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SOCIAL CONSTRUCTION, DISCOURSE AND OUTDOOR INSTRUCTION ASSESSMENT

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A thesis submitted in partial fulfilment of the requirements for the degree of Master of Physical Education at the University of Otago, Dunedin, New Zealand.

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Abstract

This research focuses on the social construction of assessment discourse(s) and how this construction creates, limits or sustains possibilities in outdoor instructor assessment in New Zealand (NZ). To achieve this I adopt a post-structural analytic framework to analyse key texts and interview transcripts of experienced outdoor educators/instructors/assessors. Interest for this topic emerged from my own experiences of assessment and from assessing others. Particularly the way distinct and conflicting discourses about the how, why and what of assessment seemed to be present at certain times and not in others.

The first aim was to explore the dominant discourses of the reforms in NZ since the election of the fourth Labour Government of 1984. In particular I focus upon the education and assessment reforms, which create the context within which outdoor instructor assessment sits. The second aim was to explore how outdoor educator/instructor assessors construct their beliefs about their practice and understanding of outdoor education/instructor assessment.

The theoretical position is loosely based upon critical social theory, however it is more heavily influenced by some of the key concepts of post-structuralism and in particular the work of Michel Foucault. Given the nature of the topic, social construction of discourses in outdoor education/instructor assessment, a qualitative research methodology was most appropriate to gain some understanding of how experienced outdoor education/instructor assessors’ construct their beliefs on assessment. I use discourse analysis as an approach for analysing the data, particularly a genealogical analysis of some of the key documents and a ‘thematic decomposition’ of interview transcripts.

The study highlights how neo-liberal ideology has underpinned much of the literature in education/recreation instructor assessment. It shows how the introduction of performance-criterion-standard based outdoor instructor assessment was based on very little reflection in terms of educational philosophy. Standard based assessment is problematic in terms of education philosophy as it fails to acknowledge the difficulty of introducing national standards in a discipline (outdoor education) that is extremely difficult to define. Equally it is a process that fails to acknowledge the interests and needs of individual instructors/educators. Much of the philosophy espoused in the outdoor assessment literature and in a great deal of the interview data supports liberal and more conservative neo-liberal discourses. Consequently there is almost a complete absence of any recognition that power is a central feature in the creation of the assessment criteria or their implementation.

In conclusion I argue, that if assessment has to happen, maybe we (the outdoor community) should move towards a process that is more formative than summative. Moving this way would lower the ‘stakes’ and it would allow a move towards an assessment process that adopts a more critically aware philosophy.
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Chapter One: Mapping

This research focuses on the social construction of assessment discourse(s) and how this construction creates or limits or sustains possibilities in outdoor instructor assessment in New Zealand (NZ). To achieve this I adopt a post-structural analytic framework to analyse key texts and interview transcripts of experienced outdoor educators/instructors/assessors. The key texts are from a variety of locations. Some, such as Kelsey (1993, 1997) and Sinclair (1980), offer a broad account of the historical, political and economic climate. Whilst others, such as Codd (1997), Crabtree (1989), and Davidson (1988), offer opportunities for an analysis of specific issues or events. Examples of these include the philosophy of assessment, the creation of Department of Conservation and its impact upon outdoor education/recreation, and the creation of the New Zealand Outdoor Instructors’ Association (NZOIA).

Why the concern?

Interest for this topic emerged from my own experiences of assessment and from assessing others; and especially the way distinct and conflicting discourses about the how, why and what of assessment seemed to be present at certain times and not at others. Discourses which were often accepted with little or no questioning by others around me, or myself, other than on a technical level. In hindsight, it is not surprising that when I began to read around the topic of assessment for my research I initially focussed heavily upon the technical aspects of assessment; particularly upon the works of Rowntree (1977); Izard (1992); Ministry of Education (1994); Crooks, Kane and Cohen (1996) and many others. Consequently, the initial focus of the research was a purely descriptive piece based on an evaluation of the strengths and weaknesses of current assessment practices of outdoor instructors in NZ. However, as I progressed with the research three significant shifts in my thinking occurred which changed the focus of the research. I have included this section because I feel it is important not to hide behind some seamless, linear, and eminently logical notion of research. The research process for me has been much more messy, circular and emotional. And as Schratz and Walker (1995, p.139) suggest:

Mobilising subjectivity in research is not simply a technique to counter objectivity, but opens doors to dark places ... Emotion is not a side effect or a pathological consequence of engaging in research; it is central to the project.

The first shift was the rediscovery of one particular sentence, which I had originally included in my research proposal. This sentence questioned the lack of awareness about the socio-cultural context and the philosophical position within which all assessment sits (Hams, 1999). The reason that this sentence rose to prominence was my emerging concern around my lack of understanding of research methodology and its relationship to epistemological and ontological questions. I realised I was making many assumptions about the research process in relation to the role of power, the nature of knowledge and reality, subjectivity, the role of language and the writing process itself.

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1 Powers (1996, p. 207) “Discourse has been defined as a group of ideas or patterned way of thinking which can be identified in textual and verbal communications, and can also be located in wider social structures.”

2 I realise that it is problematic to associate outdoor education and recreation as one and the same thing. However it is part of my thesis that this association is very much part of the discursive practices in the assessment policies and processes.

3 Subjectivity refers to the “conscious and unconscious thoughts and emotions of the individual, her sense of herself and her ways of understanding her relation to the world” (Weedon in Gavey, 1989 , p.465).
My questioning of the dominant discourse of what one should be concerned about at Masters level research prompted this increasing concern about my research methodology. Once I began to read a little more I saw that many similarities existed between the research process and the assessment process in terms of these socio-cultural and philosophical issues. I did not acknowledge this in my proposed research process nor as Harris (1999) suggests, does most assessment writing/processes. The second shift, which in many ways supported these philosophical concerns, came from reading particular NZ authors such as Codd (1997); Irwin, Elley, & Hall (1995); and Snook (1996). These writers question, often from quite different perspectives on the political spectrum, the current role of education and assessment within NZ. The third shift, again influenced by the previous two, came from reading some of Foucault's work and others who had adopted his theories for their work in education (see Atkinson, 1998; Burrows, 1999; Liggens, 1997; Marshall, 1996; Middleton, 1998 and; Olssen, 1999).

This circular process of reading and reflection about my own research and assessment beliefs highlighted how education and assessment can be, and I would argue should be, analysed for their overt and covert assumptions. These create certain notions of ‘truth’ which often deny the opportunity for other possibilities to exist.

What are the aims?
The first aim was to explore the dominant discourses of the reforms in NZ since the election of the fourth Labour Government of 1984. In particular I focus upon the education and assessment reforms, which create the context within which outdoor instructor assessment sits. The second aim was to explore how outdoor educator/instructor assessors construct their beliefs about their practice and understanding of outdoor education/instructor assessment.

Achieving these aims
In chapter two I outline the methodology for this study. The theoretical position is loosely based upon critical social theory however it is more heavily influenced by some of the key concepts of post-structuralism and in particular the work of Michel Foucault. Given the nature of the topic, social construction of discourses in outdoor education/instructor assessment, a qualitative research methodology was most appropriate to gain some understanding of how experienced outdoor education/instructor assessors’ construct their beliefs on assessment. As such I use discourse analysis as an approach for analysing the data, particularly a genealogical analysis of some of the key documents and a ‘thematic decomposition’ of interview transcripts.

This approach is based mainly upon Foucault’s theoretical work because he questions the relationships between power-knowledge and truth, discipline, punishment, and the construction of self. At the start of Discipline and punish: Birth of the prison Foucault (1995) describes an overt and graphic act of physical punishment. He goes on to describe how punishment has not disappeared but has been relocated away from disciplining the body to the disciplining of self. Power for Foucault is everywhere, always present and as such it does not disappear when we get rid of brutal regimes of punishment, rather it has merely been reinscribed in different forms. Middleton (1998) outlines how education as a discipline reflects similar shifts to those outlined by Foucault. In education there has been a shift from the rudimentary but overt use of punishment to covert forms of discipline. This historical positioning is exemplified by one
teacher’s memories:

I remember the first day because my form master really terrified me. The first thing he did was to show us the range of canes that he had. He had this box alongside his desk and he held up the canes of different lengths and thickness and informed us how the canes were to be graded. The bigger you got, the heavier the cane. I remember that very well (Keith in Middleton, 1998, p.32).

Middleton (1998) goes on to discuss how the current education system has developed much more sophisticated but covert forms of discipline. Various forms of discipline, however, also govern education itself. As Middleton suggests the “population is governed by surveillance, classification, and normalization by professional, managerial, and administrative experts” (p.5).

History of the present

To achieve my first aim I begin chapter three with an analysis of the social, economic and political context of New Zealand in 2000 - in a Foucauldian sense a history of the present. As Middleton (1998) writes:

ito write a history of the present in Foucault’s (1982) sense, ‘We have to know the historical conditions which motivate our conceptualization. We need a historical awareness of our present circumstance’ (p.209). Rather than regard the present teleologically - as the end-point of a steady progress towards liberation or enlightenment - we should be less ambitious, he argued, and study ‘the present as the form of a particular kind of domain of rationality’ (p.241) or ‘regime of truth’ (p.7).

This ‘history’ includes a review of the reforms in NZ since the fourth Labour Government was elected in 1984 and how these reforms have created/reflect the dominant discourse of neo-liberalism. This discourse relies upon concepts of an autonomous self or individualism and the use of the ‘market’ based on human capital theory to achieve optimal economic and social gains. However, neo-liberalism also depends upon a complex and in some ways conservative view on the role of the State which distinguishes neo-liberalism from classic liberalism (Cassidy, 1995; Olssen and Matthews, 1997). At the same time the education reforms introduced an assessment scheme which appears, on first reading, to have its philosophical origins based in pedagogical constructivist discourses (Chamberlain, 1996; Willis, 1994). The political and more immediate origins seem to lie with the educational reviews of the early 1970s and in particular the Hawke Report of 1988 (Chamberlain, 1996). The assessment reforms initially appear to be influenced by pedagogical and educational discourses. However, on closer examination it transpires that they appear to rely upon the neo-liberal discourse of accountability and individualism. Therefore assessment is founded on technicist rather than educative concepts (Willis, 1994).

I subsequently broaden the analysis to include the land, health, safety, and accident compensation reforms and how these have influenced the outdoor arena through increased demands for certification, managerial systems and accountability. To complete this section, on the social, economic and political context, I explore how outdoor instructor assessment bodies and policy have developed in NZ.

4 This clinical organisation of punishment is reflected by Malby (in Foucault, 1995, p.312) “it is not so much the atrocity of penalties as the exactitude with which they are carried out that keeps everybody within his duty.”

5 Professor Gary Hawke author of the report on post-compulsory education and training. This report forms the basis for the policy document Learning for Life (Chamberlain, 1996).
In the final sections of the third chapter, I discuss the assessment reforms within the outdoors in NZ. In this discussion, I focus particularly upon the New Zealand Outdoor Instructors Association (NZOIA) assessment scheme. I do this for four reasons. Initially, within the NZ outdoor instructor context NZOIA is seen by some as one of the leading assessment bodies. Secondly, the creation and subsequent ‘development’ of NZOIA is almost a mini case study in terms of the how the reforms have affected the outdoors in NZ. Thirdly, the organisation and its assessors have had a significant input into the creation of outdoor recreation unit standards. Fourthly, in the wider educational context a number of schools and training institutions are using these unit standards as part of their outdoor education/recreation training programmes (NZQA, 1998).

Assessors’ beliefs
In chapter four I focus upon the second aim - how outdoor educator/instructor assessors’ construct their beliefs about their practice and understanding of outdoor education/instructor assessment. The assessors’ understandings of outdoor assessment in NZ are analysed to see the ways they do or do not support the dominant discourses. Discourse analysis is a valuable methodological tool for the interview transcripts because it shifts the focus from individual views to a broader analysis of a range of understandings and different interpretations. As Liggens (1997, p.73) suggests “a fundamental assumption of discourse analysis is that meaning is constructed by individuals, but in a sense, the meanings are not ‘personal’, that is, the individual is only part of the origin.” Within this chapter I also draw on the previous work which has outlined some of the constraining and facilitating mechanisms by which disciplines and discourses operate. I examine the points at “which the discursive policing of discourses break down, the limits whereby ordinary values, practices and beliefs of a discipline can be transgressed in order that new or different discourses can emerge” (Lloyd and Thacker, 1997, p.3).
Chapter Two: Theory of Method

Critical perspectives and Foucault

Ever since critical theory emerged as a distinct form of thinking and philosophical concept from the Frankfurt School in the 1920s, it has polarised various critical theorists within both that particular school of thought and those on the outside. However, I agree with Kincheloe and McLaren (1998, p.260) when they say

[w]e can be against critical theory or for it, but, especially at the present historical juncture, we cannot be without it. Indeed, qualitative research that frames its purpose in the context of critical theoretical concerns still produces, in our view, undeniably dangerous knowledge, the kind of information and insight that upsets institutions and threatens to overturn sovereign regimes of truth.

Given that I use a perspective partially informed by critical theoretical assumptions then it seems important and necessary to examine critical theory’s political, historical and cultural background. This chapter begins with a brief explanation of what constitutes a research paradigm. This is followed by an exploration of some of the assumptions that underpin the critical field and a discussion of how some of these assumptions challenge the dominant beliefs in and rational concepts of objective truth, knowledge and reality. It is important to note that any notion of a single critical theory is problematic. Consequently I review how these assumptions derive from particular cultural, philosophical, political and historical contexts. In the later sections of this chapter I review some of the assumptions that underpin the critical paradigm from a poststructuralist and in particular a Foucauldian perspective. In addition, I develop a theoretical and methodological understanding of discourse analysis. It is important to note that my understanding of Foucault does not necessitate a complete rejection of the importance and relevance of some elements of critical thinking. Indeed Foucault’s questioning of the role of power is inherently part of critical philosophy.

Understanding paradigms

All research is based, either consciously or tacitly, upon a philosophical position (Humberstone, 1997). Therefore it is important to take heed of Maykut and Morehouse’s (1994, p.16) suggestion that

as the working assumptions embedded within the traditional approaches to science effect beginning researchers, it becomes all the more important that they have a solid grounding in the philosophic underpinnings of qualitative research.

All research philosophies (paradigms) consist of epistemological and ontological assumptions and, as suggested by many researchers, these assumptions effect our methodological approach. For Guba and Lincoln (1998), the answer to our ontological, epistemological, and methodological questions will define the inquiry paradigm.

- The ontological question. What is the form and nature of reality and, therefore what is there that can be known about it?

- The epistemological question. What is the nature of the relationship between the knower or would be knower and what can be known?
The methodological question. How can the inquirer (would be knower) go about finding out whatever he or she believes can be known? The methodological question cannot be reduced to a question of method; methods must be fitted to a predetermined methodology (adapted from Guba and Lincoln, 1998, p.200-201).

Guba and Lincoln (1998) outline four possible competing inquiry paradigms: positivism, postpositivism, critical theory and constructivism. Within this chapter I focus upon the critical and constructivist fields, but, as previously mentioned any discussion in this area is by no means simple and the separation of one paradigm from another is not clear or straightforward.

Critical Theory(s): what is it (not)?

It is important within any discussion of critical theory to note that the very notion of a single critical paradigm is problematic, as Kincheloe and McLaren (1998 p. 260) suggest it “is a term that is often invoked and frequently misunderstood.” Bearing this warning in mind it is maybe more appropriate to replace the singular, neatly packaged conceptualisation with a more representational notion of multiple critical theories (Sparkes, 1992). A description of what critical theory may incorporate is offered by Tallack (1995, p.3). He contends that:

One way to generalise about critical theory is to see it as a set of theoretical discourses variously predicted upon highly unstable tendencies and preoccupations: first, ground breaking methodological advances, as in structuralism, which deliberately bracket hermeneutic questions; second, deconstructive self-reflexivity; third, an increasingly immanent form of critique as the best option yet distancing oneself from capitalism and fourth, the substitution of power for truth as primary focus for analysis.

Guba (in Sparkes, 1992, p.37), writing in relation to critical approaches to research, reflects Tallack’s (1995) views. Guba suggests “a more appropriate label might be an ‘ideologically orientated inquiry which would include neo-Marxism, materialism, feminism, Feireism, participatory inquiry, and other similar traditions as well as critical theory itself.”

Whereas for Harvey (in Sparkes, 1992) critical social research

is underpinned by a critical-dialectical perspective which attempts to dig beneath the surface of historically specific, oppressive, social structures. At the heart of critical social research is the idea that knowledge is structured by existing social relations. So critical social research is concerned with the broad social and historical context in which phenomena are interrelated (p.38).

Critical Theory is in itself a theory but critical theory is also a multitude of concepts and preoccupations. It appears therefore that any attempt at a simple definition is impossible and probably inappropriate anyway. Considering this multiplicity of approaches to critical theory it seems important and helpful to briefly explore their ‘theoretical heritage’ (McDonald and Birrell, 1999) and ‘intellectual debts’ (Tallack, 1995). And as Peters, Hope, Webster and Marshall (1996) suggest it is often all too easy to transport theoretical paradigms and disputes between different national and cultural contexts without examining how these paradigms, disputes and debates have themselves emerged from particular socio-cultural and historical contexts.

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6 Guba and Lincoln admit that the paradigm categorisation is a judgement call on their behalf.
Peters et al (1996, p.9) suggest Critical Theory (CT) as a name is a theoretical position linked to the “Frankfurt School - the Institut fur Sozialforschung (Institute for Social Research) set up in Frankfurt - am- Main in 1923”. The main purpose of this school of thought was to distinguish itself from the dominant notions of knowledge based on logical empiricism and logical positivism. CT established a “different form of knowing, one anchored in both reflection and practice” (p.9). Peters et al (1996) explore the intellectual and historical influences on CT from its earliest traces from the 1840s through the work of Hegelians, to Marx, to the impact of WWI, to the influence of the Vienna Circle, through to second-generation thinkers like Habermas, then finally, to the third generation of theorists based around the American journal Telos and the Australian journal Thesis Eleven. So for Peters et al (1996, p.12) CT is meant to provide a guide to action: in particular, it is meant to enable agents to determine their true interests and, thereby, produce enlightenment. They are, therefore considered to be inherently emancipatory since they will free agents from distorted ideological practices and forms of coercion which are at least partly self-imposed.

Although CT seems to consist of a disparate grouping of approaches it does appear that there are four commonly held beliefs that loosely bind these approaches together. Initially, it seems one of the key motivations of the researcher/research is the emancipation of oppressed people from their present state (Kincheloe & McLaren, 1998; Sparkes, 1992). Secondly it appears on first reading that the critical paradigm has a commitment to reject the positivistic paradigm. Thirdly the critical paradigm has concerns with the ‘macro-blindness’ of the interpretive paradigm which ignores power relationships when considering how people construct their realities (Bain, 1989; Kincheloe & McLaren, 1998; Roman & Apple, 1990; Sparkes, 1992). Fourthly, some critical approaches “make problematic the direct link between experience and written accounts of that experience” (McDonald and Birrell, 1999, p.289).

It is important to note that although these assumptions appear to tie the various approaches in the critical paradigm together, each approach will still have quite distinct philosophical and therefore ontological, epistemological and methodological positions. As Tallack (1995), Peters et al (1996) and McDonald and Birrell (1999) suggest, categorising CT is problematic as no one theorist and/or theory sits neatly within any particular category. Each approach views each of the assumptions in a partially or completely different light. In the following sections, I explore some of the relationships the various critical approaches have with these assumptions. This is by no means an exhaustive exploration but is merely an attempt to expose the often complicated, sometimes divergent, sometimes convergent, sometimes subtle and not so subtle aspects of the critical paradigms.

Emergence from positivism and interpretivism.
Sparkes’s (1992) suggests that one strand of the critical paradigm can be associated with positivism. This strand he calls radical structuralism has elements that include an “external-realist ontology, an objectivist epistemology, and holds a somewhat determinist view of people” (p.39). He also identifies a second strand, which he associates with the interpretivist paradigm, which he calls radical humanism; this approach “adopts an internal-idealist ontology, a subjective epistemology, and a more voluntaristic view of people” (p.39). However, Sparkes continues in his article to question how interpretivists fail to address the historical, economic or
material conditions that have a direct effect upon the individual as subject and their ability to know ‘reality’. For Sparkes, what can be shared between the radical humanist paradigm and interpretivism is that the individual constructs knowledge about ‘reality’.

In some ways this philosophical division of the critical paradigm, as outlined by Sparkes (1992), seems to be partially reflected in the debate between the structuralist and culturalist approaches. As McDonald and Birrell (1999, p.284) suggest; “while structuralists focus on the overdetermined ideological structures and apparatus of (class) power, culturalists turn their attention to the significance of human agency in the construction of oppositional working class structures”. Not only is it within these debates that the disciplinary boundaries such as history, sociology and politics are questioned but also the philosophic boundaries erected by previous research paradigms (Kincheloe and McLaren, 1998).

If we accept that one of the key elements of the critical approach is change or emancipation from the current state, then it is important to recognise the two other elements of enlightenment and empowerment that support this notion of change and how different perspectives within the critical paradigm approach these issues. Much of the critical position is based on the Hegelian dialectic “with its beliefs in progress, enlightenment and optimism concerning human ability to understand reality” (Olssen, undated, p.4). Within the critical paradigm there is a “strong commitment to democracy and equality” (Hickey, 1997, p.1). This is supported by an “epistemology of rational enlightenment, a critical theory of education holds that social actors are capable of understanding and transforming the injustices that restrict their access to a full and happy existence” (p.1). However, as alluded to earlier, “such emancipatory interests call for a different form of engagement than that associated with the positivistic and interpretive research forms” (Sparkes, 1992, p.41). He goes on to quote Guba at some length on how this may happen:

If the aim of the inquiry is to transform the (real) world by raising the consciousness of participants so that they are energised and facilitated toward transformation, then something other than a manipulative, interventionist methodology is required. Critical theorists (ideologists) take a dialogic approach that seeks to eliminate false consciousness and rally participants around a common (true?) point of view. In this process, features of the world are apprehended and judgements are made about which of them can be altered. The result of effective, concerted action is transformation (Guba in Sparkes, 1992, p.42).

However, Peters et al (1996) suggest that CT is problematic as a guide to action from a post-structuralist viewpoint because of its reliance upon “... the humanistic, self-reflective, unified, individual subject...” (p.12). Hickey (1997, p.2) also raises concerns about the inherent difficulties for critical educators to “subvert what is overwhelmingly subconscious or opaque.”

The enlightenment and emancipatory beliefs of some critical theorists is also critiqued by some feminist researchers. Gavey (1989, p.462), reflects upon the way “feminists have observed [that] dominant conceptions of reality and truth in patriarchal Western society have tended to be male constructions which reflect and perpetuate male power interests.” Roman and Apple (1990) also critique the modernist tradition of critical research, which saw the ideal inquirers as “the scientific equivalent of Mannheim’s (1936) ‘unattached intelligentsia’ who stand above the
social conflicts and can see what is truly real and what is ideological or false” (p.38).

In the following sections I continue to explore and develop an understanding of power, language, and reality but I shift the focus towards a more post-structural perspective. I examine in particular Foucault’s work in relation to power, knowledge, self, truth and possibilities for change. However, before I begin that process I should remind the reader that the lines between CT, structuralism, post-structuralism, feminism, semiotics and postmodernism are blurred (see Cherryholmes, 1994; Tallack, 1995). Therefore, one should read the following sections with this thought in mind.

Emergence of post-structuralism
Post-structuralism’s heritage lies in its geographical, historical, and cultural origins and these are tied to post-war France (Peters et al, 1996). “In terms of its cultural history, poststructuralism can be understood as belonging to the broad movement of European formulism, with explicit links with both formulist and futurist linguistics” (p.13). Its philosophic roots can be traced to Nietzsche. Politically post-structuralism appears to be against the totality of the Hegelian logic of the dialectic “for understanding history and identity formation” (p.13) and replaces it with DeLuze’s “logic based on pure difference” (p.13).

Some of the significant people associated with post-structuralist social theory are Derrida, Lacan and Foucault. Derrida and Lacan’s work has been critiqued, to a certain extent, for offering no moral base for judging any one practice over another. It is for this reason that I see Foucault as a particularly useful ‘theorist’ to focus on for this study as he does acknowledge to a certain extent material conditions. As Usher and Edwards (1994) suggest “he differs from Derrida and Lacan in that he is concerned to go beyond the role of language and textuality into an explicit consideration of the nature and role of power” (p.83). Although he appears to contribute to the critical tradition I should note here that his concept of power, as with DeLuze, differs significantly from traditional concepts of power. In the following sections, I explore, along with other aspects, his position on power and knowledge.

Focus on Foucault
Who is Foucault? To a certain extent, giving biographical details does not illuminate who he is. He has been described, at various times, as a philosopher, an historian, a Marxist and a neo-liberalist. Foucault himself seems to have no problem with these various descriptions. In answer to the question where do you stand, he replies:

I think I have been situated in most of the squares on the political checkerboard, one after another and sometimes simultaneously ...None of these descriptions is important by itself; taken together, on the other hand, they mean something. And I must admit that I quite like what they mean (Foucault, 1984, pp. 383-384).

7 Hegel “believed that the social world was essentially composed of ideas, manifested in the idea of the ‘world’ (or ‘absolute’) spirit (geist). These ideas were to be discovered by a contemplative process of the mind ‘alienating’ itself from itself. The spirit is illustrated in history by the dialectical movement of ideas through time - a thesis combines with antithesis to produce a higher synthesis. This historical pattern unfolds with individuals (Napoleon is often cited) as mere pawns in its development” (Jary & Jary, 2000, p. 261). Hegel was an idealist he believed in purposeful progress of history towards an Absolute Spirit (Sarup, 1993).

8 The concept of self as a distinct, permanent, or essential identity is a fallacy; very much based on Nietzsche’s emphasis on the “individual and his or her attempts at self-realization” (Sarup, 1993, p.91).
It appears, therefore, problematic to consider even trying to pin him down to one distinct definition as to do so would contradict the ideas he was trying to introduce. What I have tried to do instead is to explore some of his ideas in relation to change as opposed to the emancipatory ideal; the relationship between power, truth and self; and the role of language as discourse.

Foucault, as were others such as Fay (1987), was sceptical about “genuine emancipation, believing that institutions, discourse and social practices are sources of power which limit the extent to which the individual can ‘think’ or ‘do’ otherwise” (Hickey, 1997, p.19). There appear to be two important factors in Foucault’s writing on how things (mankind, ideas, and truth) evolve or come about. The first idea I explore is the distinction for how and why things evolve, between general history and total history. The second aspect I wish to highlight is the emphasis Foucault placed on chance in ‘determining’ what does or does not happen.

Foucault critiques some critical approaches for their reliance upon total history as opposed to his concept of general history. In a sense he is questioning the “rationalist and humanist grounds upon which modern society bases its conception of itself” (Usher and Edwards, 1994, p.83). Olssen (undated, p.2) outlines this critique:

Whereas total history seeks to explain all phenomena in relation to a single centre, general history employs the space of dispersion. For Foucault, the explanatory quest is not to search for an organising principle of a cultural formation -whether the ‘economy’, or the ‘human subject’ or the ‘proletariat’. Rather, Foucault is interested in advancing a polymorphous conception of determination in order to reveal the ‘play of dependencies’ in the social and historical process.

What are these ‘dependencies’ for Foucault? Olssen (undated, p.2) suggest three areas of play:

[F]irstly, the intradiscursive with concerns about relations between objects, operations and concepts within the discursive formation; secondly, interdiscursive which focuses on relations between different discursive formations; and, thirdly, the extradiscursive, with concerns about relations between a discourse and the whole play of economic, political and social practices.

The ‘essential’ aspect to take from Foucault’s work according to Olssen is that he resists “the temptation to try to explain the development of particular discursive formations as a result of any single cause or principle” (p.2). The second aspect I wish to highlight, in light of the previous section, is the role chance plays in the creation of any particular event. It is this haphazard and unpredictable aspect that challenges the linear, sequential and logical foundations upon which all grand or meta narratives rely. If we accept that much of our history and development rests upon chance, we are therefore unable to predict how or why certain things will happen and others do not. As Olssen (1999, p.65) suggests:

For the totality always eluded analysis or understanding in terms of ‘necessity’, and hence the ability to predict any future course of events, but rather was characterized by incompleteness, indeterminacy, complexity, and chance.

So what does that leave for any research based upon a critical perspective? Well maybe Foucault’s own position on change and his role in creating a pathway for others may help in
answering this question. Firstly, how does he view his own changing perspective on his identity?

I don’t feel that it is necessary to know exactly what I am. The main interest in life and work is to become someone else that you were not in the beginning. If you knew when you began a book what you would say at the end, do you think you would have the courage to write it? ...The game is worthwhile insofar we don’t know what will be the end (Foucault, 1988, p.9).

So for Foucault his own pathway to enlightenment, empowerment and emancipation is not at all clear and if it was how scary would that be? In the same interview he also responds to a question relating to his role in creating programmes and pathways for others:

For rather a long period, people have asked me to tell them what will happen and to give them a program for the future. We know very well that even with the best intentions, those programs become a tool, an instrument of oppression. ... My role - and that is too emphatic a word - is to show people that they are much freer than they feel, that people accept as truth, as evidence, some themes which have been built up at a certain moment ...can be criticized and destroyed. To change something in the minds of people - that’s the role of an intellectual (Foucault, 1988, p.10).

So, it appears from this work that change isn’t predictable or determinable. However, I think it is important to note that the outcome to this seemingly unstable and unpredictable position, for Foucault, is not some sort of collapse into fateful passivity, but a positive, though potentially dangerous, questioning of our various relationships to knowledge, truth, power and ourselves.

Truth, power and self
In Foucault’s (1988) interview he suggests that he has studied three problems. To paraphrase, these problems revolve around our relationship to truth and knowledge; our relationship to power; and the relationships between truth, power and self. I begin this exploration by outlining Foucault’s rejection of traditional concepts of power and I subsequently discuss how this effects our relationship to truth, knowledge and identity.

Foucault’s critique of traditional, as in Marxist and liberal, approaches to power is explored by Sawicki (adapted from Olssen 1999 p.19). Sawicki suggests that in a traditional model power:

• is possessed (e.g. by the state, classes, individuals);
• flows from a centralized source, from top to bottom; and
• is primarily repressive in its exercise.

In contrast, Sawicki suggests for Foucault power:

• is exercised rather than possessed;
• is productive, as well as repressive; and
• arises from the bottom up.

These distinct conceptions of Foucault’s work have significant effects upon our concepts of truth, identity and their relationship to power and knowledge. In most traditional writing on power, knowledge and truth these concepts are seen as separate entities: “knowledge is seen as a search for truth...power...is often regarded as a kind of possession” (Atkinson, 1998, p.31).
Within Foucault’s work, as we have already seen, there is no separation, so he sees power and knowledge as integrated power-knowledge and this concept is one at the same time repressive and productive (Atkinson, 1998; McDonald and Birrell, 1999). As Atkinson (1998, p.31) suggests, “central to this thesis is the idea that the acquisition, transmission or use of knowledge...implicate forms of power.” A major concept of Foucault’s work is, therefore, how discursive practices constitute truth rather than reveal truth.

This constitutive practice is present in all aspects of the social world. Therefore the concept of self as a distinct, permanent, or essential identity is a fallacy: “Power, through knowledge, brings forth active ‘subjects’ who better ‘understand’ their own subjectivity yet who in this very process subject themselves to forms of power” (Usher and Edwards in Atkinson 1998, p.31).

**Role of language**

In most research based upon positivist, post-positivist or interpretive paradigms, language is regarded as a ‘neutral’ medium which simply reflects reality. Within some critical paradigms this is also the case. Foucault, however, and other post-structuralist thinkers do not share in this belief. Olssen (1999) in his discussion on the relationship between Gramsci and Foucault suggests: “Like Foucault, the importance Gramsci placed on language was its role as a carrier of political and philosophic presuppositions” (p.96). Therefore “...in relation to epistemology ...Foucault was critical of materialists who assume a direct correspondence with reality unmediated by culture or language” (p.95). For Atkinson (1998, p.30) “... subjects are positioned and regulated through specific forms of language, or discourses...”

So it appears, for Foucault, that power not only represses but also produces certain knowledge and therefore what is constituted as truth. We are both powerful constituting subjects but also constituted by forms of power. And language, as discourse not only fails to represent reality but is in fact actually the creation of reality, as Ball (in Usher and Edwards, 1994, p.90) suggests:

> Discourses are...about what can be said, and thought, but also about who can speak, when, where and with what authority. Discourses embody meaning and social relationships, they constitute subjectivity and power relations ... Thus, discourses construct certain possibilities for thought.

**Disciplinary power**

For Foucault, the self is constituted discursively and institutionally by power-knowledge organized in disciplinary blocks. There are two main mechanisms: technologies of domination and technologies of self (Olssen, 1999, p.32).

In this thesis I examine in some detail how the individual is constituted through disciplinary blocks, such as education, psychology, and professionalism. As Middleton (1998) suggests, the “population is governed by surveillance, classification, and normalization by professional, managerial, and administrative experts” (p.5). However, for educators there is an implicit contradiction present in the disciplinary power of education (Middleton, 1998). Education, on one hand, imbues people in an area of knowledge that can be liberating, whilst on the other, demands obedience to and complicity with the ‘rules’. This contradiction is even more profound, I believe, when we assess either others or ourselves. We assess on one level for pedagogical...
reasons whilst at the same time our assessment processes are part of the discursive process which 'normalizes' what can be said, how it can be said and by whom, and as such is a powerful labelling exercise. As Middleton (1998) suggests, the covert surveillance inherent in the disciplinary power of examinations "result[s] in case records, which 'fix' our identities in writing (on paper or in electronic databases), and these records may be passed from one disciplinary institution to another" (p.6).

I begin this process by teasing apart Foucault's thoughts on the role of examination. He argued that

\[\text{[i]}\text{t is the examination which, by combining hierarchical surveillance and normalizing judgement, assures the great disciplinary functions of distribution and classification, maximum extraction of forces and time, ...optimum combination of aptitudes and, thereby, the fabrication of cellular, organic, genetic and combinatory individuality (Foucault, 1995, p.192).}\]

For Foucault (1995) there are several mechanisms in and through which disciplinary power operates. As mentioned previously, Foucault sees power quite differently from some other critical thinkers:

\[\text{We must cease once and for all to describe the effects of power in negative terms: it 'excludes' it 'represses', it 'censors', it 'abstracts', it 'makes', it 'conceals'. In fact, power produces, it produces reality; it produces domains of objects and rituals of truth. The individual and the knowledge that may be gained of him belong to the production (Foucault, 1995, p.194).}\]

Also disciplinary regimes rely upon different notions of individualisation and these are achieved through surveillance, normalizing judgements and examination. Foucault (1995) saw distinct differences between feudal concepts of individualisation and a disciplinary view. In the feudal regime, individualisation occurred on an ascending scale: "[t]he more one possesses power or privilege, the more one is marked as an individual, by rituals, written accounts or visual reproductions" (p.192). Whereas within a disciplinary regime

\[\text{[i]}\text{ndividualization is 'descending' as power becomes more anonymous and more functional, those on whom it is exercised tend to be more strongly individualized; it is exercised by surveillance...by observation...by comparative measures that have the 'norm' as reference (Foucault, 1995, p.193).}\]

\[\text{\textbf{Surveillance}}\]

The concept of surveillance for Foucault is based on two interlinking sources; external sources which occur occasionally and internal sources which are constant. The origins of this concept of surveillance lie with industry and economics and have been replicated in education. The industrial and economic rationale lay in the large factories of the 18th and 19th centuries. For Foucault the process of surveillance was transferred into the classroom for similar reasons i.e. more students and a desire to monitor what was being learnt and how it was being learnt.

\[\text{We have here a sketch of an institution of the 'natural' type in which three procedures are integrated into a single mechanism: teaching proper, the acquisition of knowledge by the practice of the pedagogical activity and a reciprocal, hierarchized observation. A relation of surveillance, defined and regulated, is inscribed at the heart of the practice of teaching, not as an additional}\]
This contradictory position is reinforced in Foucault’s work on prisons. Sarup (1993) suggests that for Foucault prisons were not to reform people but in fact “manufactured criminals and criminality” (p.68). This process of creation thus justified the need for policing of the entire population. The key aspect within this mechanism called ‘surveillance’ is that it is not purely a top down process: “by its very principles it leaves no zone of shade and constantly supervises the very individuals who are entrusted with the task of supervising” (Foucault, 1995, p.177). For Foucault not only was surveillance ‘inscribed’ at the heart of any disciplinary regime but he also believed that disciplinary apparatus relies upon ‘normalizing judgements’ rather than the use of corporal punishment.

Normalizing judgements

For Foucault (1995)

the art of punishing, in the regime of disciplinary power is aimed neither as expiation, nor even precisely at repression. It brings five quite distinct operations into play: it refers individual actions to a whole that is at once a field of comparison ... It differentiates individuals from one another... It measures in quantitative terms and hierarchizes ... abilities, the level, the ‘nature’ of individuals. It introduces...the constraint of a conformity that must be achieved. Lastly, it traces the limit that will define difference in relation to all other differences, the external frontier of the abnormal (pp.182-183).

The various relationships between the ‘art of punishing’ and the above operations are important elements of my thesis and therefore I briefly explore each of these in the following section.

Foucault (1995) suggests at the centre of all disciplinary systems lies a “small penal mechanism” (p.177). This mechanism has its own laws, offences, forms of judgement and a “whole micro-penalty of time...behaviour... speech ...[and] body...of sexuality” (p.178). What is interesting and specific to this micro-penalty is that it is based on non-observance. That is we define what must be done but leave open the infinite range of non-conforming alternatives or what should not be done, all of which are punishable because they do not measure up to the defined rule. Disciplinary punishment for Foucault is essentially corrective; it “has the function of reducing gaps” (p.180). Therefore the punishment is, on the whole, “isomorphic with the obligation itself, it is not so much the vengeance of an outraged law as its repetition” (p.180). How often have I spent time writing lines such as ‘I will do my homework’ or trying a hundred times to roll on the left in my sea kayak because that is what is demanded in order for me to ‘pass’. These ‘punishments’ illustrate Foucault’s point. The first penalty may be a ‘punishment’ but the second penalty very much lends itself to the concept “that the corrective effect expected of it involves only incidental expiation and repentance; it is obtained directly through the mechanics of training” (p.180). The second penalty also links to another key aspect to Foucault’s thinking on disciplinary penalty - punishment only forms one part of a double system of gratification and punishment. This system “makes possible a number of operations...First the definition of behaviour and performance on the basis of the two opposed values good and evil ...good and bad marks, good and bad points” (p.180). Foucault contends that all behaviour or performance can be judged against these values and importantly this scale allows for the behaviour to be
quantified and used in some sort of ‘penal accountancy’. The performance is what one is judged by and this process for Foucault is what creates the subject. People can now be ordered into a hierarchy of ‘good’ or ‘bad’ subjects in relation to one another not by their acts but as “individuals themselves, of their nature...their level or their value” (p.181). This distribution also serves a double role: “it marks the gaps, hierarchizes qualities, skills and aptitudes; but it also punishes and rewards” (p.181). The hierarchy allows for the notion of reward through promotion but also the threat of punishment and demotion down the scale whilst at the same time subjecting all “to a constant pressure to conform to the same model” (p.182). Summarising these operations Foucault (1995) argued that “[t]he perpetual penalty that traverses all points and supervises every instant in the disciplinary institutions compares, differentiates, hierarchizes, homogenizes, excludes. In short, it normalizes (p.183).

Before leaving this area of disciplinary power I think it is worth re-emphasising the interaction of Foucault’s technologies of power/domination and technologies of self. These technologies 

do not reflect the old free-will/determinism dualism but refer to different ways in which power is exercised, or individuals are made to ‘adopt appropriate conduct’. Technologies of self refer to the ways in which individuals act upon themselves as subjects ‘to effect by their own means or with the help of others, a certain number of operations on their own bodies and souls, thoughts, conduct and way of being, so as to transform themselves in order to attain a certain state of happiness, purity, wisdom, perfection and immortality’ (Foucault, 1998:18). Technologies of power/domination refer to objectivising techniques through which individuals act over one another (Fournier, 1999, p.303).

But the crucial aspect in this discussion is that these technologies are not independent of one another but are interconnected, and it is the interaction of these technologies that we need to explore to “understand the constitution and government of the modern subject” (Foucault in Fournier, 1999, p.303).

Narrative and discourse analysis

Denzin and Lincoln in their introduction to Strategies of Qualitative Inquiry (1998 p.25) highlight some of the key aspects that have emerged from the previous sections:

Poststructuralists and postmodernists have contributed to the understanding that there is no clear window into the inner life of an individual. Any gaze is always filtered through the lenses of language, gender, social class, race, and ethnicity. There are no subjective observations, only observations socially situated in the worlds of the observer and the observed. Subjects or individuals, are seldom able to give full explanations of their actions or intentions; all they can offer are accounts, or stories, about what they did and why.

In light of these thoughts I examine the emergence of narrative and discourse analysis as ‘valid’ forms of knowing and I outline some of the arguments that surround these analytical approaches.

Research Moments

Denzin and Lincoln (1998) speak of five moments in qualitative history. The last three moments (blurring of the genres, crisis of representation and double crisis) reflect much of the previous section’s discussion, which acknowledges the emergence of a multidisciplinary approach to
research, the questioning of the power of the researcher and the non-innocent role of language has to play in all our work. Blurring of the genres challenges the boundaries between all facets of the research process. The crisis of representation had profound effects upon many research areas because

[t]he gap between engaging others where they are and representing them where they aren’t, always immense but not much noticed, has suddenly become extremely visible. What was once technically difficult, getting ‘their’ lives into ‘our’ works, has turned morally, politically, even epistemological, delicate. (Geetz, in Sparkes, 1995, p.159)

The double crisis that now faces researchers according to Denzin and Lincoln (1998) is one based around the twin issues of representation and legitimisation. To put this simply the questions are: how do we capture lived experience, when “such experience is created in the social text written by the researcher” (p.21)? And how can we evaluate qualitative studies in the post-structural moment? It is these questions that have re-established the need for the debate about our assumptions and has had the positive effect of opening or reopening alternatives to the dominant approaches to research.

Emergence of new (old) ways of knowing

In the recent past qualitative research has been dominated by positivist and post-positivist concepts of what ‘truth’ should look like. Much of this work attempted to recreate the hard or natural science approach to discovering truth.

Truth was to be discovered in the objective and observable and confirmed by public evidence of a repeatable, valid and reliable nature. A corollary of this was a perception that what people might ‘say’ about themselves, their actions and motives...was not to be regarded as trustworthy evidence (Thomas, 1995, p.2).

It is important to note, at this point, that whilst I have concerns about the domination of logical/deductive or empiricist/deductive approaches to research (both quantitative and qualitative) I do take the advice from Foucault (1984), Oakley (1998) and Sparkes (1995) seriously. They suggest that to argue for any universal approach is dangerous and is just as oppressive as the previous ‘truth’ dominating paradigms. As such the move away from the focus on people as ‘objects’ of inquiry

was to alter the focus of attention from information and data to ideas, thoughts, perceptions and, in particular meanings. It reclaimed the subjectivities as a legitimate zone of inquiry by challenging the hegemony of the objective substituting more organic, more holistic, metaphors for mechanistic (Thomas, 1995, p.3).

Thomas (1995) notes that stories people tell about themselves can be ‘captured’ in multiple ways: logs, diaries, life histories, interviews, and all these “modes of expression can be seen as ways in which the person socially constructs him or herself” (p.xii). One of the criticisms of Foucault’s work is that he focuses excessively on the production of discourses and does not spend enough time analysing how the individual consumes them (Ezzy, 1997). It is therefore one of the distinct advantages of the methodology I use in this study (i.e. including both documents and interview transcripts) as it allows me the opportunity to examine how certain individuals make their own “innumerable and infinitesimal transformations of, and within, the

What I come to know is only partial; it is inconsistent, and complex. But the use of narrative and discourse analysis as methodology acknowledges this and makes no attempt to hide behind the authority of the author (as in the research participant) or the writer (the writer of the final text). I know that when I (or others) write or speak about our lives we are not telling the truth but we are telling a story which the researcher, participants and reader all contribute to in one way or another.

In many ways what I am really trying to answer is the question I posed earlier: how do we capture lived experience, when “such experience is created in the social text written by the researcher” (Denzin and Lincoln, 1998, p.21)? It appears from this question that all research writing in some ways is autobiographical and, as Kincheloe (1997) suggests, it just depends whether it is explicit or covert. So how do we write for ‘self’ or ‘other’? Sparkes (1995) offers a variety of options for ‘writing people’ from realist accounts to ethnographic fictions. The choices we have in social science writing appear to lie upon a continuum from realist but essentially scientific tales in which the objects as subjects were granted a ‘voice’ whilst at the same time the ‘voice’ of the author was absent. In this case the writer, to establish the authenticity of their work, uses a variety of devices. Such as: “extensive, closely edited quotations” (Sparkes, 1995, p.163); or the use of the natives’ vernacular in the report; or a detailed theoretical explanation with the judicious use of empirical field data to convince us of its validity. Sparkes suggest that the use of these and other conventions “produce texts that portray people as ‘flat’ unidimensional, highly stable, and predictable characters, as opposed to multidimensional “rounded characters” (p.164). The alternative to producing flat characters is to employ alternative (or experimental) approaches which may still hold to the realist convention but do not deny the ‘voice’ of the researcher as integral to the inquiry. As a researcher I have to acknowledge that I have responsibility for authorship but I do not have authority over the people I study. What is more I accept the notion that I can not write truly ‘multi voiced’ accounts or co-constructions. Within the experimental mode my voice as researcher may appear and then disappear only to reappear later in the text or I may be overtly present throughout the text. I have partially adopted (as already evident in this research report) from Sparkes (1995, pp.173 - 181) the confessionalist tale. This mode of representation is primarily concerned with how the “fieldwork odyssey was accomplished” (p.173) - driven by a desire to provide a context to the study. For the actual text, as may be obvious by now, I have adopted a conventional mode of presentation (Potter, 1996) rather than the, perhaps, more exciting alternatives such as ethnographic drama. But my representation comes with the caution, that I hope has already been illustrated, that the work is no more ‘factual’ because of this conventionality. The demands in writing a more truly experimental text are beyond my literary means.

In the following section I take a closer look at the second question I posed earlier: How are qualitative studies to be evaluated in the post-structural moment? However, I would suggest the concerns surrounding representation and legitimacy blur with one another and legitimacy is also very much an ethical concern.
**Legitimacy**

Research based upon post-structuralist theory challenges the dominant discourses on what makes for good research and these discourses are typically associated with the notions of validity, reliability and generalisability. In this section I briefly explore some ethical and interpretive concepts/criteria I adopt when using discourse analysis as a methodological approach.

If research is a political act, and one based upon a critical paradigm is necessarily so, then research undertaken under its auspices can not be any more amoral than it is ahistorical or apolitical. As I have developed my own research philosophy the ethical dimension has become in some ways paramount. How do we as critical researchers, driven by our desire for knowledge, kudos, legitimacy as academics or whatever, act in such a way that does not trample on the people we are in theory trying to support? Issues surrounding practice and theory or theory/practice appears to constrain all of us in our day to day being as researchers or educators. The answer lay in the need for me to accept one of the premises upon which the post-structuralist critical paradigm rests, namely the adoption of a reflexive stance. Adopting this stance means decisions are based not on some universal set of ethical rules so much but more on conscious decision making which partially acknowledges my position of power and responsibility in writing about other’s lives.

Writing about the voice known as other or me is in itself a creative process. I (re)create self/other through the thinking process and subsequently through the writing process, the reader then creates another through the reading. As I have discussed several times in this thesis the issue is not whether our stories are ‘true’ but whether they should be judged in light of the theoretical and methodological shift. As Stenner (1993, p.115) argues “[w]e must resist the urge to ask whether or not a given story is ‘true’, and instead look to what may be said to be achieved by its use. What are its constructive effects? What is it doing?”

**Discourse analysis**

It appears that the actual ‘method’ of discourse analysis is not at all straight forward. Burman and Parker (1993, p.2) suggest that there is “a series of dilemmas we have to negotiate...[in particular] how to develop alternative methods as part of discourse analytic work”. They suggest that although there have been a number of works on ‘how to do’ discourse analysis there is a distinct danger of misinterpreting the subtle but at times significant differences between the various methods. They argue that there has been a proliferation of approaches and therefore it is very hard to conceive of ‘discourse’ or ‘discourse analysis’ as singular entities. But what does unite them is their commitment to a Foucauldian view on language and the construction of self:

In its various forms, discourse analysis offers a social account of subjectivity by attending to the linguistic resources by which the sociopolitical realm is produced and reproduced...All involve an attention to the ways in which language does more than reflect what it represents (Burman and Parker, 1993, p.3).

Burman and Parker (1993) suggest that it is often not a clearly expressed statement that indicates the framework for a study but more likely the cluster of other writers that the author uses as reference points. They go on to outline three reference points that may signify the author’s framework. These three points of reference are repertoires and dilemmas, conversation and making sense and, structure and subject. As already clearly established in the earlier discussion
on Foucault that this work will be using the third point of reference - structure and subject. As Burman and Parker (1993) suggest:

> When the post-structuralist twist to discourse analytic research is added, particularly in the use of Foucault’s (1981) work, then we are able to look not only at how objects are constructed in discourse ...but also at how subjects are constructed (p.7).

Furthermore Stenner (1993) says ‘our’ stories “...should not ...be considered as the product of any individual. We use and adapt stories with narrative themes which have already been arranged for us”(p.114). Stenner suggests “a thematic decomposition’ is a close reading which attempts to separate a given text into coherent themes or stories.”

**The analytic process**

In the following chapters I draw upon various material sources; books, academic articles, newsletters, and conversations I have had over the past year with various key people” involved in outdoor recreation/education assessment. Potter (1996) suggests drawing on a wide range of materials can avoid some of the tensions between specificity and generality. People’s specific talk can be located in the wider location. This is a very Foucauldian notion as previously discussed - all cultural formations (including people’s talk) can not be explained in relation to a single centre. For Foucault

> the explanatory quest is not to search for an organising principle of a cultural formation whether the ‘economy’, or the ‘human subject’ or the ‘proletariat’. Rather, Foucault is interested in advancing a polymorphous conception of determination in order to reveal the ‘play of dependencies’ in the social and historical process (Olssen, undated, p.2).

In my analysis I often use quotes taken directly from interview transcripts. In these extracts I have also (where possible) included my questions or comments which preface the participants’ responses as my input has direct impact upon the response that the participant makes. Potter (1996) illustrates this when he states “[T]he simple point here is that people do not produce descriptions out of the blue; they produce them for what they can do in some stream of activity” (p.4). Also at times I include quite extensive extracts for three reasons. Firstly, and most obviously, the descriptions tell us what is described. Secondly, and slightly less obviously, the descriptions also relate to what is left out and this also forms part of the analysis (Potter, 1996). Thirdly, Potter (1996) suggests that by including a “transcribed record of discourse, rather than a set of formulations in note form, it places the reader of the research in a much stronger position to evaluate the claims and interpretations” (pp.105-6).

**Issues of discourse analysis**

One of the key aspects in any qualitative research is/was the relationship between myself as researcher and the various participants and how that changes as the research itself is constructed. As already indicated there appeared to be sound methodological reasons for not adopting a collaborative approach to the analysis and writing process - though the ethics of this decision does seem problematic in my mind. Nonetheless I had to consider once the work was finished how to feedback the outcomes to the participants. Marks (1993) highlights this issue of using

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9 see interview practicalities for more detail on participants and interview process.
discourse analysis in “progressive, critical and socially engaged research” (p.151). She argues for discourse analysis to have any critical value in drawing attention to the way in which meanings and subsequent outcomes are constructed in and through language, the analysis must be undertaken out of its context and examined in a non-threatening setting (Marks, 1993, p.151).

My work then is not an evaluation of the various participants but an analysis of their stories in a broader context. I also support Marks’ (1993) approach that using this analysis as a training tool for others is much more appropriate than “used directly to challenge participants about discourses” (p.151) in their own situation.

**Interview practicalities**

I had conversations with five people in total for this research. The criteria for selection were their long-term involvement with the New Zealand Outdoor Instructors’ Association (NZOIA) and that they had assessed for NZOIA. Some of the participants I already knew prior to starting the research and I therefore had a sense that they would be key people to talk with. Other valuable sources (people and documents) were suggested to me as the study progressed. I was keen to talk with people who had a strong sense of the history of NZOIA but I was also eager to talk to those who offered an ‘alternative’ view on the development of NZOIA and the role of assessment. As I later discovered this approach of selecting ‘marginal’ thinkers was one Foucault favoured in his own work. When asked why he did this he replied

> I deal with obscure figures and processes for two reasons: The political and social processes by which the Western European societies were put in order are not very apparent, and have been forgotten, or have become habitual. They are part of our most familiar landscape, and we don’t perceive them anymore. But most of them once scandalized people. (Foucault, 1988, p.11)

I telephoned all the participants to discuss the research and which aspects I was particularly keen to talk with them about. All those that I approached appeared ‘happy’ to take part (I discuss their various reactions in the following section). I sent all the participants a letter and information sheet outlining the study, a list of possible questions and a consent form. The formality and necessity of these questions and other processes have become very much part of my emergence as a researcher. The detailed questions were initially necessary for me, as a handrail is for a novice orienteerer, but as I talked with more people, and read the transcripts the desirability for a ‘schedule’ diminished. I did not take notes during the audiotaped interviews as I found it almost impossible to continue my train of thought, listen to the participant, and make sense of my notes. I had a philosophy, in line with Clandinin and Connelly (1998), that the interview was very much a conversation with a purpose and the direction would be partially set by my needs and interests but also by the participants’ interests. Finding the balance was not easy and my desire for compact neat answers can be seen sometimes in the transcripts, especially in the early interviews. I had conversations with two people in the North Island. The geographic location meant I could only talk with them in person on one occasion. I taped the conversations, which lasted between one to one and half hours. The other three participants were based in the South Island and this gave me the opportunity to have more than one conversation or longer conversations. The actual recorded time for two participants was less than half the time I spent

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10 However, I did keep a record of my reactions and thoughts to the interviews. I also wrote several ‘letters’ (to my supervisors) recording how I felt about the actual research process.
with them. The cumulative time of each taped conversation was between two to four hours. I followed up the conversations by sending a transcript to each participant inviting them to make any additions or changes. Two transcripts came back with only minor changes.

I use quotes from the transcripts quite extensively in this report. When I do so I have italicised the extract. To keep some sense of flow in the extracts I have left out some of the umms, yeses and so on which we often interjected over the top of one another in the conversations. I use two full stops (..) to indicate a change of direction, repetition or pause within a sentence. I realise how little we speak as we write or read; hopefully the spirit and sense of the conversations has not completely disappeared in my transcribed extracts that I draw on in this research.

Reactions

The reactions to the research process for the participants and me were varied. I include them here because it is part of the research 'story'. It reflects the wider concern about the power of the research process at both a personal and organisational level.

On a personal level I explained in all my conversations that anonymity would be problematic because of the small number of people who hold 'key information' in the New Zealand outdoor arena. For some this was seen as unproblematic as was highlighted by W who stated:

\[ W - \text{generally I don't care what I say even if it's a bit scandalous or based purely on conjecture or this sort of obvious bull shit.. it doesn't matter to me anymore.. I don't have anything at stake I don't think and I don't care (W, p.1).} \]

For another participant there appeared to be concerns around the possibility of being in the public gaze. This concern was not openly discussed but the need to feel safe appeared to be reflected in the participant’s request that I did not (even) genderise them in my write up. In a subsequent telephone conversation I discussed this issue with the participant. I outlined how hard it was to write without using ‘he’ or ‘she’ and so on without the project becoming strangely flat, whilst, at the same time, recognising the ‘dangers’ of sharing our voices. The participant agreed that I could genderise them but we also agreed that using pseudonyms, because names are so personal, was also problematic.

So bearing these concerns in mind I use only initials for information collected from my interviews rather than names. Also I do not overtly provide any biographical details. Although I do acknowledge that some of the stories will outline experiences in which others may recognise themselves or the ‘author’ of the story. Of course this approach has its limitations in providing a context to the participants. However I also realise how ‘dangerous’ sharing voices (both researcher and researched) can feel at various times and in particular contexts, especially when working on research that highlights how my own and other’s beliefs, values and so on are often based on assumptions we have never examined in detail.

On a broader scale one participant expressed concern about the impact this study could have on NZOIA and questioned my motivations for the study. In answer to a question about their reaction to the information sheet W said:
W - the first thing was a touch of minor paranoia about what can this be used for? ...NZOIA is actually a valuable commodity thing .. and it’s been, kind of like, too easily sold down the river or given away ..with just general openness, you know? People quite keen and they are not normally .. um paranoid at all. If somebody asks something they’ll say .. they’re outdoors people, they’re not thinking entrepreneurial, city slicker how can we make a dollar out of this .. you know? (W, p.1)

My position, as I explained earlier, was to learn just as much about the research process as it was to learn about the topic under discussion - in other words to learn to become a reflexive researcher. This evolving research position is partially reflected in my reaction to W’s concerns:

H - umm..[pause] it’s a very important point ..um ..the concerns about the study and in fact I think it’s becoming more and more apparent as I get into it. I think people have suddenly realised I’m actually doing it ..and your initial reaction is actually being reacted by several people at this very moment in fact, so ..its made me ..as I was driving up I felt I have become very conscious about my ethical position in terms of the power. Certain power, obviously, that I have, within a very limited structure (W, p.1).

Here I appear to respond to the issues of power by sharing the evolving nature of the research with the participant.

H – .. the other thing that’s come up has become ...what’s become quite important to me is the context within which the NZOIA system sits .. so I have looked and I am looking quite deeply at the historical foundations ... so I just wanted you to be clear that some of this work today may be linked to the history (W, p.2).

The concerns about the research process and the concerns around NZOIA’s position led me to change the focus of the study to a broader study of the assumptions, which support, limit or constrain assessment of outdoor instructors rather than focussing exclusively on an evaluation of NZOIA.

I now view the whole research process as a network of power relationships between the participants (and their position within other networks: NZOIA, work opportunities, the outdoor community) and me. Also between the various parts of the university institution (i.e. supervisors, ethics committees, research teachers) and me. The following chapter begins with an exploration of how my own ‘present’ position has emerged in relation to this research topic and I follow this with a broader analysis of the social, political and economic context.

Schratz and Walker (1995) discuss the use of tenses (past and present), by researchers in their writing to provide some illusion of currency - a device that can be (un)consciously used. They ask the reader to spot this happening in their own work and how this has significant effect upon the reading of an account. I also suggest that there may well be times when I employ this ‘technique’ to portray an idea as ‘current’ - when of course it may well no longer be the case.
Chapter Three: Plotting positions

My position

Before I begin the broader analysis of the social, political and economic context within which this research sits I feel it is important to explore how I see myself located in this research. I approach this by partially answering these two questions: who (how, what) am I? And what’s that got to do with this research? In some ways I write a history of the present about myself.

The first part of our [education] is as if we were in the middle of a confused, busy street... We’re so busy jumping out of the way of what’s coming toward us that we can’t understand our own entrapment in the traffic. But if we watch it for a while we begin to see that there are holes in the traffic here and there. We might even step up on the sidewalk and begin to take a more objective look. And no matter how busy the traffic, here and there, we begin to notice clear areas....Now our [next] step might be to go into a tall building and climb up onto the third-floor balcony and observe the traffic from there. Now... we can see the direction of it....If we climb higher and higher and higher, eventually we see...patterns...and we begin to see it as a tremendous panorama. We begin to see areas of difficulty as part of the whole.... And in the final state of our practice we’re back in the street, back in the marketplace, right in the middle of the hubbub. But seeing the confusion for what it is (adapted from Charlotte Beck in Diller, 1998).

I included this quote in my original thesis proposal because I thought it was a useful and pertinent analogy for my own assessment education. I include it again here because I think it still reflects my assessment education. Moving from the centre either as an assessee or as an assessor, not sure of what it meant and often not even questioning whether it meant anything at all; to the margins where I was not so certain but where I did have opportunity and reason for reflection. Also I decided to include it for quite another reason, this time based on philosophical concerns.

In many ways the above quote symbolises my lack of awareness when initially approaching my research. Some of the terms in the quote highlight some of the assumptions that underpinned my research approach. For example “take a more objective look” ... “we begin to notice clear areas”... “we begin to see a tremendous panorama”... “seeing the confusion for what it is”. I saw myself as separate from the process - able, in a Kantian or Cartesian way, to step away from myself to enable an objective view of myself and the issues. However, in light of my early research experiences it became clear that my ‘objective’ stance was philosophically problematic and the voice of the researcher, my voice, needed to ‘come out’. Also I realised that the examination of some of my assumptions would help in the subsequent analysis of others’ assumptions.

12 "Understanding one’s own voice and why it is as it is requires an understanding of its social context, which in turn prompts questions about history, biography and the socially situated nature of social action” Schratz and Walker (1995, p.137). However Potter (1996) provides a word of warning about this process when he suggests that “narrative descriptions of the [research] process of ethnography often present the researcher as initially callow and naive, suffering many confusions and misunderstandings. They only gradually come to understand...” (pp.139-140). He suggests that there isn’t anything inherently wrong with this process but to be aware that ‘category entitlement’ - i.e. I am now entitled to the category ‘researcher’ or ‘assessor’ is all pervasive.

13 “Foucault undermines our tendency to think that each of us is a self-sufficient meaning-giving cogito” Dreyfus H.L. (downloaded 3/7/00) Heidigger and Foucault on the subject, agency and practices Available on-line: http://socrates.berkckly.edu/~hdreyfus/html/paper_heidandfoucault.html
The following research writing has been produced/constructed by a 37 year old, white, English, middle class\textsuperscript{14}, woman, with no children, with a diploma from a New Zealand polytechnic but no degree. These bare ‘facts’ do not in themselves tell you anything about me in one sense but as Kincheloe (1997) would suggest all stories are partially autobiographical and that is the case in this text. My biographical details as I say do not offer an explanation or a true reflection of who I am but they do offer the reader and myself the opportunity to reflect how these may emerge or stay submerged as the text is written or read. At times my ‘voice’ may be at one with the reader and at other times it may be divergent but this divergence may offer new possibilities for both of us. In the following sections I outline my life story in relation to this topic not to create some sort of authority based on my assessment credentials but more for epistemological and methodological reasons. If you are still wondering what’s that got to do with it? I offer these words from Chamberlain (1996, p.118) by way of explanation:

In Newcastle-upon-Tyne in 1951, working class David Hood\textsuperscript{15} passed his 11-plus along with four others from his class and got selected to attend a middle-class institution, a grammar school. But Hood’s personal success was eclipsed by a burning sense of outrage at what failure did to the 30 remaining children in his class, an outrage which has remained undiminished over the ensuing 40 years.

I do not have a sense of burning outrage or wish to revolutionise assessment practice as David Hood attempted to do. But I think if any educator spends time contemplating their assessment experiences it will raise a variety of emotions from delight or relief when we or our students pass, to grim reminders of long evenings spent marking essays or having to tell someone that they have failed an assessment. Assessment is a key part of pedagogical discourse and therefore has an important role in establishing our subjectivities. As Gore (1995, p.165) suggests:

If we recognise ourselves in Foucault’s discourse, this because what today, for us, is intolerable is no longer so much that which does not allow us to be what we are, as that which causes us to be what we are.

My own assessment education began long before I attended any school. Being the youngest of five children meant I was constantly being compared to others and comparing myself with them. I was always shouting the odds over who got more of what and that it was not ‘fair’. For much of the time the justification would be ‘because I said so’ or ‘you are only 5’. Of course in subsequent discussions with my brothers and sisters I found their perspectives differed significantly from mine! However, none of us were spared the English schooling system. In many ways our paths were similar to those of David Hood as the 11-plus was only phased out when I arrived at that auspicious age. My parents held typical middle class aspirations for their children. In relation to their schooling it was interesting to watch and experience how these aspirations differed significantly between us once we reached that magical age of 11; until that age (apart from one) we all attended our local state primary school. My eldest sister (the ‘bad’

\textsuperscript{14} I should explain I was born and spent most of life in England until I was 21. My parents were ex-colonial service, ex -farmers - my mother’s parents were both doctors in Devon, UK and my father’s dad was a Bank of New Zealand manager in rural NZ.

\textsuperscript{15} David Hood founding CEO of the New Zealand Qualifications Authority (NZQA) and major player in the implementation of the National Qualifications Framework (NQF). Hood’s goal was to “change entrenched attitudes and establish an education and training culture” (Hood in Marshall, 1995, p.2).
one) failed the 11-plus and subsequently attended high school\textsuperscript{16}; put very simplistically girls learnt to type and the boys carpentry. My second sister (the ‘clever’ one) passed 11-plus and therefore gained access to the local grammar school and an academic education. Even though she did well academically she was dissuaded from attending university as this was perceived as a waste of time and it was considered much more useful to attend a local technical college to gain secretarial training. My eldest brother (the ‘wild’ one) was sent to a boys only public school (the weird English concept that a school is public when in fact it is desperately private). The main purpose here was to get him away from home. The secondary purposes were to teach him how to be a man and to enable him to make contacts for future work. Educational achievement was not deemed important. My other brother (the ‘well behaved’ one), who is also my closest sibling, attended public school until the money ran out when he was 16.

My own initiation into senior schooling was complex and messy. I attended five different schools from the age of 11 to 13, two public schools and three state schools. It was at the second public school that I sat the equivalent of the 11-plus and I recall how little it meant to me, I could not tell you if I passed or failed. My mother saw academic education as mildly important but not as important as the right ‘voice’; I had extensive elocution lessons to train me out of my Somerset burr. This training was very useful for the time I spent in the public school system but when I was launched back into the state system my new found ‘voice’ was not so welcome. The launch was precipitated by a financial crisis, which meant my mother had to decide which child stayed in the public school and my brother won that battle for a short while. It may be of no surprise that my academic career did not flourish under these conditions and assessments came and went with hardly a ripple. There was no outrage on my mother’s part or mine. At most a perplexed frown as yet another C or worse came in the post. The real confusion about the role of assessment set in around the time I finished comprehensive school and I applied for university. The system in the UK was to apply to UCAS\textsuperscript{17} outlining the courses and universities to which one would like to attend. I subsequently had an interview at Keele University and was offered a place dependent on my getting a B and C in my A levels - a good offer I was told because I interviewed well. My mother was right, my ‘voice’ would always serve me well in England. In my final exams I got an E and fail - so the offer changed to Grimsby College of Higher Education to do a diploma in business studies. I struggled for a long time with the thought that I had gone from being a student capable of taking on a reasonably academic course at a ‘good’ university to a course I had no interest in at a very lowly institute - I lasted six weeks at Grimsby! Interestingly, there was no discussion about not attending a tertiary institute. It took me 13 years before I could contemplate re-entering full time study.

Just before my 30th birthday I re-entered the formal education system. Just prior to this I had spent some time working with the WEA\textsuperscript{18} literacy programme as a tutor in West Auckland; trying to create new possibilities for people who had often spent many decades adopting strategies to avoid reading or writing. Not surprisingly much of their current literacy struggles emerged from truly grim educational and assessment experiences and the creation of myths about their ability based on the dominant discourse of literacy. Strangely enough (or not) their stories gave me a

\textsuperscript{16} Before comprehensive schooling was introduced students in the state system went to either high school or grammar school
\textsuperscript{17} University and Colleges Admissions Service for the U.K.
\textsuperscript{18} Workers Education Association
chance to examine my own educational discourse and the story I was still telling myself about what it was to be ‘good’ or ‘clever’ enough.

The re-entry into the formal education system encapsulated the contradiction of the experience being simultaneously illuminating and liberating whilst frustrating in its institutional limitations. I spent two years studying for a Diploma in Outdoor Recreation Leadership at the Auckland Institute of Technology\(^\text{19}\). The most interesting aspect as far as outdoor education assessment was concerned was the decision not to formally (as in summatively) assess practical skills or instructional ability until the very end of the two year diploma. It became clear on reflection and through my subsequent work how this approach has had a significant pedagogical effect upon me. As a person with limited formal outdoor experience and still dominated by my previous educational experiences, the informal (formative) approach to the assessment of my skills and teaching ability was beneficial because of its supportive and non-threatening style. It allowed me the opportunity to create a new or at least different discourse at both personal and professional levels.

My more recent experiences directly related to outdoor education assessment in New Zealand have come from two sources. The initial experience came at the culmination of my outdoor programme with formal assessment in two pursuits, bush and sea kayaking. The assessments were run by national outdoor bodies\(^\text{20}\). Both of these assessments ran over three days with a focus upon both technical and instructing/guiding skills. I passed the bush assessment successfully and I was deferred on the sea kayak assessment for a technical failing. I argued at the time over what I saw was the pedantic nature of the deferral. The reply from the assessors was ‘their hands were tied by the syllabus’. My second outdoor education assessment experience was as an assessor using New Zealand Qualification Authority (NZQA) unit standards. As an external assessor I encountered many difficulties, these included: cultural clashes between me with my background and Maori, Samoan, Tongan, hearing impaired, physically impaired, boys, girls, the list goes on. These clashes, debates or points of contention also existed between assessors and between the demands of the teachers of the particular students and us. These clashes or debates raised many questions. What was it we were trying to say about these people? What standards was I using in comparison to others? Why were we assessing these types of attributes such as leadership, communication, co-operation or trust at all? How can you be serious about trying to assess these types of essentially unassessable attributes anyway?\(^\text{21}\)

In both of my experiences of assessing and being assessed I saw and felt that there were significant issues present but was never very clear about what these meant. It raised many questions but very few answers. It is from this personal and professional background that I became interested in this topic for my research and it is from this background that this research is constructed.

\(^\text{19}\) Now renamed the Auckland University of Technology.

\(^\text{20}\) New Zealand Outdoor Instructor Association and the Sea Kayakers Operators Association of New Zealand.

\(^\text{21}\) A point I develop in the later section (see ‘Dominant debates’, pp. 42-43).
Neo-liberalism: reforming New Zealand

Each age creates grandiose fictions in its own image, at the end of a tired and disillusioned century ours is that life is basically business (Flanagan in Fitzsimons, 1999, p.139).

I think I should establish that the present understanding, as suggested by Flanagan, on the current NZ socio-economic and political context, can only, as Foucault would have it, be known or understood if we look to the history from which the present has partially emerged. This work is based on a genealogical method - a Foucauldian process of documenting the way society is by examining how we have come to be the way we are. In this approach Foucault often looked for distinct junctions where one way of being or another replaced specific discourse. In this chapter I briefly outline the recent dominant socio-economic and political discourses in NZ history and look in particular at the profound shift that occurred when the fourth Labour Government was elected in 1984.

This genealogical analysis also explores the question: what makes and maintains a discipline as a particular discipline (Lloyd and Thacker, 1997)? I focus on education as a discipline and in particular, the role it plays in policing the discourse on assessment and equally how assessment plays a role in disciplining the discipline called education. My analysis explores the contradictions between the pedagogical discourse of liberation through education whilst education as discipline controls and limits what can be known through examination, teaching practices, and curriculum content. This analysis distinguishes some theoretical areas of pedagogical and epistemological concern within outdoor education/instructor assessment.

The pavlova paradise

New Zealand the pavlova paradise where, for some, the ideals of New Zealanders: [are] to live in a country with fresh air, an open landscape and plenty of sunshine; and to own a house, car, refrigerator, washing machine, bach, launch, fibre-glass fishing rod, golf-clubs, and so on. These aims are relentlessly pursued, and widely achieved (Stead in Sinclair, 1980, p.283).

The pavlova paradise itself emerged from the significant social and political shifts at the end of the 1930s depression. These shifts were reflected in the subsequent election of two Labour Governments. These terms in government heralded a major shift in the nature, and role, of the State. Sinclair (1980) suggests that a consequence of “a tremendous burst of legislative activity in 1936-8, and another in 1945-6, Labour transformed the State into the Welfare State” (p.270).

It is interesting in light of the subsequent shifts to understand that for Sinclair the State had always played a significant role in New Zealand’s development and government since colonisation:

‘Welfare’ - ‘insulation’ - meant the State. Perhaps that is the most striking feature of New Zealand history. From the beginning the settlers have sought to achieve their aspirations through the medium of government activity (Sinclair, 1980, p.276).

22 Although Flanagan is referring to the 20th century; I see little evidence to suggest that the arbitrary move into the 21st century has meant any significant move away from the dominant neo-liberal discourse.

23 A term frequently used to describe NZ post WW2. (See Austin Mitchell (1972) A half gallon - quarter-acre pavlova paradise. Christchurch, N.Z.: Whitcombe & Tombs Ltd).
This emphasis on a strong central government was based upon a deeply held notion of equality. This notion appears to be based on two key factors; the fear of destitution and; a general will whose origins lay in the “colonial cradle...the humanitarianism of the missionaries and by the utilitarian creed, ‘the greatest good for the greatest number” (Sinclair, 1980, p.271).

Within the social, and especially the intellectual context, NZ was struggling to emerge from a ‘paralysing subjection’ to Mother England. Findlay (in Sinclair, 1980) writing on *The Imperial Factor in New Zealand* remarked that the “visionary and idealised England, which absorbs the emotional energies of New Zealand, and keeps it permanently in a state of feeble-mindedness ... prevent [NZ] from facing her individual destiny” (p.282). How much of this loyalty to Britain still remains is unclear.

Sinclair (1980) suggests that on the whole NZ governments have been generally conservative in both political and economic legislation and at the time of writing the only times this has not been the case came as a result of economic depression and threats to the ‘pavlova dream’. It has been at these junctures that voters have sought “sweeping political reforms” (p.289). This analysis may be a little simplistic as Sinclair himself suggests the reforms of the first Labour Government could not have happened without the inspiration of the leaders such as Nash and Fraser. And as Foucault (in Olssen, 1999) suggests, events in history involve a number of intersecting moments one of which includes chance.

**Emergence from paradise**

There were several factors, which appear to have come together in the 1970s that foreshadowed the election of the fourth Labour Government in 1984. The aim here is not to provide a deep analysis of why Labour was elected but more to supply a brief summary of how conditions allowed this to come about.

New Zealand in the 1970s was still reliant to a large extent upon exports to Great Britain and the Prime Minister was the strong centralist but controversial and in some ways conservative Rob Muldoon\(^{24}\). The first factor that had enormous economic implications was the United Kingdom joining the European Economic Community. This meant the economic apron strings were in danger of being cut whether NZ liked it or not. As Sinclair (1980) suggests “instead of an ennobling American revolution, New Zealand experienced a somewhat humiliating rejection by the Motherland” (p.329). Secondly the 1970s saw a major fuel crisis which meant the Kiwi reliance upon and love affair with the car was threatened. Thirdly, and to a certain extent in response to the first two reasons, the financial situation in NZ was very difficult with a large overseas debt, crippling inflation, sluggish economic activity and high interest rates. This financial crisis was reflected elsewhere and was used as a justification for a general move towards ‘de-centralising’ government controls as the blame for the crisis lay with the welfare state (Olssen and Matthews, 1997). This was already happening in Great Britain with the election of Margaret Thatcher’s\(^{25}\) Conservative Government in 1979 and their move away from

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\(^{24}\) R.D. Muldoon (b 1921 d 1992) N.Z. National Prime Minister (1975-1984). When Ruth Richardson (National Finance Minister, 1991-94) was asked for an assessment of Muldoon, she replied “[I have] total contempt for Muldoon. He was a disaster for the party and the country” (Richardson in Gustafson, 2000, p.2). Gustafson suggests it was Muldoon’s conservatism in relation to deregulation which partly led to his political downfall at the 1984 election.

\(^{25}\) Margaret Thatcher; U.K. Conservative Prime Minister 1979-90 - the term “thatcherism” coined after her name.
"mixed economy" Keynesian economics, which had previously dominated there, towards an economic system based on the work of Milton Friedman and the Chicago School of Economics. This was a style of economics that relied upon reduction of the State sector and an increase in the free market, the latter becoming the regulatory force. Other factors also led to the change in government were; the combination of the soothing smiling face of the Labour party leader, David Lange and his persistent and stubborn finance minister Roger Douglas, plus the decision by Muldoon to call a surprise snap election. In many ways Lange seemed to embody the move away from the rather dour days of Rob Muldoon towards a new notion of New Zealand - one freed from Mother England, and willing to free itself from its American dependence with the decision to ban nuclear powered ships from visiting NZ. Douglas on the other hand came to embody 'Rogernomics' - an ideological shift towards neo-liberalism.

Kelsey (1997) suggests that “the unstable political and economic conditions in which the 1984 snap election was called seemed scripted to facilitate urgent and radical change” (p.29). She outlines how a ‘major crisis’ can create new opportunities for those who have been previously silenced. This notion is based on the work of the Institute of Internal Economics (IIE) based in Washington which had previously examined the political factors that made structural change possible; they had included New Zealand in their work. Their (IIE) goal:

was to devise a manual for technocrats (defined as those who advocate organisation and management of a country’s industrial resources by technical experts for the good of the whole community) and technopols (technocrats who have assumed a position of political responsibility) involved in implementing structural adjustment programmes (Kelsey, 1997, p.28).

Williamson (the convenor of the IIE) suggested three hypotheses which would support structural change “the need for a strong political base, visionary leadership and a coherent economic team” (p.29). As I have already suggested all three of these conditions were present within New Zealand. To complete the scenario there was mounting concern that New Zealand was in the throws of a financial crisis. Kelsey (1997) believes Roger Douglas may have exacerbated the concerns about the crisis prior to the 1984 election, and this helped pave the way for the subsequent blitzkrieg of reforms.

Easton (1999, p.149) argues, in relation to the political, economic and social reforms, that the dominant approach to government, in recent times, in New Zealand has been based on a “commercialist policy” by where all social policy is based upon economic business theory. Codd (1997) suggests that in relation to education the changes have been based upon Marginson’s human capital theory. The following sections outline the emergence of the need, or perceived

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29 “In each case the lightening strike involved a policy goal radically different from the existing configuration, to be attained in a short period, following a surprise announcement and a very rapid implementation” (Easton cited in Kelsey, 1997, p.33).
30 “the development of contemporary economics depends crucially on the knowledge, skills, and attitudes of their workforces - in short, on human capital” (Marginson in Fitzsimons, 1999, p.141).
need, for educational reforms and how they reflect the dominant and at times conflicting discourses of accountability, efficiency, managerialism, governance, liberalism, conservatism, and the market whilst at the same time are party to the construction of those discourses.

**Education Reform**

It appears that the reforms, which took place in Labour's first term in office, were to essentially displace the role of the state with that of the free market. These reforms focussed primarily on economic and fiscal policies and it was not until Labour's second term that the reformers turned their attention towards social policy (Rice, 1992). In the following sections I discuss how the various reforms within education and assessment, management of the conservation estate, health and safety, and accident compensation have all reflected to varying degrees this neo-liberal shift. This process, however, has not been without its complications and contradictions.

The old regime of truth in education where the "central issue of equality of opportunity ... had dominated the educational debate up to the end of the Muldoon era" (Olssen and Matthews, 1997, p.18). Soon after the Labour Government was voted in for a second term the old regime was replaced with a regime of truth dominated by neo-liberalism. Fitzsimons (1999) argues under recent neo-liberal reforms, education in NZ has been reconstituted for the augmentation of skill formation in individuals to compete in the world-market place. The new paradigm employs the language of financial capital to explain education with terms such as 'fiscal neutrality', 'credit', 'efficiencies', 'competition', 'investment', and the 'market' (p.139).

Education within New Zealand, as I have already suggested, had been based upon notions of egalitarianism, classic liberalism and progressive notions of education. The existence of these notions meant inherent contradictions would appear when the neo-liberal discourse began to dominate. Olssen and Matthews (1997) outline some of these complications and conflicting requirements for education in their introduction to *Education Policy in New Zealand: The 1990s and Beyond*. In their introduction they include a discussion on some of the fundamental theoretical differences between neo and classical liberal discourse. I think it is appropriate to include some of these here as background to the subsequent discussions on educational reform.

Within classic liberalism the state is seen in a *negative* light and the "theoretical aim of the state is to limit and minimise its role" (Olssen and Matthews 1997, p.22) to allow the autonomous self-interested individual to maximise their opportunities. However for those using a neo-liberal perspective, the state is regarded in a *positive* light and its role is "to create an individual that is an enterprising and competitive entrepreneur" (Olssen and Matthews 1997, p.22, emphasis added). They conclude

[i]t is not that the conception of the self-interested subject is replaced ...but that in an age of universal welfare, the perceived possibilities of slothful indolence create necessities for new forms of vigilance, surveillance, 'performance control' and of forms of control generally...In this new model the state has taken upon itself to keep us all up to the mark (p.22).

So although it may appear that there is less state intervention, what we are left with is more government in "what seems to be a process of 'governing without governing'" (p.22). Education is not immune to these contradictions.
Evidence for these contradictions (around the role of the state in education) can be found in the notion of equality of opportunity. This notion was clearly stated by the then soon to be Labour Prime Minister Peter Fraser in 1939 in a note written for him by the Director of Education Dr Clarence Beeby:

The government's objective, broadly expressed, is that every person, whatever the level of academic ability, whether he be rich or poor...has a right as a citizen to a free education of a kind for which he is best fitted and to the fullest extent of his powers (AJHR in Olssen and Matthews, 1997, p.9).

In many ways this statement reflects classic liberal notions that education is not just a private good but is in fact a public good in its ability to provide each member of society with the basic skills of literacy and numeracy to enable them to participate in a democratic society. However the concept of 'equality of opportunity' was challenged over the years through various reports that argued the policy was inappropriate for some members of the community, especially Maori, children with learning difficulties, children in rural communities, and children in new urban communities. Interestingly the challenges appeared to come from all sides of the political spectrum but the Curriculum Review (1987) in particular languished on the sidelines and this appears to be due to the increasing influence of the Treasury. Treasury saw the review as failing to reflect the neo-liberal discourse of Government manipulating policy to create a free market environment. The views of Treasury concerning education were reflected in their briefing paper to the incoming Labour Government in 1987 (in Olssen and Matthews, 1997, p.12):

- Education shares the main characteristics of other commodities traded in the marketplace...
- The nature of education should be determined by society's aims; in particular, education should be more responsive to business interests and to the needs of the economy.
- The reason it [education system] has performed badly is because teachers and the educational establishment have pursued their own self-interest rather than those of pupils or parents, i.e. they are not responsive enough to consumer interests and desires.

Indeed a concern Treasury expressed (in the aforementioned reports), that an equal opportunity policy in fact ended up being taken up disproportionally by middle classes, was used as ammunition to support their arguments.

There was, therefore, a fundamental shift away from an education system based on liberal and egalitarian philosophies - where education is seen as a public good and the state had a duty to provide for all. To an education system based on a neo-liberal philosophy where education is seen as a private good and the welfare state is seen as an inappropriate and inefficient mechanism to deliver 'quality' education to all sectors of society.

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31 Marshall (1995, p.2) suggests modern liberal views on education emphasise "the importance of the individual, psychological theories of development or growth, demands to respect the needs and interests of children, and more enlightened social and political views...Personal autonomy and not social control is now seen as a fundamental aim, if not the aim, of modern education" He argues however, that these aims have been distorted by neo-liberal theory built upon busnocratic rationality (see below What counts as knowledge for further discussion).


33 See Olssen and Matthews (1997, p.11) for discussion on debate within NZ. See also Vinson (1999) for interesting discussion on both liberal left and conservative right arguments re. education reform in the USA.
How has this been achieved in NZ?

Codd (1997) has described the changes in higher education as the quiet revolution of the 1990s. He suggests these changes have been driven by the New Zealand Qualifications Authority (NZQA) and in particular the National Qualifications Framework (NQF). NZQA as a Crown entity was “empowered under the Educational Amendment Act 1990 to ‘establish a consistent approach to the recognition of qualifications in academic and vocational areas’ (section 247)” (Fitzsimons, 1999, p.140). NZQA subsequently created the NQF under section 253 of the same Educational Amendment Act (Chamberlain, 1996). Interestingly the OECD\textsuperscript{34} saw the NZQA’s all encompassing governance of both academic and vocational areas as an important link between education and the Government’s economic policy (Fitzsimons, 1999). The NQF and the creation of Industry Training Organisations (ITOs) came under the auspices of Skill New Zealand through the Industry Training Strategy. The NQF and ITOs were key parts of the Government’s commitment to ‘Seamless Education’\textsuperscript{35}. 

Skill New Zealand is designed to give industry the leading role in setting and monitoring skill standards which are benchmarked to international best practice. Industry Training Organisations set up and owned by industry will play a key role in implementing strategy... As such, Skill New Zealand emphasises national workplace, competency-based training (Olssen and Matthews, 1997, p.20).

Outdoor recreation and education training comes under the auspices of the Sport Fitness and Recreation Industry Training Organisation (SFRITO). Its role within outdoor recreation/education has been seen by some as problematic (Straker, 1995). I discuss SFRITO’s role and influence in the development of outdoor instructor assessment in more detail in later sections.

One key ingredient which linked the NQF and ‘seamless education’ to all aspects of education and training was the introduction of ‘unit standards’. This is an assessment system, which measures achievement against standards and replaces the previous system based on ‘norm referencing’. In the following section I explore how this assessment system has been introduced within the broader context of the NZ education system and then more specifically within the outdoor scene.

Assessment reform.

The introduction of a particular assessment culture or procedure has the effect of emphasising particular forms of knowledge, often at the expense of alternative conceptions of knowledge (Codd, 1997). Also a particular assessment culture reflects the ideology of the national context (Broadfoot, 1996). Within this section I explore the introduction of standards-based assessment into the New Zealand context and the ideology that has supported its widespread use.

\textsuperscript{34} Organisation for Economic Co-operation and Development, based in Paris. The OECD in a recent report on NZ declared that the current Labour/Alliance Government needed to include more privitisation of government assets.

\textsuperscript{35} ‘Seamless education’ first envisaged in the report Education for the Twenty-First Century (Ministry of Education, 1993). Is the Government policy which promoted the belief that the social value of ‘education’ can and should be measured by its ‘economic utility’ and therefore the integration of the workforce into the education system is desirable (Fitzsimons, 1999). As with other reforms this policy was driven through by the then committed (zealous?) National Education Minister Dr. Lockwood Smith wishing to “set his ministerial mark upon the educational portfolio” (Chamberlain, 1996, p.118)
Development of standards based assessment

Codd, McAlpine and Poskitt (1991) suggest that the development of an educational assessment policy based solely upon criteria or standards is problematic educationally and politically. In their paper they outline the development of assessment policy in NZ following the release of the *Learning and Achieving* report in June 1986.

In *Learning and Achieving* assessment was seen as subservient to the curriculum and according to Codd et al (1991) was based on sound educational principles. They also make an important point about how this report saw the role and nature of ‘educational standards’:

> It is interesting to note that the terms ‘accountability’ and ‘outcomes’ do not appear anywhere in the *Learning and Achieving* document. There is, however, a section on ‘educational standards’. The following statement represents a balanced position on this vexed issue:

> It is the Committee’s view that standards and teachers’ performance cannot be improved through an assessment system alone...It is also important to look at standards of achievement in all aspects of their endeavours, and not to confine attention to easily measured and narrow skills (Committee of Inquiry in Codd et al 1991, pp.5-6).

Codd et al go on to suggest that it was another report *Quality of Teaching* released in November 1986, which shifted assessment away from an educational focus towards issues of ‘accountability’ and assessment of learner outcomes. The report stated that a balanced case has been put together for pupil achievement to be used as one measure of accountability ...The use of pupil performance measures should be carefully researched and developed. Measurements should cover all areas of student learning and development, especially those areas which may be ignored because of difficulties in devising objective measures (Education and Science Select Committee in Codd et al 1991, p.7).

This move towards ‘accountability’ and distrust of ‘interest groups’ (i.e. teachers) was reinforced with the release of the *Picot Report* (1988) which resulted in the separation of “those who produce in learning from those who monitor the outcomes” (Codd et al 1991, p.9). This report reversed the earlier position outlined in *Learning and Achieving* (1986) with the result that the curriculum became subservient to assessment. Codd et al (1991) suggest that these policy shifts were the result of, and resulted in, confusion and conflicting concepts about the role of assessment. On one hand they wanted to develop educational and assessment quality by recognising the professionalism of teachers whilst at the same time implementing another policy which saw assessment as a way to improve efficiency and accountability in education through assessment.

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36 In November 1984 newly elected Minister of Education, Hon. Russell Marshall appointed a Committee of Inquiry into Curriculum, Assessment and Qualifications in Forms 5 to 7. *Learning and Achieving* was the Committee’s second report.


38 Treasury’s devolutionary goals to rationalise the costly and inefficient educational bureaucracy was to eliminate provider capture by interest groups such as the teachers unions over education policy and practice Kelsey (1997).

39 Report *Administering for Excellence* named after Brian Picot the chairman of the Task Force to Review Education Administration.
The debate about the political and educational role of assessment continued with the release of the report *Tomorrow's Standards* in August 1990. In many ways this report supported the earlier report *Learning and Achieving* (1986) whilst acknowledging the political shift towards demands for more accountability.

Interestingly in both reports, *Learning and Achieving* (1986) and *Tomorrows Standards* (1990), serious concerns were raised about the importing of assessment models which had already come under heavy criticism in their own countries. Saul (1997) explained the perceived need to adopt overseas models as

> the provincial, colonial mind at its most insecure. Social, cultural, educational and economic models from the Rome of the day are dragged back home as proof of sophistication. Local circumstances become embarrassing reminders...that it is not really Roman (Saul, 1997, p.11).

However, *Tomorrows Standards* (1990), was not greeted with enthusiasm. The new National Government Minister for Education, Dr. Lockwood Smith “described the document as ‘very much like the work of a committee - something for everyone’ and implied that it is a ‘bit of a dog’s breakfast’” (Codd et al, 1991, p.14). In its place National introduced its own *Achievement Initiative* (1990) and Codd et al (1991) suggest that this policy was “closely linked to an agenda for assessing and comparing the effectiveness of schools” (p.14). In the 1991 Budget document the National Government outlined their educational policy, which emphasised

> the range of knowledge, understanding and skills needed for a modern competitive economy, set learning objectives, and improve assessment and national monitoring of progress (Ministry of Education in Codd et al, 1991 p.15).

Codd et al (1991) and Fiske and Ladd (2000) both suggest the education policy development of the late 1980s and early 1990s was very much a philosophical and ideological battle. For Codd et al (1991) it was between “educational professionalism and the forces of marketisation” (p.15). For Fiske and Ladd (2000) the reforms meant “[d]emocratic-populist ideas were gradually pushed out, and the balance of power in NZ’s state educational system shifted to a combination of managerial-business and New Right - market concepts” (p.46). These battles resulted not only in fundamental changes in the administration of NZ education, from primary schools through to tertiary education, but an education policy grounded in managerial and New Right thinking required a philosophical shift in what counts as knowledge.

**What counts as knowledge**

Codd (1997, p.133) argues that this shift towards standards-based assessment not only changes the assessment style but also “represents a fundamental and far-reaching shift in what counts as knowledge, initially within society and subsequently within higher education”. This shift discredits the notion of knowledge as process in favour of knowledge as a product. Marshall (1995) argues that these philosophical changes were founded on notions of *bureaucratic*

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41 Fiske and Ladd (2000) see New Right and neo-liberal thinking as synonymous with one another.
rationality. Barnett (1994) outlines the distinguishing differences between the 'traditional' notions encapsulated within higher education and current notions (see table 1). He does make it clear, however, that he is not arguing that the list on the left should be seen as some 'holy grail' but that each aspect should be carefully examined and understood before accepting or rejecting its role or place in education.

<table>
<thead>
<tr>
<th>'Traditional'</th>
<th>‘Current’</th>
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<tbody>
<tr>
<td>knowing-that</td>
<td>knowing-how</td>
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<tr>
<td>written communication</td>
<td>oral communication</td>
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<td>personal</td>
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<td>internal</td>
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<td>localized capacities</td>
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<td>thought</td>
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<td>problem-making</td>
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<tr>
<td>knowledge as process</td>
<td>knowledge as product</td>
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<tr>
<td>understanding</td>
<td>information</td>
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<tr>
<td>value-laden</td>
<td>‘value-free’</td>
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<td>discipline-based</td>
<td>issue based</td>
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<td>concept-based</td>
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<td>pure</td>
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<tr>
<td>proposition-based learning</td>
<td>experiential learning</td>
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<td>individualized learning</td>
<td>group-based learning</td>
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<tr>
<td>holistic</td>
<td>unitized</td>
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<tr>
<td>disinterested</td>
<td>pragmatic</td>
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<tr>
<td>intrinsic orientation</td>
<td>instrumental orientation</td>
</tr>
</tbody>
</table>

Table 1 ‘Traditional’ and ‘current’ notions of knowledge (adapted from Barnett, 1994, p.48-49).

However, Codd (1997) suggests that the concerns about what counts as knowledge are only applicable to certain aspects of education. He sees a clear distinction between academic and vocational learning and the aim of vocational learning is only “to be trained in particular skills and competencies” (p.7). Within some circles (especially those outside outdoor education) a discourse of vocationalism within outdoor education may be assumed. However, I believe for those within outdoor education the academic/vocational line is blurred and therefore Codd’s philosophical concerns are still relevant and applicable. Codd (1997), as previously mentioned, believes the whole education revolution is informed by Marginson’s human capital theory where “qualifications no longer qualify the attributes and capabilities of the person but come to be commodified as credentials” (p.6). This concern about the purpose of assessment is reflected in Broadfoot’s (1996) work. She states that the majority of research on assessment has been focused on technical issues and only a tiny minority have examined the socio-cultural effects of assessment or I would argue the socio-cultural and political construction of assessment discourses.

Busnocratic rationality is a term Marshall (1995) uses because for him the world of work has permeated the world of education. Teaching effectiveness is assessed in terms of efficiency, quality decided by 'consumer' satisfaction.
Other Reforms

Regardless of how one evaluates their content, a striking feature of the public sector reforms between 1984 and 1990 was their consistency. In general, each new policy initiative built on and supported the previous policy shift...All the major reforms were guided by a similar body of theory and a common analytic framework (Boston, Martin, and Walsh in Buhrs and Bartlett, 1993, p.114).

In this section I wish to broaden the focus of the reform process within the outdoor education/recreation context. I begin with an overview of how the Department of Conservation (DOC) was created by the conflicting discourses of the ‘green movement’ and neo-liberal theory forming an ‘unholy alliance’ (Crabtree, 1989). Also I explore how the dominant discourse of neo-liberalism and ‘its common analytic framework’ (Buhrs and Bartlett, 1993) based on efficiency and accountability has subsequently created problems for DOC and how these changes in structure impinged upon the outdoor education sector. In the final section I briefly outline some of the other legislation that has had a direct and indirect impact upon the outdoor scene and has therefore increased the perceived need for certification and the climate within which the assessment process takes place.

The conservation estate

The conservation estate in NZ is significant - thirty percent of the land area and thirteen thousand kilometres of coastline. This estate is managed by the Department of Conservation (DOC) - created by the Conservation Act, 1987. Prior to DOC’s creation the conservation estate had been managed primarily by the New Zealand Forest Service and the Department of Lands and Survey. There appear to be a number of factors that combined to create a drive towards significant structural change. I draw heavily upon Crabtree (1989) who undertook an analysis of the background to nature conservancy in NZ and subsequent political processes that resulted in the emergence of DOC in 1987.

From an environmental perspective the dual mandate of the Forest Service and Lands and Survey created fundamentally conflicting demands upon the services. On the one hand they were designed to promote development and production and were therefore seen as having a “major role in the exploitation of resources” (Crabtree, 1989, p.2). Their second role was one of being responsible in some aspects for preservation of these same resources. From the 1960s through to the 1980s environmental demands against these departments were mostly reactive especially against the Forest Service. For example the protest against the raising of Lake Manapouri and the Maruia Declaration, 1977

The goal for the ‘green agenda’ was to bring conservation under the auspices of some sort of Ministry of Environment. This drive towards “an omni-competent type Ministry” (Crabtree, 1989, p.12) was initially supported in a proposed policy document prior to the 1984 election by the then Labour spokesperson for the environment, Michael Cullen.

Creation of the ‘unholy alliance’, between the green movement and neo-liberals, came with a political will towards a strengthened and focussed environmental administration. However, the green movement’s desires were eventually subsumed to Treasury’s demands. Treasury was

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43 Over 340,000 New Zealanders signed a petition urging an end to all harvesting and immediate protection of all indigenous forests (Memon and Wilson, 1993).
44 The environmental movement was seen as a useful political tool for the New Right reformists - "turning potential critiques into useful allies" (Kelsey, 1997, p.119).
concerned that previous attempts to reform the Forest Service and Lands and Survey had been blocked by “institutional self-interest” (Crabtree, 1989, p.7). Treasury wanted reform on grounds of efficiency and accountability. The influence of Treasury and Roger Douglas⁴⁶ meant that one of the key green demands that conservation should come under the auspices of a new Ministry of Environment was doomed. Treasury, as with education, wanted separation between the policy makers and the implementation of that policy to avoid ‘interest group capture’ (Buhrs and Bartlett, 1993). Also, Roger Douglas was adamant that the state would not be involved in any more ‘think big’ projects and this stance was reflected in the passing of the State Owned Enterprises (SOE) Act, 1986. This Act meant all previous money generating aspects of the departments became separate stand alone ‘businesses’, so along with many others⁴⁶ Landcorp and Forestrcorp were born out of the Lands and Survey and the Forest Service respectively. This stance took away from the state any “interventionist temptations” which was “the declared reason for the vigorous programme of corporatisation” (Roberts, 1987, p.147).

There were several varying problems that arose during and after the implementation of the reforms. The implementation of the structural changes was rushed through under extreme urgency, another blitzkrieg. The reason given for the urgency was the desire to have all the SOEs commence on the same date - essentially the restructuring happened within a matter of three to four months (Crabtree, 1989). Also the new Department of Conservation (DOC) had severe financial problems having to implement the changes with only two thirds of the budget of the previous departments. There were also philosophical difficulties for staff and DOC generally with adopting an environmental ethic. The consequences of the rushed and financially constrained implementation were significant in both the short and long term. The most significant personal loss was the number of jobs which were cut from DOC; the message prior to the reform was that jobs would be safe (Crabtree, 1989). The reforms also meant that the local districts lost some of their autonomy and power with decision making being centralised to the regional offices. This had a significant roll-on effect for outdoor educators taking groups into the conservation estate. This was highlighted in a recent conversation with a leading outdoor professional. He described how he felt that there was a loss of relationship and trust between outdoor educators and DOC because of the new structure, partially due to the loss of local people involved in the management of the conservation estate.

The financial constraints had a longer-term impact. DOC suffered a considerable financial loss in the first year and this partly provoked a review authorised by the then Minister of Conservation, Helen Clark. This review was undertaken by the accounting firm Coopers and Lybrand with a remit to investigate how DOC could be made more efficient and increase its ‘conservation outputs’ (Crabtree, 1989). The revenue generating arm of DOC became dominant because the budget cuts had been so severe and the new ideology underpinning DOC had not, in fact, severed the commercial demands placed on the department. As Probine suggested “… it will, in fact, be prudent to carry out some commercial operations in respect of the assets administered by the Department [of Conservation]” (Probine⁴⁷ in Roberts, 1987, p.124).

⁴⁶ Labour Minister of Finance.
⁴⁶ Nine new SOEs created: Land, Forest, Electricity, Telecommunications, Coal, Airways, Post Office Bank, New Zealand Post and Government Property Services (Kelsey, 1997).
⁴⁷ Dr Mervyn Probine author State Owned Enterprises - The checks and balances. In Purpose, Performance and Profit: Redefining the State Sector.
The commercial impact upon the conservation estate did not stop with just DOC's own activities. Other legislation also limited its effectiveness as an agent for environmental protection. In 1988-9 Helen Clark, in her capacity as the Minister declined a request from Spectrum Resources to re-mine for gold at the Monowai site - part of the DOC estate on the Coromandel. Spectrum took Clark to the High Court and "her decision was overturned on the grounds that the Mining Act had precedence over the Conservation Act" (MacDonald, 1989). The second piece of legislation that DOC use profitably but in turn are constrained by was and is the Commerce Act, 1986. Examples of this have been illustrated in recent discussions with sea kayak operators in The Abel Tasman National Park. Some of the operators have raised concerns about the number of operating concessions DOC has issued. The contradictory position of DOC is exemplified here because the concessions are a revenue generating exercise whilst in theory they are meant to be a conservation management tool; that is only allowing 'approved' people to operate within the estate. DOC, in answer to these concerns, suggested it could not limit the number of concessions it permitted because this would be seen as limiting trade - an offence under the Commerce Act.

The role of concessions as a management tool demands some way of determining who is appropriate or not appropriate to run activities. One way which has become more prominent - partially as a result of the loss of relationship and local knowledge - is to rely upon certification to identify those who are deemed 'competent' for the activity they plan to run. A recent conversation with a leading outdoor professional in NZ stated that:

\[ W - Pete Dale^{48} \ldots more or less said unless outdoor instructors get together and get their own assessment scheme it is going to be imposed upon them by government and user groups. It was at the start of the Dept. of Conservation, they thought they were going to come in and say for people to take groups into the outdoors they need this this and this...it was that era (W, p.2). \]

These downstream consequences of the reforms in the conservation estate, based to a large extent upon the 'unholy alliance', has not realised the greens hope that splitting the commercial arms of Forestcorp and Landcorp away from the conservation portfolio would result in a more focussed environmental ethic. What appears to have happened is a loss of local knowledge and relationship -thus the need for alternative systems of accountability. The severe financial constraints due in part to the low priority\(^9\) given to conservation in Government - has resulted in commercial aspects taking a prominent role. Moreover at least two very powerful financially driven Acts held\(^9\) and currently hold precedence over the Conservation Act. Two other reforms which appear to have had a significant impact upon the outdoor scene are the Accident Rehabilitation and Compensation Insurance Act (1992, 1998, 1999) and the Health and Safety in Employment Act (1992).

**Accident Compensation Corporation and Health & Safety**

Accident compensation was initially targeted for reform because it was viewed by the then Minister of Finance Roger Douglas as a system that was inefficient, unfair and had been subjected to 'provider capture'. He was "critical of ...the Accident Compensation scheme... He

\(^{48}\) Pete Dale current head of the Hillary Commission. Man widely acknowledged being the driving force behind the creation of NZOIA.

\(^{49}\) The conservation portfolio was placed outside cabinet.

\(^{50}\) The Resource Management Act would now usurp the Mining Act - but any objection to applications I feel still relies upon the dedication and money of individuals just as it was for the Monowai protesters who spent 8 years just to get the decision adjourned (Macdonald, 1989).
... believes that there is a systematic deficiency in this form of welfare delivery” (Roberts, 1987, p.157). And “just like all the other cases of special government assistance...the ACC scheme has been a bonanza for some private health practitioners” (Dominion in Roberts, 1987, p.157).

Reforms of the scheme followed the same commercialisation theme as with conservation, health and education. Kelsey (1993) suggests the reforms were a clear victory for the Employer’s Federation and the Business Roundtable. The reforms were again subject to judgement by the New Right analytic framework. Accidents were defined only in relation to “market place ‘loss’ and efficiency... [and]... ignores the traumatic emotional and mental disorders a claimant may suffer as long as [he or] she can continue to function in the workplace” (Bear in Kelsey, 1993, p.93). The new competitive focus of the accident compensation scheme was not deemed enough by some supporters of the New Right. As this statement from the Business Roundtable (BRT) signifies: “The Accident Compensation Corporation should be corporatised and ultimately privatised and barriers to competition in the provision of accident insurance should be removed” (BRT in Kelsey, 1993, p.93). Privatisation, or at least an open market for accident insurance, did indeed come about through legislation introduced by the National Government in 1998. The key industry arguments for this privatisation were (i) efficiency and costs, (ii) choice, and (iii) fairness and safety (Stritch, 1998). Though these arguments did ‘win’ in the short term Labour fulfilled its declared ambition to roll back the 1998 ACC reforms once they were elected in 1999.

The Health and Safety and Employment Act (HSEA) (1992) has had a significant impact upon the outdoor industry and the Act continued the dominant discourse of accountability and efficiency and I would suggest a ‘culture of distrust’ (Codd, 1998). The HSEA (1992) had strong links to the ACC reforms - lower accident claims resulted in lower ACC premiums for employers (Kelsey, 1997; Stritch, 1998). At the same time the HSEA (1992) has to be viewed within the context of the significant changes in employment law with the introduction of the Employment Contract Act (1990).

The HSEA “concerns itself with management systems to ensure the health and safety of employees and other persons in places of work” (EONZ, undated). This focus upon ‘management systems’ created a culture of surveillance of organisations and individuals. This has been achieved through the demand for accurate and up to date record keeping, codes of practice, risk management systems, log books and accreditation of organisations or certification of individuals. For outdoor providers this has created additional problems

[i]n terms of outdoor activities and adventure learning all equipment would be a hazard in the widest sense. The basis of adventure learning is to ensure there is an element of risk. Practically this reinforces the requirement to have and be working with standards and codes of practice (EONZ, undated).

Health and safety legislation can of course be seen in as a positive mechanism for ensuring worker and client safety. Magill (1997, p.62) suggests that

[i]t would be a naive worker who believes that factory inspectorites are interested in maximising her freedom, but workers and their organisations can make informed judgements about the effectiveness of health and safety legislation ...in protecting and advancing their interests.

Unfortunately for NZ workers there are two reasons why Magill’s confidence in workers or their
organisations were, and still are not in a position to make any significant impact upon Health and Safety. Firstly the legislation is based upon management making and enforcing the systems. A recent Insight programme argued that this was a fundamental flaw in the legislation and meant NZ accident rate for workers was still unacceptably high. Secondly just prior to the Health and Safety Act being enacted the National Government had introduced the highly controversial Employment Contract Act (ECA) (1990). This fundamentally changed the way contracts were made between employer and employee. Instead of the previous system of unions negotiating on behalf of their members the Act supported individual contracts. The dominant discourse of the time did not see any imbalance in the ability for individuals to negotiate their contracts (Kelsey, 1997). Union membership fell away significantly and the ECA was widely criticised as being too weighted in the interests of the employer. Kelsey (1997) reports on the select committee review of the ECA. She states the committee

was warned that employees were trading off health and safety aspects of their employment to keep their jobs...Productivity demands meant that employees had to maintain standards while doing more in a shorter time. Stress levels increased, with more accidents blamed on pressure to complete jobs (p.202).

Even though this Act has been recently replaced by the current Labour/Alliance coalition with the Employment Relations Act (2000) it is still too early to judge if it will significantly alter the situation.

It is useful to recognise that the focus upon written management systems as a mechanism to ensure safety is culturally specific. This became very clear during a recent conversation with an experienced Antarctic safety co-ordinator about safety frameworks. He explained the way teams from different countries approach safety in the Antarctic:

W -when I have worked for the Germans in Antarctica they have had no manuals, they have had no safety manuals .. and I have worked for the Americans they have this huge vast thing...

H - ahh..do they [referring to Germans] have an inordinate number of people dying on them?

W - no .. they say [German accent]..‘if you need a manual we don’t need you’ and I really like that it’s .. initially I was thinking ‘but?’ and then .. oh that’s cool, that’s good .. and they are very safe, nothing .. if you don’t have constitution you can’t argue about it, you just do sensible things ... anyway that concept of having.. whether you have rules and regulations and that makes you safer, or if you need them then you are obviously a bit suspect (W, p.5).

ACC legislation and the Health and Safety Act are dominant forces within outdoor education. The dominance has emerged from two key sources: the offer of rewards and the threat of punishment. ACC premiums will decrease if the number of claims made by an employer drops (Stritch, 1998). Equally if claims increase so will premiums. This policy creates an incentive for employers not to make claims and ACC may also dispute whether a particular claim is ‘valid’

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51 23/10/00 - National Radio.
52 Roger Kerr (director of the Business Round Table and previous Treasury member) observed that “the idea that there is any systematic inequality in bargaining power between employers and employees is a basic fallacy in labour law which is rightly set aside in the Employment Contracts Act” (Kerr in Kelsey, 1997, p.201).
The Health and Safety Act also has implicit rewards. If one completes all the ‘management systems’ to their standard you will be ‘rewarded’ with work. But if one has not completed the required forms and one of your charges has an accident then you may be liable to prosecution under the Crimes Act, 1961, the Children, Young Persons and their Families Act, 1989, or by the Occupational Safety and Health Service if one breaches the Health and Safety Act, 1992 (EONZ, undated).

Contextualising outdoor education/recreation assessment
The context within which outdoor instructor assessment sits is complicated. It consists of interwoven discourses of accountability, responsibility, standardisation, political control by organisations and individuals, and various psychological, educational, and assessment philosophies. There is an emphasis upon the expert, the specialist, and professionalisation and these are all elements of disciplinary logic (Fournier, 1999). Disciplinary logic “refer[s] to the network of accountability within which the professions have to inscribe their practice and expertise in order to maintain their place in liberal government” (Fournier, 1999, p.288). The creation of professional organisations (i.e. NZOIA) and identifying certain outdoor instructors as professionals has relied upon this disciplinary logic “through forging connections between various actors” (p.288). Figure 1 illustrates these connections.

Figure 1 Professionalism as disciplinary logic

The following sections trace the various strands/themes, which construct the network within outdoor education/recreation assessment. It highlights the diverse range of ways, as highlighted in this section, that not only legitimise the desire/demand for certification and thus assessment but also legitimise a particular style of assessment.

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53 Fournier (1999) includes note of warning about this ‘model’: “Thus it should be stressed that the lines are not meant to represent cause and effect relationships but processes through which connections and translations are made. The dotted lines suggest that professional competence is only loosely connected with the knowledge of the practitioner, or control over practitioner’s acts; professional competence is essentially translated in terms of personal conduct” (p.304).
The dominant debates

To begin I explore two aspects related to assessment, which have become dominant in outdoor
inguidance/education: a) is accreditation or certification the more effective mode of ensuring
standards4; and b) what are the competencies required to being an effective instructor (Ewert,
1989; Priest and Gass, 1997)?

Priest and Gass (1997, pp.35-37) highlight some of the key arguments around certification.

Arguments against:
• process is time consuming and costly
• the certification process is flawed with assessment inconsistencies
• certification standards will change depending on supply and demand
• does a certificate guarantee competence or that the instructor is safe?
• how can a short duration assessment process evaluate a person’s ability to make sound
judgements upon which safety depends?
• does a certificate really mean you are competent in all the critical areas of outdoor
leadership or are you just competent in specific technical skills?
• certificate system creates a closed shop by excluding experienced but uncertified
instructors
• certification attracts the wrong people for the wrong reasons

Arguments for:
• protect the consumer and environment
• maintain public safety
• establish excellence in practice
• motivate instructors to seek higher standards
• provide support network

In light of these issues Priest and Gass (1997) suggest that there has been a move away from
certification towards accreditation or a combination of both where certification is based purely on
technical skills. Interestingly, there appears to be an implicit assumption that assessment does
establish excellence in practice and does act as a motivating tool for instructors to seek higher
standards - as discussed earlier both of these assumptions appear to be unfounded. Priest and
Gass's (1997) claim that there is a trend towards accreditation highlights the North American
bias in their work, since within NZ this has not been the case. Indeed there has been a
proliferation of certification within a variety of polytechnics, private training providers, NZOIA
and voluntary organisations such as the Mountain Safety Council offering training and
certification. Outdoor education/recreation has been at the forefront in adopting the standard
based approach to assessment and being part of the NQF (Iles, 1995, Rawson, 1993) has
supported the proliferation.

The second long running debate in outdoor education and recreation has been what makes a
‘good’ leader/instructor/teacher? Priest and Gass (1997) have identified three key components:
generic, metaskills and specific technical competencies.

More recently Garvey and Gass (1999) list twelve “critical core competencies”.

1. technical skills
2. safety skills
3. environmental skills

4 Accreditation of programmes/businesses or certification of individuals.
4. organizational skills
5. instructional skills
6. facilitation skills
7. flexible leadership skills
8. experienced-based judgement
9. problem-solving skills
10. decision-making skills
11. effective communication skills
12. professional ethics

Jordan (1989) argues that whilst technical skills are vitally important there has been an undue emphasis on them at the expense of human relationship skills. She expands this argument by suggesting that it is not enough to just develop our interpersonal skills as this does not deal with the underlying expectations and needs of society or the individual. Also I would argue that this 'listing' of skills has several inherent problems. I support the argument made by Barrow (1999) that there is a "widespread tendency both to call everything a 'skill' and, an appalling error, to see everything on the model of a specific, discrete, physical, trainable behaviour" (p.133). This approach appears to rely upon psychometric and therefore positivist assumptions. These assumptions support the view that people are 'objects' and as such can be broken down into a series of clearly defined variables all of which can then be measured and therefore quantified by another unbiased, detached person. This approach of listing competencies appears to ignore the context in which the 'appropriate' competency was defined. Barrow (1999) argues that not only is it problematic to describe human beings in terms of skills, but it is also problematic to view skills as generic "in the sense that if you have them you can exercise them in any context" (p.134). The evaluation/interpretation of these competencies also appears to ignore methodological problems as Barrow (1999) suggests there has been an inappropriate reliance upon the "experimental science model" and "a curriculum of performance" (p.134).

Burman and Parker (1993) argue the reliance upon the 'experimental discourse' of developmental and social psychologists, personality theorists and cognitive scientists in trying to study what goes on 'inside' the individual is fundamentally flawed. They argue that things such as personality, attitudes, personal identity are not hiding inside the person which a psychologist can then 'discover' but are created by the language that is used to describe them. Psychological phenomena have a public and collective reality, and we are mistaken if we think that they have their origin in the private space of the individual (Burman and Parker, 1993, p.1).

But what competence does do is legitimate certain norms and values over others. As Fournier (1999, p.286) suggests "[c]ompetence embodies the government of truth and inscribes professional conduct within a network of accountability to clients and to the profession itself". Furthermore a key aspect of "professional competence is its reliance on technologies of the self (e.g. through careful selection and strong doses of socialisation) rather than merely technologies of domination" (p.287).

55 Please note the discrepancy in the dates between Priest and Gass (1997) and Jordan (1989). The Priest and Gass (1997) list has been reproduced over a number of years in different publications and I believe that Jordan is referring, if not directly to Priest and Gass, it is at the approach their listing represents.
Outdoor education/recreation reforms in NZ

When discussing assessment reforms within the outdoors in NZ I focus particularly upon the New Zealand Outdoor Instructors Association (NZOIA) assessment scheme. I do this for three reasons. Initially within a NZ context NZOIA is regarded as one of the leading outdoor instructor assessment bodies. Secondly, the creation and subsequent ‘development’ of NZOIA is almost a mini case study in terms of how the reforms have impacted upon the outdoors in NZ. Thirdly, the organisation and its assessors have had a significant input into the creation of outdoor recreation unit standards registered on the National Qualifications Framework (NQF). This process came about through the relationship the members of NZOIA particularly its assessors had, and still have, with the Sport Fitness and Recreation Industry Training Organisation (SFRITO).

NZOIA was formed in 1987 with one of its aims being to establish and administer a “sequential training and assessment scheme” (Brailsford, 1992a, p.294). Why and how the assessment scheme came to be created is interesting in that it reflects many contradictory discourses. I rely heavily upon Grant Davidson’s (1988) work and conversations I have had with past and present members of the organisation to provide background on how NZOIA came to be formed. At this stage I think it is worthwhile noting that Grant Davidson was and still is part of the Sir Edmund Hillary Outdoor Pursuits Centre (OPC). The OPC is an organisation that has had a significant role in outdoor training in NZ over the past 25 years and indeed in the creation of NZOIA. Davidson was also in Ples y Brenin56, North Wales in 1986, and it was during this visit that he became “stimulated by the thought of introducing an award57 scheme to New Zealand” (1988, p.6). In this section I re-emphasise the demands that came from ‘above’ for reform of the outdoors, as well as identifying other discourses which may have contributed to its creation.

Background

Prior to NZOIA’s formation the outdoor ‘industry’ (by that I mean all elements; volunteer, paid ‘professionals’, recreationalists, and educationalists) had relied upon a mixture of sources for training, for ongoing support, and for professional development. In many ways this mixture of approaches created a unique context within which and from which NZOIA was formed.

Man alone vs. the British professional

Many pakeha59/European men (I discuss later why I talk of ‘pakeha/European men’ deliberately) working in the outdoor industry came from a strong independent background where their skills had primarily been self-taught (Davidson, 1988). They just did their own thing very much in line

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56 Home to the English National Mountaineering School in North Wales - certain imperialist irony here in terms of the organisation’s title and its location.
57 I use the term certificates and awards synonymously. “The award scheme is a two tier system, the level at which a member holds an award is determined by successful participation in assessment courses and logged personal experience” (Brailsford, 1992b, p.294). “Each award is designed to represent the minimum standard of knowledge and competence an individual needs to safely, efficiently and effectively deliver an experience as outlined in the scope of a particular award” (NZOIA, 1997, p.3).
59 Pakeha: person of non-Maori descent (usually European) (Rice, 1992). I use both pakeha and European to highlight that the vast majority of outdoor recreationalists were of European descent. The use of the term ‘pakeha’ can be controversial.
with the classic depiction of Kiwis as *Man Alone* or *The Good Keen Man*, doing it the 'hard way' with "a typical Kiwi have a go attitude" (Davidson, 1988, p.2). Another key element of the 'essential' Kiwi outdoor male identity was to be modest - a very British notion but very much part of Maori culture too with value being placed on being whakaiti (Palmer, 2000). As exemplified by (Henare, 1988): "A kumura never announces that it is a sweet potato. You know by eating it. And it is by your deeds that you will be known, not words" (p.7).

Both Phillips (1996) and King (1988) question the stereotyping of pakeha/European males. Phillips’ (1996) suggests this image of the male stereotype which “continued to view back blocks experience and outdoor strength as the most distinctive element of Kiwi manhood” (p.288) was in fact a fiction. He notes that in fact the majority of men in the twentieth century have lived or worked in a city. Michael King’s (1988) book also readily testifies to the ‘Man Alone’ myth by the diversity of approaches various men take as they explore their masculine ‘identities’.

But what is very clear within the NZ outdoor ‘industry’ has been the dominance of pakeha/European males, at least, in terms of sheer numbers. Dann and Lynch (1989) have tried to address the perception that women have not had an important influence upon the outdoors with their work focusing on ‘wilderness women’ which celebrates female role models. Though how much authority women leaders have is sometimes questioned as highlighted by Bradshaw and Joyce (1989, p.115) when discussing women in Antarctica:

> For the most part no resentment was shown by other Antarctic New Zealanders towards a woman leader, although one small incident indicated that men found it hard to accept a woman in charge: Margaret recalls, ‘When I was talking to the pilot about where to put down, he waited until I finished, then replied, ‘Can I see your leader now?’

Despite the under representation of women and non pakeha/European the arguments around outdoor leadership in NZ have not centred on issues to do with sex/gender or ethnicity (though this lack of debate is interesting in itself). What appears to be given more emphasis is the role of the British professional over the self taught Kiwi. Davidson (1988), maybe because of his recent British experience, appears to infer that the self-taught Kiwi, male or female, was inferior as an instructor and leader compared to the expatriate British professional. He stated that:

> Not surprisingly then many key positions in established organisations went to expatriate British instructors, who had greater training and a large number of professional peers for developing instructional technique. Their example certainly helped guide a fledging industry and the NZ club scene also saw many British activists take the helm as far as direction went (Davidson, 1988, p.2).

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61 whakaiti: humility, modesty (Palmer, 2000).

62 1999 membership of NZOIA 68% male - 21% female - 11% organisations: NZOIA Annual Report. Also see Priest (1987) - in his survey on international outdoor leadership preparation (which included NZ) only 8.4% of the sample for his research was female. The 1999 NZOIA Membership Survey only 4.9% of respondents were non Pakeha/European.

63 Alan Trist, Ray Button, Jo Straker, Mick Hopkinson, Hillary Illes, Hillary Chidlow, and John Davidson are all British and are (or have been) leading members of one or more of the following organisations: the MSC (Mountain Safety Council), or OPC, or NZOIA, or EONZ (Education Outside New Zealand), the NZCA (New Zealand Canoe Association).
Maybe this perspective was reinforced by the 1981 report from Neil Harris, the then “Director of [the] Outdoor Education Centre in Britain” (Stothart, 1993, p.15). In his report he suggested that, at that time, NZ teacher training in outdoor education was inadequate (Stothart, 1993).

**Organisations**

Davidson (1988) as well as identifying the background to individual instructor’s development also explores the background of outdoor organisations, which existed prior to NZOIA’s creation. In each case he appears to critique their role in outdoor instructor assessment and/or their political difficulties. In his work he acknowledges that he has made no effort to explain the history behind the need to co-ordinate and structure the training of outdoor leaders other than to suggest that there was a desire by some “to ensure consistency of standards and therefore higher safety for those being led” (p.2). Interestingly the safety argument does not appear to be supported by the New Zealand Council for Recreation and Sport (NZCRS):

There are very few accidents or search and rescue operations relative to the rapid increase in numbers participating in outdoor recreation in NZ backcountry...This suggest that existing training in basic bushcraft skills is at least adequate, even though such training is often ad hoc (NZCRS, 1986, p.5).

Also Davidson (1988) acknowledges that there were many successful commercial and educational services operating prior to any attempt to formalise the industry.

Davidson (1988) suggests one of the more innovative educational services was the Outdoor Training Advisory Board (OTAB). This was established in 1977 to “investigate outdoor training needs” (NZCRS, 1986, p.6). Interest in the creation of OTAB was generated from a number of sources. The political will and money came from the NZCRS and in particular the personal interest of its then head Colin Abbott wishing to increase the profile of the outdoors (Rawson, 2000). Also its formation appeared to be a defensive move to provide protection especially for teachers against the “hard core” of the mountain guides and to avoid the prescriptive nature of the English Mountain Leader Certificate (Rawson, 2000). Despite this OTAB did not survive for long.

There appear to be a number of conflicting reasons given for why this organisation failed. Davidson (1988) and the NZCRS (1986) argue that it was because of the diverse needs of the many organisations that formed OTAB. These organisations were all “pulling in slightly different directions, all having slightly different political views to represent” (Davidson, 1988, p.2). He uses this argument to provide support for a single narrowly focussed organisation made up of professional outdoor instructors i.e. NZOIA. The NZCRS (1986, p.6) also suggest OTAB failed because it only “achieved a low level of recognition partly through inept promotion, and partly due to a lack of demand for an assessment system that set no minimum standards.” At the time OTAB endorsed self-assessment based upon a log book scheme. However, others involved with OTAB, suggest the organisation failed for two different reasons. Its failure has been attributed to funding cuts (Rawson, 2000) and another leading outdoor instructor suggested OTAB

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64 Mountain Safety Council, Federated Mountain Clubs, Department of Education, Department of Internal Affairs, New Zealand Council for Recreation and Sport (Stothart, 1993).

65 Education officer for OTAB at that time.
Davidson (1988) also reflected these concerns about the perceived lack of political cohesion and perceived lack of standards or low standards. He suggests that other groups such as Mountain Safety Council and NZ Canoe Association though offering training and assessment were “amateur groups with questionable consistency in standards” (p.2). Equally problematic, it appears were the high standards of the NZ Mountain Guides Association (NZMGA) - though Davidson obviously admires these standards on one level. According to Davidson there was increasing demand by public land managers for outdoor leaders to have qualifications. In the absence of alternatives this meant they adopted the NZMGA as the standard. This resulted in capable leaders being precluded from taking groups on much less technical or risky terrain. This point reinforces the issues raised in my earlier discussion about the land care reforms and subsequent limitations of DOC. These included the alienation of local land care managers from the local providers of outdoor experiences, which resulted in an increasing demand for instructor qualifications due to this loss of relationship.

In line with the dominant discourse of government regulation to control health and safety through ‘management systems’ those in the outdoors also appeared to see regulation - which included both reward (e.g. work) for compliance and threats of punishment for non-compliance - as the answer to its perceived problems. The NZCRS stated that “[i]t is only regulations with enforceable teeth that will give recreation resource managers the powers required to ensure high standards of operation of commercial activities” (NZCRS, 1986, p.7). Equally the demand for regulation was not entirely driven by the internal desires of the professional aspects of the industry, as highlighted by this letter from Ian Street, the then OPC Director, to Grant Davidson illustrates:

As you will be aware, there is increasing pressure from the public sector (especially Government departments for O.P.C. staff to be formally certified and the feeling is that if we (O.P.C.) don’t do it, then somebody else will do it less well and impose it on us. (Street in Davidson, 1988, p.7)

Davidson, as I already suggested, was thinking about a much broader national scheme than one just focussed on OPC. There appeared to be little point in challenging the concept that regulation was inevitable - again this appears to very much reflect the political and economic ethos of the time - ‘there is no alternative’.

Interestingly both Davidson (1988) and the NZCRS (1986) classified the ‘commercial’ sector as including adventure tourism and outdoor education. It is the NZCRS (1986) newsletter which most clearly establishes outdoor education as a ‘commercial activity’ by claiming that “[o]utdoor education teachers also gain their living from teaching on public lands and they too can be included as commercial users of public recreation resources” (p.9). How the same standard can be philosophically and educationally the same for several differing needs i.e. adventure tourism,

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66 Davidson praises the NZMGA for gaining international recognition for their standards.
adventure therapy, adventure education, outdoor education or outdoor recreation does not appear to be seen as problematic by either Davidson (1988) or the NZCRS.

**Significant figures**

Significant changes or reforms often rely upon significant figures to drive the process through any dissension or resistance. In the reforms implemented by the 4th Labour Government this relied to a large extent upon Lange for the public face and Roger Douglas for ruthlessness and perseverance (Kelsey, 1997). Kelsey, in *A Manual for Counter-Technepols*, suggests one strategy to challenge the reforms is to expose the ‘stacking of the deck’. That is exposing who is behind any changes and how may they or others benefit from them. In line with that call I explore the dominant personalities and the benefits that they may have had from implementing these reforms. I have already briefly touched on the fact that Davidson was already planning to introduce an assessment scheme into NZ based partly on his UK experiences. This was supported not only by OPC but very much by Pete Dale the then Outdoor Recreation Advisor for NZCRS which subsequently morphed into the Hillary Commission for Recreation and Sport. During one recent conversation with a member of OPC at the time of these changes it emerged how significant the reforms were on a political level especially for Pete Dale:

\[\textit{H - ... what do you think prompted Pete Dale to get on the band wagon in the way that he seems to have been ...}\]

\[\textit{W-... Pete Dale was sort of beginning to become a mover and a shaker when he moved to Wellington and I think after that he thought now .. I want to make my mark in this business, somebody’s probably told him ... the rafting they need to be organised, go and organise these people .. there’s all these people going off and doing things why don’t you get them all doing all the same stuff and some qualifications .. and he goes [accent] ‘well, I could make some political mileage out of this’ and gets into it .. so I think there was self-interest, but also a kind of altruistic thing as well. He really did believe that..}\]

\[\textit{H - from his previous experience..?}\]

\[\textit{W - from his previous experience working with, he was a social worker and all this sort of thing, heart of gold and all that, and a bloody good bloke [laughs] .. he is [in] a political position and he needs a good harrow to push and I think this was a very, very fine vehicle for him .. so he got a lot from it, which in hindsight of course, he is in a very, very, important position and I think he got there as result of .. I think, in encouraging people to do what he wanted (W, p.4).}\]

In many ways Pete Dale, by focussing upon OPC, was like the missionaries who “understood the internal conflicts that were occurring and sought the conversion, patronage and protection of certain chiefs. Their influence then expanded under their chiefly protector’s influence” (Mara, Foliaki and Coxon, 1994, p.184). Though in this case the sphere of influence was increased for both parties (i.e. Pete Dale and OPC).

It appears that a number of discourses were present at the time of NZOIA’s creation and these discourses reflected/embraced the language of the market. They formed and were formed by a

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67 Pete Dale eventually became head of the Hillary Commission and resigned from that position in October, 2000.
network of actors who were held accountable to the profession itself, the client, the law and the demands of the market place. This accountability was legitimised by the criteria of the mangerialist discourse with its focus upon perceived threats to quality and safety therefore control (accountability through certification) was necessary for the public good. The network also embraced the experimental discourse with its reliance upon simplistic behaviourism to legitimise the concept that assessment was unproblematic - as long as it was controlled by professionals. All of this was enacted in a climate of crisis (due to the death of a student68 and impending regulation from above) within the outdoor industry and therefore reform was seen to be inevitable and it had to happen quickly.

In the wider context there were the management requirements of DOC, the Health and Safety Act, and ACC. The role of regulation was at one level seen as a way to govern, to gain control and to a certain extent increase the power of certain institutions especially OPC but it also had the implicit and explicit expectation that regulation would improve standards. This association of awards with increased standards was reflected in the perceived concern about the ‘quality’ of NZ instructors as well as the British instructors being perceived as being more professional because of their awards and were therefore of a higher quality. This perception existed despite evidence from the UK, albeit anecdotal, had indicated that ‘awards’ did not raise standards.

*W - The majority of the English people around at the time said ‘don’t have bar of it, don’t touch this thing’.. and they would all say, people like John Davidson69 would say‘don’t do it, don’t go there ..we’ve been through it all in Britain and it’s ended up with all these outdoor certificates.. and some other system like that’. The major argument was that if you [laughs].. you get people with a certificate and they think they know a lot .. and you get .. it would end up being more hazardous than the hazard that you were trying to prevent (W, p. 3).

The ‘threats to quality’ discourse was also reflected in concerns about the then current assessment processes; such as OTAB’s ‘no standard’ self-assessment and the ‘inconsistent’ assessments run by amateurs.

Equally the language of the market place was dominant. This dominance can be found in the lack of differentiation that was made between the various strands of the outdoor ‘industry.’ Notably all were defined as being ‘commercial’ if they used public lands. In many ways the demand by professionals 70 for professional rather than amateur qualifications appears to reflect the concern mentioned earlier about the way “qualifications no longer qualify the attribute and capabilities of the person but come to be commodified as credentials” (Codd, 1997, p.6). Also it reflects a strong emphasis on the concept of professional being solely linked to money rather than any broader understanding of what a professional may be which may have very little to do with financial transactions. The role of the market and competition were also clearly present. OPC’s desire to take control of any regulation was identified by Davidson (1988) as a means to

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68 Davidson (1988) had highlighted that the death of a student on Ruapehu had prompted “cries from parents for ‘certification’ of teachers” (p.3).
69 John Davidson founding member of NZOIA. Current director of Taranaki Outdoor Pursuits Centre.
70 Willis (1994, p.168) suggests: “The term professional has become a problematic one. Not only is there disagreement as to whether teachers should even seek to be described as professional (Burbules and Desmore, 1991; Sykes, 1991) but Cameron (1990) has pointed to the value laden and elastic use of the term.”
capture more of the training market. But this desire to take control was also partly based on the perceived threat of ‘others’ controlling the writing/creation of any scheme and/or the regulation being implemented by government. The lack of discussion around alternatives to the implementation of regulation, awards, and formal assessment for Davidson (1988) seems consistent with the discourse that there were no alternatives. This discourse relied upon a negative view of any resistance to change and the use of media/communication to ensure the desired message was effectively transmitted (Kelsey, 1997). These notions are reflected in Davidson’s (1988) work where he describes how he perceived people’s reaction to the proposed changes; “change = threat; no change [=] complacency = safety and comfort” (Davidson, 1988, p.23). An interesting dualism. No prospect, seemingly, of seeing resistance in any other light - change is good, no change is bad. He goes on to suggest that communication of the right information will ease these concerns - “[w]e had created waves in the tranquil sea of outdoor education and ships in all ports were starting to rock. Communication from now on is crucial” (p.23).

To conclude I quote at some length from Davidson’s (1988) own summary of the background to certification in NZ

All in all, the early to mid 1980’s saw changes in attitude occurring in New Zealand. Outdoor education was now a career and a growth business. Accompanying this was a call for professional standards from two places: the public and its officers who were trying to ensure high standards of safety for the public on public land, and more importantly the professional operators themselves who wanted to show they were operating at contemporary standards, thus separating their activities from the ‘fly by nighters’ who were jumping onto the outdoor bandwagon. Certification was no longer the dirty word it had been in the 1970’s (underlining in text, other emphasis added, p.4).

Creation of NZOIA

Davidson (1988) spends some time outlining the processes he and other’s took in the establishment of the NZOIA assessment scheme. In December 1986 an advisory group meeting was held which included many of the main players in the outdoors at that time. From this meeting Davidson was given a mandate “to form a working group of outdoor instructors to work on proposals for the formation of an Association and certification scheme” (p.24). Interestingly the working party had no women on it and indeed the larger advisory group had only 4 women members out of a total of 27 members. What is more the working party had no assessment specialist or educationalist in its membership. Equally interesting Davidson made a small comment that the initial meeting had been “a bit of a rougher passage than it could have been” (p.24). This ‘rough passage’ emerges as a dominant theme throughout NZOIA’s creation. After consulting widely with the industry Davidson came to be seen by some as the ‘fall guy’

W – well.. he was employed by OPC to go about and do the tour of the country and talk with lots of people and pretty much he ended up being the fall guy in a way, because he was almost like the flak catcher of old... he went around talking with everybody, antagonised the majority of NZ, I can’t think of anyone that he didn’t antagonise, so he pissed everyone off..

H – was that because of his personality or because of what he was saying?
W – probably both .. you know.. nobody wanted to hear it and .. hear the message that they have to form an organisation and they have to have standards and regulations and all this kind of thing .. it just went against what people wanted to hear ..it was bad news and he was the messenger (W, p.3).

This ‘consultation’ culminated in a weekend (19-20 Dec. 1987) of meetings in Wellington to establish NZOIA. This meeting appears to have been very controversial and heated as the following statements from people present at the meeting indicate:

Even the development of the [NZOIA] wasn’t easy. I remember being at the meeting where there were 20 people in a room which could have easily accommodated 60 and being amazed at the egos present. With about three egos per person, the room was bursting at the seams (Dale, 1992, p.5).

From an interview with another who was there:

C - ah there were 65 different factions there. .. all you know..threatened or whatever..there was the Maori faction saying this isn’t inclusive of us .. there was the club faction saying where do we stand in this .. watch out we are not paid, how are we going to afford to do this, do we need to be up to your guys’ standards? There were people who didn’t think there should be any form of assessment because they had been doing it for years and that’s where it’s at..there were soft skills, metaskills people who were saying what about assessment in our area and forget all the hard skill stuff.. there were all of these people in the one spot at the one time waving 55 different flags.. (C, pp.5-6).

Several concerns were raised at the Wellington meeting including: the speed of implementation, the necessity of the scheme, too much focus on financial issues, lack of emphasis on Maori beliefs, the present structure was inappropriate for teachers, and lack of concern for environmental ethics (Davidson, 1988). Even though the meeting was very heated NZOIA was eventually incorporated; grounded not so much on the desire or agreement about the need for an assessment scheme but more from a desire for an association (Davidson, 1988).

Development of outdoor assessment processes
The focus of the following section is on how the various assessment processes have developed over the years within NZOIA and in the wider outdoor education field. I concentrate upon the relationship between NZOIA and the Sport, Fitness and Recreation Industry Training Organisation (SFRITO). Specifically how this relationship has broadened the sphere of influence for NZOIA and SFRITO simultaneously in relation to the construction of the dominant discourses in outdoor assessment in NZ.

SFRITO was created in 1990 under the Industry Training Strategy. Both the industry training organisations (ITOs) and the National Qualifications Framework (NQF) came under the auspices of Skill New Zealand, and, as I have already mentioned these were key parts of the past and present governments commitment to a seamless education. Both Labour and National Governments have been committed to the ITO framework and for voluntary organisations such as NZOIA this has had enormous implications. Within the outdoor recreation/education arena
SFRITO has been perceived as an extremely powerful organisation. The demands for change and the relationship between NZOIA and SFRITO in some ways mirrored the dominant discourses of the late 20th century and early 21st century in NZ. These dominant discourses, as outlined already in this thesis, are: accountability, efficiency, professionalism, the market place, desire for personal and organisational control, and reliance upon the experimental model. These dominant discourses appear to have largely ignored alternative educational discourses based on a complex mixture of liberal and critical pedagogies.

During the early 1990s there were wholesale changes within outdoor recreation/education. For many in the outdoor community the changes were viewed as unwelcome but there were many that also viewed the changes as opportunities for personal and organisational control. The following extract highlights how a Foucauldian concept of power in disciplinary societies is not solely a top down process. One of the dominant messages coming through on a macro level from Government and SFRITO was the NQF was inevitable and resistance to change was pointless and you are “stupid” to think otherwise. Interestingly in a Foucauldian sense this message was equally supported and disseminated on a micro level by members of NZOIA and other key players in outdoor recreation/education; as this extract from an interview with a leading member of NZOIA exemplifies.

\[H\] - yeah .. and what did.. [looking at MOA\textsuperscript{71}] .. this is an interesting one John Davidson, 1994, November 1994, he saw ..one of the statements he makes is ‘isn’t the whole assessment business now virtually obsolete with the incursion of NZQA’ and I read somewhere Bev Smith\textsuperscript{72} also later on when she is retiring .. quite a bit later on .. there was this sense from both of those people that the NQF the National Qualifications Framework was actually going to usurp..

\[K\] - yes, that was the message ..that was the message ..that NZOIA was receiving from people like Chris Knol\textsuperscript{73}, Mitzy [Austin]\textsuperscript{74}, Liz [Dickenson]\textsuperscript{75} Hugh [Van Norden], Gerald [Rawson]\textsuperscript{76}, Judy [Smith]\textsuperscript{77} when she came on board..and well everyone based in Wellington [laughing] the closer that people were based in Wellington the more they would say ‘look NZOIA is a dead duck really, you have got to go the NZQA way the SFRITO way ... SFRITO is getting a million dollars a year to write these things you are doing it on this voluntary basis, you are dropping behind the ball game you know, you are don’t know what you are doing, you are stupid, you are thick, you have got no ideas get out (K, pp.15-16).

Coupled with this message that SFRITO and NZQA were unstoppable was the speed of implementation. As Straker (1995) comments the whole process was like “a run away rhinoceros” (p.19). This blitzkrieg approach continues today as the current changes to the

\textsuperscript{71} MOA: The Journal for Outdoor Educators and Instructors.
\textsuperscript{73} Chris Knol current executive director of Outdoor Assembly New Zealand. Has been involved over the years with Mountain Safety Council, Outdoor Recreation Advisory Group, NZOIA, SFRITO.
\textsuperscript{74} Mitzy Austin in 1995 Education Outdoors New Zealand representative.
\textsuperscript{75} Liz Dickenson (died 2000). Founding member and early secretary for NZOIA. Wrote many of the early outdoor recreation unit standards. Hugh Van Norden (Liz’s partner) current NZOIA assessor.
\textsuperscript{76} Gerald Rawson past member of OTAB; Outdoor Recreation Advisory Group; currently working for Ministry of Education, Wellington.
\textsuperscript{77} Judy Smith worked (and still works) for SFRITO.
SFRITO structure have been criticised as “hurried and that organisations were given little time to consult, research, and make an informed decision” (Cory-Wright, 2000, p.9). Also the SFRITO approach reflects one of Roger Douglas’s key tactics during the reforms of the 1980s. That is include interest groups to overcome their opposition but do not give them time to think. His rationale for this approach is that “[t]he fire of opponents is much less accurate if they have to shoot at a rapidly moving target” (Douglas in Kelsey, 1997, p.34).

As I have already suggested NZOIA and several of its members were committed to supporting SFRITO and the writing of unit standards. Interestingly those arguing loudest for the move to unit standards such as Liz Dickenson were knowledgeable about the language of unit standards and/or were physically close to the political centre in Wellington.

**Impact**

Brailsford (1992a) outlines the initial use within NZOIA of a self and peer assessment model as a positive approach to instructor assessment. He argued that the self and peer assessment model was to train “the individual to assess themselves...and monitor their performance long after the course is over and the assessors are no longer looking over your shoulder” (Brailsford, 1992a, p.23). Foucault’s Panoptican springs to mind with this notion of on going surveillance of one’s actions. However, this model of self and peer assessment was never adopted. What was adopted was a feedback process which resulted in the assessor always making the ultimate decision on whether someone had, or had not, reached the ‘standard’. Overall the awards have always been based on achievement based assessment. The rationale for adopting this approach was that “it was the only model used by other outdoor groups at the time and was therefore the easiest template to run with” (personal correspondence C, 2000).

The original language of the syllabus for the awards was described by one assessor as ‘general’. She gave the example in the interview:

\[K- \text{[reading from caving syllabus]} \text{ so equipment says: should be familiar with the use of characteristics of caving equipment and clothing used in New Zealand. So [it is] a lot less precise and that's how they were all written (K, p.8).}\]

However, within NZOIA in recent years there has been a move away from this ‘general’ language and there has been a strong push to adopt the universal language of unit standards. This meant the “language of the awards...had to relate to unit standards and be written in terms of performance criteria” (Straker, 1995, pp.19-20). This push to adopt the unit standard language was based on a number of differing and at times conflicting desires. Some of these were internal to NZOIA and other outdoor bodies and some were external via the Sport Fitness and Recreation Industry Training Organisation (SFRITO). The internal desires were based on a wide and at times conflicting mixture of financial rewards, educational beliefs, efficiency, accountability, and governability on a national and personal scale by controlling the writing process. The following extracts from recent interviews and documents allude to these desires:

\[K- \text{ Gerald [Rawson] was in at the start of SFRITO and saw the opportunity that the outdoors, if it got in early, would get funding for writing its unit standards (K, p.10).}\]
This economic imperative was also reflected by the then National Government’s “push to get 200 schools accredited by October. The Government is hoping to use schools more than polytechs for vocational training as it is cheaper” (Straker, 1995, p.19).

The other internal desire for writing or adopting the unit standards language according to one assessor came from the assessors because of client (assessee) dissatisfaction

\[ K \text{- ...and some clients [stated] that they needed more clarification in the syllabus ..and Hugh Van Norden and Liz [Dickenson] were really strong supporters of we must write these things in clearer language} (K, p.18). \]

By way of conclusion to this section I rely upon Vinson’s (1999) discussion on the difficulties of introducing national curriculum standards into American social science education. Although the particular subject is slightly tangential to my thesis I think his work does accurately reflect the atmosphere that has existed, and still exists, in outdoor education in New Zealand. He writes that:

the issue of creating and implementing national curriculum standards represents one of today’s most heated, complex, political, and pedagogically - defining debates. Of course, positions vary enormously and indicate a fluid and dynamic multiplicity rather than simply or simplistically a bipolar ‘for’ or ‘against’. Indeed, specific perspectives are quite intricate, with each produced and reproduced according to an array of hierarchical and asymmetrical relations of power, created locally as well as structurally, that exist grounded in a series of contingent and complicated interactions... (Vinson, 1999, p.296).

Vinson’s (1999) raises concerns which in many ways link with my earlier discussion that there are serious threats on philosophical and technical grounds for considering standard based assessment to be problematic: What does count as knowledge? How do you assess non-material aspects such as judgement? And how can all individual characteristics be separated into neat variables and then measured or counted reliably? Rubens (1999, p.26) argues that a performance based approach to adventure education can have an impact at a pedagogical level as a performance based approach is directly linked to ability and gaining ‘public’ recognition. He goes on to suggest, on similar lines to Codd (1997) and Barnett (1994), that as a consequence of focusing on performance the learning is often only superficial and understanding may be lost or never gained. Also the very nature of a performance-based approach to adventure is at odds with the underlying experiential philosophy of adventure education. Although Ruben’s (1999) arguments are specifically related to student experiences, in terms of instructor training the arguments seem relevant. Especially as the following pedagogical issue has already been identified by NZOIA; namely it “recognises that the award scheme...can provide barriers to participation to some people from some cultural backgrounds” (NZOIA, 1997, p.52).

How the organisation creates the performance standards is also problematic. Within the NZOIA award scheme the standards are maintained and created by the technical sub-committee (NZOIA, 1997), which is constituted for the most part from experienced NZOIA members. Jonathan Warren\(^8\) (in Rowntree, 1977, p.21) reflects a relevant concern, based on anecdotal evidence, that standards operate “like a set of recommendations to an exclusive club written by long-term

\(^8\) While Warren was not discussing NZOIA in particular he does raise the general concern around standard setting bodies.
members who know the kind of people the other club-members prefer.” This concern was supported during a recent conversation with a NZOIA assessor:

K - I've never ..this is hard to believe but I've never been right into the assessment

H - yeah .. because ..?

K - because as soon as ..well because once you become an assessor you become sort of ..most schemes..and I believe NZOIA is falling into this trap .. whether it is good or not so good ..is once you have a scheme the people who are in the scheme make it harder for the next level to come into it. Its like there is a belief that you are protecting your own territory really and so standards are rising (K, p.20).

NZOIA members then assess the performance criteria, though how assessors are appointed is not outlined in the guidelines. The NZOIA assessor guidelines also express a concern about how assessors have been perceived on past assessments: “NZOIA assessors can receive feedback that they are aloof, cold, detached and even arrogant” (NZOIA 1997, p.15). This concern seems to indicate that assessors should (and can) adopt a more ‘open’ approach on assessments.
Chapter Four - Reading and Telling Stories

Foucault suggests his own “analyses are against the idea of universal necessities in human existence. They show the arbitrariness of institutions...” (Foucault, 1988, p.11). In the previous chapters I have built upon the notion that institutions such as NZOIA’s assessment scheme are not universal necessities. Equally the assessment ideas and processes which support such a scheme are not universally accepted even if the rhetoric may make it appear so. I have constructed a picture (a history) of how, and what, we have come to know in terms of outdoor instructor assessment is arbitrary and is supported by rarely examined assumptions. Also I have highlighted how the overriding regime of truth in the late 20th and early 21st centuries has been one foundered on neo-liberalism; with its twin towers of accountability and individual responsibility. The foundation, upon which these towers rest, is a philosophy (an ideology) built upon a positive belief in the all encompassing power of the ‘market’, where individualism and freedom of choice (to choose) are paramount. But these twin towers also govern this ‘freedom’ and this governance in a modern society is built upon covert surveillance through managerial systems.

Managerial systems rely upon networks of accountability and criteria of legitimacy. They also rely upon an interaction of technologies of power/domination and technologies of self. These technologies specify individuals but as noted previously disciplinary power both emphasises difference whilst emphasising homogeneity. Assessment using standards or norm referencing does all of these things - it individualises, totalises, homogenises and develops hierarchies. Assessment in this sense can be perceived in quite contradictory and conflicting ways. It can be seen with a positive notion of power-knowledge, as individuals construct judgements about themselves/others based upon careful and reflective consideration - acknowledging the whole of the ‘iceberg’ (Schratz and Walker, 1995)\textsuperscript{9}. That is the visible part of the iceberg (our conscious observations of behaviours, actions, or competence) forms just part of a whole which is supported by the non visible the unconscious areas of judgement, beliefs, values - power-knowledge (regimes of truth) in other words. Or assessment, as part of an appeal to professionalism, can be seen as a negative regulative function of power-knowledge. As Fournier (1999) suggests the disciplining effects through the “articulation of competence” can be seen as one way amongst others to “regulate the autonomous conduct” of others (p.282).

I use the following questions adapted from Vinson’s (1999) work as a useful framework (lens) to aid my analysis.

- How does assessment using national curriculum standards function/create ‘regimes of truth’?
- What are their ‘political’ and ‘ethical’ dimensions?
- To what extent do they promote a power/knowledge-based conformity, a restriction of inter- and intrapersonal behaviour in the direction of political ‘docility’ and economic ‘utility’?
- How are these conditions established and maintained via the disciplinary practices or technologies of ‘surveillance’ and ‘normalizing judgement’?

\textsuperscript{9}I acknowledge that Schratz and Walker use the conscious and unconscious aspects of the iceberg in a different context but the concept I think is still pertinent to this work.
In whose interests does the assessment using national curriculum standards operate?  
Who benefits by them? Who does not?  
How do they affect the status and evolution of social justice, equality, freedom, fairness, and opportunity? (Questions adapted from Vinson, 1999, pp.314-315)

In this chapter I explore, in relation to the above questions, how outdoor educator/instructor assessors construct their beliefs about their practice and understanding of outdoor education instructor assessment. However, in no way do I wish to suggest that I fully answer these questions. I see them more as an analytical guide. I present this chapter within two major themes of neo-liberalism and liberal educational philosophies. In the first sections I explore how participants’ stories are constructed in relation to the perceived need for certification within a society that is built upon a discourse of distrust. I focus particularly upon the disciplinary functions of surveillance and normalizing judgement in this section. I subsequently examine how busno/techno rationality, a key foundation of neo-liberalism, is drawn upon and resisted. In the second section I focus upon the liberal educational philosophies which, emphasise notions of equality, the autonomous self, and moral worth. But in some ways these are arbitrary boundaries. It became clear as I read and reread the transcripts how many aspects could easily cross from one category to another. As Gore (1995) suggests, when discussing power, “many episodes could legitimately appear in more than one category ... indicating the co-incidence and rapidity with which power is enacted” (p.169). Therefore, I underline the fact that a mixture of discourses are often alluded to throughout each section in this chapter. Also on occasions participants (or my self) may challenge/resist the dominant discourse whilst in other sections they are (or I am) silent.

**Neo-liberalism**

**Certification - surveillance - free - subjects (or not)?**
The above heading to this section offers numerous readings. I deliberately use the rather ambiguous hyphen to connect all four aspects whilst acknowledging, with the brackets and question mark, that each aspect may in itself be questioned. What does certification mean? What does it mean to be free? Free to choose? Free from power?

**The ‘market’**
The following extracts problematises two key regimes of truth, which support the perceived ‘need’ for certification. Firstly certification is necessary to make people safer and secondly that it is needed because of the conservation reforms.

In this extract K does not see any connection between assessing someone and making him or her safer. This statement contradicts one of the key desires of certification which is to “maintain public safety” (Priest and Gass, 1997, p.37) and therefore “protect the consumer” (p.37).

\[ H - so \ was \ safety \ one \ of \ the \ paramount..? \]

\[ K - safety \ was \ ..interestingly \ enough \ ..but \ still \ with \ the \ belief.. still \ with \ the \ realism \ that \ the \ qualified \ instructor \ was \ actually \ not \ any \ safer..as \ in ..like \ an \ avalanche \ does \ not \ know \ you \ are \ an \ expert..people \ knew \ that \ it \ didn’t ..\]
that it eliminated some safety things but [only] the really stupid issues out. But that a qualification doesn’t actually make you any safer...

H - but in terms of how people viewed me if I was given that qualification.?

K - you would be given.. people would assume that you were safer and that is where the problem lies (K, p.7).

Another strong justification, as part of the network of accountability, given for the introduction of the certification scheme were the demands of land owners (i.e. the Department of Conservation as the sovereign customer) for people to be certified based on a regime of truth that safety and certification were synonymous with one another. D questions the validity of this claim

D - ...and yet that wasn’t the issue in the end, no land owners came and said you can.. if you don’t have qualifications you are not going to come on my land.. never happened .. but what did happen was this move towards professionalism. (D, p.6).

Interestingly this move towards professionalism, and its associated certification, was not only being promulgated from above but was and is still very much part of a desire by particular segments and individuals of the outdoor education/recreation arena wishing to establish a ‘market niche’. In the current climate risk taking, flexibility and qualifications are valued over the creation of a personal history or a “narrative of identity” (Sennett, 1998, p.26). In the following sections I develop this concept of identity by exploring how the market place devalues routine as an educative concept.

Routine and mastery
The neo-liberal discourse devalues longevity. Longevity is associated with routine and routine is discounted in favour of flexibility and risk taking. The latter is viewed as being prepared to take responsibility for being downsized or becoming a portfolio worker - commitment to a project but not to an organisation (Sennett, 1998). Risk taking and routine are seen as mutually exclusive within an organisation. This discourse on routine is strongly associated with Adam Smith’s (1776) classic work the Wealth of Nations. Sennett (1998) discusses in some detail how this negative view of routine is at odds with the work of Diderot and Giddens, the latter he suggests is Diderot’s modern heir:

Giddens has tried to keep Diderot’s insight alive by pointing to the primary value of habit in both social practices and self-understanding; we test our alternatives only in relation to habits which we have already mastered (Sennett, 1998, p.44).

In the following comment from one assessor we see, in a NZ context, the positive notion of habit or routine. W had 10 years with one outdoor organisation. He had mastery of the instructional habits and this allowed him the possibility of taking pedagogical risks by experimenting with his groups. Here he discusses how he used to plan a programme with a new group

W –...'you don’t want to do the standard programme, we want to do something completely special, just for us, probably be a bit hard for the other folks but we’ll be all right'..[laugh] .. or some other blatant .. ‘so what do you
think, what are you good at’ .. ‘oo like to climb X ..ah Tuesday would be good for that’ ..and you would end up kind of like the standard programme .. you would always try and work something in that nobody else had done ..and that was for your own sake ..

**H** – to stop yourself going completely nuts?

**W** – (pause) well it was always my aim to teach or do something completely different each week ..

**H** – wow

**W** – something, didn’t have to be the whole programme but had to be something that we hadn’t done before ..had been before or hadn’t tried before ..we had some instructors who would say the group changes that’s enough .. and umm ..‘nah.. I want to do something different’ (W, p.31).

But the current discourse of short term work, flexibility, and no commitments means we do not have the opportunity to develop a “narrative of identity and life history in a society composed of episodes and fragments” (Sennett, 1999, p.26). Because of this we have to constantly prove oneself - market oneself. In the following extract we see the dilemma that was created for W when he came to leave an organisation where he had developed a ‘narrative of identity’.

**W** – ... [I] had a bit of a philosophy for awhile that there should almost be the invisible, anonymous instructor and that I should be able to teach without people realising that I am teaching ..they should be able to say at the end of there time ‘we did it all ourselves’ and somebody should ask them ‘didn’t you have an instructor?’ .. ‘oh yeah, it was that ..there was that guy with us, kept hanging around’ (both laughing) .. ‘expecting us to laugh at his silly jokes’ ..I sooner it was a bit that way ..and at times I regretted that idea ..especially when I left V and you pretty much become, like you are so self effacing ..you’d be .. ‘I’m X ..’ not ‘I’m X and I would like to build an international career based around being X’ (both laugh) ..and in a way that maybe .. I remember saying to Y ..this is what you have to do, you have got to become famous .. Y must become a household name, that’s what you must do, so when you leave here you can get plenty of work .. people will want to employ you, whereas if ‘X who?’ ..X the invisible instructor with the invisible income (both laugh) .. so a wee bit of a problem there with market forces ..but I still believe philosophically that’s the way to go ..you’ve got to have people thinking that they did it all themselves rather than them saying they couldn’t have done it without you (W, pp.18-19).

W took risks, he wanted to become an invisible instructor. But this is only possible within an organisation that knows your work and values your risk taking. But once you leave that environment what happens? A new ‘philosophy’ is required as Sennett (1999, p.25) suggests “once employees understand (they can’t depend on the corporation) they’re marketable.” However, you need qualifications to be marketable\(^8\), you need a ‘profile’.

\(^8\) Indeed the concern that qualifications become commodities is partly reflected in the 1999 NZOIA member survey in which members were asked the importance of holding an NZOIA award. 91% (of the respondents) regarded the awards as important for gaining employment and 87.4% felt the awards were valuable as benchmarks for employers.
Culture of distrust

We not only live in a society where people are commodified through qualifications but where qualifications become part of a culture built upon distrust and managerialism. Teachers, in the British context, who have been ‘trusted’ because of loyalty and long term commitment to a ‘local’ area are no longer valued. Their experience and ‘local’ knowledge is now no longer ‘credible’ (Sennett, 1999). Their knowledge (they) can not be objectified, classified, ranked as an ‘award’ does. This ‘culture of distrust’ creates an environment where it is essential for people to pass through some sort of ‘quality’ assurance programme such as an assessment. If one does not have an award how can one be held accountable? The implicit consequence of a move towards certification suggests that in a competitive environment, one based on economic utility, those who do have a MLC or the alternative NZ qualification will be able to get work taking groups out into the hills. In the following extract W discusses how certification becomes part of the governing process. These concerns were originally expressed by British instructors at the time certification was starting in NZ.

W-.. and certificates in Britain seemed to become ..like a bludgeon to hit people with, people who were perfectly good teachers, for instance, who had been taking some group hillwalking out into the local hills, for 20 years or so, and didn’t have an MLC they couldn’t do it anymore. So people having great experiences were denied this because of a qualification .. so it was seen as more of a limiting factor that would stop people doing good things and that good fun stuff (W, p.4).

Disciplinary penalty in the form of punishment is reflected in the concerns about not getting work or being stopped from working. They are stopped from doing “good fun stuff”. They are restricted in their practice in effect certificates promote docility.

One of the consequences of the present society being enmeshed in managerialism is that it operates through a framework of efficiency. Therefore surveillance in line with this framework operates most effectively at the micro level. Disciplinary power at a micro level depends upon the Foucauldian concept of Panopticism; the concept of an ‘invisible policeman’ which constantly controls what one does. This is clearly seen by W as a potential consequence of certification.

W- you wouldn’t be allowed to do anymore or there would be a kind of .. there is a special word for this .. it’s like a kind of self governing, self limiting situation where ..even though people say you can’t do it you assume there is an invisible policeman which stops you from doing it ..because it is outside of the rules, outside the guidelines, whatever it is .. and so it will restrict people’s activities and make them less likely to have fun and a general strange good time .. they won’t just say ‘hey, let’s do this’ they will go [English accent, again] ‘well, I’m not actually qualified or this is outside of the guidelines or this ..the parameters that have been established’ ..all that sort of crap .. you know ..(W. p.4).

Interestingly W appears to only talk of others. He gives collective character (Gore, 1995) to all English instructors - they, people, you are limited and controlled - they become docile. He appears to differentiate himself (in a positive manner) by indicating in his choice of words that he is not and does not want to be restricted in his practice.

* Mountain Leader Certificate.
Legitimacy and reward

However the double role of punishment and reward in normalizing judgement is also present, W appears to see an award as overt recognition of his 'value' as an instructor; a 'reward' of legitimisation.

W - But, personally, at the time I wouldn't listen to this [the concerns expressed by the British instructors].. so, this is fine for you Britters [laugh].. you've got your MLC, you've got a teaching qualification, you've got all these things, and I don't have any qualifications at all .. this is at that time .. I would like some [laughs] .. (W, p.4).

This public recognition closes the perceived gaps between him and his peers who he sees as possibly more 'valued' due to their qualifications. This theme was already prevalent as I discussed in the formation of NZOIA. As Fournier (1999) suggests:

Professionalisation is a process of social crystallisation of expertise allowing the expert to 'practice in peace'. Thus experts acquire their authority once they have secured autonomy and exclusive appropriation through such strategies as accreditation and licensure (p.302).

However, on reflection W also appears to recognise the irony of his desire for an 'award' which in the previous parts of the interview he had clearly found problematic.

W - now that I have [chuckle] my NZOIA qualifications and I'm an assessor in rock, mountain and bush ... from a secure position, now I'm qualified ...I can say 'nah, you don't need them' .. same as what the early British people were saying to us 'no, no you don't need them, a can of worms' (W, p.5).

Interestingly, although there was a concern about the restrictions placed on people through certification there was just as great a concern that once people had got their 'qualifications' they would not continue to develop their skills. The desire for continual development - re-legitimising oneself and ones profession is a powerful one which I develop later this chapter.

Role modelling as a regime of truth

The continuous surveillance of an individual's actions/behaviours does not stop once one has been assessed. This continuous surveillance is partially legitimised by a regime of truth that an instructor/assessor must be seen as a 'role model' for pedagogical reasons. According to one assessor

D -students' learn by seeing, 70% more than what they hear.. 70% of their learning is done by seeing not hearing (D, p.14).

E also identifies this theme of being a role model for pedagogical reasons

H - can I just ask you what..um.. your thoughts are on role modelling?

E - I think that 70 to 80% of all learners are quite visual ..yep.. and if we want to be effective instructors we need to cater to that learning style..yep..so providing good visual images is a really important part of kayak instruction.. (E, p.6).
Surveillance of self and surveillance by other instructors will keep everyone as close to the ‘rule’ as possible. It is part of the network of accountability not only to other instructors but also to their clients. In the following extract D, in light of this ‘truth’ about role modelling, constructs a story that surveillance and reprimand are unproblematic and are seen in a positive light.

**D** - I think the role modelling is quite interesting and I’m really aware of it even now . . . even though I’m not a practising assessor or whatever . . . I go to the local wall . . . because I’ve been rock climbing for so long . . . I belay like this and slide my hand down . . . I don’t do the [demonstrated 1, 2, 3, 4 ‘safe’ method] . . . and I remember belaying somebody and I had the rope, if he had fallen over . . . I had it . . . years and years it just becomes part of me. But I looked across ... the rock wall and thing [sic] was saying ‘don’t do what she’s doing’ . . . and that wasn’t very good because I’m supposed to be a role model, I’m a stage 2 . . . rock climbing instructor and still recognised as that so I shouldn’t be doing [that] (D, p.15).

In this extract D gives herself individual character, which Gore (1995, p.178) suggests “is a common technique of power in pedagogy.” By telling her story of professional development as a rock climber D establishes her authority as a role model. A dominant process in liberal pedagogy is to turn to claims of authority whilst disclaiming notions of power being present (Marshall, 1996). Her positioning of herself as a role model appears to therefore justify her ‘punishment’ of herself for the perceived gap between her behaviour and the established values that accompany the title role model. But this position (being a role model) is problematic for D as she discusses elsewhere. When I asked D to define role modelling she said

**D** - define role modelling . . . I suppose performing consistently the standard which you at least represent . . . which is the accepted industry standard as well. I find it really hard to put a helmet on when I’m riding my mountain bike . . . how many years have I been riding a bicycle and I don’t go very fast . . . and I’ve got to put this damn helmet on . . . I’ll do it when I’m with the students . . . I find it torn between when I’m with students or people under my care rock climbing they wear helmets . . . yet I go to Y Bay and there is no danger from falling rocks unless there is a crowd above me and I don’t wear a helmet. But I’ve got to do it because industry says when I have got students it would be just negligent of me not[to]. (D, p.15)

In this story there are significant differences between her personal behaviour and her professional behaviour. Her reasoning behind the need to close the gaps between her personal behaviour and her professional behaviour is interesting. She sees herself as being held accountable by the “industry standard”, because “industry says”, by “people under my care”, the legal system - “it would be negligent”. The comments are especially interesting as D has been very much part of the organisation that created these standards. Why the dissonance? Maybe the desire to be a ‘professional organisation’ within a larger regime of truth of managerialism results in systems made up of ‘rules’, surveillance of the ‘rules’ and punishment/reward for non-compliance or compliance respectively because that is what it is to be ‘professional’.

**Reductionism, holism or protectionism?**

McKenzie (1997) suggests that the more specific the criteria the greater the emphasis is on “lower level cognitive skills” (p. 62). Furthermore, he argues that one of the reasons why there
is this focus on narrowly defined criteria is because we live in a society where litigation is now a real possibility in response to 'poor' professional performance. Therefore

the more critical a learning task is deemed to be for a student’s career enhancement, the more likely it is that the task will be tightly specified and that teachers, for their own legal protection, will keep to the prescriptions laid down - or appear to do so (McKenzie, 1997, p.62, emphasis added).

In the following extracts I examine in more detail how various participants conceptualise role modelling. E eventually moves from a holistic view and resorts to a reductionist approach breaking down one stroke into a very defined set of criteria.

H - Ok ... um .. how do you define what a role model is?
E - [laughs] ..that’s my thesis..
H - well give it a good shot..at the moment..it’s something I am going to ask other people..
E - well..[long pause] ..its a very good question and someone should do some research on it ..[both laugh]..the assessors in general have a common understanding..yep. ..and that common understanding we can communicate to an extent with the assessees, through points; such as on a sweep stroke ..even that one’s got quite fuzzy these days..but it was really easy, say 3 or 4 years ago. 3 or 4 years ago it would have been [sits forward to demonstrate as he talks] sweep stroke, you have a horizontal paddle shaft, blade goes in at your ankle, watch the blade, straight arm which breaks as it comes past the 90 degree, and you keep the other chicken wing in, the blade is all the way under water, and it’s vertical..so you can kinda ..I think everyone had a pretty safe flat water..yep..it was reasonably easy to communicate benchmark standards of performance.. (E, p.6).

Interestingly E’s first answer is to suggest the assessors have a “common understanding” it is only in the second part of his answer that he moves towards a reductionist and technicist approach to try and communicate this “common understanding”. I analyse this reductionist versus holistic concept (a common understanding) in more detail in the techno/busnocratic rational section.

However, there are problems associated with this reductionist approach and the notion of a common understanding. This is evident as the re-legitimising process becomes problematic between new assessors, with new regimes of truth and the ones who originally set the standards who want to protect their legitimacy or regime of truth:

H - and these benchmarks were created by whom?
E - ahh ..I think it was the people who were grand fathered\textsuperscript{62} on to the assessors..there are definitely problems there..because we’ve always got ..people wanting to ..on their own..using their own personal experiences to

\textsuperscript{62} Grandfathering was the process by which the first assessors were appointed. People were identified by the ‘industry’ as suitable candidates and these then attended a dummy assessment where many of the rules for future assessments were established. Who was invited to be an assessor was viewed, by some in the interviews, as a controversial process.
revise the benchmark...and then we’ve got say...a person in particular who assessed on ..in fact almost all of the very first assessments and stays true to those benchmarks...so ..yeah..there’s definitely ..there are..I certainly believe that there are issues floating about (E, p.6).

In this section I explore what it is the assessors are looking for and what they value in the assessee. In this instance though, I argue that the uncertainty of what the standards are creates opportunities for protectionism. E makes decisions about a candidate based on “tell tell” signs which appears to mean he has an expectation some elements should be “automatic”.

\[H\] - what would be a tell tell sign to you? [of someone not performing well]

\[E\] - a tell tell sign would be people kind of blowing the good line... as in essentially losing boat control for a second or two .. and they.. people not being automatic ..um.. it’s also beginning to see how well people are reading the water and ..

\[H\] - do you have an expectation that the process is automatic?

\[E\] - certain parts of it should be automatic...the working out the best place to leave the eddy certainly might not be .. because different piece of water .. but in terms of the patter for the students and the.. where to hook on and instructions to give them that should be pretty much automatic (E, pp.3-4).

For C there is an expectation that the assessee should “flow”

\[C\] - ... because I’ve done a lot of instruction myself in ..at that stage I would have considered myself pretty technically competent .. I can also tell by how they are doing it whether they are proficient or not...and ..do you understand what I mean.. so there’s a bit of subjectivity coming in here but .. I’d be going oo ..it’s looking pretty bloody mechanical and be taking a long time, it’s not flowing ..and so I like.. and that’s what I’d say to people at the start that’s what I’m wanting to see, it’s that they’ve not just read a book the night before .. but they can flow with it .. and adapt one thing to another situation that sort of stuff (C, p.8).

In a later interview I ask W about his expectations

\[H\]- ahh I’m just a bit confused because if I was looking for flow or something that was very automatic and obviously very experienced... does that equate with level 1 or does that actually equate with ..

\[W\] – not really that’s a higher level and I don’t think you can expect that to be there at level 1 .. you .. I know when I was beginning as an instructor it would be .. I would look after the people a lot more because everything seemed to matter .. at that time ..where as after awhile I realised that you don’t need to look after these bits.. they can tie their own shoe laces [both laugh].. so you would expect people at level 1 to be .. to have a fair amount of book learning, theory and be a bit light on practice (W, p.11).

There are a number of elements in the above extracts. Notice how I exaggerate automatic to “very automatic” and how I also equate these concepts (being automatic and flow) with being
“very experienced”. Notwithstanding, the demands and expectations placed on the assessee seem to vary significantly between the various assessors. The expectation of something being automatic or having flow is interesting when one considers the number of logged days currently required prior to sitting an assessment. The number of instructional days now required for the level 1 Kayak award is 20 teaching sessions of rolling, 30 flatwater sessions, and 20 moving water sessions. For the level 1 Rock award 40 days are required, 20 personal days and a minimum of 10 instructional days. These requirements have increased over the past few years. In the previous chapter I raised the concern that standards change to limit entry and I see increasing the number of logged days as possibly part of this protectionist process. I develop this relationship between power and increasing standards later in this chapter.

The overall expectation or requirement (what is valued by the assessors) of the assessees appears to vary greatly and it is a theme I explore in the following section. I problematise the view that “there’s a bit of subjectivity coming in here” as this statement seems to suggest that subjectivity is not normally part of the assessment process.

**Standards and techno/busno rationality**

Sarup (1993, p.69) suggests that technical rationality is based on a belief that the more rational, autonomous a subject is the more “important the criterion of means and ends becomes”. However, she goes on to argue that the main focus is actually on the means to mastery “over the physical and the social environment” (p.69) and although “means can be calculated with efficiency” (p.69) it results in the ends and values becoming increasingly “problematic to determine” (p.69). Marshall (1995) expands on this notion when he uses the term busnocratic rationality, a term that highlights how the world of work has permeated the world of education. So teaching effectiveness is assessed in terms of efficiency and quality is decided by ‘consumer’ satisfaction.

This focus upon efficiency in terms of assessment and the confusion about the ends or values appears, as I have already shown, in several of the interviews. In the following extract W appears to initially favour the use of standards or performance criteria. He appears to be judging the ‘success’ or ‘usefulness’ of the criteria in terms of efficiency of means and judging the ends or value of the process against the benchmark of “least controversy”. He suggests there are limited gaps between what is laid out in the syllabus and what the assessees perform. The language of the market seems to contribute to W’s confusion over the label he feels is appropriate for the assessees - “students” or “clients”?

**H – ...** but anyway the general feeling of it has been a big move towards the use of performance criteria in the syllabus and in your assessor guidelines ... what are your views on that?

**W –** well it certainly made Rock 1 real easy to assess ..it had probably the least controversy of all of the assessment programmes the max one was kayak ..the least was Rock ..so people would see as students or clients or whatever you call them going on the .. for assessment .. found it easy to pass if they knew their stuff ... I like that, there was no doubt in anyone’s mind as to whether they were of the standard or not .. they could pass or they could fail (W, p. 9).
In other sections he reinforces this view that the criteria are unproblematic for him to assess against and the syllabus content is appropriate and possible:

\[ H - so\,\,f\text{undamentally\,\,then\,\,}...\,\,when\,\,you\,\,are\,\,out\,\,there\,\,as\,\,an\,\,assessor\,\,what\,\,do\,\,you\,\,see\,\,as\,\,the\,\,purpose\,\,of\,\,the\,\,assessment? \]

\[ W - \text{in\,\,general\,\,I\,\,think\,\,they've\,\,got\,\,to\,\,demonstrate\,\,that\,\,they\,\,have\,\,the...what's\,\,laid\,\,down\,\,in\,\,the\,\,syllabus\,\,for\,\,a\,\,start...what's\,\,required\,\,to\,\,be\,\,ticked,\,can\,\,get\,\,ticked,\,so\,\,if\,\,they\,\,have\,\,the\,\,knowledge\,\,and\,\,the\,\,experience\,\,and\,\,the\,\,skill\,\,then\,\,they've\,\,got\,\,to\,\,be\,\,able\,\,to\,\,demonstrate\,\,that,\,\,and\,\,the\,\,assessment\,\,should\,\,be\,\,a\,\,way\,\,of\,\,demonstrating\,\,that\,\,they\,\,have\,\,this\,(W,\,pp.7-8).}\]

**But values do matter**

According to Vinson (1999) criteria promote a power/knowledge-based conformity and restrict inter- and intrapersonal behaviour in the direction of political ‘docility‘. In the following extract W reacts against this conformity and docility. Here W is discussing a recent incident on a bush instructor assessment with a decision by the lead assessor to move away from self and peer assessment/feedback

\[ W - \ldots\,\,so\,\,we\,\,didn't\,\,have\,\,much\,\,in\,\,the\,\,way\,\,of\,\,peer\,\,and\,\,self\,\,assessment\,\,at\,\,all...\,\,it\,\,was\,\,quite\,\,autocratic\,\,at\,\,times\,\,and\,\,at\,\,times\,\,I\,\,felt\,\,this\,\,was\,\,the\,\,wrong\,\,thing\,\,..\,[the\,\,assessee]\,\,had\,\,a\,\,number\,\,of\,\,questionnaires\,\,that\,\,X\,\,had\,\,sent\,\,out\,\,to\,\,them\,\,before\,\,hand;\,\,on\,\,weather\,\,or\,\,navigation\,\,and\,\,some\,\,exercises\,\,and\,\,\,they\,\,had\,\,no\,\,relative\,\,weighting,\,\,So\,\,\,that\,\,a\,\,question\,\,was\,\,worth\,\,the\,\,same\,\,no\,\,matter\,\,whether\,\,it\,\,was\,\,an\,\,important\,\,question\,\,or\,\,just\,\,a\,\,filler\,\,kind\,\,of\,\,question\,\,\,..\,\,so\,\,it\,\,was\,\,a\,\,controversial\,\,way\,\,of\,\,operating\,\,\,..\]

\[ W - \ldots\,\,personally\,\,..\,\,like\,\,I\,\,still\,\,..\,\,have\,\,problems\,\,in\,\,understanding\,\,the\,\,way\,\,X\,\,\,was\,\,really\,\,coming\,\,from\,\,with,\,\,this\,\,kind\,\,of,\,\,comments\,\,like\,\,'I\,\,felt\,\,that\,\,your\,\,understanding\,\,of\,\,the\,\,national\,\,organisations\,\,in\,\,NZ\,\,was\,\,very\,\,limited'\,\,..\,\,you\,\,\,know\,\,\,..\,\,they\,\,wouldn't\,\,know\,\,what,\,\,for\,\,instance,\,\,what\,\,SFRITO\,\,was\,\,..\,\,well\,\,they\,\,\,don't\,\,\,have\,\,to\,\,\,..\,\,It's\,\,fine\,\,that\,\,you\,\,ask\,\,them,\,\,but\,\,there\,\,should\,\,be\,\,some\,\,kind\,\,of\,\,a\,\,weighting,\,\,rather\,\,than\,\,you\,\,getting\,\,a\,\,score\,\,that\,\,doesn't\,\,reflect\,\,whether\,\,you\,\,\,are\,\,competent\,\,outdoor\,\,instructor,\,\,it\,\,just\,\,means\,\,that\,\,you\,\,are\,\,a\,\,competent\,\,outdoor\,\,instructor\,\,who\,\,doesn't\,\,know\,\,what\,\,SFRITO\,\,stands\,\,for\,\,..\,\,you\,\,\,know..\,\,and\,\,I\,\,don't\,\,think\,\,this\,\,is\,\,going\,\,to\,\,make\,\,[them]\,\,\,any\,\,less\,\,competent\,(W,\,p.7).\]

Although the move away from self assessment to a more autocratic approach is obviously problematic the main issue I wish to highlight is the non-differentiation between the various aspects of the syllabus. It promotes conformity and docility for both the assessors and assessees, it does not acknowledge that the needs and interests of either party may differ from that specified in the syllabus. The main focus is actually on the means to mastery and, although “means can be calculated with efficiency” (Sarup, 1993, p.69) it results in the ends and values becoming increasingly “problematic to determine” (p.69).

In response to W’s thoughts I try to establish what it is he is actually assessing if criteria are problematic - what does matter? Here he adopts a holistic approach.

\[ H - so\,\,\,if\,\,they\,\,are\,\,demonstrating\,\,it\,\,how\,\,are\,\,you\,\,assessing\,\,it? \]
W – I reckon you can tell

H – you can tell?

W – I can tell ..this sounds awfully arrogant.. but ..I think police get into terrible trouble when they say they can tell a criminal just by looking at them [both laugh] .. they can get into terrible trouble...but I still think that there is room for an intuitive feel of whether a person is relaxed, whether they are people familiar with all the material and they know what they are doing as opposed to somebody who’s .. gets a bit flustered .. in navigation for instance is spending a long time looking at the map or if they are doing a rock climbing set up and they are taking half an hour when everyone else you know you could have done it yourself in five minutes .. so those kinds of things ..you know (W, p.8).

Also K sees the performance criteria as limiting. She draws upon a holistic discourse whilst emphasising a liberal pedagogy. That is she focuses upon the ends, the value, of a teaching session - an “inspirational session” which “uplifts students” to an increased “relationship with the environment”. Her use of the pronouns “we” and “you” seems to indicate that these values are, or possibly should be, the norm, and equally these values are superior to tying a figure eight knot.

K - but that you can’t once you actually write those things ..you can’t actually get the essence of what you are trying to assess because you break it down into these observable bits..the performance criteria .. which it is so much easier to say .. ‘we will observe you tying figure of eight knot’ rather than ‘we will observe you delivering a inspirational session where you manage to uplift your students to relationship with the environment far and above to what they had prior’ [laughing] ..and so what you really want is ..is you want your instructor to inspire people to do things and not. I mean it is nice that they can tie a figure of eight knot correctly ..I have never assessed anybody who couldn’t (K, p.21).

In the following extract W appears to be contradicting his earlier position about the value of clear criteria by suggesting the whole process is “bogus”. The criteria are clearly seen as an aid for the assesseee (for customer satisfaction) but not for the assessor - they know very quickly who is ‘in’.

W – .. so anyway that whole idea of formal assessment was, kind of, a wee bit bogus to me ..I think you went through the motions and .. and people would know who should be in and who shouldn’t be at that time .. and I still think that there is a kind of intuitive way of working out whether a person’s good enough to do the job .. as opposed to a quantitative assessment (W, p.6).

This notion that W would ‘know’ who should be in appears to be founded on two aspects. His assessment was based on the ‘grandfathering’ process63. This meant all the original assessors were appointed by each other. For W this meant ‘you tick my box I’ll tick yours’ - peer validation. Also the truth about ‘knowing’ the right person appears to ignore the socialisation that 10 years at one institution would have had on what and how he ‘knows’.

63 As were 4 out of the 5 people I interviewed. The fifth was ‘trained’ to be an assessor by others who had been ‘grand fathered’ in.
W – it would be a kind of pattern recognition...so that we could spot the same pattern again existing in somebody else...you would get tuned in...that this is what an instructor looks like, acts like, sounds like, and we would spot this one...‘oh, yeah they’re one’...and you make these judgements in 5 minutes...or less...just pattern recognition (W, p.20).

This passage totalises on two levels (Gore, 1995). By the simple use of the word “we” and in terms of giving collective character to “what an instructor looks like, acts like, sounds like”. Appropriateness to be an instructor is assessed by recognition of the sort of person who can be trusted with the truth (Fournier, 1999). Someone like us? As Sennett (1998) suggests within a society based on loose networks (non-organisational) we draw upon a “fund of social capital – shared past experiences as well as individual achievements and endowments” (p.85).

This process is repeated in E’s story:

\[H\] - ...are you thinking anything when they are paddling around..?

\[E\] - [laughs]...oh gosh...more stuff coming out of the closet...um...well...[long pause]...yeah..I...you can generally get a picture within the first ten minutes how people are going to go..

\[H\] - for the whole assessment?

\[E\] - worth.. certainly get a pretty good idea ..yep..(E, p.7).

It is interesting how W and E frame their answers in the negative - “police get in trouble” and “more stuff coming out of the closet”. They appear to see the gap between their intuitive practice and the rule that the assessment should be against a standard as problematic. This is seen as something they may get in trouble for, not necessarily for what they are doing, but for admitting that this is what they do.

For K the criteria also act as a bind. They create a gap to her intuition when she wants to pass someone:

\[K\] - and the other [thing] is... you end up in a power position which you have this incredible feeling that this person is a really good instructor but they just..you know..they have this really nice rapport and yet they forget to do up a carabiner... (K, p.20).

Interestingly K is reluctant to step outside the ‘rules’. They failed to do up a carabiner, therefore, according to the criteria they must fail or be deferred, even though she is convinced that they are a really good instructor. It seems K sees herself dominated by these rules just as much as the assessee whom she has to defer or fail.

D partially acknowledges that the assessment process is intuitive but uses criteria to support her intuitive decision. Indeed she will spend some time looking for a mistake to ‘justify’ her intuitive decision to highlight the gap between her opinion of the student and the student’s actual behaviour - by doing this she establishes that the process is ‘fair’.

\[D\] - I saw this assessee who I had been concerned about...his student was belaying and dropping the rope. Part of me went spot it, spot it...he never
spotted it and I just called down and said 'blah, blah your students dropping the belay rope' and he 'went ahh, don't do..I just didn't see it then' ..and I went.. it was a failure. He had something he definitely had to get reassessed .. I was so rapt that he made a mistake because otherwise..I had this gut feeling he wasn't ready but I couldn't observe.. and that's where I believe your assessment course has to be fair and that's what I was saying .. you can't just go on a gut feeling you have got to actually say at this point in time did you see something that was untoward.. (D, p.11).

D’s punishment for this student was to ask for 5 more days of logged time before the student could receive the ‘reward’ of the certificate - closing the gap through repetition. She was pleased that the student would not have to be formally reassessed; she depended upon the student’s own self-surveillance to do the extra days.

So far the work in this chapter supports some of the concerns I adapted from Vinson (1999), which I expressed (as questions) at the beginning of this chapter. In particular how assessment:

• of national curriculum standards promotes a power/knowledge conformity, a restriction of inter- and intrapersonal behaviour in the direction of political ‘docility’ and economic ‘utility’.
• using national curriculum standards function/create ‘regimes of truth’.
• and certification establishes and maintains these truths through technologies of surveillance and normalizing judgement.

In the following sections I continue to draw on these concerns as well as focussing upon other concerns raised by Vinson (1999), specifically:

• In whose interests does assessment of national curriculum standards operate?
• Who benefits by them? Who does not?
• What are their ‘political’ and ‘ethical’ dimensions?
• How do they affect the status and evolution of social justice, equality, freedom, fairness, and opportunity?

Judgement, perspective and construction of identity

National curriculum standards work to legitimate certain knowledges as true, certain methods as appropriate to the establishment of truth...certain acts as consistent with truth, and the power of certain individuals to determine truth and what constitutes it... (Vinson,1999, p.313).

W agrees with Vinson (1999) and suggests an important feature is how cultural backgrounds limit what we can come to know or how we come to know. Our judgements are based on our construction and as a consequence our values will differ. Interestingly these concerns contradict his earlier position that it was unproblematic for him to ‘know’ who should be in. When discussing the interpretative process involved in my research he points out that:

W – it’s been a big thing in NZOIA as well .. many of the major players are English .. and it’s difficult sometimes for English people to understand, say a Maori perspective ..because you assume that Maori will be thinking along the same lines as you are ..they are not all that different ..but they are a lot
This theme of individual difference and the English influence are major themes for W. I reintroduce the concept of individual difference and judgement making in the final section of this chapter. But for now I explore how different perspectives on a particular assessment component are constructed, I then discuss how subjects are disciplined by the use of self and peer feedback and/or assessment.

Colonialism/imperialism - whose rules count?
British colonialism/imperialism has influenced how outdoor education/recreation has emerged on an organisational level in NZ. This influence also permeates how assessors and assessees’ construct their identities. W sees some of the British values as detrimental at an assessment level. His story outlines how his own upbringing has created a discourse on navigation which resists the dominant one based on British concepts of what good navigation requires. Here he is discussing a recent Bush 1 assessment:

H - but you weren’t using orienteering maps

W - no ...we didn’t use those, there wasn’t one for that area, and I kind of think that that’s bull shit to use orienteering maps but that’s a personal thing

H - tell me why?

W - because in general if you are going out with a group on Bush 1 exercise you’re going to be using the real map you are not going to be using an orienteering map even though it may well be interesting to do it with one. And orienteering might well be a nice activity to do as a way of improving your navigation. But I have a problem with navigation exercises anyway .. it’s not the traditional Kiwi thing. It’s an imported European idea based on orienteering and things like this ... in NZ the way I was brought up deer stalking and pig hunting and things like this you never carried a map or a compass and you would go out into the bush for ...usually just day trips ..but you would take good notice of where you were going and you wouldn’t be on tracks because you were deer stalking and you would get a feel of the land and you’d come back out again at the end of the day .. and my father took me deer stalking when I was 7 and that sort of thing and it carried on from there. So it’s that way of seeing the landscape a lot more rather than ..in the arts speak ..mediating the experience with a map (W, p.10).

D’s views differed significantly. She seems to rely upon ‘others’ to define what is OK or not. It appears that D has a definite belief that the English process was valuable and indeed superior to her own Kiwi experience. Her story, her ‘confession” here seems to very much replicate Foucault’s work on the process of training and regulation where “[t]he overall outcome of this disciplinary practice were bodies that were useful and docile, productive and subjected” (Sarup, 1993, p.71).

D - I was in M doing a placement in [19]87 .. and I said this assessment stuff is going to happen in NZ I want to put myself on an assessment course so I went on a mountain leadership .. summer...and I said to my boss at Y

84 “By confession Foucault means all those procedures by which subjects are incited to produce a discourse of truth...which is capable of having effects on the subjects themselves” (Sarup, 1993, p.70).
Outdoor Centre I don't want any training, I want to go in raw... I want to go in raw with no NZ qualifications either... year 4 professional instructor... so off I went... went on this thing at G... and I got deferred on navigation... I was pathetic, because in NZ at that stage I survived on navigation by aiming off by, finding a ridge, finding a stream bed, walking down... contours? Oh yeah, got to go up and down this hill... timing? No way... just sort of... I knew that took 8 hours... knew that took 5 hours... from experience rather than measuring... pacing? Don't know anything about that... had never done orienteering to any degree... now I got deferred on my navigation, everything else was strong and I thought shit (D, p.21).

D appears to discount her NZ navigational experiences in favour of the English concept of navigation, which depends on ‘orienteering’. For W the broad scale of the NZ topography, the denseness of the bush and in some ways the freedom to roam seems to demand a navigational style where one ‘feels’ ones way intuitively, experientially. This style is lost to almost a military style navigation, with pacing, timing, and the focus on the map, which may of course suit the much more ‘open’(that is less physically defined) but more controlled countryside of the UK. The ‘rules’ and therefore the subject appear to be made around a discourse on navigation, which is very much founded, on a foreign country’s topography. D’s perceived failure (her apparent docile acceptance that her knowledge was not legitimate knowledge) in comparison to the British knowledge was followed by a period of ‘training’ to reduce the gaps between her non-legitimate knowledge with the legitimate knowledge of the British instructor.

How we construct ourselves
Self and peer feedback is a ‘confessional’ process, part of the technology of self. As Marshall (1996) suggests for Foucault the ‘confession’ is part of “the desire in modern culture to tell the truth about one’s self” (p.118). It is essentially therapeutic; “the therapy comes about; from telling the truth, which can itself involve vicarious, pleasurable and liberating effects; from thereby knowing one’s self through speaking the truth; and thereby ‘liberating’ one’s self from the repressive aspects of speaking and reconstructing oneself” (p.118). But we are not autonomous - the ‘confession’ is disciplined by the norm. So self and peer feedback/assessment is individualising (as in differences are emphasised whilst part of the totalising norm - the criteria, the ‘gaze’ of the assessor/others). Essentially our behaviour is problematised. Marshall (1996) discusses how Foucault conceives of this concept of problematisation. Although focussing on sexual behaviour the concept, I believe travels across many aspects of a person’s way of being. Foucault argues that:

*The History of Sexuality* is not a history of morals or behaviour or sexual practices, but the way in which pleasures, desires and sexual behaviour were problematised, reflected upon and conceived in relation to a certain art of living. ...It is through problematisation, reflection and conception that we ‘construct’ ourselves in relation to sexual behaviour by ‘telling’ the truth about ourselves (Marshall, 1996, p.119)

In the outdoors self and peer assessment/feedback - telling the ‘truth’ about oneself is ‘facilitated’, as in the following extract, through rounds where the whole group feedback on good points (strengths) and bad points (or more subtly put ‘areas for improvement’) in a particular assessment moment.
we were doing a lot more self and peer and by the time the round had
gone round and everyone said 'yeah benchmark, below, up above, or
whatever, it was .. it would have to be kind of strange to be out of everyone
else's assessment (W, p.9).

In another interview D tells of her own experiences of self assessment

D- but when I think back he [the assessor] treated me with dignity.. he kept
it to the criteria and he let me ..interesting eh.. he let me say I am not up to
standard, he never did (D, p.22).

Self assessment - telling the 'truth' about oneself is also 'facilitated' through a process called
funnelling. The NZOIA (1997) assessor handbook describes funnelling as a

feedback reviewing method [which] relies on the assessor steering the assessee to
recognise and acknowledge particular elements of their performance both in the
realms of 'things to improve' and 'strengths'. The assessor uses open ended and
leading questions (p.36).

In the following extract I discuss what methods an assessor has tried in the past.

E - well we certainly don't use that in the strict full group thing [as described
by W in above extract].just often casual yarns..yep..if the trust ..and if the
relationship is working..and the funnelling which is spoken about in the..

H - guidelines?

E - yep

H- so..can you just describe what you think..I have you got an example of a
funnelling moment?

E - umm..I think essentially trying ..not sure if I have got a specific ..but just
when I've been trying to draw something out of them and helping them to
..umm.. helping them to work out the learning for themselves..so ..it could be
that ..I thought that in their flat water session that they did a whole heap of
fancy techno.. stuff which wasn't appropriate for the objectives of the
session ..so I might ask them 'so what were the objectives for the session?'
and if they have got good objectives that's cool or I might ask them 'why
those objectives, what's the big picture'.that sort of thing..and kind of
questions that ..drawing stuff out ..and hopefully they'll suddenly ..'oh, I see
I screwed that up'.yeah..(E, p.5).

It appears for E in this process that it is only the student who could have misconceived what was
happening in the assessment. It is for the student to 'confess' “oh, I see I screwed that up”
and thereby move towards the norm set by the assessor that of having “good objectives” and
teaching “appropriate stuff”.

To a certain extent the use of self and peer feedback with assessors making autocratic decisions
appears to be partially based on the perceived problem of overestimation on the part of the
assesseees. A belief supported by Adam Smith (in Sennett, 1998, p.90) when he wrote, possibly
rather scathingly, of the “overweaning conceit which the greater part of men have of their
abilities”. Possibly what is never questioned, or not questioned enough, in outdoor
education/recreation assessment is the conceit of assessors in their decision-making abilities.
Liberal philosophy and power

Ethics and moral behaviour
In the earlier sections of this chapter I discussed how some of the participants viewed the performance criteria as beneficial because it made the assessment process more transparent and therefore fairer. In the following sections I develop this notion of fairness as a particular regime of truth based on liberal education philosophy. This regime of truth not only governs ones moral conduct whilst denying the significance of power, but also rests upon a Kantian belief of individual moral worth. I subsequently explore in more detail how power is constructed through a complex mix of claims to authority whilst, at times, denying the existence of values which underpin this authority.

Equality
A key aspect of liberal education is equality which demands “an unceasing war against privilege of any form which hinders or blocks the development of others” (Marshall, 1996, p.110). In the following extracts D’s conception of attacking a particular behaviour is related to this regime of truth and that truth is supported by the use of ‘criteria’ to ensure ‘equality’ - justice, fairness. Therefore the decision to ‘attack’ certain behaviours is seen as ‘fair’ and ‘equal’ because they do not conform to the normative criteria. For D an attack on someone for other reasons appears to be ‘unfair’. Whether the criteria themselves are ‘unfair’ or that the need for assessment itself is ‘unfair’ appears not to be an issue.

D - here’s this whole thing of quality feedback coming in..and that’s to do with not some guru saying: [Yorkshire accent] ‘eh, you’re useless’..I shouldn’t put that accent on should I? [both laughing]. yeah..you know what I mean.. you should be measuring against a criteria .. this is where Grant [Davidson] was very good, ‘cause, coming .. having research from Britain ..which says.. you set the criteria, you measure against the criteria (D, p.4).

And

D - I had a person who was a ..she’d been 5 years as an emergency nurse, you could think of no one better to deal with emergencies, she was breaking down in an assessment course because her ego..her own personal thing was being attacked.. and we had to keep telling .. reminding her..saying we are not judging you, we are wanting .. we’re wanting to create an atmosphere that is totally supportive for you as a person .. all we want to see is can you tie this fig 8 knot, can you back this up, we went back to the criteria and that woman performed in the end.. because she thought we were trying to put pressure on her .. when in fact she wasn’t performing.. and all we were trying to say was we can’t pass you until we see these competencies.. once she saw that we weren’t putting pressure on her, she was putting it on herself (D, p.5).

D appears to see her role as an assessor as non-dominating “we weren’t putting pressure on her, she was putting it on herself”. The assessee is viewed as autonomous - free from the ‘judgement’ of the assessors. As Marshall (1996, p.111) suggests liberal education depends upon “the idea of personal autonomy where individuals are free from the authority and dogmas of others”. However the assessee had to perform to the ‘rules’ created by these others. But D is also governed by these professional competencies (Fournier, 1999).
This lack of recognition of power is reflected in E’s story with a desire for “equal footing”. Here he is discussing the first day of an assessment where he was a solo assessor - a first for him and NZOIA.

_H- how did that feel being solo?_

_E- certainly a bit more exposed..also given that it was one of my students on the assessment..

_H- one of your current students_

_E- yeah ..that was definitely double exposure.. so certainly I needed to ..it was important to have a kind of open culture operating for that weekend..

_H- what do you mean by open culture?_

_E- well..just.. make sure that everyone felt free to ..like the communication was kind of very free and easy and that felt as though as much as possible we are all on a pretty even footing.. and that there was good trust happening ..that sort of thing..(E, p.8).

E feels “double exposure” - in a sense he is monitoring himself based on the belief that others may monitor him. He is exposed to the gaze of the clients and the threat that they may challenge him on his ability to assess fairly on his own, especially with one of his own students on the course. Also he is exposed to the wider gaze from ‘industry’ as NZOIA often states that running assessments with two assessors will counter positive or negative ‘bias’. Both positions presume that on other assessments ‘fairness’ and ‘objectivity’ are possible by not assessing recently taught students or by having two assessors.

The criteria appear to become the ethical rules by which the assessors’ and assessees’ moral behaviour/conduct is governed and justice is decided by the assessors and the assessees agreeing to abide by the ‘rules’. But appeals to rules are highly contestable. The ‘rules’ (the criteria) are seen as disinterested, non-partisan but of course this is not the case. A certain ‘group’ creates the ‘rules’. They are then interpreted and applied in a variety of ways.

_Moral worth_

For D the behaviour of the individual is emphasised, she makes a clear distinction between the behaviour and the ‘whole’ person. In a sense she appears to be supporting a Kantian notion that “however the individual is construed, she or he is of moral worth and to be accorded essential and absolute dignity and worth as a human being” (Marshall, 1996, p.109).

_D- you have to look after people, you can’t go and hammer someone personally ..you’ve got to attack the behaviour or the competency not the person..you know.. you have to still look after the person’s wholeness.. (D, p.4).

This ethical discourse is present in D’s story in wanting to care for the assessee or as she describes it “a philosophy of health”. She does not want the assessee to experience an assessment similar to her own previous experiences, which she described in negative terms. For
example the feedback D received from the kayaking guru was “eh, you’re useless”, she also describes a male English assessor as “very, very closed”. But she also ‘values’ these experiences - learning the hard way. As discussed previously she viewed going into her first assessment ‘raw’ with no preparation and then experiencing a range of assessment outcomes, a “fail, deferment and pass” as a “crucial part of...[her] development as an assessor” (D, p.21).

Interestingly D argues that the assessee (i.e. the emergency nurse, see p.73) should have been capable of separating her identity “who she is as a person” away from her behaviours. However D appears to have forgotten the descriptions of her own assessment experiences, where she appears to construct her identity around the success or otherwise of the assessment. For example:

\[
D - I \text{ got deferred on navigation ...I was pathetic.} \text{ (D, p.21).}
\]

\[
D - I \text{ was having personal problems with trying to deal with failing in front of my peers ...I was almost in tears when he was telling me ...I couldn’t handle it} \text{ (D, p.22).}
\]

In the following extract it is interesting to see the number, and at times, conflicting discourses D draws upon in her story on what she sees is important as an assessor. Being professional is being held accountable to the “industry” and is legitimised by the client or potential clients. But D also draws upon a liberal educational discourse which values individual autonomy where each can pursue personal psychological development to be(come) “better people”. Therefore the assessor must conduct himself or herself in a certain way. They must have “less ego” and presumably “less ego” makes a “good person” - a good assessor?

\[
D - I \text{ think I was also looking for that fairness, their ego was less ...that they looked at the fairness of what they were doing, cause it is quite, I thought it was quite a responsibility as an assessor to ...you are not only looking after a standard for an industry but you’re looking after a professional approach to how people are treated...you know... the whole people skills side is just so important compared to the technical side... because that’s what our industry is about ...our industry is about ...well I believe...is about developing people through outdoor pursuits to make them better people ...so if the assessor isn’t a good person who isn’t doing that well anyway well what on earth are they doing in there} \text{ (D, p.20).}
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**Construction of Power**

The award system has been created for those who work across a variety of disciplines and K highlights the fundamental difficulty of this:

\[
K- \text{ we[NOIA] said who needs this qualification?... The scouts, the guides, the youth at risk, womens’ groups and school groups and polytech groups and ... we tried to come up with those commas}\text{ in the right place...now we knew they were going to be too low for some people and too high for others ...but eventually you had to ...if you are going to have an assessment you have to have that comma...}(K, \text{ p.31}).
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55 A term used to describe the level for each award e.g Rock 1 and 2.
But what is often not acknowledged is certain ‘voices’ have had authority to speak on what is OK and what is not OK within these ‘national’ awards. The outdoor assessment culture exists as if power is non-existent. One of the major educational philosophers which outdoor education draws upon is John Dewy, and I have also used some of his concepts in this analysis. But Marshall (1996) challenges Dewy’s position when he suggests

[in] any educationalists, particularly philosophers of education, write as if power is non-existent. The two, most prominent philosophers of education...R.S. Peters and John Dewey, are excellent and typical examples here, as the concept mainly used by them and other liberal philosophers of education is ‘authority’ (p.114).

My analysis has supported this view. Outdoor instructor assessment rests upon claims to ‘authority’ based on certain philosophical beliefs, certain people, certain countries, certain actions, certain assessment assumptions and these are hierarchised and legitimised.

Pakeha and male?
The low number of non-Pakeha coming to NZOIA assessments, as previously mentioned, is a concern recognised by the organisation. In the following extract K suggests that these barriers (that prevent the participation of certain groups) are universal, that they are the norm. It frames the ‘problem’ as a global one and not something NZOIA can do anything about.

H - do you think the scheme itself ..one of the other things it talks about in the guidelines..is the ..that there are barriers to certain cultural groups and ..this is not to do with assessors, this is to do with the assessment scheme itself..and I would suggest that if it is a barrier to certain cultural groups then it’s a barrier to other groups as well ..

K - gender..

H - yeah..gender and socioeconomic as well..

K -well ..yes..but every education system is ..does have some barriers ..I don’t know how you necessarily get around those..there is nothing that is structurally set up which deliberately engenders that barrier..there is nothing deliberate about it (K, pp.30-31).

Having established the ground rule (it is a global problem) it is interesting how Maori, as has been shown with women, are problematised. Maori do not “put themselves forward”, and it is not really a problem as they are happy in their own non-technical ‘at risk youth’ field.

K -..with that in mind, then there are some things that do cause a barrier. One is that on the whole many of the Maori instructors would not put themselves forward for an assessment. They work in their own field and they are really comfortable in their own field and they are doing a good job in their own field. But they measure themselves against [different] criteria [NZOIA criteria] are different...they are not ..they are not the criteria which they would put in the highest regard ..because it is a little bit more technical. A lot of them are working with ..generally working with more youth at risk background..so they are definitely working with the people side rather than the how to hold your paddle when you do a paddle twirling back flipping whoopying cartwheel in an eddy line (K, p.31).
K goes on to discuss how the technical demands in kayaking particularly disadvantage some women because of the spatial awareness needed to perform some of the moves.

K - ...there are some aspects which also disadvantage women in that, particularly in the kayaking field a lot of the new style type kayaking women find them a bit harder. Guys seem to just love doing these cartwheely and things like that. Women are quite good in rivers but shouldn’t be disadvantage for some its not but does seem to be another good masters project why the spatial concepts in kayaking in vertical moves (K, p.31).

There is an explicit expectation that there is a need to do research to find out why this is so that some women may lack spatial awareness. However, there does not appear to be an expectation to ask why these ‘abilities’ are required? Why is it instructors need to perform all of the possible moves? Do we expect it of others such as teachers or coaches in society and if so why?

The assessment process is unavoidably hierarchical and paternalistic but not solely related to gender. The following from Lavender (2000) highlights this:

Feminist critiques of Western culture have for some decades now pointed out that hierarchies are paternalistic - based on the ancient notion of the kindly father who sits at the head of the table doling out justice in the form of rewards and penalties. The feminist critique goes on to assert, quite correctly in my view, that no matter how kindly he conducts his business, the father at the top can not actually represent the interests of those lower down - since he can not necessarily be said to be driven by those interests himself, and he may not even understand them as he has been socially, culturally and even biologically encoded quite differently from those interests they are (p.3).

This paternalistic authority is at the heart of liberal, progressive education. The teacher is recognised as the ‘authority’ and tries to teach in a child centred environment, but recognises that what the child knows may not necessarily be ‘right’ or ‘correct’. Therefore, it is the job of the teacher to guide the pupil towards ‘enlightenment,’ - a better relationship with the environment, become better people. What is central to this philosophy is the teacher does recognise that needs and interests are ambiguous and reflect value positions. This is fundamentally different to techno or busno rationality where the interests and needs are seen as universal and where the value driven nature of these needs and interests is not recognised.

This lack of recognition of the value driven nature of assessment is reflected in D’s perception that it was her fault, due to a lack of confidence, not to challenge the hegemony of the British males on her kayak assessment. She later reasons “I must have looked pathetic” in some way this appears to justify her “being annihilated”.

D - here I was trying to stand up for a standard and fight these huge gurus and egos that were going on and yet here was me being annihilated because my own confidence in myself was ..I wasn’t strong enough at that stage (D, p.3).

*They is a current and heated debate within NZOIA concerning the desire to raise the standard required for lead climbing for the level 2 Rock award from grade 17 to grade 19 or 20. In one recent discussion with a well respected female level 2 award holder she suggested that this would mean she would no longer pass.*
Now they assessed these people and they were made, K and M and all these people were made stage 2 kayak instructors. And I mean, I look at myself now and I must look pathetic because... of course I just went backwards... but two weeks later was the grandfathering rock climbing course and it’s interesting because out of that experience I went... ‘I’m not going to fail this’ (D, p.3).

D does not like conflict or politics. But for Foucault ‘politics’ and ‘power’ are everywhere. D believes the construction of particular criteria (see reductionist approach) is ‘fairer’ because the assesses create the criteria but the exactitude and minutiae of the process in itself does not diminish the ‘regime of truth’. It re-inscribes it in a way that makes it appear more ‘democratic’. But the ballot has being rigged; the grandfathering process, a controversial process in itself, has already decided the ‘standard’.

In contrast to D, W does resist the British value system. However none of the respondents appear to question the constraints placed on assesses’ ability to contest the ‘fairness’ of the criteria even though most recognise the ‘stress’ present:

E - ahh... yeah... I’ve had... yeah... definitely... a lot of people find their level one kayak assessment one of the most stressful times in their whole life...

H - ok... so that is very well known between you and the assesses?

E - yep (E, p.7).

D replicates this theme when she comments:

D ... it was really interesting hearing from someone like X who’d been so long in the field and put himself up and he said it was incredibly stressful for him... incredibly to be suddenly in like an exam... and putting yourself in front of your peers and say am I good enough? (D, p.4).

Ability

Although this section focusses upon the assessors’ views on ability it is also intriguing because it highlights the multiple layers of interaction. There is a hierarchy of expectations, some of which are explicit some of which are not. There is pedagogical confusion between educational and training concepts. There are a series of complex relationships: between the assessors; between the assesses; between assessors and assesses; between assesses and ‘clients’ and; all other combinations between the various individuals. There are recurring references to the notion of individual responsibility and accountability to the profession and the ‘market’. All of which takes place in an environment where power is notable by its invisibility.

In the following extract E is discussing day 2 of a recent 3 day white water kayak assessment. It is the first time the assesses have met the second assessor (L) and the assesses are expected to teach some ‘clients’ rolling:

H - okeydoke... so you met them at nine... the [asseses]... you met them at the pool? and the clients were there?

E - yep
H - how long did you get to talk to the [assessees] before cranking into it?

E - we had about a 5.3, 4 min talk..yep

H - and that was the first time they met L?

E - yep..um..yeah..that was not quite so ideal..but L had his hat on backwards and was smiling and asking them for jokes..it worked..and then .. oh yeah I done ..put a fair bit of effort on the Thursday night into telling them that the whole day 2 and 3 was all about them providing an experience that was safe, educational and had the x factor..nice and easy for them [the assessees] to remember..

H - and what.. did you describe..did they understand what the X factor was?

E -yeah..as in the X factor was essentially enjoyable..um..enjoyable, fun, challenging..well ..yeah... it had something extra to it..

H - had ...the clients .. had they come with the expectation it was going to be educational? why had they come?

E - I think they had simply been told that they needed..the assessees needed some guinea pigs and it was a good chance to learn how to paddle (E, p.12).

The story E tells is illuminating. The very short time between meeting the assessees before starting the day with the client group is not seen as particularly problematic, even though the assessees had not previously met L [the second assessor]. L's smiling and joking with the assessees "worked" - created an image of the 'friendly' assessor. Maybe one who can be 'trusted' - maybe he had the X factor?

The most interesting aspect in this story is the assumptions that underpin E's recounting of what happened. First he suggests that he put a lot of effort into the Thursday night briefing. It is now Saturday morning on an event that he has already described as possibly one of the "most stressful times in their whole life". He assumes because of the effort he made on Thursday night the briefing must still be in the assessees' heads, it was "nice and easy for them to remember". In response my next question appears to suggest that I do not accept that because something is easy to remember it is necessarily understood so I ask for clarification of this X factor. The answer E gives is vague as one would imagine with a notion called X factor. As the 'rule' is vague it leaves open an almost infinite number of possibilities for failing some one whilst it still allows those that 'conform' to the pattern to pass.

I then try to find out if the 'educational' expectation he has of the assessees is one that the clients also have. His answer suggests two things. Firstly the experience for the clients was more akin to a laboratory experiment where they were going to be the "guinea pigs" and secondly what they may 'learn' is to paddle. Neither of these suggestions implies an 'educational' experience other than if you equate learning the skill of paddling as 'educational'. Learning to paddle is to be trained in a skill. Education via the medium of kayaking offers an almost infinite number of outcomes. Interestingly the clients did not have any expectation that they would be 'challenged',
E, however, did have an expectation that the assessees would make the session a ‘challenging’ experience for the clients. This imposition upon both the assessees and the ‘clients’ promotes a power-knowledge conformity whilst restricting the inter and intrapersonal behaviour in favour of political docility. To be ‘challenged’ is very much part of a regime of truth associated with adventure education. Adventure education, very briefly, is a developmental process where an experienced professional facilitates risk and challenge; a process that has been critiqued by some feminists as patriarchal. Mack (in Collins, 2000, p.31) critiques this emphasis on standardised outcomes

not only must the instructor assess the client’s needs, provide a safe physical environment...but she/he ‘must also provide appropriate forming and structuring of the experience for the client’ (Gass, 1993:226). This means an application of what might be considered a heavy and paternalistic hand in creating and directing the metaphoric activity.

The following extract highlights three issues. Firstly the assesseee is expected to have a large body of knowledge to draw upon when teaching a kayak rolling session. Secondly this knowledge must be current. Thirdly the expectation that the previous two requirements are a duty for a NZOIA instructor.

E-we often talk about the size of someone’s tool box. As in if a problem occurs how many tools have they got to throw at it..do they just keep hammering away with one area. So if people show themselves to have a very small tool box, that’s a problem..

H - is that clear..is that identified prior to turning up for the assessment? would I know ..that having a wide variety of tools is part of the deal?

E - ahh ..[long pause] ..I’m trying to remember what is in the pre-course information.There’s definitely some referral to rolling session..the importance of it..and I have heard of assessors’ going by the NZOIA log book and saying its one of the duties of an NZOIA instructor to be aware of current techniques (E, p.14).

In the extract E seems vague on what the pre-course information does include. However in the previous sentence he suggests “we often talk about the size of someone’s tool box” - although who this “we” includes is unclear. E seems to distance himself from the practice of using the logbook to justify his own decisions - other assessors’ do that. For E the rule “you must be aware of current techniques” appears to be synonymous with having a large toolbox. The suggestion that it is the “duty” of NZOIA instructors to know current techniques creates a regime of truth that is almost impossible to know. What is it to be current? Is it what the assessors know? It creates limitless possibilities on what it is not to be current.

The power of currency
Keeping current is a dominant theme amongst assessors and therefore what is expected of their assessees. Knowledge is only ‘credible’ if it is ‘current’. As Sennett (1999) argues “[t]he market ... is too dynamic to permit doing things the same way year after year...or do the same things” (p.22). In an outdoor education context C likened it to being on a treadmill “if you stop still for a minute you drift backwards...” (C, p.14).
Technical advances are used as an ‘excuse’ for the never-ending movement of standards and can be seen as part of the re-legitimising process to keep a dominant position in the ‘market’. In the following extract this assessor accepts new boat design and therefore new paddling techniques as inevitable and acceptable. There appears to be little acknowledgement that many of the current kayak designs may limit who can paddle. It favours those who can afford to constantly update their gear, and a number of new low volume boat designs are unsuitable for heavier paddlers. However, K also expresses a conflicting notion that there is indeed potential for increasing/changing standards to limit entry to the ‘market’.

\textit{K -standards also have to rise. I have to remember this because actually standards do rise in things like kayaking. The standard of kayaking now is considerably higher than the standard of kayaking twenty years ago, or even ten years ago, when everyone was in Dancers. You know so you do have to move with the times. Different gear comes in and different technological things so you do have to change the standards. But there are some things you don’t have to change in a standard and that’s if those people are still doing a safe good job why make it harder and more difficult for those people to get into the scheme? And most schemes, Alpine Guides have done it. They always seem to add an extra course, an extra day on, cost more, all those things seem to just make it harder for the young person wanting to do the scheme or an old person, thinking they ought to get the qualification (K, p.20).}

The following extract highlights how a hierarchy of currency exists within NZOIA as well as within the wider community. Also it illustrates the reluctance to accept the capacity of the assessee to challenge the decision of the assessor.

\textit{E - one was having a wee bit of trouble taking it on. Gosh, having a wee bit of trouble taking it on board because many of the techniques she was using were techniques that she had recently learnt off a level 2 instructor.}

\textit{H - mum, so she felt like, how come?}

\textit{E - yeah, I think she could see it and at the same time, she was definitely, I was the one who gave her that feedback, she was definitely accepting of it but there was also that sense of frustration that was, yeah, I mean, like, kind of what’s going on here? (E, p.14).}

The assessment candidate fails because her recent training to stay/get current was from a level 2 instructor who is not perceived to be ‘current’. Clearly E viewed the candidate as being a potential problem “gosh, having a wee bit of trouble taking it on board” until she is seen to ‘accept’ the assessor’s judgement - becomes ‘docile’ becomes ‘obedient’. The opportunity for her not to accept is seen as available, however to provide context, she is only the only female on the course, and NZOIA does not have any female kayak assessors\textsuperscript{87}. I ask E if he sees any issues here

\textit{E - in general, in general it may well be an issue but I would expect not too much of an issue with that particular.}

\textit{H - did you know her before she came?}

\textsuperscript{87}Though one women is being “fast tracked” to become a kayak assessor (E, p.14)
E - yeah..

H - had you taught her?

E - no ..we had been at the same canoe club early 90s.. she's well used to doing stuff where she’s the only woman. (E, p.15).

His earlier statement that a kayak 1 assessment is the most stressful experience for some people does not appear to impinge upon his view on this woman’s ‘ability’ to question the assessment process. It appears that E sees her past experiences as the “only woman” as grounds to support the belief that she is now capable of challenging their decision. Accepting responsibility for the decision must be hers; indeed her acceptance is part of the discourse on individual ‘free will’. The belief in her own strength of character (free will) must now make her accountable for her poor ‘choice’ of trainer and therefore it was her responsibility for failing that part of the assessment.

**Contestable ground**

Fournier (1999) suggests when professionalism is deployed to invoke a particular form of moral conduct the meaning is highly contestable. My analysis in this chapter has supported Fournier’s argument. In the following section I briefly highlight some of the multiple, conflicting discourses to re-emphasise the complexity of the assessment process of outdoor education/recreation instructors. I use bullet points because they portray the conflicting, competing concepts rather graphically. So what conduct is it the assessors were wanting? What do they see as important?

- A neo-liberal discourse of accountability and responsibility?

  H..was the NZOIA ticket really set up very much for the professional, full time worker, would that be a fair thing to say?

  C – umm.. it would be a fair thing to say.. but the point that we were making even back then .. was that it didn't matter what you were doing if you owed a professional standard of care.. then that standard was the same whether you were paid or unpaid, volunteer or not.. so ... you know.. a client centred standard of care, yes..

- A liberal educational philosophy?

  D - our industry is about ...well I believe..is about developing people through outdoor pursuits to make them better people

  K - you want your instructor to inspire people to do things

  E - [it's] all about them providing an experience that was safe, educational and had the x factor.

- Other discourses:
  Be current?
  Have flow?
  Be at home in the bush?
  Be good people?
• Standards:
  Everyone knew what they had to do, did they?
  But are all standards worth the same amount?
  Well which ones are worth more?
  But what if she is a really good instructor but just forgot to do up a carabiner?
  Criteria are fair?
  Criteria are bogus?
  Are standards raised to keep others out?
  Do standards discriminate against some groups?
  Who wrote the standards?

• Assessment Methods:
  Self and peer is good?
  Self and peer is problematic?
  Autocratic good because it is quick; autocratic bad because it is, well, autocratic?
  Does any of it matter as we knew who should be in anyway?

Maybe in light of the diversity present in the above synopsis it seems an understatement to suggest that deciding what and how to assess is problematic. Consequently it is worth considering adopting an approach that acknowledges the fundamental difficulties of having a ‘standardised’ approach. This study highlights the difficulties associated with trying to create some sort of universal assessable standard based on the experimental model. In the following extract W continues the individual/difference theme, mentioned earlier, when he discusses his own work as an artist and how he subsequently offers a solution to the conflict between generalised standards and individuality:

W – just going to check what I wrote .. [long pause] .. I wrote this statement out ‘his art is really reflective of him’ .. I don’t know if you would agree with that? .. your art?

W – oh right.. a lot of people .. have said ‘nobody else would make anything like that’ [both laugh] .. you would look at it and you would say ‘I know who made that’ .. which is .. I’m quite keen on that .. I think that’s the way it should be. It shouldn’t be divorced from you .. so my personality, your history, your whole thing is in it, everything is your work. And its tricky for some people because they don’t like to expose themselves too much to critical gaze as it were.. and ..where as I don’t mind (W, p.13).

W suggests in the art world it is appropriate to adopt an assessment approach based on individual standards and therefore context specific judgements in assessing pieces of work. However he stops short of supporting this approach for assessing others’ in the outdoor field. He appears to see this as an issue, an area of concern.

W – I had some pieces selected [for an art] Exhibition, just recently, and the selector .. selected out pieces.. when he came to explain his selections he said I’ve tried to work out, what it is that I thought each person was trying to do and then in my mind I then worked out how successful they have been in achieving your aims .. and that’s what I have selected upon’ .. and that seemed like a very sensible, approach. It allowed for individuality, it
allowed for things that he didn't necessarily like at all. I thought that's sensible. Maybe we should do more of that so it's an individual standard, it's not a wider standard. But it seems very suitable for art [and] because I think art and outdoor instructing are there are kind of the same. Then maybe we should be doing something like that. It's only recently that I've been exposed to this new idea said in that particular way. I don't know how we would do that for assessing peoples' competencies to take others out into the outdoors (W p.21).

W's comments reflect Lavender's (2000) views about judgement in educational leadership and what it is to be 'fair':

The upshot of all this is that each judgement is a separate judgement, and it must be made independently from all other judgements if we are able to say of it that it was careful and reflective. The reasons for determining something to be the right decision in one case may be precisely the reasons for determining that something is the wrong in the next case (p.9).
Postscript

Through my exploration of the data using a Foucauldian framework I have highlighted the importance of needing to know the way assessment institutions, policies and processes emerge before any understanding of what our future moves could or should include. Moreover a Foucauldian perspective has shown the arbitrariness of these institutions, policies and processes and has marked the “space of freedom we can still enjoy and how many changes can still be made” (Foucault in Martin, 1988, p.11).

Moreover the study has highlighted how neo-liberal ideology has underpinned much of the literature in education/recreation instructor assessment. It has shown how the introduction of performance-criterion based outdoor instructor assessment was based on very little reflection in terms of educational philosophy. This gap was especially noticeable as outdoor education has previously celebrated (and still does) the strong links with a progressive Dewyian philosophy. The imposition of the NZOIA assessment scheme itself was grounded on pragmatic reasoning, political manoeuvring by OPC and Pete Dale, in a context where there were concerns about quality and the impact of educational, land, health, safety and accident compensation reforms. Also certification, and the subsequent need for assessment, was sold as a pre-requisite/co-requisite in the drive towards professionalism.

The dominant discourse of professionalism created a network of accountability and criteria of legitimacy (Fournier, 1999). This network of accountability has included - the legal system, the land managers (DOC), the client, and the profession itself. Certification, as part of the legitimisation, enables control to be exercised on who is doing what and indeed who is allowed to practice at all. The desirability for this control is cloaked in a regime of truth that certification makes people more responsible and accountable because of the law - the ‘rules’.

NZOIA, the ‘professional certifying body’ for outdoor instructors, has created and developed an outdoor instructor assessment scheme which appears to have emerged from competition between ‘other’ outdoor bodies (MSC, OTAB, NQF) and the threats to quality that these ‘other’ bodies represent. The implementation of the assessment process was controversial and, as with many of the reforms of the 1980s and early 1990s, was implemented at speed. Not surprisingly the outdoor assessment process has been dominated by the wider reforms in education and especially the implementation of the NQF and the belief in a universal standard based assessment process.

Outdoor instructor assessment has, in line with the whole of NZ education reform, imported ideological driven processes from the UK and elsewhere, with little consideration of how these processes were (or were not suitable) for the NZ context. The adoption of the NQF language has been forced (whilst at the same time willingly co-opted) upon outdoor assessing bodies with little educational understanding of what this process actually means on philosophical, epistemological or methodological grounds. The assessment process is problematic in terms of education philosophy as it fails to acknowledge the difficulty of introducing national standards upon a discipline (outdoor education) that in itself is extremely difficult to define. Equally it is a process that fails to acknowledge the interests and needs of individual instructors/educators or assesseses.
Much of the philosophy of outdoor assessment espoused in the outdoor assessment literature and in a great deal of the interview data supports liberal and more conservative neo-liberal discourses. Therefore there is almost a complete absence of any recognition that power is a central feature in the creation of the assessment criteria or their implementation.

In this thesis I have questioned the notion that it is possible to have universal ‘national’ standards. The interview data and the literature support this view as nearly all the assessors, whether explicitly or implicitly, raised issues that show the process to be flawed. There are epistemological difficulties with an unrealistic and unproblematic focus on positivist notions of how we come to know - the belief that it is possible to break down individuals into a series of discrete variables (performance criteria) which can then be measured. Equally on methodological grounds there is a belief that an objective assessor can then judge these variables. Invariably, when defining any particular aspect of what they were assessing, the interview participants resorted to reductionist approaches. These approaches are in themselves controversial - that is, the more specific the criteria the greater the emphasis is on lower level cognitive skills (McKenzie, 1997, p. 62). Alternatively the assessors’ adopted an ‘holistic’ approach of pattern recognition of ‘what an instructor sounds like, looks like’ - but this approach ignores the socialisation which creates this idea of ‘what an instructor looks like, sounds like’. This pattern has largely emerged from OPC which itself has been dominated by a mixture of British, white, male values with an emphasis on technical competence.

What next? If assessment has to happen maybe we should move towards a process that is more formative than summative. It would lower the ‘stakes’. It would allow a move towards an assessment process that adopts a more critically aware philosophy by acknowledging that individual assessors and assessees have different interests and needs. We live in a society that is not ‘equal’ and people are not ‘free’ to choose in terms of: access to money for equipment, money for travel, opportunity for travel, the desire to do so, and/or people are committed to family/whanau\textsuperscript{88} / location/ organisation. Moreover individuals are not ‘free’ to voice concerns or opposition to people who they perceive to hold positions of power (however) democratic we are in our assessment processes.

\textsuperscript{88} extended family.
References


