hardworking person (Larousse. French-Polish Dictionary, p. 1232); according to 15% of respondents, an intelligent person is “hardworking,” “liking work,” “well-working,” “taking work seriously;”
- *poli(e)*, i.e., a polite and kind person (Larousse. French-Polish Dictionary, p. 903) – this adjective appeared in 11% of the interviews.

Respondents also point to other criteria for intelligence, such as respect for others (8% of responses), the ability to answer questions (6%), knowledge of French (5%).

The definition given by the female teacher of the examined children was: “An intelligent person is capable of reflection, logical thinking and reasoning in order to answer questions or adapt to situations.” She described the characteristics of an intelligent person as follows: “Striving for knowledge, having a lot of knowledge, being well-organized, orderly, sociable, open, giving thoughtful answers.” Both statements clearly indicate the social component.

The answer to the third question provides important conclusions on the social perception of disability.<sup>8</sup> In the surveys, 29% of students said that a person with disabilities cannot be intelligent. Here is an excerpt from the interview with the teacher who acted as an intermediary in collecting interviews: “They were very surprised when we wrote the third question concerning a disabled person. I was surprised because the school I work in is an integrated school.” Thus, in social perception, are people with disabilities devoid of characteristics that are attributed to intelligent people?

---

<sup>8</sup> Of course, this is too small a sample to draw conclusions about the whole of Burundian society, but it is a pilot piece of information that I shall further study in my doctoral thesis.

Children with disabilities often have enormous intellectual potential which, unfortunately, is not used due to the lack of opportunities to attend school or overcrowding (from 80 to even 120 children in the classroom) (Janus, 2013). An example of the stigmatization of a child due to an intellectual disability is the story of 12-year-old Angella, a girl with a serious speech impediment who was expelled from school because of her disability. She participated in my workshops conducted using the Montessori method. In just two weeks she learnt to count to 20, got acquainted with continents and, most importantly, she opened herself up to communication with her peers and became more courageous. During the project evaluation,<sup>9</sup> the participants often mentioned the change that had occurred in Angella, who had ceased to fear attempts at verbalization.

Children with mental disabilities are in a particularly difficult situation: "On Tuesday, a teacher expelled a disabled child from the classroom; fortunately the child's mother is brave, she came to school quickly to ask if the disabled aren't like other children, and the principal supported her," recalls the teacher from the Integrated Primary School in Bujumbura during her interview.<sup>10</sup>

When implementing development projects in Burundi,<sup>11</sup> I witnessed many situations in which children with disabilities were discriminated against because of their state of health. I saw an intellectually disabled teenager trapped in a church room because his family, persuaded by the local community, wanted to expel evil spirits from him. His hands and legs were tied, and his food was a piece of bread thrown in through a small window once a day.

It is very common for children with physical and mental disabilities to be marginalized because of their psychophysical condition. This opinion is confirmed by my interlocutors working for the community of children with disabilities. According to one of them: "Children with disabilities do not go to school because of their disability, so special schools should be set up for

---

<sup>9</sup> "We learn not for school, but for life – the support for the methodology of working with children with disabilities in Centres run by the Association of Mothers of Disabled Children AMEH Indemesho in Burundi."

<sup>10</sup> Interview with Digne Dusabe – a teacher at the Integration School in Bujumbura, 10.11.2018.

<sup>11</sup> I implemented two projects in Burundi as part of the Polish Aid Volunteering Program in 2012 and 2013 financed by the Ministry of Foreign Affairs: "We learn not for school, but for life..." (see above) and "The development of psychological knowledge and skills of the staff at the Disability Centre in Musinga, Burundi, as well as of the Centre's wards and their families."



them; otherwise, they will still be considered worthless, although they are able to do quite a lot of things.”<sup>12</sup>

Here are the basic conclusions from the research presented in this article:

1. The basic criteria of “intelligence” are social competences and life resourcefulness.
2. The respondents distinguished four main traits with which they describe an intelligent person: serious, hard-working, brave and polite.
3. People with disabilities, both mental and physical, are considered unintelligent by 29% of respondents, which may be a factor contributing to the high level of social exclusion of people with disabilities in Burundi.

At this point, it is worth looking at the cultural determinants that may influence the above perceptions of intelligent people and the conclusions of this research. The first emerging hypothesis to explain the attribution of such traits to intelligent people is the typology proposed by Geert Hofstede, a Dutch sociologist who is known as the creator of the cultural differences model of many countries and their impact on the organization of governance (1997). Due to collectivism which constitutes one dimension of the Burundian national culture, the students’ responses assign an intelligent person to a paradigm expressed in the cooperation and harmony of society, where the individual plays an insignificant role. In such societies, the people who are considered socially “useful” are those who are hard-working, kind, polite and reasonable.

The second hypothesis may be the understanding of intelligence as presented in Daniel Goleman’s model, or the so-called emotional intelligence, which consists of five elements: self-awareness, self-management (here, what will be of importance for a Burundian is the adaptability to change), motivation, empathy and social skills – inter alia, creating bonds, cooperation with others (Lamczak, 2001; Strelau, 2000, p. 179). The results show that from the respondents’ perspective, an intelligent person must *a priori* possess social competences.

The third hypothesis that emerges from the qualitative data analysis suggests that it is also the difficult socio-economic situation that may indicate such a perception of intelligent people. Among other things, the respondents point to the relationship between intelligence and work, being reasonable, diligent and eager to act. In a country with such a high level of poverty, it is

---

<sup>12</sup> An excerpt from an interview with Pascal Twagirayezu, a teacher and president of the AJGA Teachers’ Association in Burundi.

not surprising that such “life resourcefulness” can be perceived as a criterion of intelligence.

## Conclusions

The lack of legislation governing the rights of persons with disabilities, socio-economic problems and the lack of educational facilities all hamper the daily lives of children with disabilities in Burundi. The isolation of people with disabilities and their families is often a factor in social exclusion, which makes it impossible or very difficult for people with disabilities to fulfil their social roles.

The analysis of interviews concerning the understanding of intelligence and the perception of people with disabilities showed how culturally relative the definition of intelligence is and what consequences it has in the social perception of children with disabilities. Research has shown that there are four main characteristics that pupils use to describe an intelligent person: serious, hard-working, brave and polite. Identifying intelligence through a range of traits referring to social competences makes it even more difficult for children with disabilities to adapt to society and the education system.

The perception and treatment of disabled people in Burundian society is a very broad subject which shall constitute the direction of my further research.

## References

- Aronson, E. (2009). *Człowiek – istota społeczna* [*The Social Animal*], transl. J. Radzicki. Warszawa: PWN.
- Babbie, E. (2008). *The basics of social research*. Belmont CA: Thomson/Wadsworth.
- Devlieger, P. & Nieme, L. (2011). *Handicap et société africaine* [*Disability and African Society*]. Paris: L'Harmattan.
- Gardner, H. (2002). *Inteligencje wielorakie. Teoria w praktyce* [*Multiple Intelligences: The Theory in Practice*], transl. A Jankowski. Poznań: Media Rodzina.
- Hofstede, G. (1997). *Cultures and Organizations. Software of the Mind*. New York: McGraw-Hill.
- Janus, B. (2013). *Poznawcze i społeczne funkcjonowanie dzieci z niepełnosprawnościami w Burundi* [*The Cognitive and Social Funding of Children with Disabilities in Burundi*]. Unpublished Master's thesis. Kraków: archiwum Instytutu Psychologii Stosowanej UJ.
- Kłoskowska, A. (1980). *Kultura masowa* [*Mass Culture*]. Warszawa: PWN.

- Konecki, K. (2000). *Studia z metodologii badań jakościowych. Teoria ugruntowana* [Studies in Methodology of Qualitative Research. Grounded Theory]. Warszawa: PWN.
- Kopik, A. (2016). Inteligencje wielorakie – wachlarz możliwości dziecka [Multiple intelligences – a range of child's possibilities]. *Konteksty Pedagogiczne*, 2(7), 15–25.
- Kowalik, S. (2007). *Psychologia rehabilitacji* [Rehabilitation Psychology]. Warszawa: Wydawnictwa Akademickie i Profesjonalne.
- Kwiatkowska, A. (2014). Problemy metodologiczne w badaniach międzykulturowych i kulturowych [Methodological problems in intercultural and cultural research]. *Psychologia Społeczna*, 9(28), 8–27.
- Lamczak, U. (2001). Co to jest inteligencja emocjonalna? [What is emotional intelligence?]. *Edukacja i Dialog*, 5, 41–47.
- Larousse. *Słownik francusko-polski* [Larousse. French-Polish Dictionary]. Warszawa: Wydawnictwo Rea.
- Leung, K. & Vijver van de, F.J. (2000). Methodological issues in psychological research on culture. *Journal of Cross-Cultural Psychology*, 31, 33–51.
- Majcherek, J.A. (1995). *Relatywizm kulturowy – uwarunkowania i konsekwencje pewnej doktryny* [The Cultural Relativism – Conditions and Consequences of a Certain Doctrine]. Kraków: Wydawnictwo Naukowe WSP.
- Masuda, T. & Nisbett, R. (2001). Attending holistically versus analytically: Comparing the context sensitivity of Japanese and Americans. *Journal of Personality and Social Psychology*, 81, 922–934.
- Moskowitz, G. (2009). *Zrozumieć siebie i innych. Psychologia poznania społecznego* [Social Cognition: Understanding Self and Others]. Gdańsk: GWP.
- Nęcka, E. (1994). *Inteligencja i procesy poznawcze* [Intelligence and Cognitive Processes]. Kraków: Oficyna Wydawnicza Impuls.
- Nieme, L. (2011). La conception du handicap et la pastorale des sourds [The conception of disability and the pastoral care of the deaf]. In: P. Devlieger & L. Nieme, *Handicap et société africaine* [Disability and African Society] (pp. 69–80). Paris: L'Harmattan.
- Nisbett, R. (2009). *Geografia myślenia. Dlaczego ludzie Wschodu i Zachodu myślą inaczej* [The Geography of Thought: How Asians and Westerners Think Differently and Why]. Sopot: Smak Słowa.
- Peng, K. & Nisbett, R. (2000). Dialectical responses to questions about dialectical thinking. *American Psychologist*, 55, 1067–1068.
- Piaget, J. (1966). *Narodziny inteligencji dziecka* [The Origins of Intelligence in Children], transl. M. Przetacznikowa. Warszawa: PWN.
- Reber, A.S. (2000). *Słownik psychologii* [The Penguin Dictionary of Psychology], transl. B. Janasiewicz-Kruszyńska. Warszawa: Wydawnictwo Naukowe Scholar.
- Strelau, J. (2000). *Psychologia. Podręcznik akademicki* [Psychology. Academic Textbook], vol. 2. Gdańsk: GWP.

- Strelau, J. (2002). *Psychologia różnic indywidualnych [The Psychology of Individual Differences]*. Warszawa: Wydawnictwo Naukowe Scholar.
- Superson, B. (2017a). Działania wspierające proces edukacji i kompleksowej rehabilitacji osób z różnymi typami niepełnosprawności w Burundi (Afryka Wschodnia) [Measures to support education and comprehensive rehabilitation of people with various disabilities in Burundi (East Africa)]. In: G. Gunia, A. Ochman & M. Trojańska (eds.), *Teoria i praktyka oddziaływań profilaktyczno-wspierających rozwój osób z niepełnosprawnościami [Theory and practice of preventive and supportive actions for the development of people with disabilities]*, vol. 4.1 (pp. 205–217). Kraków: Wydawnictwo Naukowe Uniwersytetu Pedagogicznego.
- Superson, B. (2017b). Rola inteligencji cielesno-kinestetycznej w procesie edukacji dzieci niepełnosprawnych oraz zagrożonych wykluczeniem społecznym w Burundi [The role of physical and physiotherapeutic intelligence in the education of children with disabilities and those at risk of social exclusion in Burundi]. In: I. Sikorska, K. Gerc & L. Pawłowski (eds.), *Sportowcy z niepełnosprawnościami: aspekty psychologiczne i społeczne [Athletes with Disabilities: Psychological and Social Aspects]* (pp. 83–94). Kraków: Oficyna Wydawnicza AFM.
- Szustrowa, T. & Jaworowska, A. (1992). *Podręcznik do testu matrycy Ravena [A Manual for Raven's Progressive Matrices]*. Warszawa: Pracownia Testów Psychologicznych Polskiego Towarzystwa Psychologicznego.
- Wrzesińska, A. (2005). *Mwana znaczy dziecko. Z afrykańskich tradycji edukacyjnych [Mwana Means a Child. From African Educational Traditions]*. Warszawa: DIALOG.

## Internet sites

- Czarnecki, M. (2015). Wybory w Burundi. Strzały na ulicach, tysiąc osób dziennie ucieka z kraju [Elections in Burundi. Shots in the streets, thousands of people flee the country every day]. *Gazeta Wyborcza*, 21.07.2015, <http://wyborcza.pl/1,75399,18399594,wybory-w-burundi-strzaly-na-ulicach-tysiac-osob-dziennie-ucieka.html> [accessed: 11.11.2018].
- HRW (2018). *Burundi, Events of 2017*, <https://www.hrw.org/world-report/2018/country-chapters/burundi> [accessed: 11.11.2018].
- Institut de Statistiques et d'Etudes Economiques du Burundi (2018). *Annuaire du Ministere de l'Education*, <http://www.isteebu.bi/index.php/presentation-generale-des-secteurs> [accessed: 11.11.2018].
- Ministerstwo Spraw Zagranicznych [Ministry of Foreign Affairs] (2018). *Ostrzeżenia dla podróżujących [Alerts for Travelers]*, <https://polakzaganica.msz.gov.pl/Burundi,%5Cstrzezenie,dla,podrozujacych,15w392544.html> [accessed: 11.11.2018].
- OMS (2018). *Profil sanitair du pays*, <https://www.who.int/countries/bdi/fr/> [accessed: 10.11.2018].

- Polska Pomoc [Polish Aid] (2018). *Milenijne Cele Rozwoju* [Millennium Development Goals], <https://www.polskapomoc.gov.pl/Milenijne,Cele,Rozwoju,53.html#cele> [accessed: 12.11.2018].
- UNDP (2018a). *Human Development Indices and Indicators 2018 Statistical Update*, [http://www.hdr.undp.org/sites/default/files/2018\\_human\\_development\\_statistical\\_update.pdf](http://www.hdr.undp.org/sites/default/files/2018_human_development_statistical_update.pdf) [accessed: 11.11.2018].
- UNDP (2018b). *Human Development Indices and Indicators: 2018 Statistical Update Briefing note for countries on the 2018 Statistical Update Burundi*, [http://hdr.undp.org/sites/all/themes/hdr\\_theme/country-notes/BDI.pdf](http://hdr.undp.org/sites/all/themes/hdr_theme/country-notes/BDI.pdf) [accessed: 11.11.2018].
- UNDP (2018c). *Human Development Report 2018*, <http://www.hdr.undp.org/en/2018-update> [accessed: 30.10.2018].
- UNHCR (2018). *Burundi situation*, <http://www.unhcr.org/burundi-situation.html> [accessed: 9.11.2018].
- Urząd Statystyczny w Lublinie [Statistical Office in Lublin] (2018). *Dane Głównego Urzędu Statystycznego* [Data from the Central Statistical Office], [https://lublin.stat.gov.pl/vademecum/vademecum\\_lubelskie/portret\\_wojewodztwa/wojewodztwo\\_lubelskie.pdf](https://lublin.stat.gov.pl/vademecum/vademecum_lubelskie/portret_wojewodztwa/wojewodztwo_lubelskie.pdf) [accessed: 21.10.2018].
- <https://www.un.org/en/universal-declaration-human-rights> [accessed: 13.08.2019].

COSETTE FOX, MILTON E. BECKNELL,  
ANASTACIA BELDEN, RUTHIE L. FIRMIN  
The Effect of Glucose and Emotional Arousal  
on Memory in College Students

KATARZYNA OŻAŃSKA-PONIKWIA,  
BEATA WEEB  
Emotions and Communication in  
Second/Additional Language: Getting  
Students Ready for an International  
Experience

OLENA SUKHENKO  
Fostering Learner Autonomy:  
Self-evaluation in Enhancing English  
Writing Skills

VITALIA PRIMAKOVA, LILIYA MORSKA  
Educating Students in a Safe Educational  
Environment in Secondary Schools of  
Ukraine: Current Issues and Challenges

KAROL KONASZEWSKI, SEBASTIAN  
RUTKOWSKI, ALFRED TUCI  
Identification with Selected Educational  
Environments and Intensification  
of Antisocial Behaviors in the Group of  
Juveniles Placed in Youth Educational  
Centers

MAŁGORZATA PRZYBYSZ-ZAREMBA  
Concerning Depression and Suicidal  
Behavior in Children and Youth – Selected  
Aspects and Research

AGNIESZKA SZCZELINA-SZCZOTKA  
Art Therapy as an Educational Intervention  
Focused on Social Relations of Children  
at a Younger School Age

OLIMPIA GOGOLIN, EUGENIUSZ SZYMIK  
The Role of Drama in Developing  
Communication Competencies of Early  
Primary School Students

ŁUCJA RECZEK-ZYMRÓZ  
Educational Methods, Forms and Aids  
Applied in Polish and Hungarian  
Schools at the Level of Early Childhood  
Education. Research Report

EWA JĘDRZEJOWSKA  
Social Self-reliance of Preschool Children

ONDŘEJ ŠIMIK  
Types of Exercises in Primary School History  
Textbooks

SEBASTIAN SKALSKI  
The Situational Motivation Scale (SMS-15)  
for Children: Design and Preliminary  
Psychometric Properties Assessment

JOANNA POZIEMSKA  
Construction of a Scale of the Locus  
of Control in School Situations

BARBARA SUPERSON  
Culture-Related Criteria of Intelligence and  
the Socio-Economic Situation of Children  
with Disabilities in Burundi. Survey Report