
Methodological problems of historical and educational research on associations

Grzegorz Michalski

Introduction

In the recent history of education,¹ the mainstream of scientific research is clearly distinguished, the subject of which are associations operating in the educational reality. The research conducted on them significantly expands and deepens the knowledge about the past, given that in modern societies, the picture of education is crystallized not only in the circles of authorities but also in the activities of indirect structures, which get involved in the educational decision-making processes, create the environment of self-education, form exchanging views on topics related to issues of education, the place of major disputes and political pressures.

Associations as institutions of social life are a part of the state structure, since they operate within the limits of acts of law. For a historian of education, the process of becoming familiar with political solutions, and especially identifying the political properties of the state, defining the framework and conditions for social engagement and the development of trade union activity opens the opportunity for detailed investigation of the associations functioning in the past. Therefore, knowledge from other sources is a basic and indispensable condition for carrying out research on the associations operating in the area of education. It gives insight into the complexities of the historical period and political world conditions, enabling the understanding of the principles and mechanisms of the state and society, not only in a formal-legal dimension, but a real one as well. Commenting on this, Majorek states: “A historian of the latest history of educa-

I It covers the period of the last century, »i.e. time from the onset of radical tendencies in educational theory and practice, through their evolution stimulated by social and political changes in the first half of twentieth century, continuous reform movement of the second half of this century, to their present image.« See. Cz. Majorek (1995: 59).

tion, regardless of the object of his study, should try to place the considered facts and phenomena in their natural, that is social, political and intellectual context. It would be a cliché to claim that they do not occur spontaneously, or are not autonomous or separate from the accompanying phenomena of human life, especially the >collective man<” (Majorek, 1995: 60).

Historical and educational research

In the historical and educational research, as well as in any scientific study, the starting point should be an accurate outline of the area of interest. In practice, this means the settlement of the definition that defines the object of exploration. In conducting the research on the associations, the achievements of social pedagogy may prove useful. There is a parallel between the study of associations by a historian of education and their examination by a teacher, which is expressed in the fact that we are dealing with the same subject of interest. The difference is only in the location of exploration. The former relates to the past, the latter - to the present. By understanding the affinity of the two disciplines in the above way we can formulate a methodological principle, describing the mutual penetration of the theoretical approaches and considerations. There is no need for a historian of education to study the association to define this type of organization independently, since this category is an object of discourse and determination in social pedagogy. It is sufficient to study and assimilate the scientific achievements in this area and a special workshop presentation of its elements is for them to adopt the form of detailed instruction and guidance of what and to what extent will be subject to exploration.

Concept of association

The concept of association has been present in the writings of social pedagogues since the time of Helen Radlinski. It was only Kamiński who gave the theoretical meaning to this category. He believes that the association is an organized group striving to achieve common goals, which has its own organizational structure and members complying with fixed and internally sanctioned rules of conduct (Kamiński, 1959: 15). Developing this view, I. Lepalczyk states that a social organization has the characteristics of the association if it is “a formal group of people identified with its objectives and tasks, joined by a common bond of a subject nature whose content is the pursuit of a common civil task arising from the needs of micro-or macro social environment, current or anticipated needs. To carry out its statutory tasks, the associations undertake various operations /.../, which can be aimed at the members and people connected with the association”) (Lepalczyk, 1982: 343).

Studying the theories of association by A. Kaminski, we can find that in their scientific research, we should adopt the attitude, which will show the activities of the association not only in terms of the functions assumed, but also - or even primarily - in real functions. He considered the latter more important than the former, and described as the results arising from the statement of the goals and objectives and unpredictable results, not defined by these goals or intentions. The latter is a kind of by-product of the concentration on statutory activities, which in fact determines the degree of internal cohesion and vitality of the organization and, as a consequence, its external dynamics and strength in the transgression process of values and norms.

Indicated attributes of the association define and clearly specify the fields of historical and pedagogical research activities, but certainly do not exhaust them. Looking for data, one must have broadly outlined problematic guidelines at one's disposal, which will "screen" and target the source material to be studied. They seem indispensable, as they allow efficient and rapid selection of information, facilitate the distinction between what is useful and what is of little use or even useless. "For a historian of the recent history of education - writes Th. Majorek - it is important not only where you must perform a query, but above all, what information it seeks and what he wants to win. Hence, the awareness to run queries and gather information to clarify the rules seems to be a prerequisite for effectiveness of the research" (Majorek, 1995: 66).

In a forthcoming workshop of methodology studying the associations, the issue of the genesis should be adopted as the basic question. This means that before the organization started its activities, a lot of consecutive actions aiming at its inception were carried out. There were some reasons, someone conceived an idea, a group of people has been involved in the project and has taken appropriate steps to lead to the implementation of the plan. Analysing the reasons and mechanism behind the formation of the association allows its location in the broader historical context and answers the question about the meaning and intentions of those involved in the process of legalization of the association.

Another problem is the issue of organizational structure, the reproduction of which gives knowledge, whether the association was nationwide, or only local. If an organization has placed its activities over a vast area of the country, then it is necessary to draw up a list of field units. These findings depend on the territorial location necessary to study the source material.

The organizational structure of the association is directly related to the number of members, and sometimes it is necessary to inquire of their age, gender, social background or education. Attention should be paid here not only to the total number of affiliated members, but the percentage of active

members in relation to all members. It can be assumed that the activity of the association is unsatisfactory, if its membership is below 10 %, satisfactory - with a rate of 20-25 %, good - at 26-40 % and very good - at 41-55 % of active members. If this indicator shows a value of above 55 %, then there is a need for research to find out whether the organization has not adopted an exclusive character, which in relation to the statutory provisions changed its position and role in the educational reality (Kaminski, 1975: 168). On the other hand, it should also be noted that passive attitudes of members create dislike, criticism, contempt of the association and stagnation causing a decrease in the membership. Z. Narski says: "Passivity is / ... / contagious. Once it becomes widespread, the association is stifled, its action, in the sense of relying on rigid formulas, slowly leads to a fall" (Narski, 1997: 111). At this point, the investigator should also consider the possibility of resolving other issues: firstly, to what extent do members of the association satisfy their need for affiliation, since their activity substituted for traditional bond, so-called ties of choice, enable the satisfaction of similar needs and aspirations and develop common interests; secondly, to what extent and how far the association has facilitated the "mental and emotional barrier crossing separating the >small world< of a man from the >great world< of his nation and humankind" (Kaminski, 1975: 157), thus introducing members to values of broadly understood local and global culture; and thirdly whether and to what extent the association has allowed its members to express their views, experiences, skills, interests, preferences and tastes.

Leaders hold a separate place in the historical and pedagogical study of the association, regardless of the fact as to whether they have managed a head-office or exercised managerial responsibilities at lower levels of the organizational structure. In any case, it was them who planned tasks, made decisions, supervised and controlled their execution. It is personality, organizational skills and the manners of these people that affect the course and quality of daily work, including the possibility of success.

Determination of the programme range of the association is another area of interest of a historian of education. In this case the point is, on one hand, to identify superior, solid goals and objectives stored in the parent document, on the other hand - the schedules of work adopted in subsequent years. In addition, depending on the need to expand the organizational structure, it seems vital to gain the information about the intentions of the local units concerning the taking on of additional commitments.

Gaining knowledge about projects and plans of the association involves also studying its assumed function. The actual function is revealed by obtaining the data, which proves the real accomplishments of the organization. This is specifically to show the directions of its functioning. Finding

out what is the real activity and the resulting consequences, and then referencing those facts to what “was intended” not only gives a complete picture of the extent to which objectives have been achieved, but also the awareness of the results that have not been previously assumed or anticipated.

Equally important is the perception of any transformations, even small ones, in addition to mention the reforms carried out within the association. It is connected with the discovery of their causes (who was the inspiration? - government initiative or grassroots pressure? Why were they adopted?), and then the observation of the consequences of the changes.

In search of historical and educational data of the association, we cannot ignore the ideological and political character of the problems. The researcher should focus here on formal declarations contained in the basic documents of the organization or in the absence of such records, trace the personal relationships of members with political parties, statements of leaders and members related to specific situations occurring in the socio-political life in the country and world events. “The implementation of the ideals of the association - demonstrates Z. Narski - is essentially achieved by two methods. The first concerns the impact of ideology on the formation of the moral canons of associations, the programme of action, methods of conduct and organizational system. The second way to implement the idea directly affects a man, a team of people, relationship, and possibly society” (Narski, 1997: 17). It is important that this aspect is perceived throughout all the years of the functioning of the organization, because only then can it be determined whether in different periods of its existence there had not been a substantial derogation from the previously adopted ideological line.

The above-discussed issue is combined with the cooperation with other associations and societies. It usually happens that external contacts are conditioned by proximity of preferred values. In these circumstances, the main task will be to reconstruct the list of associations, societies, institutions or political parties with whom the association cooperated and to identify the principles, forms and scope of joint ventures.

Monographic approach to the organization of a social, educational and cultural nature requires investigation of its publishing works. This issue concerns finding all edited works published by the object, which is the subject of the study. So we take into consideration: books (by authors or collective members or other commissioned textbooks and series), magazines (central, regional, local), reporting and informational materials (reports, circulars, announcements, brochures) and any other publications, including those of an ephemeral character (e.g. leaflets, advertisements).

Caring for the preparation of a full, extensive study of the history of the association, we cannot fail to record its stoppages. The analysis of this

question will determine whether they were due to: internal factors (e.g. a lack of activity or leadership skills, conflicts, limited funds arising from members' tardiness in paying membership fees) or external factors (e.g. being suspended by the state, stopping the funding of entities which were previously obliged to do this or diverse, hostile actions taken by other organizations of a similar scope of services).

Housing and material base of the association is also independent of those already mentioned, an important direction of research exploration. It testifies to the wealth, strength, attractiveness, opportunities for development and implementation of daily tasks. It consists of the property owned or leased buildings and accommodation headquarters of the central authorities and local associations, and other buildings with facilities and equipment that are available to members or used for the benefit of the wider community. They can also include building land or recreational areas purchased or received as a gift, sums invested in various enterprise, the amounts kept in bank accounts and others.

As presented above, the fields of research interests of the historian of education preparing a description of a chosen association also shows the ranges of source exploration. They must first make a discernment which materials should be reached, and then acquire the orientation of their location.

It seems that in every case, regardless of the historical period in which the association functioned, the expected (because the results of the queries are unpredictable) and main source base should consist of: the source from archives, printed sources and, possibly primary sources.²

Sources

Archival sources. An important issue is to determine whether and where to find materials of the past activities of the associations, both in relation to the work carried out by the panel, as well as boards of local structures. A good state of relatively full collection after authorities finished their function enables us to have an insight into the whole undertaken activity. Protocols of general meetings, board meetings, annual and term reports, correspondence, messages, issued circulars and other documents provide a deep source of information which usually can determine the origin, trace the subsequent board room configurations, changes in the number of members, internal organization, planned and executed tasks, contacts with the wider environment, encountered difficulties, carried out changes, accumulated properties etc. If these materials exist, they are stored in the archives of state and local government. In a situation where an association which is subject to

2 One of the many classifications of sources was adopted, recognizing that it is the most readable explanation of the problem undertaken.

examination, has had a longer or shorter past activity and continues to function, as a rule, it keeps the documentation in its own registry.

In the case of national associations, after an earlier diagnosis of the geographical distribution of individuals, it is necessary to make queries in the state archives or in some cases abroad where there are documents originating from the areas of individual agencies. Collected source will help to answer questions related to the execution of tasks outlined by successive congresses or central administration, as well as those undertaken by the association itself. They will contribute to restoring the composition of the authorities of lower instances, the number of affiliated people, as well as the range of involvement in local problem solving and initiating changes relevant to the whole organization. Here are the basic materials: minutes of meetings, lists of members, records of membership fees, their orders aimed at the members, reported documentation, correspondence with headquarters and other organizations, institutions or authorities.

It is worth emphasizing that announcements, circulars and other letters preserved in the country archives which were sent by the central administration to their lower level structures can sometimes be the only remnants of the documents, if all the stored collection is destroyed or goes missing.

In the event of existence of only residual sources after the organization in the archives, any attempts to reach the individuals, if there are suspicions that they may be in possession of some materials, should not be withheld. Finding former activists or their families who are alive (siblings, sons, daughters, grandchildren) may result in gaining access, if not to the large collection then at least to individual documents, and even manuscripts or typescripts of written memoirs, diaries or logs.

Printed sources. Among them the following can be identified: 1) publications of the association, 2) activists', members' or other people's publications of personal nature staying in contact with the association, 3) supplementary sources.

The first source group is made up of all printed publications, which were produced by the association. It is based on the statutes, regulations and other documents defining its objectives, tasks, forms of organization and functioning. Equally important are pamphlets, books, prepared with a view to presenting, for example, ideology, directions of activity, relation to the affairs of educational, cultural or social life and promoting the association in the wider environment.

Substantial source material issued by the association constitutes periodicals, especially a printed magazine regularly acting as a body press. It often contains valuable information about: everyday activity of the association, emerging problems, extraordinary events in the form of accounts of the

conventions, occasional celebrations, organized conferences and meetings, summary reports of activities undertaken in a given year. The sections devoted to organizational matters contain news concerning the action of central administration and activities of a local unit. Broad knowledge can be acquired of the latter, if they could lead to the establishment of their own bodies. This might also provide some information about the general nature of the organization, but with a significant predominance of reported issues relevant to local community members. There has also been other specialist journal, issued by some associations, which published articles, methodological materials, polemics on topics directly related to their statutory activities.

An extremely rich source for the study of the history of the association is the annual report or reports prepared every few years presenting their activities, issued in special, separate publications. They comprehensively and thoroughly present all the undertaken projects and achieved results. Their additional advantage is in presenting many figures that give a full picture of the overall functioning of the organization and carried out activities.

The association may have published various brochures, convention diaries, one-day leaflets, folders, and other occasional editions commemorating and documenting their current activities.

The second group includes printed publications of activists, members of the association and those who were more or less related with the association. It is crucial to mention such publications as: autobiographies, memories, diaries, and journals. We must also point out that it is difficult to find in them a systematically presented history of an organization, but selectively preserved, by the author or author-activist-members, events, situations and episodes may be useful in resolving ambiguities arising, for instance, in the absence of other data. Subsequently, information coming only from people who collaborate or observe from the outside the development of the association may become opinion-forming factors.

In addition, this type of work is extremely useful for a historian of education, since it introduces them to the atmosphere of the times in which the organization functioned, as well as the climate that prevailed in the organization.

The last of the proposed group of printed sources can be described as complementary material base. It includes articles of pedagogical journals, teacher organizations, educational, cultural, social, religious, women's publications (depending on the specificity of the association), selected press of local, regional and national range, official publications (e.g. laws, implementing regulations, curricula) and books in the field of science education from the historical period or periods of activity of the association.

These items, along with the knowledge gained from other sources contained in the studies involving issues of educational policy, social, cultural,

educational concepts, and other carefully selected works, will enable the reconstruction of the political and socio-educational situation in which the organization, which is the subject of research is to function.

Primary sources. This kind of source is the result of preparing surveys, conducting interviews and collecting the accounts from the people, who have had an impact on the formation of the facts, watched their development or knew people who were direct creators of the past reality. Clearly advocating this way to obtain research material, Cz. Majorek states:

“In contrast to Western European and American learned societies, where sociological methods and techniques in historical and educational studies enjoy considerable popularity, Polish historians of recent history of education rarely resort to such tools, which inevitably impoverish the knowledge of modern education. Moreover, it distances pedagogy from the history of education, seriously inhibiting the integration processes within the education of science” (Majorek, 1995: 66–67).

The use of surveys is recommended when the association has ceased its activity, and the time difference since that event prevents contact with its former members or when the association, despite its long history, is still running, which enables the obtaining of information from its current members.

Conducting interviews with people formally associated in the past or at present with the association may take the form of an ethnographic interview, resembling in form a friendly chat. K. Konarzewski explains: “The peculiarity of the ethnographic interview is that the researcher is more interested in the knowledge of the interlocutor than the interlocutor himself. The interlocutor is not the subject of study, but more an informer or an expert: he speaks about locations (ethnic groups, subcultures, organizations, etc.) and not about himself” (Konarzewski, 2000: 123).

Data obtained by the methods and techniques of sociological knowledge not only expands the knowledge of the association, but also lends credence to the reconstruction of the facts by verifying them with the new material gained through queries.

Discussing the question of evaluation of source in the historical and educational research on the association, we cannot ignore the necessity to make criticism of the collected data. Without developing this issue further, we have to mention, however, the difficulties that a researcher may face while classifying the collected material as valuable for further use.

As a result of external criticism, an answer to the question whether the materials containing the knowledge of the association are authentic, or whether they are certainly the products of this organization, should not cause major problems. However, problems may arise, for example, when archival documents include pamphlets, proclamations and other printed forms that

do not have the mark of the organization. There is a need then for multilateral analysis with other sources (comparisons, record sheets, not only external but also concerning the content) that will lead to a final evaluation.

A much more complicated aspect seems to be internal criticism. For instance, attention should be paid to the reports of local units sent to central authorities (whether they contain accurate information). Published comprehensive annual reports on the activities of the association should be treated similarly. In Addition special caution is recommended in the adoption of the data when we are aware of the simultaneous existence of other (competing) organizations and associations, which undertook comparable activities of similar nature.

In used autobiographies, memories reconstructed after years are not free of errors, distortions and illusions. The memory gaps are often filled with fantasy, or subconsciously with stories of third parties. It must be remembered that some confusion and ignorance of certain events may be caused by the sense of shame or the need to maintain confidentiality to family and friends, whose lives were intertwined with the life of the author's own biography. Contrary to autobiographies, diaries are kept daily, thus avoiding reproach related to the unreliability of human memory. They contain descriptions of momentary feelings accompanying the events of the near past. They often contain some contradictions arising from the fleeting and superficial character of recorded moods. It should be expected that the decision to publish them sometimes lead the author to use private censorship (Michalski, 2004: 178–179; Podgórska, 2004: 183–191).

The primary source completed with the use of questionnaires, conducted interviews and conversations can carry the incorrect information, resulting from the passage of time, such as inaccuracy of provided dates, mixing events and people involved in them, and also subjective and emotional attitude to those events. We should also consider what type of relationship connects a person recollecting the past with individual activists and members of the association.

In conclusion

We ought to formulate one more general comment relating to how to use sources in reconstructing the history of the association, which remains in direct relationship with the author's study. It is extremely important for the objectivity of the research that the author's beliefs and his personal relationship with the past and the contemporary events of political and social life do not influence the shape of the prepared synthesis. It is vital that the author does not advance predetermined theses, and then adapt them to the source material, omitting inconvenient data, which "breaks" a previously assumed vision of the association.

References

- Kaminski, A. (1959). *Prehistoria polskich związków młodzieży* (Prehistory of Polish youth associations), Warsaw, 15.
- Kaminski, A. (1975). *Funkcje pedagogiki społecznej* (The functions of social pedagogy), Warsaw, 157, 168.
- Konarzewski, K. (2000). *Jak uprawiać badania oświatowe. Metodologia praktyczna* (How to cultivate educational research. Practical Methodology), Warsaw, 123.
- Lepalczyk, I. (1982). Rola stowarzyszeń społecznych w edukacji ustawicznej społeczeństwa (The role of social associations in the lifelong education of society), *Chowanna*, 4, 343.
- Majorek, C. (1995). Warsztat badawczy historyka wychowania dziejów najnowszych (Research Workshop of the historian of education of recent history) In: Jamrożek, W. (ed.), *Stan i perspektywy historii wychowania* (*Status and prospects of the history of education*), Poznań, 59, 66–67.
- Michalski, G. (2004). Źródła do badań biograficznych w historii wychowania (Sources for biographical research in the history of education). In: Jałmużna, T., Michalska, I. and Michalski, G. (eds.), *Konteksty i metody w badaniach historyczno-pedagogicznych* (Contexts and methods in the historical and educational research), Kraków, 178–179.
- Narski, Z. (1997). *Zarys wiedzy o stowarzyszeniach* (Outline of knowledge of associations), Toruń, 17, 111.
- Podgórska, E. (2004). Autobiografia jako źródło w historii wychowania (Autobiography as a source in the history of education), In: Jałmużna, T., Michalska, I. and Michalski, G. (eds.), *Konteksty i metody w badaniach historyczno-pedagogicznych* (Contexts and methods in the historical and educational research), Kraków, 183–191.

(samo)refleksijo, kakšne so »tihan« kulturne predpostavke in kakšna so oblastna razmerja, ki sooblikujejo naš pogled v vzgoji in izobraževanju.

Ključne besede: spol, kurikulum, feministična epistemologija, umeščene vednosti

Grzegorz Michalski

Methodological problems of historical and educational research on associations

The concept of association has been present in the writings of social pedagogues since the time of Helen Radlinski. It was only Aleksander Kamiński who gave theoretical meaning to this category. He believes that the association is an organized group striving to achieve common goals, which has its own organizational structure and members complying with fixed and internally sanctioned rules of conduct. In the search for historical and educational data of the association, the ideological and political character of the problems cannot be ignored. Discussing the question of the evaluation of source quest in the historical and educational research on associations, the necessity to make criticism of the collected data cannot be ignored. Without developing this issue further, however, the difficulties that a researcher may face while classifying the collected material as valuable for further use have to be mentioned.

Key words: methodology, association, research, criticism, data

Grzegorz Michalski

Metodološke težave zgodovinskih in pedagoških raziskav o društvih

Koncept združevanja je bil prisoten v spisih socialnih pedagogov vse od časov Helene Radlinske. Šele Aleksander Kamiński pa je tej kategoriji pridal teoretski pomen. Meni namreč, da je združenje organizirana skupina, ki si prizadeva za doseganje skupnih ciljev, ki ima svojo organizacijsko strukturo in člane, ki se držijo trdnih in mednarodno sankcioniranih pravil obnašanja in ravnanja. Pri iskanju zgodovinskih in izobraževalnih podatkov o združenjih ne moremo prezreti ideološkega in političnega značaja problemov. Pri razpravljanju o vprašanju evalvacije pri iskanju virov v zgodovinskih in vzgojnoizobraževalnih raziskovanjih združenj ne moremo opustiti potrebne kritičnosti do zbranih podatkov. Ne da bi ta vprašanja še naprej razvijali, pa moramo omeniti težave, ki jim je raziskovalec lahko izpostavljen, ko razvršča zbrano gradivo kot dragoceno za nadaljnjo uporabo.

Ključne besede: metodologija, združenje, raziskovanje, kritičnost, podatki