

**Matching Instructional Credibility and Institutional Viability in a Changing World.**

Sir John Daniel, O. C.

**Introduction**

It is a pleasure to be here and thank you for inviting me. Anne-Marie Kee asked me to address this conference six months ago.

The title that I gave her then, which was *Matching Instructional Credibility and Institutional Viability in a Changing World*, seemed like a good idea at the time. Now it seems rather pretentious! I don't usually string together quite so many polysyllabic words in the same sentence, especially not for the title of a talk.

Let me begin by unpacking this title, starting with instructional credibility. In their academic and teaching functions schools everywhere face three significant pressures. The first is to sustain a curriculum that synthesises academic content, 21st century skills and values education in an appropriate fashion - while ensuring, of course, that your pupils gain entrance to the university programmes of their choice.

The second is to appear modern by integrating educational technologies, such as online learning and open educational web resources, with classroom teaching in ways that enhance pupil performance, enrich their learning and might even cut costs.

The third is to satisfy the evolving definitions of quality held by internal and external stakeholders, which will include judgements about the quality of pastoral care in boarding environments in particular.

Then there is institutional viability. All schools must respond to these pressures whilst ensuring their viability and sustainability as businesses, but that challenge is particularly acute for independent schools. Demographic change and attitudes in society are leading many schools to admit a more diverse pupil body on several dimensions, not least family wealth and nationality. Studying in school communities that are more representative of the wider world, rather than just ghettos for rich kids, will prepare pupils better for later life. But they will challenge admissions offices to apply means tests in a fair manner and to achieve a fee-income profile that enables revenues to balance expenditures.

**Institutional Viability**

I shall comment on these issues in the reverse order, starting with institutional viability. I shall talk about them in the light of my own experience, rather than in a theoretical way,

so I should begin by outlining that experience. Where you stand depends on where you sit!

My career has been a sandwich. Slices of experience with independent schools are the bread. Between them is a thick filling of leadership posts in university education in Canada and the UK and later in international intergovernmental organisations, both the UN system and the Commonwealth.

### *Independent Schools*

I start with the independent schools and must go back 464 years to put you in context.

You know of Henry VIII because of his six wives. More important for my story is that as part of Henry's strategy of taking charge of the Church in England, he abolished the monasteries and either gave away or sold their considerable assets to his friends.

While there were undoubtedly some corrupt practices in these rich establishments they also supplied most of England's social support system: teaching children, caring for the sick and looking after the poor. Alarmed by the removal of these services following the elimination of the monasteries, some eminent citizens got together to try and provide these support services in other ways.

In London, city aldermen and bishops persuaded Henry's son, the boy King Edward VI, to create three establishments, called hospitals. St. Thomas' Hospital was a general hospital for the sick poor. Bridewell Hospital was for the 'disorderly poor' - in effect England's first correctional institution.

Christ's Hospital was a foundling hospital with the purpose of caring for and educating poor children. It existed for 350 years under the shadow of St. Paul's Cathedral in the City of London until, in 1902, it was moved to a large greenfield site in Sussex. I was a pupil there for nine years from 1952-61. The traditions of its sixteenth century creation continue today. The Tudor uniform of 1553 is still worn daily.

70% of the annual costs of educating the 870 pupils, 50/50 girls and boys, are met by its foundation from an endowment of over half a billion dollars, the largest of any UK school. 82% of the pupils receive some subsidy, 14% pay no fees at all, only 16% pay full boarding fees and about 10% are international students.

My grandson, Oscar, who lives on Vancouver Island, is one of the first Canadians to attend. He is doing the final two years of the programme. It was rather moving to see him kitted out in the same uniform that I wore there for 9 years! And to know that he marches to lunch every day accompanied by the best school band in the UK!

I mention all this because at a time when inequality, as much within countries as between them, is at the top of the policy agenda, independent schools need to have policies for addressing it.

Christ's Hospital is a unique example in the UK because it is now engaged in a debate that starts from the other end. Until quite recently none of its pupils paid full fees and its slogan then was 'An Education Money Can't Buy'.

Since then it has started taking some full fee payers, primarily in order to enrich the diversity of the student body by having some pupils from wealthy families and more from overseas. This, as you might imagine, has been hugely controversial with the alumni.

The considerable number of Christ's Hospital alumni in British Columbia mounted a petition against taking any full fee payers and gathered a goodly number of signatures from around the world. I distanced myself from this process, partly because I trusted the school's governing council to make decisions about its future and partly because I agreed with the idea of having a broader pupil profile in terms of family wealth. Christ's Hospital will work towards a cap of 10% of full-fee payers.

By coincidence I now suddenly find myself having to get to grips with the same issues in a different context, which I would now like to explore at more length.

It brings me to the slice of bread on the upper side of my sandwich. Here I face a similar challenge to the one facing Christ's Hospital - the difference being that I am involved in addressing it.

My recent experience with the independent school sector began with my appointment, in 2012, to the *pro bono* role of Chair of the International Board of the United World Colleges, or UWC. This was not quite my first contact with the UWC system. My daughter went to UWC-USA in the 1980s and one of her classmates, Ian Chisholm, who addressed your conference on Sunday afternoon, later married my other daughter.

Then I was a member of the Council of Foundation of the International Baccalaureate for most of the 1990s. The first of our United World Colleges, Atlantic College in Wales, had been part of the creation of the IB, along with the Ecole Internationale de Genève some fifty years ago.

The 1990s were interesting times to be on the IB Council. We launched the Primary and Middle-Years IB programmes and had to adjust the language requirements of the IB Diploma because of the large numbers of US public schools coming into the IB system. Most of their pupils entered the IB without much grounding in any second language, while some pupils entered schools like the Ecole Internationale de Genève already fluently trilingual. We had to adapt our language requirements!

From the turn of this century until 2012 I had little contact direct contact with the IB, or with independent schools generally, because my focus was international development, first as Assistant Director-General for Education at UNESCO.

Then as President of the Commonwealth of Learning, a small Commonwealth agency based here in Vancouver that helps developing Commonwealth countries use technology at all levels of education, formal and informal.

My main task as head of Education at UNESCO was to coordinate the global campaign to achieve Education for All that had been launched in 1990 but had actually gone backwards until it was given new impetus by the Millennium Declaration and a conference in Dakar in 2000.

The main focus of the EFA campaign from 2000 until today has been to achieve Universal Primary Schooling and much progress has been made. Furthermore, independent schools are playing an important role in this - although their role is usually unacknowledged and often flatly denied by development agencies wedded to the dogma that only state schools can do the job.

If this clash of ideology interests you, you should read James Tooley's book *The Beautiful Tree*. While researching private schools in India for the World Bank he was worried he was doing little to help the poor. One day Tooley wandered into the slums of Hyderabad's Old City. He was startled to find the slums overflowing with tiny, parent-funded schools filled with energized students. He went on to discover schools like this in poor communities all over the world. The book is named after Mahatma Gandhi's phrase for the village schools of pre-colonial India.

I tried to counter the orthodoxy that Education for All could only be achieved through public schools in my book *Mega-Schools, Technology and Teachers: Achieving Education for All*, published in 2010, which gives an account of progress up to that time.

But to return to main plot, and the question of institutional viability, I became chair of the UWC International Board just as the growth of the UWC movement accelerated.

#### *Evolution of the UWC movement*

For many years the growth of the UWC network was spasmodic and reactive. Indeed, it's only in the last ten years that you can really speak of a UWC system or a movement. Before that it was simply a collection of schools united by a common name with a small coordinating office in London and, very importantly, national committees in most countries of the world recruiting students.

Each new institution joined the group by a different trajectory.

UWC Costa Rica, for example, was previously part of SOS Children's Villages.

UWC Red Cross Nordic lies alongside the Red Cross Haugland Rehabilitation Centre and the two institutions work closely together and share many facilities.

UWC Changshu China, one of our newest institutions, was founded as a result of the efforts of Chinese UWC alumni over many years with the generous support of the City of Changshu.

UWC Waterford Kamhlaba in Swaziland, by contrast, is our second oldest school. It was founded by a group of teachers led by a young British teacher, as a multi-racial school in opposition to South Africa's apartheid policies. Nelson Mandela sent his children there.

The common feature of all the UWCs is that they offer the two-year programme leading to the International Baccalaureate Diploma, usually to around 200 pupils - one hundred in each year - and usually recruited from around 90 countries in each school. The large majority of these IB Diploma pupils receive scholarships - in many cases full scholarships - and in plenty of cases support for travel and clothing.

However, in three of our institutions the IB Diploma Programme is the capstone on top of a larger school. UWC Waterford Kamhlaba is a full secondary school. UWC Maastricht, another fairly recent addition, has a pre-kindergarten, a primary school and a secondary school. Finally UWC South East Asia in Singapore, which must be one of the world's largest schools with over 5,000 pupils, has an infant school, a primary school, a junior school, a middle school and a high school with boarding available for pupils over 14.

This is where we get into issues of institutional viability. Although there are almost more UWC pupils in our Singapore school than in all the other UWCs put together, until quite recently most UWC folk regarded full schools as something of an aberration: a deviation from the supposed 'standard' UWC model of a two-year college doing the IB Diploma. But views are changing.

One agent of change was Peter Howe, a Canadian who moved from the headship of UWC Adriatic, a two-year college, to be the founding head of UWC Maastricht, which is a full school. Peter is adamant that his primary and secondary pupils are just as thoroughly imbued with UWC values as the IB Diploma pupils.

Issues of institutional viability are also changing views. In all UWCs the scholarships and financial support are largely focused on the two-year IB Diploma programme. But clearly, even without doing any overt cross subsidisation, being able to spread many of the fixed and overhead costs over a larger school operation reduces the unit cost of the IB Diploma programme and therefore the funds required for scholarship support.

How the two-year colleges resolve their funding challenges has been a contentious issue.

Our oldest college, UWC Atlantic, which has the task of maintaining the 12th century castle that houses it on top of the challenge of operating a school where most pupils are substantially subsidised, has increased its recruitment of full fee paying pupils. This is seen as retrograde by some of the other UWCs, particularly if the full fee payers do not go through the same admissions process as the others.

Our Canadian college, UWC Lester Pearson College of the Pacific, near Victoria, has historically been the most vociferous in insisting, until recently, that all its pupils must have full scholarships, even resorting to reducing its intake when there weren't enough scholarships to go around. But for the founders this was a moral issue.

I confess that this is a view with which I have never sympathised. Were I to be a donor to the College I would want my money to meet as much need as possible rather than being spent on giving full scholarships to the children of the wealthy. Indeed, when my daughter was at UWC USA in the 1980s I felt guilty that the only costs we had to bear were getting her there and back three times a year. I was a university president in Ontario at the time and could well have afforded to make a contribution.

As often happens, it is the growth of a movement that forces it to clarify policies and come clean about expectations. There is now a line-up of expressions of interest and applications from bodies wanting to become UWC institutions. Some of these are conversions of existing schools whilst others are green field sites with enthusiastic donors who want to create a UWC in their country.

*Why do institutions want to join UWC?*

Why has there been this upsurge in interest in joining the UWC movement? I think that a large part of the reason is that as it has matured and become more cohesive, the UWC model has impressed many observers.

This model is the IB Diploma plus a more intensive community service programme than the IB requires (at least 200 hours and largely pupil led), plus the international outlook that comes with living in a boarding school for two years with 90 other nationalities and a deliberately diverse intake.

The transformative impact of a UWC education impressed the US investor Shelby Davis. After 9/11 he had determined to find ways to increase international awareness in America, starting with the universities. In visiting US universities he found many that were highly enthusiastic about the contribution that UWC alumni make to life on campus, not least by making it less parochial and by generating more student initiatives.

One thing led to another and today any pupil who graduates from any UWC institution with a solid record is assured of a Shelby Davis scholarship that covers four years of study in any one of 90 US universities. I believe it is now the largest philanthropic scholarship programme in US higher education.

Moreover Shelby Davis has now moved upstream and promised one million dollars to each of our fifteen UWC institutions provided that they can match it with donations from alumni, parents and friends.

I'm not saying that the Davis programmes alone have sparked the upsurge of interest in joining the UWC system, because most of the applications in the pipeline pre-dated his

latest generosity. But it would be foolish to deny that his generosity has made the UWC movement even more attractive both to prospective pupils and to new institutions.

Our process for vetting applications from existing schools or new projects to join UWC has always been pretty thorough but also somewhat *ad hoc*. We felt that we would recognise a potential UWC when we saw one!

### *Conditions for becoming a UWC*

But this is no longer good enough. Applicant bodies usually have to invest significant funds in developing their school even before they gain preliminary approval from UWC, so it is only fair to lay out the conditions as clearly as we can. So after a careful process we approved a set of conditions the most recent meeting of the International Board held at our UWC in Norway in February.

I'm not going to take you through all of the conditions, but some items may be of interest, especially in relation to my theme of institutional viability.

For starters, obviously, we take for granted that applicant institutions sign up to the UWC mission and values, to our educational model and to our philosophy of deliberate diversity. We expect them to become more UWC-like as time goes on, to participate actively in the wider movement and to make a conscious contribution to their host nation - being, for example, not just a UWC in Armenia but a UWC of Armenia.

To this end we insist that institutions joining the movement recruit a number of staff, some at senior level, that already have experience of working in UWCs. I'm pleased to say that many of our teachers, heads and deputy heads seem happy to take on the challenge of helping to make new members more UWC-like.

We also hope that each new institution will add something new to the movement. The Robert Bosch UWC in Freiburg, Germany, which opened two years ago, brings a special commitment to environmental issues. One of our current applicants puts stress on mindfulness and another has a strong focus on creating entrepreneurs.

In any system that depends on significant philanthropy and scholarship funds there are always worries, among existing members, that any expansion of the system will be a zero-sum game that will reduce the funds available to them.

So we ask new institutions for a ten-year business plan showing that they will be accretive to the system and not a drain on it. They must not be run for profit, nor charge excessive fees, which means showing an ongoing source of financial support or a sufficient endowment. I realise that we are now setting the bar rather high, but current applicants do not seem to be deterred.

In terms of governance we insist on a clear distinction between the governing council and the management of the school. The national environment must be one of political and legal stability, with freedom of speech on campus.

At the IB Diploma level the large majority of pupils should be boarders and we have found that dormitories with four pupils to a room work best in fostering our goal of international understanding.

In terms of the composition of the student body we expect that in the full schools the IBDP programme will have not more than 50% of pupils from the host country. For such schools at least 50% of the IBDP pupils should be admitted through the UWC national committee system and less than 50% of the income for the IBDP years should come from parental contributions.

In the two-year colleges we expect not more than 25% of the pupils to come from the host country and that all pupils will be boarders. 90% of pupils should be recruited through the UWC's national committees and not more than 25% of revenues should come from parental contributions.

You will appreciate that the criteria have to be somewhat different for full schools and two-year colleges, since the full schools will already have fee-paying pupils at the lower levels that expect to move into the IBDP years. To their numbers the school adds an intake of new IBDP pupils coming through the UWC national committee system with a high degree of scholarship support.

That's enough to give you the flavour of it. I fully appreciate that this is rather different from the world that you live in, but I hope that it is of interest.

That gives me little time to talk about instructional credibility, which may be a relief for you! Here we come to the filling in my career sandwich, which was in universities and international development.

### **Instructional Credibility**

Earlier I identified three issues that I suspect you face in the academic side of your operations. The first is to sustain a curriculum that synthesises academic content, 21st century skills and values education in an appropriate fashion. The second is to integrate educational technologies in a sensible way. The third is to satisfy the evolving definitions of quality held by internal and external stakeholders.

Let me comment on each in telegraphic style and do so from the perspective of the higher education institutions to which most of your pupils will be going.

#### *Curriculum*

In the curriculum the big fad at the moment is 21st century skills. This list of what they are is typical. The simple point I want to make is that once you get to higher education these skills become less generic. Most need to be embedded in a domain of knowledge so developing them, at least in higher education, is context specific. For example, communication skills for doctors, lawyers and teachers are not the same.

My fellow Vancouverite Professor Tony Bates, who has written a brilliant book on *Teaching in a Digital Age: Guidelines for Designing Teaching and Learning*, reckons that the most over-arching of these 21st century skills is knowledge management because the skill of how to find, evaluate, analyse and disseminate information within a particular context is a skill that graduates will need to employ throughout their careers.

### *Educational Technology*

The second issue is the appropriate integration of educational technology. Here the obvious point is that whether or not you use online learning explicitly all learning today has a large digital component. Your pupils who find their way into universities in a few years time will find those institutions using online learning much more than today. Already a big annual survey of online learning in American colleges and universities concludes that 'with more than one-quarter of students taking a course online, distance education is clearly mainstream'. Of the 5.8 million American students studying online last year half were taking all their courses online.

Sadly, we don't gather data as systematically in Canada as they do in the US, but the best estimate is that there were 1.3 million online course registrations per semester across Canada in 2015. If that is true, online learning must be even more popular here than in the US. I'm sure you are preparing your pupils for that world.

### *Quality*

Finally, what about quality?

Earlier I talked about Christ's Hospital. I am amazed by the amount of scrutiny to which English boarding schools are subject from a variety of agencies.

I'm pleased to say that after its most recent inspection by the Independent Schools Inspectorate Christ's Hospital was rated excellent under all ten of the criteria used. This is a great credit to its Australian Head, John Franklin, and all the staff.

I don't know whether the evolution of quality assurance in higher education is relevant to your sector. The flavour of the month for quality measures in universities is now student learning outcomes, rather than the earlier foci on inputs and then on processes. I'd be interested to know whether you feel that trend. Perhaps we could come back to that in discussion. I think it's fair to say that universities - particularly the elite universities - are strongly resisting this trend towards measuring and comparing learning outcomes.

### **Conclusion**

I'll leave it there. I'm very conscious that my earlier comments about the achievement of deliberate diversity, both at Christ's Hospital and in the UWC system, are probably a long way from your own preoccupations but I hope that you found it interesting to hear how we are grappling with the challenge. I wish you well as you grapple with your challenges and I thank you for your attention.