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Assessing the Zambian technical and vocational training

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ASSESSING THE ZAMBIAN TECHNICAL AND VOCATIONAL TRAINING

A Project

Presented to the

Faculty of

California State University,

San Bernardino

In Partial Fulfillment

of the Requirements for the Degree

Master of Arts

in

Education: Vocational

---

by

Mambwe Luka Mbewe

March 1995

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December 1994

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ABSTRACT

This project is an assessment of technical and vocational training in Zambia. It was undertaken because of the belief that a strong and quality technical and vocational education system is vital for economic recovery in Zambia and the belief that each individual has value and has the potential to constructively contribute to the progress of the nation. Education should accord each individual the opportunity to develop skills to an appreciable level of excellence. The education system of a nation should provide opportunities which will stimulate each individual's interest, abilities and desires to acquire knowledge, skills and intellectual excellence.

The people of Zambia are aware of the importance of technical and vocational education. They understand that technical and vocational education is the backbone of a strong economy. This study was developed to assess the extent to which technical and vocational training is preparing the workforce in Zambia, and how well prepared the workforce is to adapt to technological changes.

Qualitative information was gathered. Telephone and face to face interviews were conducted. Information was obtained from Zambian respondents in Zambia, Washington D.C., Los Angeles, Orange, and San Bernardino Counties.

ACKNOWLEDGMENTS

TABLE OF CONTENTS

CHAPTER I

INTRODUCTION

Background

In May 1974, the Ministry of Education set up a Steering Committee to evaluate the Zambian education system. The comprehensive evaluation was completed in October 1977. The Steering Committee (1977) expressed that the

> ...government and people of Zambia have repeatedly
> stressed the need to create a system of education which is
> properly attuned to, and more fully meets, the needs and
> aspirations of Zambians and which functions as a powerful
> instrument for our society's progress in the direction we
> have chosen for our nation (p. v).

In order for Zambia to be wholly independent, it needs to be politically

independent and economically independent. Zambians understand that to be

economically sound, Zambia needs a strong workforce so as to be able to

compete on the global market. Research indicates that a high skilled manpower

is created from a high quality educational system. The Steering Committee

(1977) prophetically stated:

> Educational institutions are, by nature, centers of learning.
> All the activities they undertake should be related to the
> overall aim of education, which is to enable every citizen to
> develop his capacities fully for his own good and the benefit
> of society (p. 44).

Zambia does realize its inadequacies. The Steering Committee (1977)

acknowledged the lack of total sufficiency when it pointed out that:

> For some time to come, Zambia may not have all the
> expertise needed to produce certain educational materials

1

and equipment, nor would she be in a position to have the technical capacity to produce them or the opportunity to lower the unit cost and produce them cheaply. In some cases, environmental and climatic factors may not make it possible for certain material and equipment to be obtained or produced locally. The areas in which materials and equipment from abroad would continue to be relevant include: Science, Mathematics, Agriculture, Medicine, and certain other professional and technical fields (p. 35).

There has been, for some time, an awareness for Zambia's need of a technological revolution in order to bring about self-reliance, higher productivity, efficient use of natural resources, and thereby stimulate development in both urban and rural areas. President Kaunda, cautioned the nation when he wrote, on November 6, 1969, in a foreword to the "Statement of Policy and Intent" on technical and vocational training that in an age of technological achievement, the nation must prepare to train its people, not only to use, but to maintain and create the technical apparatus which increasingly supports the modern community. In the foreword, President Kaunda also warned that if Zambia relies entirely upon foreign expertise, it will run the risk of becoming the slave of technology rather than its master. Following this advice should enable Zambia to be competitive on the world market.

In 1973, Zambia became a one-party state. In March 1991, Zambia organized a National Conference on "Education For All" Participants included politicians, teachers, labor union leaders, church leaders and foreign dignitaries. As a result of the National Conference, a Review Team was appointed to

examine the recommendations and feasibility for their implementation.

According to the Review Team (1992), the introduction of the one-party rule

brought, "...huge bureaucratic party machinery wholly financed by the state.

Indeed, money allocated to education and health by Parliament was largely

diverted to Party functions" (p. i). As a result, educational services deteriorated.

Zambia returned to plural politics in 1992. The new government is ushering the

nation into, "...a new kind of society inspired by democratic values characterized

by fundamental respect for dignity and rights of all human persons" Review

Team, 1992, p.6). According to the Review Team (1992):

> The modern technological and economic character of this
> emerging society is such that individuals within it may not
> have difficulty in acquiring the understanding, developing
> the skills, and forming the attitudes which will enable them to
> function in it with satisfaction to themselves (p. 6).

High quality education and training is inevitable to prepare the workforce.

Vocational education is the backbone of a developing nation. The Review Team

(1992) stated that:

> It is the role of education, and of schools as the principal
> institutionalized form of educational provision, to prepare the
> individual to live in this society, to develop into a new type of
> person needed to meet the challenges of life in Zambia at
> the beginning of the twenty-first century. The educational
> system must respond, therefore, to the needs both of the
> individual and of society. Hence its essential objective in
> Zambia is to foster the fullest possible development of each
> individual for his or her personal fulfillment and as a
> significant member of the Zambian community (p.6).

In the past twenty years, commissions such as Working Group in June

1987, and Zambia National Task Force in 1990 were set up to analyze the

educational system in Zambia. Three major documents have set forth

comprehensive strategies for the development of the education sector. In 1977,

the government published the document Educational Reform Proposals and

Recommendations (ERPR) which outlined government policies and goals for the

quantitative and qualitative development to education sector. According to the

Review Team (1992), "This document still concerns school development,

although in a number of instances there have been significant departures from

the policies and strategies that it embodied" (p. 2).

Following some years of fruitless efforts to implement the contents of

ERPR, the government assigned the University of Zambia to develop a detailed

and comprehensive plan for implementing specific aspects of the ERPR. The

Review Team (1992) stated that, "This study, which was financed by the World

Bank's Fifth Project, led to the Educational Reform Implementation Report" (p.

2). The Review Team (1992) further informed that:

> The ERIP report made a thorough analysis of the issues
> affecting primary and secondary school provision and
> expressed a number of the original reform proposals in
> operational form, with targets and costs spelled out on an
> annual basis and with concrete proposals for meeting the
> costs (p. 2).

The Review Team (1992) also made it clear that:

> Social, political, demographic and economic developments
> in Zambia since 1986, and the educational insights
> disseminated worldwide by the 1990 World Conference on
> Education For All, bear out the continuing relevance of the

ERIP report's contents to the development of the school
sector today (p. 1).

The Review Team's document was published in May, 1992. The report

proposed a number of strategies for articulated development of school education

and also made far-reaching recommendations, some which impinge on the

educational policy of the government.

Zambia's political position has been what may be referred to as "non-

aligned." Zambia has tended to lean on socialistic ideologies. According to

Lungu (1987), Zambia belonged to the camp of "Socialist" countries. Being a

non-aligned country, it obtained technical assistance and traded with the

Communist, Socialist, and Capitalist countries. According to Dr. Davy Nyirenda

(Personal Communication, August 10, 1994) Zambia may be regarded as a

political prostitute. There is absolute nothing wrong with dealing with a variety of

nations. However, in Zambia most of the technological decisions were greatly

influenced by the political agenda (Dr. D. Nyirenda, Personal Communication,

August 10, 1994). In most cases, major technological decisions were made

without engineering consultation (Dr. D. Nyirenda, Personal Communication,

August 10, 1994). For instance, the original railroad that runs through the

major cities was built to the British specifications. This rail line links Zambia with

Zaire and South Africa. As such, it is a good access to the sea. However,

Zambia still wanted to have more access to the sea. To this end, the Tan-Zam

Railway was constructed with Chinese assistance providing a rail-link with the

port of Dares-Salaam on the East coast (Bliss & Rigg, 1984, p xii). This rail-line

was built to the Chinese specifications which were totally different from the

British specifications. As such the two rail-lines could not be physically joined.

The locomotives and the wagons were very different.

Goods have to be off-loaded from the wagons of one rail-line and

delivered by road to the wagons of the other rail-line. This is very inefficient and

causes delays in delivery. The locomotives, wagons, and support equipment are

technically incompatible. This creates a maintenance nightmare.

Zambia's decision to seek Chinese assistance was politically influenced.

Bliss and Riggs (1984) stated that, "Since independence, efforts have been

made to lessen her dependence on Southern route through South Africa for the

import and export of goods and materials" (p. xii). The politicians should have

obtained technical advice before seeking Chinese assistance.

Gordenker (1976) explained that:

> ...the effective decision makers on multilateral aid within the
> national government remained a very small group,
> sometimes only three or four officials and politicians might
> be involved, sometimes, perhaps as many as five times that
> number. Of the decision-makers involved in multilateral
> assistance projects, only a small proportion ever had
> specialized experience and duties that were clearly relevant
> (p. 169).

The President of the Republic of Zambia is responsible for appointing

Managing Directors of major corporations. Most of these appointed Managing

Directors have no technical knowledge of the corporations they are appointed to

manage (Dr. D. Nyirenda, Personal Communication, August 10, 1994). Dr. D.

Nyirenda (Personal Communication, August 10, 1994) also mentioned that the

President has a tendency to shuffle these managers from one organization to

another. For instance, one director has been in charge of Zambia Airways,

Zambia State Insurance, and African Farmer's Equipment to mention but a few.

The number of people involved in effective decision-making is remarkably small

and yet always changing (Gordenker, 1976, p. 168).

Government officials and Ministers are also moved from one ministry to

another. It is common for one minister to be moved from the Ministry of

Education to Health, then to Finance. Describing the shuffling of high ranking

government officials, Gordenker (1976) explained that, "This situation begins on

the national government side, where the chronic shortage of trained, energetic

officials is the primary reason for seeking technical assistance" (p. 169).

Gordenker further stated,

> The national governments sometimes shifted personnel with
> startling rapidity. This was essentially true within the senior
> ranks in Zambia, where the government strove to give its
> meager high-level staff broad experience and little chance to
> acquire vested interests and where opportunities for
> promotion were abundantly available (p. 172).

These frequent reshuffles were rather counterproductive. In some cases,

national projects turned into white elephants because, if the decision-makers

were regarded as cogs in a machine, each of them tended to be a major gear

whose movements affected the entire operation. Furthermore, they had marked

individual characteristics and came from diverse social and educational

backgrounds, so that it was difficult to substitute them one for the other.

Replacement of these high-ranking officials had significant impact on the

projects or operations of an organization. In fact, Gordenker emphasized that:

> The general impression left by this situation of free-wheeling
> tendencies, unsettled administrative doctrine, the small
> number of decision-makers with great importance of
> personal characteristics, and rapid turnover of personnel,
> was one of constant reconstruction of lines of personal and
> organizational contact. The situation was so fluid that
> projects lost their anchors and drifted away into indifference
> and abandonment (p. 172).

The Zambian government and parastatal organizations offer scholarships

to study abroad. Also, the government accepts scholarships or bursaries offered

by friendly countries and international organizations (Steering Committee, 1977,

p. 78). Technological clashes were very common in a lot of organizations where

the personnel were prepared in different countries. These clashes led to a

number of engineers and technicians resigning and seeking opportunities in

other countries. This "brain drain" caused a severe set-back for Zambia. Having

Zambians train in various countries was a sound political foreign affairs policy,

but it was a technical nightmare. The Steering Committee (1977) advised that:

> There is, however need for control and for establishing
> proper machinery to ensure that individuals, as well, as the
> Nation, derive maximum benefit from studies abroad.
> Before approval is given, the nature of the proposed study
> or training, the relevance and educational value, the content
> of the program to be followed... etc. should be scrutinized (p.
> 79).

Statement of the Problem

Since 1975 when copper prices dropped tremendously, Zambia's economy declined sharply. Zambia's hope lies in minimizing its dependence on copper. Thus, Zambia will have to diversify into manufacturing and developing its agricultural potential.

Zambia needs to develop production techniques which will enable it to be competitive in the global market. The United States, European Economic Community (ECC), and the pacific Rim countries are formidable competitors. China is emerging as an economic power to reckon with. The Zambian government has taken initiatives by instituting government policies that will stimulate economic growth. In his budget speech to the National Assembly, Minister of Finance R. Penza (Jan. 31, 1994) stated that:

> ...we are only part of the way toward creating a dynamic,
> competitive, market system which will support rising
> standards of living for all Zambians. Many challenges
> remain. Our debt is too heavy; our savings and investments
> are too low; our attitudes towards work are poor; and our
> productivity has to increase (p. 19).

In order to maintain a high standard of living for the workforce, Zambian industries ought to have a high dollar output per capita employee. Zambia, therefore, should implement highly technologically advanced equipment and machinery in production processes. Thus the workforce has to be well prepared to adapt to technological changes. "Skill levels will increase with both content

and complexity because of technological change" (Kutsher, Johnson, & Packer, 1987).

The Movement for Multiparty Democracy (MMD) Commission (1993) pointed out that:

> Zambia's heavy dependence on external assistance will remain. The government is making every effort to adopt policies which will increase or at least maintain the net inflow of resources. It accepts the fact that the continued flow of both private and donor support depends on economic performance (p. 5).

In order for the private investors and foreign donors to have confidence in the economy, Zambia needs to demonstrate commitment to economic growth. A major contributing factor to economic growth is a highly skilled workforce. A highly skilled workforce will improve productivity and efficiency. Minister of Finance R. Penza (Jan. 31, 1994) emphasized that "economic growth results from two factors: Increases in supply of productive resources and improvement in the efficiency with which those resources are used" (p. 8). This project was to determine the effectiveness of vocational/technical education. This may identify or reveal areas that need improvement so that graduates can meet the challenges of business and industry.

According to the Review Team (1992), "very few local resources have been available in recent years for supplying schools with books and materials. The result is that there has been a reported decline in the level of student

achievement" (p. IV). There is need for research to provide information about

the performance of the vocational/technical education. The government may

take efforts to improve quality to vocational/technical education. If Zambia is to

attract foreign investors it may have to indicate to the investors that it has an

adequate supply of well trained workers. The Minister of Finance R. Penza

(Jan. 31, 1994) informed the nation that, "the private sector, which has the

capacity to expand its investment, is not fully convinced that the Government's

commitment to economic reform is unshakable" (p. 9).

Nature of the Problem

Zambia primarily depends on the mining industry for its foreign exchange

earnings. Efforts are being made to broaden the economy by restructuring other

sectors such as agriculture, tourism, and manufacturing. Baird (1993) indicated

that:

> With copper production declining as ore resources are
> slowly depleted, Zambia now faces the challenge of
> containing inflation and of reducing its dependence on a
> single export commodity by developing its small
> manufacturing sector and its agricultural potential (p. 14).

In order to revamp its economy, a well prepared workforce will be vital.

According to Dr. D. Nyirenda (Personal Communication, August 10, 1994,

technological advancements have penetrated all sectors of business and

industry. Thus the Zambian workforce should be very conversant and able to

11

adapt to the rapid technological changes if Zambia is to be competitive in the global market. The Steering Committee (1977) stressed that, "...technical education and vocational training deserve the highest priority and that these are more meaningful and permanent form of vocational development" (p. 49). The Steering Committee also emphasized the importance of technology when it stated that, "...the objective in technical education in Zambia is to train Zambians to meet the needs and requirements of industry for skilled manpower and to facilitate more meaningful Zambianization in critical areas of technology and economic activities" (p. 49).

The educational system in particular the vocational/technical programs have a great challenge to fulfill the demands of the present and the 21st century workforce. Zambia recognizes that, "Unless the people have been given the means, through education, to achieve self-fulfillment and understand national and world affairs, their effective participation in, contribution to, national development is seriously impeded" (Steering Committee, 1977, p. 55).

In his budget address to the National Assembly, the Minister of Finance R. Penza (Jan. 31, 1994) warned that:

> Parastatal performance is poor; many work practices are counter-productive; key resources have been misallocated due to distorted prices; and the deteriorating infrastructure increases the operating costs of business and government alike. The result is that, relative to international standards, our production methods are inefficient and our overall productivity is low (p.9).

Technical matters were decided by politicians who had no technical

knowledge. The critical technical decisions were made with no engineering

consultation. Gordenker (1976) stated the issue very well when he mentioned

that:

> The observed behavior of national officials and politicians
> was directed primarily toward obtaining multilateral aid for
> defined projects. Whether the ideas for such projects
> originated in their own ranks or were brought to them from
> outside, often through international officials, made little
> difference in their actions. They sought support for what
> they understood as economic development in national terms
> (p. 173).

There is no doubt that the political machinery supplies the money for

major projects. However, poor decisions can be costly in the long run because

the cost of maintaining such projects may be exorbitant. For instance, the

Zambian Air Force has fighter planes from the former Yugoslavia, Italy, and

former USSR (Dr. D. Nyirenda, Personal Communication, August 10, 1994).

The Zambian technicians were taught to read and write the technical manuals in

Yugoslav, Italian or Russian and the personnel can only maintain the aircraft

they were trained on because of language barriers (Dr. D. Nyirenda, Personal

Communication, August 10, 1994). Dr. D. Nyirenda (Personal Communication,

August 10, 1994) revealed that the parts for the fighter planes are not

interchangeable, therefore, the Zambian Air Force procures parts from different

nations in order to maintain its fleet.

Significance of the Problem

The high cost of living and fast changing technology is creating a large gap between education advancement and manpower preparation or training needs (Ali, Commander, Fuller, Huerta, Mbewe, and McDonald, 1993). Developed nations as well as developing nations need to create a workforce that can meet the demands of a high-performance economy that will be competitive in the global market. This "...requires workers to maintain up-to-date knowledge and competence in the present jobs while also having the capacity to broaden their qualifications for jobs in diverse career fields" (Sheckley, Lamdin, & Keeton, 1992).

The United States is one of the major donors to Zambia. Today, "...much of the change in the U.S. world economic position is the result of technological advances in communications and transportation" (Vocational Education Resource System [VERS], 1989). Zambia must, therefore, prepare its workforce to adapt to technological changes so the workforce can fully utilize equipment or machinery that will be donated in the form of aid. The VERS (1989) noted that:

> A primary difference in the nature of work in an industrial society is that physical strength is a major asset to work. In an information society, intellectual abilities are the primary asset for work. Taking a workforce steeped in the industrial age, traditions of standardization, centralization and top-down authority and giving them skills for flexible, autonomous, creative and participative decision making is a major challenge (p. 10).

14

In addition to being able to utilize the donated technology, Zambia must

prepare its workforce to meet the operation of the technologically advanced

investors it has invited to invest in Zambia. Minister of Commerce, Trade and

Industry A. Hambayi (1993) assured investors that,

> In the past we as a country have talked a great deal about
> the attraction of investment, but we did not provide the
> required environment and proper institutional framework...
> the investment center will be an effective tool in attracting
> and supporting foreign as well as local investment (p. 18).

The lack of a well planned economic development may bankrupt the

nation. The cost of maintaining poorly planned projects is a financial drain. A

well prepared workforce is the springboard for national development. A well

prepared workforce is bound to meet the challenges of the fast advancing

technology.

Purpose of the Study

The purpose of this study was to determine the effectiveness of

vocational/technical education in preparing the Zambian workforce to adapt to

rapid technological changes, and thereby be competitive on the global market.

Overview of Research Questions

The objective of the research was to determine the extent to which the

Zambian workforce was being prepared to compete in a global economy.

Limitations

Most of the government policies regarding vocational education are still in the preliminary stages and are therefore very confidential. Critical information was not accessible. The study was also limited by constraints of time and resources. Vital information was obtained from Zambia and the Embassy in Washington, D.C. Therefore, the turn around time was very critical.

The sample population was limited to Zambians residing in Los Angeles, Orange, and San Bernardino counties, California. Purposeful sampling was used because of the small samples. Schumacher and McMillan (1993) agree that, "Purposeful sampling is done to increase the utility of information obtained from small samples" (p. 378).

The Zambian sample was comprised of individuals who were well acquainted with the Zambian educational system. Schumacher and McMillan (1993) stated that, "...these samples are chosen because they are likely to be knowledgeable and informative about the phenomena the researcher is investigating" (p. 378). Finding appropriate times and places to conduct the interviews was another constraint.

Definitions of Terms

For the purpose of this study, the following terms will be applied:

Managing Director - Chief Executive Officer of a corporation.

Ministry - an organization or branch of the government headed by a

cabinet minister appointed by the President of the country.

Non aligned - not allied with one ideology.

One party state - a country with one political party.

Parliament - the highest legislative body of the country comprising mostly

of the elected officials.

Primary School - first phase of the education cycle, consisting of grades 1

through 7 and it takes seven years.

Reshuffle - moving high ranking personnel from one organization to

another.

Secondary School - second phase of the education cycle, consisting of

grades 8 through 12.

Zambianization - placing Zambian citizens in key positions in both public

and private sectors.

CHAPTER II

REVIEW OF RELATED LITERATURE

Geographical Overview

Zambia is located in the central part of Africa. Zambia is a landlocked country that is bordered by eight countries, namely Zimbabwe, Zaire, Angola, Mozambique, Malawi, Botswana, Namimbia and Tanzania. A large part of the country consists of high plateau which ranges in "elevation from 1000 to 1500 meters, intersected by valleys of the Zambezi river and its tributaries" (Samyal, Case, Dow, and Jackman, 1976, p. 29). The natural vegetation is mainly savanna. The country is very rich in mineral resources such as copper, lead, zinc, manganese, and cobalt.

Being a landlocked country, Zambia's economic development depends on its access to the sea. Hence its economic growth will be greatly affected by the political stability of the neighboring countries. The fact that Zambia is a landlocked territory, far from any coast, has meant that it has always been on the periphery of international and intercontinental trade and prone to domination by traders with greater access to the world's markets (Roberts, 1976, p. XIV).

The Zambian Peoples

The history of Zambia's indigenous peoples is mainly preserved in

tribal stories, cultural traditions, languages, and social and political institutions. Roberts (1976) states, "In general, these stories contain a large kernel of truth...their main purpose is not to record what really happened, but rather to explain and justify the customs and institutions of the present day" (p. 63). The traditions of the tribe tend to bond tribesmen with a sense of community and political identity. In most cases tribal stories are supported by archeological evidence.

There are at least seventy-two tribes in Zambia. The African languages can be divided into nine main groups. Each of these groups produced additional dialects. In business and industry, English has been adopted as the official language for communication.

It should be pointed out that each of the Zambian tribes is unique in the sense that there is great diversity in terms of political, social, religious, and economic organizations. When Zambia attained independence in 1964, one of its greatest challenges was to wipe out tribalism and promote unity amongst the people. "Even if the origins of the present population can be traced back a thousand years or more, it remains very difficult to see their history as a coherent whole. The political unification of the country is not only an extremely recent event, it cut short the growth of quite different patterns of domination" (Roberts, 1976).

From time immemorial, Zambians have been engaged in commerce and

trade. Roberts (1976) stresses that:

> ...I have tried to stress the broad patterns of change in
> production and trade which underlie the confusing variety of
> pre-colonial groupings. For this the archeological evidence
> provides an invaluable foundation; in particular it enables us
> to see how in early times trade in copper and other metals
> has played a part in linking different communities. The
> modern copper mines, of course, are based on a wholly
> alien technology; in this sense their development constitutes
> a completely new chapter in Zambia's history. But this
> industry posed fundamental economic problems which are
> by no means new. In earlier days the main exports from
> Zambia to the outside world were ivory and slaves rather
> than copper, but such commerce raised many of the
> questions that worry Zambia today: The economic and
> political role of foreigners; the effects of external trade on
> local production and also on moral values; the use of
> manpower; the consequences of dependence on a single
> commodity for export, or on a single trade route (p. XIV).

As stated above, Zambia has a wide variety of peoples and tribes whose

languages and customs are quite different. "While this contributes to the

richness and variety of its cultural life, it does tend to hinder the search for

national unity" (Bliss and Rigg, 1984, p. XII). The cultural and traditional ways of

life have changed a lot because Zambia has become a wage-earning society.

Bliss and Rigg (1984) mentioned that "Knowledge of the traditional ways of life is

essential for an understanding of the changes that are taking place in society

and particularly changes in the status of women" (p. XII).

Christianity is well established in Zambia. Education and medical care

was brought to Zambia by the missionaries. In fact, it was the missionaries that

put the languages into written form. "With such a wide variety of peoples and languages, it has proved very difficult to decide which language should become the national language" (Bliss and Rigg, 1984, p. XIII). As mentioned earlier, English is the official language and is used extensively as a means of communication.

Most Zambians live in large cities along the line of railroad. "This concentration has been caused mainly by the migration of the rural peoples to the urban areas in search of higher wages and a better way of life" (Bliss and Rigg, 1984, p. XI). The new immigrants wanted jobs, houses, and schools for their children. This migratory process resulted in acute urban problems which the independent Zambian government was to try to solve mainly through its rural development policies (Tardoff, 1980, p. 4). Bliss and Rigg (1984) stated that, "...measures have been initiated to deal with the root causes of the rural-urban immigration, so as to encourage people to stay to earn a living from cultivating the land. The large migration to large cities has placed huge burdens on urban authority to try and meet the large demand of housing, water and other necessities. Presently most of the city dwellers live in the overcrowded and insanitary slums on the outskirts of the cities" (p. XI).

Economic Development

The Zambian economy is dependent upon copper production. When the

copper prices were high, "Zambian incomes per capita considerably exceeded those of neighboring African countries" (Daniel, 1979, p. 10). From 1964 to 1970, more than half of the government's revenue was generated from copper production. Sanyal, Case, Dow, and Jackman (1976) stressed that, "the major weakness of the Zambian economy is its dependence on the export of one single commodity, whose price is controlled internationally" (p. 46). Daniel (1979) also emphasized the weakness of Zambia's mono-commodity economy when he pointed out that:

> The direct contribution of the copper industry varied
> between one-quarter and one-half of the gross domestic
> product, depending largely upon the world price of copper,
> until the disastrous year of 1975, when combination of price,
> cost, and transport difficulties for Zambian copper caused
> substantial losses (p. 8).

The drop in receipts of foreign exchange had a direct contribution to wage employment in the mining industry as well as other sectors such as construction, transport, communications, manufacturing, commerce, and services.

Due to the decline in the price of copper, Zambia invested in other industries to boost its foreign exchange earnings. Zambia's effort to boost other forms of production were illustrated by Roberts (1976) when he stated that:

> Zambia now produces explosives for the mines, copper ore,
> glass and chemical fertilizer; there is also a textile mill and a
> car assembly. However, such enterprises are handicapped
> by high labor and transport cost and it is hard for their
> products to compete with imported goods, let alone find
> markets in other countries (p. 232).

The effect of imported skilled manpower on the Zambian economy is well

stated by Bliss and Rigg (1984): "Zambia's economic development has been

hindered by the shortage of trained and skilled manpower, and the slow

acquisition of management skills, which has meant a continued reliance in

certain fields on expatriate personnel" (p. XIV). In fact, Tardoff (1980) presented

the issue interestingly when he stated that: "The reliance upon expatriates and

foreign sources of supply imposed a tight straight-jacket upon Zambia's freedom

of maneuver in developing the domestic economy" (p. 44).

Zambia, like most African countries, entered the 1990s poorer than it was

in the 1980s or 1970s. Few knowledgeable persons are optimistic that Zambia's

economic problems will be solved by the end of the century. Some 30 years

ago, when many African countries were gaining their independence and

thoughts of economic growth and progress were becoming the principal focus of

attention, the words "development" and "industry" were practically synonymous

(Riddell, 1990, p. VIII). In the early 1970s, Zambia was dubbed "the fastest

growing nation" in Africa. Independence was to be followed by rapid and

sustained development and this was to be achieved through industrialization

(Riddell, 1990, p. VIII). The abrupt reversal of the economic development

started in 1987 after years of progress. This reversal was in part due to

restrictions imposed on imports, increased interest rates, and reduction in

private sector employment. Karmiloff (1990) remarks that Zambia typifies the

23

post-colonial experience of most Sub-Saharan African countries in acquiring

foreign technology (p. 297). Karmiloff (1990) further stated that:

> Turnkey factories were foisted on these countries, frequently
> too large for their requirements and export potential, and
> with technology ill-adapted to their factories and resource
> endowments. Import substitution was inefficient and found
> no dynamic outlets even in neighboring countries (p. 297).

In 1992, the political party that ruled Zambia for 28 years lost the

elections. The new political party that is currently in power "embarked on a

comprehensive program to transform Zambia into a market-driven, private-

sector-led economy, underpinned by its Liberal Investment Act" (Baird, 1993, p.

13). Zambia was determined to change from a subsidy and consumption type of

economy to a self-propelled commodity producing economy. So far subsidies

have been reduced, bringing about severe hardships for the Zambian people.

The World Focus (1994), in its editorial, stated that "Under a one party, one-man

state, [former president] Kaunda built a vast, unmanageable economy on huge

subsidies and international debt." The article also commented that under the

government of Kaunda's successor, Zambia, a country of 8.6 million people

remains very poor, struggling to rebuild a moribund economy. The New York

Times (January 30, 1994) published an article stating only 300,000 of the 8.6

million Zambians are employed in jobs in which they pay income taxes, and the

average per-capita income is $325.00 a year. The New York Times also pointed

out that with a gross domestic product of about $4 billion a year, the country is still $6.7 billion in debt and has not attracted much foreign investment.

Mr. Chiluba a former trade Union leader, won the elections against President Kaunda who ruled Zambia for 27 years. Baird (1993) reported that Chiluba won 76 percent of the vote in his battle against Kaunda for presidency (p. 13). According to Baird, Chiluba's party won 125 of the 150 seats in parliament (p. 13). Mr. Chiluba was sworn in as the second president in 1991. President Chiluba, has an aggressive program which includes broader political freedom, privatization of state industries and strict monetary regulations to minimize inflation. According to Baird (1993), in a major privatization drive, Chiluba's government plans to sell, within five years, more that 150 state-owned enterprises, accounting for 80% of the economic activity (p. 14). In 1993, Zambia established the Zambian Investment Center (IC). The Center's primary purpose is to encourage foreign enterprises to establish operations in Zambia. The Center provides guidance and service to foreign enterprises so they may get into production as quickly as possible. It has streamlined application procedures and reduced legal requirements to a minimum. Baird (1993) made the following comment regarding the establishment of the Investment Center.

> The government has also moved efficiently to implement its Investment Act and has tried to circumvent bureaucracy by establishing a one-stop Investment Center to process foreign investment applications within a month of submission. Priority is being given to investors in imports substitution, agro-industry, tourism, and non-traditional exports using local raw materials. Within a year of the Act

becoming law, the Investment Centers approved more than 440 projects worth U.S. $650 million (p. 14).

Due to the positive economic reforms Zambia has embarked on, it has been receiving generous response from the World Bank, the International Monetary Fund (IMF), African Development Bank (ADB), and donor countries such as the United States. Zambia has already qualified for special debt-relief terms, and several countries, including the U.S., the U.K. and Germany have agreed to write off much of their development loans (Baird, 1993, p. 14). President Chiluba (1993) said, "We are creating an environment that is compatible with the expectations of American investors. We value most what the people of America value most -- democracy, accountability, the rule of law."

In his budget address to the National Assembly on January 28, 1994, The Minister of Finance, Ronald Penza stated that:

> Private sector development and entrepreneurship are essential for the improvement of efficiency and restoration of growth. This is because economic justice can best be won by free men and women through free enterprise. To facilitate this process the Zambia Privatization Agency (ZPA) is pressing forward with the sale of government enterprises at an accelerated rate (p. 11).

As stated above, President Chiluba has embarked on broader political freedom and privatization of state industries. In regards to accountability, Minister of Finance Penza (January 28, 1994) told the National Assembly, "Improvements in economic efficiency will not occur without accountability. Zambians have allowed their work standards to erode and the quality of

26

management to decline. Worse, we have forgotten what being responsible

citizens requires" (p. 13).

Penza (1994) advised that "The main boost to economic growth will have

to come from increased efficiency" (p. 9). Penza (1994) warned that:

> Parastatal performance is poor; many work practices are
> counter productive; key resources have been misallocated
> due to distorted prices; and the deteriorating infrastructure
> increases the operating costs of business and Government
> alike. The result is that, relative to international standards
> our production methods are inefficient and our overall
> productivity is low (p. 9).

Penza (1994) also informed the National Assembly that the success of

Zambia's export development and trade depends on their ability to compete in

world markets (p. 12). He stressed that Zambian producers need to pay

attention to product quality, reliability of supply and cost (p. 12).

Education

Presently, Zambian basic education may be classified into three phases:

Grades 1 through 7 make up the first phase of education. The first phase is the

primary school education and it takes seven years to complete. According to the

Steering Committee (1977),

> Primary school education should be preparatory to further
> learning...Primary schools should, therefore, concentrate on
> the fundamental task of learning so that every child can
> master the essential learning skills on which he can build as
> he proceeds with further education or as he joins the life of
> work. The school should assist him to develop intellectually,

socially, emotionally, physically, morally, and spiritually; he
should be enabled to acquire learning and
practical skills so that he is able to apply knowledge intelligently
(p. 16).

The second phase of formal education are grades 8 and 9. This is the junior secondary education taking two years to complete. The Steering Committee (1977) indicated that:

Grades 8-9 are a continuation of the first phase and
preparation for life as well as for further education. Because
students will by now have mastered the essential learning
skills and will be reaching adolescence, it is necessary for
the curriculum and other activities to be more diverse in
range, depth and breadth (p. 17).

Grades 10 through 12 make up the third phase of basic education. Grades 10-12 are the Senior Secondary School level. The third phase is a preparatory stage for entry into the university and other institutions of higher learning such as vocational and technical institutes. At the end of grade 12, students will have been better prepared than those at the end of grade 9 leaving to further their education through full time or part-time study (Steering Committee, 1977, p. 20).

Zambia's economic development has been hindered by the shortage of trained and skilled manpower, which has meant a continued reliance on certain fields of expatriate personnel (Bliss and Rigg, 1984, p. XIV). At the time of gaining independence, Zambia did not have enough trained people to run the country. "There was perhaps a small elite group belonging to the urban society

who had the privilege of higher education--education often provided, not within

the country, but abroad" (Samyal, Case, Dow, and Jackman, 1976, p. 11). In

fact, Zambia did not have enough facilities for higher education. The Zambian

government embarked on programs to establish institutions of higher learning so

people could acquire skills and expertise needed to run the economy and the

government. The government also built a large number of primary and

secondary schools. In 1966, the only university in the country was opened.

When Zambia became independent in 1964, only one hundred Zambians were

university graduates and approximately one thousand Zambians had high school

certificates. In the foreword of Focus on Learning, the then Minister of

Education, Honorable Wina (1991), stated that:

> During the first 10 years of Zambia's independence the
> government of Zambia made massive investments in
> education. Very many primary schools, secondary schools
> and tertiary institutions were built and those already in
> existence were regularly maintained. Zambia was then
> financially capable of building new schools and
> rehabilitating old ones. Teachers were recruited from all
> over the world to come and educate our young generation.
> Quality in education was there and what Zambia wanted in
> addition was quantity (p. i).

Zambia adopted a political philosophy referred to as Humanism.

Humanism advocates a man centered society. Humanism in short, involves a

rejection of imported Western Capitalist values and a reassertion of traditional,

communal values (Tordoff, 1980, p. 24). Interestingly, Humanism rejected

Communism because it involved government regimentation. Instead, Humanism

29

favored a mixed economy in which state controlled companies, private firms and

cooperatives worked together. Based on the principles of Humanism, education

was provided free. Review Team (1992) emphasized that:

> It is the role of education, and of schools as the principal
> institutionalized form of educational provision, to prepare the
> individual to live in this society, to develop into the new type
> of person needed to meet the challenges of life in Zambia at
> the beginning of the twenty-first century. The educational
> system must respond, therefore, to the needs both of the
> individual and of the society (p. 6).

When Zambia became independent, one of the programs that was of high

priority was "Zambianisation". Zambianisation is, "essentially, the replacement

of non-Zambians by Zambians in positions of skill and responsibility" (Daniel,

1979, p. 2). In order to fulfill the objectives of the Zambianisation program, the

government embarked on crash programs in skilled, supervisory and

bureaucratic tasks. In fact, vocational and technical training was given the

highest priority.

The Steering Committee (1977) stressed in its report that:

> Therefore the objectives in technical education is to train
> Zambians to meet the needs and requirements of industry
> for skilled manpower and to facilitate more meaningful
> Zambianisation in critical areas of technology and economic
> activities (p. 49).

The training programs initiated by the Zambianisation program were

under guidance of the Zambian philosophy of Humanism. The Steering

Committee (1977), referring to the principal of Humanism stated, in part,

> In fulfillment of the above principal [Humanism], opportunities
> shall be provided to each person within the limits of his
> capacity so as to obtain an education based on his interest,
> abilities and needs to attain intellectual excellence and
> acquire practical skills or experience and thus contribute to
> the economic and social development of Zambia
> (p. 5).

One of the aims of education in Zambia is to develop each citizen to the fullest potential, thereby developing a sense of self-reliance and so, enabling Zambians to emotionally, morally, spiritually, socially and politically cope with life's problems.

Departments of Education

The Department of Technical Education and Vocational Education (DTEVT) is a subsidiary of the Ministry of Higher Education, Science and Technology (MHEST). The DTEVT was set up in 1969 for the purpose of revamping technical education in Zambia. There are a dozen institutions scattered all over the country. Over ninety full time programs in engineering, paramedical, commercial applied arts, business and teacher training are offered. The DTEVT enrolls 5,000 students and the number is growing. The brochure distributed by the DTEVT states that:

> The department's programs lead to examinations on the
> basis of which awards of the Examinations Council of
> Zambia are issued at the levels of Certificate, Craft
> Certificate, Advanced Certificate and Diploma
> (p. 1).

There are several criteria for evaluating students. The criteria depends

on the program. The brochure distributed by the DTEVT further indicates the

following about student evaluation:

> Among systems used are external examinations, continuous
> assessment and the results of employer evaluations.
> Combinations of these systems are quite common. The
> emphasis is to ensure that the student derives the maximum
> benefit from the training (p. 1).

The Curriculum and Standards Advisory, a branch of the DTEVT,

"...monitors standards and reviews the curricula to ensure that programs are

kept relevant to the needs of the nation" (p. 1).

In order to be admitted into most of the programs, applicants must be

sixteen years of age or older. In addition, applicants should have interest in and

an aptitude for the chosen field. They should possess a grade twelve school

certificate. Apart from relevant educational certificates and school testimonials,

it is also important for applicants to possess a career achievement form provided

by career counselors at secondary schools.

According to the Steering Committee (1977), one of the major aspects of

policy in technical education and vocational training has been to concentrate on

full-time pre-employment training in technical colleges and trades training

institutes which are furnished with modern equipment and materials to enable

them to provide in-depth theoretical training that is well integrated with practical

(hands-on) experiences. In regards to pre-employment training, the Steering

Committee (1977) stated:

> This approach is in contrast to the apprenticeship scheme
> which, in Zambia, is not considered suitable for a variety of
> valid reasons and is, therefore, not generally followed apart
> from the "on the job training" in some aspects of the building
> and construction industry and in some other technical fields.
> This policy on technical training will continue (p. 49).

Trades and crafts training programs include vehicle body repairs,

automotive mechanics, carpentry and joinery, electrical, automotive electricity,

heavy equipment repair, fitter, machinist, office machine maintenance and

repair, painting, decorating and sign writing, plumbing and sheet metal, radio

and TV repair, refrigeration and air conditioning, brick-laying and plastering,

agricultural mechanics, metal fabrication, wood machining, machine printing,

graphic arts production, camera and plate making, and print finishing (bindery

and warehouse). The training includes six months of basics followed by two

years of technical training. The trainees are also required to have one year of

acceptable, practical work experience in industry prior to being awarded the craft

certificate. The minimum entry requirement for the trades and crafts training

programs is grade 10. Enrollment of students at trades training institutes is

scheduled for every six months to meet the demands (Steering Committee,

1977, p. 50). According to the Steering Committee (1977):

> The country does not, at the moment, have sufficient of this
> type of trained manpower, particularly in the rural areas
> where their services are also badly required. As these
> trades and crafts programs have proved to be satisfactory,

they will continue to be offered but will be subject to review periodically (p. 50).

The DTEVT also offers technician training programs in electrical, mechanical, automotive, metal fabrication, refrigeration and air conditioning, computer programming, heavy equipment repairs--earth moving and science laboratory. The candidates to these programs should possess a grade 12 school certificate. The total duration of the technician program is two and a half academic years. The two and a half years includes eight terms (quarters) spent at the institute and two terms spent in industry. The two terms spent in industry are referred to as industrial break. High achieving students in the technician programs are offered places in the technologist training program. The technician training programs are of vital importance to the development of a nation. The Steering Committee (1977) acknowledges the great importance of the technician program, and in fact emphasized that:

> It is obvious that the technician group, along with the technologists, are the back-bone of the industry in Zambia. Teachers for various trades are also drawn from this group. The Department should, therefore, continue to offer these technician programs in accordance with present practice (p. 50).

Training programs for technologists include mine ventilation, industrial science, electronics, town and country planning, mechanical, quantity surveying and building technology. The technologists are drawn from the technician

34

training programs. The total duration of the technologist programs is three and a quarter or four academic years. This group is extremely important as it plays a major role in industry and technological fields, for it is the technologist who translates the engineer's ideas and plans into practical reality (Steering Committee, 1977, p. 50). The Steering Committee (1977) mentioned that the technologists have a sound theoretical base while at the same time they have achieved the highest standard in practical skills. The Steering Committee (1977) further stressed that the variety of programs offered by colleges should be increased, depending on capacity and availability of funds.

Other areas of vocational, business and commercial training in Zambia include applied arts, graphic design, journalism, music, textile design and fashion design, audio typing, secretarial, shorthand, pharmacy, radiography, physiotherapy, public health, catering, and hotel services and management. These programs are offered by the institutions under DTEVT. According to the Steering Committee (1977), the courses are tailored to the needs of Zambia as the Department is required to be responsive to the needs of the country.

The DTEVT offers evening and extension classes. The classes are held at Northern Technical College, Zambia Institute of Technology and Evelyn Hone College of Applied Arts and Commerce. Programs offered are upgrading courses and extension studies through part-time training for which there is much demand in industry (Steering Committee, 1977, p. 51). Through proper

scheduling, the DTEVT is able to utilize to the maximum the educational facilities at the three campuses. Evening programs also suit the needs of the worker since he has the opportunity to study without necessarily having to stay away from work (Steering Committee, 1977, p. 51).

The DTEVT set up Curriculum and Standards Advisory Committees which keep close relationship with industry. According to the Steering Committee (1977), "The committees give useful advice of training needs, quality and curriculum content" (p. 51). The committees provide input to the crafts, technician, technologist, applied arts, commercial and business programs. The MHEST does recognize the importance of the committees since they ensure that the programs meet the needs and expectations of business and industry. Regarding local certification compared with foreign awards, the Steering Committee (1977) stated that:

> The Department, in co-operation with industry, ensures that
> the standards of the programs and the quality of the
> graduates continue to be good and acceptable to employers
> and the Government. This is done through strict control and
> supervision during training. However, despite the high
> standard of the programs and good quality of the graduates
> there is an historical hangover, whereby both government
> and industry continue to use foreign qualifications or awards
> as a point of reference and for the purpose of job
> classification, instead of using local qualifications and
> awards (p. 52).

In regards to the Zambian awards vs. foreign awards, the Steering Committee (1977) further emphasized that:

This puts the programs of the Department into oblivion and
leads to misinformation resulting in underestimating the
value of the local awards. A glaring example is in the area
of salary Scales and Conditions of service which do not
make reference to the Department's awards. Instead,
foreign awards, such as the City and Guilds Certificates, are
used as a point of reference. This results in students
wishing to go abroad to get the qualification which society
apparently values more. In some cases, students who have
attended local training programs in the Department's
Institutions and who have been awarded certificates have
been forced to sit for external examinations in order to
obtain external certificates which employers, including the
government, consider more prestigious (p. 52).

In the early 70s, Zambia's facilities and training programs were among the

best in Africa. However, when Zambia's economy went into a decline, the nation

could not maintain the facilities and offer the teaching personnel good salaries

and benefits. Poor conditions of service and insufficient wages resulted in

teachers striking. These strikes disrupted the training processes. The Press

Summary (Jan. 17, 1994) submitted to the Zambian Embassy in Washington

stated:

Chaos reigned at the University of Zambia (UNZA) Great
East Road Campus in Lusaka where scores of students
spent Friday night in the cold following a sudden decision by
the Senate to postpone the opening of the institution. The
postponement was apparently forced by the more than 350
Zambian lecturers who on Thursday went on strike until their
long standing demand for equal pay for equal work was met
(p. 1).

The following day the Press Summary (Jan. 18, 1994) carried the

following article: "Government has refused to implement the equal work pay for

University of Zambia lecturers deeming chances of the institution re-opening

soon" (p. 1). Another Press Summary (Feb. 8, 1994) article mentioned that

"...University of Zambia lecturers have rejected an appeal by the task force of the

University Council to resume work as the students arrived yesterday" (p. 1).

Poor conditions of service and low salaries led to decline in teacher

morale. The low teacher morale had adverse effect on student performance not

only in the vocational institutions but also in high schools and universities. The

Press Summary of (Jan. 3, 1994) carried the following article:

> The Copperbelt University Council in Kitwe has ordered
> investigations into the institution's poor examination results
> in the last academic year. According to the minutes of the
> recently held council meeting, 110 students failed out of the
> 330 graduates from the schools of environment, business
> and technology (p. 1).

The Press Summary (Feb. 4, 1994) reported that "A total of 54,345 pupils

of the 199,548 candidates who sat for the grade 7 examinations last year have

been selected to grade 8" (p. 1). These children if neglected will become a

menace to society. Unfortunately, "...a generation of young people will be

deprived of their right to worthwhile education, and the social and economic

future of Zambia will be severely compromised" (Review Team, 1992, p. ii). The

primary, high school drop outs and the university students that do not

successfully complete their programs usually turn to the DTEVT to acquire the

relevant skills and knowledge to function in society.

The External Studies

As mentioned earlier, Zambia had a serious shortage of high skilled manpower when independence was attained. Consequently the severe shortage of high-level manpower constituted a major constraint on the country's development during the post-independence periods as the country's economic and industrial activities expanded rapidly (Siaciwena, 1988, p. 199). In a desperate effort to Zambianize key positions, inadequately trained Zambians were recruited to fill vacant posts. Most of these Zambians particularly in government and public services had to be trained on the job. According to Siaciwena (1988), "On-the-job training was a necessity. A more realistic and permanent solution was the expansion of higher education in the country" (p. 199). Institutions like National Institute of Public Administration (NIPA), private correspondence schools and the University of Zambia embarked on programs to meet the severe shortage of high skilled manpower. Thus in March 1967, a year after its creation, the University of Zambia enrolled its first external students (Siaciwena, 1988, p. 199). In regards to private correspondence colleges, the Steering Committee (1977) pointed out that "Meanwhile, it is recognized that many courses offered by the private correspondence colleges in Zambia may provide useful opportunities for general and vocational studies which would not otherwise be available to Zambian students" (p. 78). It is important that the courses offered by private correspondence schools are relevant and affordable.

The Steering Committee (1977) cautioned:

> ...the Ministry of Education should ensure that the
> educational quality of all courses offered to Zambians by
> private correspondence college is of acceptable standards.
> It is important that the public should be protected from
> exploitation which would result from correspondence
> colleges offering courses leading to qualifications which are
> of no value or are not recognized in Zambia (p. 78).

The external studies of the University of Zambia was a welcome venture because it allowed individuals who had no opportunity during the colonial era to further their education. The external studies also provided a high-skilled manpower that was in great demand.

Unfortunately due to operational costs and staff shortage a number of Bachelor of Science degree programs were discontinued. Significantly, in 1981, the University of Zambia Senate suspended all third and fourth-year level courses to manageable levels vis-a-vis the administrative and material production capacity of the Department of Correspondence Studies (Siaciwena, 1988, p. 200).

The Correspondence Colleges and the external degree programs at the university are very convenient for adults who cannot attend full time. In fact, Siaciwena (1988) stated that the external degrees cater to the educational needs of many capable adults who left the formal school system before higher education facilities were available in the country but who cannot attend full-time due to financial, occupational or family constraints (p. 200).

Production Units

In 1975, Zambia introduced production units in the education system.

The production units were established in Zambia by a Presidential decree in

1975 (Achola & Kaluba, 1989, p. 165). The curricula of the schools that were

inherited by the African governments from the colonial governments mostly

prepared students for white collar jobs. The two greatest disadvantages

identified by Achola & Kaluba (1989) were as follows:

> First their curricula eschewed manual labor; but in reality
> post-independence demanded greater work productivity.
> There was a need for more goods and food, and both could
> best be realized through intensive and extensive work. Yet
> manual labor was anathema to the majority of able-bodied
> school learners. Secondly, the curricula of the academic
> schools erroneously assumed that most of the pupils would
> have access to secondary and higher education. In reality,
> the bulk of pupils were lucky if they completed the full
> primary cycle. A small proportion joined secondary schools
> and the fortunate few gained entry into university (p. 166).

There was an urgency to promote manual work and instill in students the

importance of technical knowledge and skills. White-collar jobs were being filled

quickly but there was a lack of manpower to assume the technical positions.

According to Achola and Kaluba (1989), "The need to balance and reorient the

lopsided academic emphasis of African primary and secondary schools became

imperative within the first decade of independence. There seemed little choice

but to steer schooling increasingly towards productive work" (p. 166).

In 1975, the price of copper slumped. Zambia began to experience

severe economic and social difficulties. Trade deteriorated and inflation skyrocketed. Zambia realized the importance of education-with-production and the impact it will have on the socioeconomic development. Thus the Zambian President directed the schools to incorporate production units. But perhaps the most threatening specter that stirred the President into action was the swelling number of primary-school learners who could neither obtain places in the nation's secondary schools nor be absorbed in the country's labor market (Achola & Kaluba, 1989, p. 166).

The production units had some specific objectives in order to meet the education, social and economic demands. Achola & Kaluba (1989) outlined the following objectives which were stipulated by the Steering Committee (1977):

1. To link theory with practical application in order to give pupils an all-round education.
2. To close the existing gap between manual and mental work by showing that they are complementary.
3. To help form socially desirable attitudes in pupils toward manual work.
4. To facilitate the development in pupils of self-reliance, self-discipline and leadership qualities.
5. To enable pupils to learn about planning, management, marketing and related aspects of production.
6. To enable pupils to learn useful occupational skills for application in later life.
7. To reduce the cost of educational provision through self-help by the institutions themselves. In this way schools would meet some of their food needs.
8. To produce a cash surplus which could be used to improve and expand educational facilities.

The above objectives were clustered into educational objectives, social objectives, and economic objectives. Objectives 1 and 2 are educational objectives. Objectives 3 and 4 fall under social objectives. The rest of the outlined objectives are categorized under economic objectives.

Achola & Kaluba (1989) determined that, "If production-units activities are to fuse theory and practice it is logical to assume that they should be taught as part-and-parcel of the school curriculum with both cognitive and practical components" (p. 168). In regards to narrowing the gap between mental and manual work, Achola & Kaluba (1989) stated that production units major thrust is to heighten pupils' awareness of the fallacy of dichotomizing theory and action (p. 169). In fact this principle is in conformity with Dewey's maxim that thinking and doing are inseparably linked since most human actions are preceded by prior thought (Dewey, 1944, p. 142).

In Zambia there was and there is still a tendency to look down on an individual that is employed in a blue-collar job. As a result, Zambians have a negative attitude toward physical work. Thus one of the prime social objectives was to inculcate desirable attitudes of manual work. Achola & Kaluba (1989) cautioned that, "Distaste for manual Labor intensive occupations is bound to continue as long as the structure rewards in Zambia remains skewed in favor of white-collar occupations (p. 171). The other social objective of the production unit was, "...the development of self-reliance, self-discipline and leadership

qualities (Achola & Kaluba, 1989, p. 171).

The economic objectives of the production units identified by Achola & Kaluba (1989) were: a) learning about planning, management and marketing, b) learning useful occupational skills, and c) economic profitability. The above economic objectives are self-explanatory.

The biggest setback of the production units was that the activities concentrated on agricultural functions. In recommendation, Achola & Kaluba (1989) stated that:

> ...production units activities should be diversified to include
> non-agricultural functions. In the very least, practical
> subjects offered in Zambian secondary and post-secondary
> educational institutions should have a production
> component to enable pupils to relate theoretical knowledge
> to production outcomes (p. 176).

The Steering Committee (1977) commented as follows regarding production units:

> Production activities in educational institutions have educational
> value. Through production, students can apply knowledge, appreciate
> the importance of working with their brains as well as their hands,
> develop the spirit of self-reliance and learn how to contribute to the
> nation's production activities. This important aspect of education,
> which is part of a child's up-bringing, has not been emphasized in the
> past (p. 6).

CHAPTER III

RESEARCH DESIGN AND PROCEDURES

Models and Theory

The research design and procedures of this study were greatly

influenced by the wealth of information of the preliminary literature review

section and the introductory section (i.e. chapter I and II). Chapter I and

Chapter II provided the conceptual framework for this research. The

information in both chapters identified and justified the need for an in-depth

research using qualitative research proposals.

Schumacher and McMillan (1993) contended that:

> ...proposals for qualitative research are more tentative and
> open-ended allowing for an emergent design. Qualitative
> research proposals reflect an inductive approach to
> research. Qualitative researchers and scholars recognize
> that the degree of specificity in a written proposal depends
> on the extent of preliminary work (p. 573).

Dr. Joseph English (Personal Communication, May 6, 1994) pointed

out that if a government invests in its people, the economy is enhanced. This

is what is referred to as the theory of social efficiency. If Zambia's direction is

to be competitive on the global market, what plans, if any, have been mapped

to prepare the model for vocational training? Questions of this nature as well

as Zambia's pursuit of social efficiency could best be analyzed in this study by

using ethnographic technique. The interview protocol was used. According

to Schumacher and McMillan (1993), "In ethnographic research, preliminary work may be site or network selection, identification of particular cases for investigation, or locating and previewing archival collections of historical and legal documents" (p. 573). Schumacher and McMillan (1993) also state that "Ethnography is interactive research, ...a way of studying human life as it relates to education. Data collection strategies are conducive to obtaining people's perception in social settings" (pp. 405-406).

Research Questions

The following questions were the focus of this research: 1) What are the technical and vocational education needs of the workforce? 2) What is the nature of the delivery model that will adequately prepare the workforce? and 3) What is the political impact on technical and vocation education?

Instruments/Data Collection

Questions for interviews were devised in coordination with Dr. Joseph English who was then Coordinator of Graduate Studies at California State University, Vocational Education Department. Personal (face to face) interviews were conducted with respondents within driving distance (i.e. Los Angeles, Orange and San Bernardino Counties). The interviews were tape recorded and field notes were taken. Telephone interviews were conducted

with respondents out of state and in Zambia, as well as in newly independent South Africa.

Prior to the interviews, letters of request for conducting interviews were sent to the respondents. A copy of the letter of request is exhibited in the appendix. Due to insufficient time to wait for replies from the prospective respondents, verbal agreements were obtained by telephone. All respondents were asked the same questions. A copy of the questions is shown in the appendix. The initial questions that were developed in total cooperation with Dr. Joseph English were modified as a result of the feedback from galley draft readers which comprised of five Zambians and two Nigerians. Therefore the copy of questions in the appendix is the revised version.

The research questions were made available to the respondents prior to the agreed upon date and time of face to face or telephone interview. My role in this study was an observer participant. The data took four months to collect.

Population Sample and Description

According to Schumacher and McMillan (1993), "Qualitative researchers view sampling processes as dynamic, ad hoc, and phasic rather static or a priori parameters of populations. Purposeful sample can range from an n = 1 to n = 40 or more" (p. 382). Due to the small percentage of

Zambians who are knowledgeable in technical and vocational education, the sample size was n = 30. The population sample comprised of participants who teach, have taught or are administrators in the educational establishments such as vocational institutes. Some of the participants have been trained at a technical and vocational educational institute in Zambia. In any case, all survey participants were information rich informants with extensive experience in the Zambian Higher Education System.

The interviewees reside in Zambia, South Africa and different parts of the United States, as such face to face and telephone interviews were conducted. Face to face interviews were conducted in the participant's homes. Purposeful sampling was used in order to obtain in depth information.

Method and Treatment of Data

Interpreting the data was a tedious process. After each interview the information obtained was summarized. The data included field notes that were taken during the interviews. The tape recorded information was transcribed into hard copies. The transcription was done with the assistance of a professional transcriber. Main concepts were extracted from the hard copies.

A summary was generated from each interview. Thus after the data collection process, several summaries were created. The information from hard copies and summaries was then grouped under different topics. The

procedure took several hours since the data was rearranged several times

into proper clusters, thereby forming categories. 5 X 8 index cards were used

to code and chunk. The coding and chunking operation made the analysis

and interpretation of data much easier. Chapter IV will present the

categories developed from the coding and chunking operation as well as the

findings of this research.

CHAPTER IV

FINDINGS AND DISCUSSION

Findings

Based on the responses from the respondents it was evident that the respondents were aware or knew the problems vocational and technical training was experiencing. The study revealed that Zambia has not been aggressive to implement change or corrective measures.

Findings and Discussions That Addressed Research Question 1

Research question 1: What are the technical and vocational education needs of the workforce? This study revealed that Zambia is not in a position to keep abreast or even adapt to the economic development of the world. According to the respondents, primary and secondary school education has deteriorated tremendously. Secondary schools are the feeders for technical and vocational institutes and the University of Zambia. Respondents indicated that secondary school graduates that enter higher learning institutes have low aptitude. Respondents emphasized that students enter vocational and technical institutes with severe deficiencies due to poor quality of education in primary and secondary schools. During 1981-1985 education was allocated 13.8 percent of public funds and from 1987-1991 education's allocations were cut to 9.8 percent. According to the respondents, there were

no adequate resources to a) supply schools with books and educational aids, b) maintain and repair schools, and, c) support the agencies responsible for monitoring educational standards.

The Movement for Multiparty Democracy (MMD) came into power in 1991 and has taken steps to ensure that technical and vocational education in Zambia will operate under conditions that will enhance worthwhile learning. Respondents indicated that in order to build a strong workforce, concrete foundation and lifelong learning attitudes need to be instilled into students at an early age.

Respondents indicated that the people of Zambia have for a long time realized that technical and vocational education is the backbone of the economy. Respondents mentioned that in order to have strong candidates for the technical and vocational schools, the government must recognize the fact that primary and secondary schools examinations should involve higher order skills such as comprehension and application. Respondents stressed that less emphasis should be placed on recognition and recall of facts. Such examinations will relate more real-life situations. Such examinations will also evaluate writing skills, oral skills and aural skills. Candidates will be well prepared to enter the demanding technical and vocational institutes and therefore no compromises will be made that will dilute the training at the technical and vocational institutes.

Respondents revealed that the MMD government has accepted the fact that Zambia does not have the resources to specify competency levels or to design and apply instruments to match the needs of technological advancement with a delivery model of the technical and vocational education. Respondents pointed out that the MMD government intends to obtain assistance from the first world for a specialist who can help develop and evaluate essential skills so that Zambians may attain skills competitive on a global level. When Zambia begins to produce graduates with high technical skills, it can become an advanced nation among the developing nations because it can combine high productivity with low wages. Zambia may become competitive and join the other emerging economies of the third world such as Malaysia, Thailand, Chile, and Mexico.

It was evident from responses to research questions that technical and vocational education has suffered tremendously from the significant decline in government resource allocations in the past. Respondents indicated that the MMD government is aware of the situation. According to the respondents, the MMD has launched an aggressive Economic Recovery Program and recognizes that education and training is vital to the success of the program. Thus the MMD government is treating the revitalization of the technical and vocational system with extreme urgency. From the responses to research questions it was established that the MMD government plans to a) increase funding and other resources so as to expand and rehabilitate laboratories,

classrooms, workshops etc. b) provide adequate supply of textbooks and necessary educational aids and material, c) improve teacher training (both pre and in-service), d) decentralize the educational system, e) restructure the examination system, f) setting and monitoring standards, g) actively involve industry, business and community in curriculum issues and h) retrain and improve management. Providing the most needed resources will help improve the quality of vocational and technical education and will also attract qualified personnel to the teaching field. Respondents indicated that the MMD is currently working on a mechanism that will increase allocation and improve the distribution of the funding.

This study revealed that the most urgently perceived needs for vocational and technical education were rehabilitation of existing facilities and improvement of the quality of education. Therefore the government's efforts to increase allocations for teaching materials and aids, equipment, staff development (teachers, supervisors and management) seems to be timely.

How much autonomy do college principals have? Do they have control or input to the budget? Respondents pointed out that the government was reviewing the possibilities of making School Management bodies autonomous. Also, respondents indicated that possibilities of decentralizing responsibilities to the individual college were to be reviewed. This is a welcome endeavor that will have significant impact on the functioning of vocational and technical institutes.

This research revealed that the MMD government is committed to provide universal education, promote hands-on experience in schools, and revamp vocational and technical education by encouraging the teaching of science and technology which is central to economic recovery and national progress or development. Are the present graduates from vocational and technical colleges meeting the labor needs? In regards to advancement in technology, how is the country preparing itself for self-reliance? The MMD Committee (1991) stated that:

> MMD intends to promote the kind of education which will ensure that the learner acquires the following qualities:
> 1. Develop critical, analytical, innovative and a creative mind.
> 2. Appreciate the relationship between scientific thought and action and technology on one hand, and sustenance of the quality of life on the other.
> 3. Value the necessity for free expression of one's own ideas and exercise of tolerance for other people's view in defense of individual liberties and national democratic institutions.
> 4. Appreciate Zambia's ethnic cultures, customs and traditions and stand to preserve national pride, sovereignty, peace, freedom and independence.
> 5. Partake in the maintenance of ecological balance in one's immediate environment and respect for human life and property.
> To realize its ideals the MMD shall restructure the education system to suit the basic needs of learners, parents and society at large (p. 9).

This research indicated that the MMD government intends to provide resources for vocational and technical institutions in order to promote high standards of performance. Respondents stated that the MMD government

has taken an aggressive approach to fulfill the immediate needs of vocational and technical education.

Findings and Discussions That Addressed Research Question 2

Research question 2: What is the nature of the delivery model that will adequately prepare the workforce? The findings of this research indicated that Zambia is not coordination activities of primary schools, secondary schools, technical and vocational colleges, and the university. Respondents indicate that there is little involvement of business and industry in the activities of the educational system. Respondents noted that the Ministry of Higher Education, Science and Technology (MHEST) is not well equipped to provide effective guidance and support to the educational system. The research indicated that the MHEST was staffed mostly with untrained or ill-prepared personnel who had little commitment to the development of the country's educational system.

The new trend in business and industry is to have a workforce of self reliant workers. A career resilient workforce is ideal for fast changing technology. It is therefore important that technical and vocational institutions place great emphasis on employability and not merely on employment. Self reliant workers can cope with the changes in technology by reinventing themselves.

From this research, it was deduced that Zambia needs to draw up aggressive strategies of acquiring foreign technology to upgrade its technological level. Respondents indicated that donor countries such as the U.S.A. could be requested to supply state of the art training aids and expertise for primary and secondary schools as well as higher institutions of learning. Respondents also stated that Zambian personnel could understudy expatriates and eventually assume the responsibilities of running the institutions. Respondents advised that as part of the delivery model, close liaison between the educational system and industry should be encouraged. Respondents stressed that institutions of higher education such as the university of Zambia (UNZA), Zambia Institute of Technology (ZIT) and Northern Technical College (NORTEC) should be fully engaged in research in order to improve relations between research and production. Respondents indicated that graduates and teaching personnel ought to be exposed to the technology of the first world by establishing student and personnel exchange programs. Respondents indicated that school libraries should be required to subscribe to professional journals. Students and teaching staff will be able to keep up to date with the developments in technology.

The research indicated a need for restructuring the curriculum for technical and vocational institutes. The research indicated that it was imperative to match the Zambian curriculum for technical and vocational education to that of the first world such as the U.S.A. Presently Zambian

institutes of technical and vocational education offer certificates and

diplomas. The research indicated that it was important for Zambian institutes

to start granting degrees which may be accepted by similar institutions in the

first world. Hence rather than offering certificates, Zambian institutions should

grant AAS and BAS degrees. This research also indicated that lifelong

learning courses such as sociology, psychology and communications are

essential components of the modern technical and vocational education.

Thus it would be very beneficial to embody lifelong learning courses into the

curriculum.

The delivery model that was indicated from this research requires full

participation of business and industry. The components of the identified

delivery model include school based learning, work based learning, school-

business support activities and program evaluation. In terms of school based

learning, the respondents noted that it is necessary to expose students to the

work environment by integrating practical experience at school with work site

activities. Respondents also indicated that school projects should directly

relate to the production activities of industry (contracting some work). Career

counselors should work closely with human resources departments of

business and industry. In regard to work based learning, graduates'

performance should be tracked at the work site. Business and industry

should actively be involved in establishing transferable skills and work place

attitudes. As part of the delivery model, business and industry could

establish training and on-going support for the teaching staff and students at both school and the work place. Mentor programs would be beneficial. Another need is for effective audit agencies that will evaluate or assess the program.   Agencies may administer certification examinations.

Findings and Discussions That Addressed Research Question 3

Research question 3: What is the political impact on technical and vocational education? In a foreword of the "Focus on Learning," Minister of Education A. Wina (1992) indicated that during the one party state era, parliament cut back on the money allocated to education and health and diverted the money to service party functions. The cutback affected primary schools, secondary schools, technical and vocational colleges, and the university. In the foreword, A. Wina (1992) stated that the situation became so bad that local communities took the initiative to build and maintain primary schools. In the foreword, Minister of Education A. Wina (1992) indicated that most of the secondary schools were maintained by Parents Teachers Associations (PTA). The Minister of Education A. Wina (1992) stated in the foreword that the initiative of the local communities gave birth to a new breed of self-help schools which were run without technical assistance or advice from the government. The findings of this research indicated that no standards were observed or maintained and it was during this era that the quality of education sank to its lowest.

During the one party system most civil servants, members of parliament, cabinet ministers and politicians were markedly less well educated or trained. As such the policy making bodies lacked the competency and vision to give direction to educational growth and economic development. The study indicated that the present government has taken measures to appoint suitable candidates for management positions in both the public and private sectors. Respondents stated that the MMD government has staffed the high ranking positions with personnel who are conversant in global economic, technological, social, political and psychological changes. Responses to research questions indicated that the MMD government was aware of the importance of investing in its people. Respondents stated that the MMD government was taking steps to mobilize capital and invest it efficiently in technical and vocational education which is the backbone of business and industry. Respondents indicated that if quality technical and vocational education is to be available, additional public resources need to be directed to the education sector. The study revealed that MMD government has set up budgetary mechanisms that will ensure that accountability is taken for the funds.

If Zambia's direction is to be competitive on the regional and global market, what can be done within the political framework? The research findings indicated that the MMD government has developed strategies and policies that it intends to follow in order to promote stable economic growth.

The research revealed that the government has drafted plans to stimulate the public and private sectors. Expansion will definitely increase the need for well trained workforce. Respondents reported that guidelines and policies that will help create productive employment have been drawn. According to the respondents, the labor policies will ensure competitive wages or salaries on the basis of equal pay for equal work. Respondents indicated that the policies will ensure that employment will be based on merit and professional expertise. Additionally, the policies are intended to promote higher levels of employment opportunities and thereby improve the quality of products and efficiency.

The research indicated that the government is gradually weaning Zambians from totally depending on the government. In the past the government was wholly responsible for major services such as banking, production of goods, purchasing and marketing of essential commodities, import and exports. As a result of the government being in charge of major services, Zambians developed the mentality that the government had limitless resources and could do anything and was responsible for everything. The MMD government intends to restore confidence in the public and involve them actively in economic development (MMD Commission, 1993, p. 3). The research indicated that MMD government has established policies which will make the private sector assume more responsibilities in the running of the Zambian economy. Respondents believe that this will stimulate competition

and boost productivity. An improved economy will need highly skilled manpower. Hence the activities of technical and vocational education will increase. In anticipation of increased demand on technical and vocational education the government allocated 15 percent of its 1994 expenditure to education (MMD Commission, 1993, p. 10). This is an increase of approximately 5 percent.

The research findings also indicated that another factor which will have major impact on technical and vocational education is export development. In order to speed up infrastructure development, the MMD government intends to stimulate the growth of non-traditional exports (MMD Commission, 1993, p. 12). Promoting the growth of non-traditional exports is critical since it will reduce the dependency on copper exports and create jobs.

CHAPTER V

CONCLUSIONS AND RECOMMENDATIONS

Summary

The main purpose of this study was to determine if Zambia's technical and vocational education adequately prepares the workforce to meet the challenges of the 21st century and thereby be competitive on the global market. The research addressed the following questions: 1) What are the technical and vocational education needs of the workforce? 2) What is the delivery model that will adequately prepare the workforce? and 3) What is the political impact on technical and vocational education?

Conclusions

The data gathered from telephone interviews and face to face interviews revealed the perception of an urgent need to revamp technical and vocational education. Respondents indicated that immediate action needs to be taken to overhaul the entire educational system. The review of literature indicated the necessity of rehabilitating technical and vocational colleges. The economic recovery and how quickly it occurs depends on the commitment and dedication of the Zambian government to resuscitate technical and vocational education. Trained manpower to run the institutes, books and materials, and facilities such as laboratories, classrooms and libraries are

urgently required. The MMD government is aware that social efficiency implies consistent support for the development and improvement of education. Zambia's economic development will largely depend on the work forces' ability and capacity to acquire, adapt and advance knowledge, skills and attitudes. As such the MMD's efforts to develop an effective and efficient educational system is positive venture.

Most of the respondents interviewed concurred that technical and vocational training should be an investment and not just for maintaining what exists. The MMD government has conducted its research in regards to investment in education. The Review Team (1992) stated that:

> Strategies for development of school education must take account of three factors: what the system is aiming at, where it is now, and what is the policy framework for the attainment of its goals. This necessitates that the strategies be set in the context of (a) the nature of Zambian Society; (b) the evolution of the school system and development in its financing; (c) adjustments in policies affecting education; and (d) agreed upon priorities for the education sector (p. 6).

The initiatives that the MMD government has taken to develop the education sector will eventually enhance the workforce.

Recommendations

As a result of this study possibilities of further research became evident. Several areas of interest were identified. Investigations should be

conducted to examine the possibilities of establishing science and technology policies and then establishing a science and technology department. Presently Zambia exports copper at internationally controlled low prices but in turn it imports copper finished products at exorbitant prices. This creates a foreign exchange drain. Zambia should identify the commodities (finished products) that it imports in large quantities and embark on programs in which Zambian engineers and technicians, with the help of the science and technology department, will study the products and manufacture high quality substitute commodities. This will drastically reduce import costs, create jobs, and hopefully generate foreign exchange from the surplus.

It would be beneficial to study the possibilities of coordinating the activities of the science and technology department with the activities of the department of technical and vocational institutes. Another area of interest would be to study the integration of multimedia education in technical and vocational education. What impact would multimedia have in enhancing knowledge and skills?

APPENDIX A

LETTER TO THE ZAMBIAN EMBASSY

TO: Mr. Ben Chundu, First Secretary of Economics
                     2419 Massachusetts Avenue NW
                     Washington, DC 20008

FROM: Mambwe Luka Mbewe (Graduate Student, C.S.U.S.B.)

SUBJECT: Research Material on Zambia

Dear Sir:

I am a graduate student in the Vocational Education Administration program at California State University, San Bernardino Campus. I am currently researching the Zambian workforce. This research will investigate the extent to which the Zambian Higher Education is preparing the workforce to be able to compete in the global economy.

I would like for you to assist me with some literature pertaining to the Zambian economy, trade, labor, commerce, education, and government policies.

Thank you for your assistance,

Mambwe Luka Mbewe

APPENDIX B

LETTER OF ENDORSEMENT

May 16, 1994

TO: Research Respondent

FROM: Mambwe Luka Mbewe

SUBJECT: Zambian Workforce Preparedness For The 21st Century
             Global Market Demands

Dear Comrade:

I am pursuing a Master of Arts Degree in Vocational Education at California State
University, San Bernardino campus and currently conducting a study that will reveal
how Zambia's technical and vocational educational system may be restructured to meet
the demands of the 21st century global market. I would like to solicit your participation
in the research. I believe you possess a vast amount of knowledge and information
that will be instrumental to the successful completion of the research and would like to
invite you to be interviewed for this project.

I will observe the research ethics by maintaining confidentiality and anonymity. I will
ensure that no personal humiliation and or loss of interpersonal trust will be
experienced.

The interview date and time will be set to suit your schedule and will be at your
convenience and will send you the interview questions prior to the scheduled date.

I will be contacting you to schedule a date and time for our interview.

Sincerely,

Mambwe L. Mbewe

APPENDIX C

RESEARCH QUESTIONS

RESEARCH QUESTIONS

The following are the interview questions that were mailed or faxed to the respondents.

1. What are the technical and vocational education needs of the workforce?

2. What is the nature of the delivery model that will adequately prepare the workforce?

3. What is the political impact on technical and vocational education?

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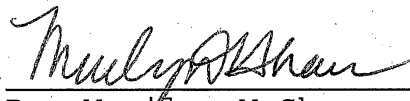
MARINE CORPS SUBCULTURE

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A Thesis

Presented to the

Faculty of

California State University,

San Bernardino

_____

by

David Herman Marshall

December 1995

Approved by:

Dr. Marilyn McShane, Chair, Criminal Justice   12-1-95
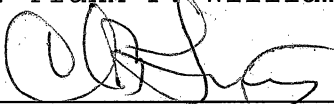
Dr. Marilyn McShane, Chair, Criminal Justice   Date

Dr. Frank P. Williams

Dr. Charles B. Fields

ABSTRACT

Early sociological literature on subcultures was formed and directed by the work of Albert K. Cohen. Cohen (1955) proposed that gang subcultures were the result of ineffective family supervision, the breakdown of parental authority, and the hostility of the child toward the parents.

In The Subculture of Violence (1967), Wolfgang and Ferracutti proposed that violent activity among humans is responsive to specific sets of circumstances, in which violence becomes the expected reaction to certain environmental stimuli. Wolfgang and Ferracutti's work focused primarily on deviant subcultures, with criminal members.

More recent literature has focused on "occupational subcultures" created by the jobs people perform. These subcultures are not necessarily criminal or deviant, however, they still have many of the characteristics of the criminal subcultures such as shared sentiments, beliefs, and customs.

The purpose of this thesis is to provide another type of assessment of the subculture, specifically; an in-depth

analysis of the subculture within the United States Marine Corps. This analysis attempts to bring the traditional literature of criminal subculture and the subculture of violence together with more recent literature of occupational subculture to explain many of the behaviors exhibited by Marines. This study questions whether domestic violence rates within the Marine Corps are an example of some of the deviant activities identified by the more traditional subculture literature.

This thesis concludes that the United States Marine Corps is a subculture of violence according to the traditional research on subcultures presented by many early scholars. Further, the Marine Corps has many of the characteristics discussed in more recent findings on occupational subcultures. The prevalence of violence is demonstrated by the high rates of domestic assaults. This thesis suggests that the Marine Corps must take steps to foster an environment which does not condone violence in family settings and introduces broader training situations which are not limited to wartime scenarios.

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

CHAPTER ONE

Marine Corps and Subculture Theory

INTRODUCTION TO SUBCULTURE THEORY

People who form a unique group within a given culture
are called a subculture (Kappler, Blumberg, & Potter,
1993). The sociological definition of subculture is a group
of peers who share many characteristics of society, but
have separate, distinct values that make them unique as
compared to the larger culture (Kappler, Blumberg, &
Potter, 1993; p. 141).

Early sociological literature on subcultures was
formed and directed by the work of Albert K. Cohen. His
book, Delinquent Boys (1955), focused on how a delinquent
subculture could begin (Williams & McShane, 1994). Cohen's
work studied juvenile gangs, describing them as
"malicious," and "negativistic." Cohen (1955) proposed a
definition of gang subculture where its members are the
result of ineffective family supervision, the breakdown of
parental authority, and the hostility of the child towards
the parents.

Cohen proposed that juveniles join gangs to achieve a
status that they can not achieve in the larger, more

1

dominant culture. Cohen believed that when juveniles

become frustrated because they can not achieve a

respectable status in the middle class world, the gang

becomes a solution. The gang can quickly provide them a

status. This status is easily achieved in comparison to

the effort it would take to assimilate into the dominant

culture.

Subculture implies that there are value judgements or

a social value system which is apart from and a part of a

larger or central value system (Wolfgang & Ferracutti,

1967). In a subculture, certain types of conduct are

expected. The way a person is to act under certain

circumstances becomes the rule, or the norm. These rules

are called conduct norms. Conduct of an individual is,

then, an external exhibition of sharing in values (Wolfgang

& Ferracutti, 1967).

The purpose of this thesis is to provide another type

of assessment of the subculture, specifically, an in-depth

analysis of the subculture within the United States Marine

Corps. This analysis attempts to bring the traditional

literature of criminal subculture together with the more

recent literature of occupational subculture discussed in

chapter two to explain many of the behaviors exhibited by

Marines.

Some studies have concluded that basic training in the

military can result in the transfer of violent responses to family interactions (Eisenhart, 1975). The Marine Corps domestic violence rate, when compared to the other services, is an example of this. Chapter three uses the Marine Corps' domestic violence rate as an example of how the Marine Corps fosters an environment for its Marines that creates a subculture of violence.

MILITARY SUBCULTURE

An example that seems to accurately exhibit characteristics of a subculture is the United States Armed Forces. The conduct norms of the military are very distinct and different than the rest of society. Also, with the conversion to an all volunteer force, the U. S. military has lost many of the characteristics that had previously made the military installation a community and it began to take on features characteristic of modern industrial occupations (Segal, Lynch, & Blair, 1979). The military is no longer a calling, but an occupation.

Recruits undergo a personal transformation during basic training. There, they receive more than just training, they are ingrained with a sense of service, honor, and discipline. It is at boot camp that the conduct norms of the military begin to take form. All hair is shaven from each recruit's head, all personal effects are taken away, and the values of the subculture begin to be

instilled. The self-interest of the individual becomes
second to that of the institution they come to know as the
military. Service members become convinced they are
selective, better, and above all, different.

The military is the nations' force in readiness.
This belief is perpetuated through training as well as
fostered by the media and the entertainment industry. Many
motion pictures as well as newspaper and magazine articles
reinforce what the military is supposed to be and how its
members are supposed to act. Almost all of them send the
same message: service members are supposed to be tough and
aggressive.

The effect of the media and entertainment industries
on the image of service members was explored by James
William Gibson in <u>Warrior Dreams: Paramilitary Culture in</u>
<u>Post-Vietnam America</u> (1994). Gibson evaluated and
critiqued several films made during the late 1970s and
1980s, mostly action-adventure films, and described how
they created and communicated an American war culture.
In these films service members are nearly always portrayed
as virtuous defenders of a just cause, and war seems safe,
even attractive (Gibson, 1994). Gibson refers to such
films as <u>Rambo</u>, <u>Dirty Harry</u>, <u>Patriot Games</u>, and <u>Lethal</u>
<u>Weapon</u> to show how the violence of war is glamorized and
paints a picture that is not representive of the actual

destructive nature of military combat.

In the military, great emphasis is put on its members to conform to the conduct norms of the subculture. A military unit, regardless of size, is a disciplined family structure, with similar relationships based on mutual respect among members. It is believed that issues and problems which tend to lessen a units' effectiveness must be addressed and resolved. If a service member is having troubles, and those troubles affect the performance of the unit, he or she will receive pressure from the unit to resolve the issue. This pressure may lead to increased frustration, aggression, and ultimately, violence.

The subculture of the military is not isolated to just the service member. Each and every member of a service person's family is also within the military subculture. Military families are subjected to many of the same experiences as their civilian counterparts, however, military families experience stressors unique to their particular situation.

Low pay, having dependents to support, and the high cost of housing today create a great deal of pressure in many military families lives. For example, a service person just out of basic training in 1994 earned $854.40 per month, which is $213.35 per week, and $10,994.20 annually (Marines, 1994). Military spouses may feel the

5

need to contribute financially to offset the low pay. However, spouses often face a difficult challenge when they try to seek employment. Because of the frequency of relocating, spouses are often unable to establish careers. This may create a significant amount of friction and resentment in a relationship. Not being able to contribute financially may develop low self-esteem in some spouses, they may feel even more trapped, and dependent on their spouse.

Sixty-one percent of all military members have a family (U.S.D.O.D., 1993). Both during basic training and tours of duty, military men and women are separated from family members for extended periods of time. This separation may make a parent less involved in the lives of the children, as well as less involved in the relationship with their spouse. Additionally, reunification can be as stressful as it is joyful.

Packing up your possessions and moving to another town may be stressful for anyone. It often means leaving friends behind and no longer having the support of family members. Mobility may also involve additional expenses which can exacerbate an already stressful financial situation.

Military personnel often feel isolated from their family because of long hours and temporary separations.

Service members and their families are also physically isolated from the surrounding communities, living on installations, behind fences, and inside of gates usually maintained by armed guards. Further, communication barriers add to an already frustrating lack of contact with family members. During basic training and tours of duty, the isolation and communication barriers are at their greatest.

Many military men who have served overseas have married women from other countries, which introduces culture and life-style differences and creates additional barriers to communication. This usually includes lack of support from friends and family for the spouse, which in turn creates more dependence on the relationship. The military family is isolated and removed from their hometown where other family members and friends can provide emotional support. When the military family travels or is transferred overseas, many problems similar to those discussed above can create stress within the family: isolation, lack of support from friends and family, difficulties in acculturation, and increased physical and emotional dependency on the relationship.

The activities of a military member are closely monitored by his or her superiors. During basic training, field maneuvers, and combat situations, service members

live and work together. Their activities are continually supervised. If there are problems at home or at work, the commanding officer usually knows about them.

Many in the military describe a double message they receive from command or the military system in general. The first message, "Your family is recognized in that we will offer services for family members to help you keep everyone healthy and happy at home." On the other hand, the second message is, "When it comes right down to it, your work is more important than your family. We really do not want you to bother us about them." Of course, the degree to which these messages are expressed varies from commander to commander; however, the consensus is that these dual messages do exist in one form or another.

In recent years, there is increased stress due to the uncertainty associated with force drawdown. As of December 31, 1994, the services had a combined strength of 1,584,232 people on active duty, which was 8,132 fewer than November and about 91,000 fewer than in 1993 (Navy Times, 1995; p. 28). The Presidio Base Closure Evaluation (1992) found that over the last four years many civilian jobs have been cut and military members have been called in as replacements, often in understaffed offices and in jobs for which they had no previous training. Increased pressures and future uncertainty place stresses on families. The

Presidio report found that these stresses often take their toll in incidents of family violence, child abuse, and alcohol and drug abuse. Additionally, when civilian jobs are cut, military members become even more isolated and less integrated with the civilian communities.

CHARACTERISTICS OF THE MARINE CORPS SUBCULTURE

With deployment rates far above those of the other services and an increase in small, urban conflict throughout the world, the Marine Corps, in particular, is even more vulnerable to these unique stressors. In 1993, seventy-eight percent of all officers and sixty-eight percent of all enlisted Marines were away from their families for over thirty days. Marine Corps spouses are especially young, with one-third between the ages of seventeen and twenty-four. Sixty-eight percent of all Marine Corps families have children under the age of eleven, and Marine Corps families move more frequently than the other services, about every 2.4 years (Marines, 1994).

The Marine Corps presents a unique opportunity to analyze both the traditional and more recent research on subculture. Being a Marine is an occupation, and the Marine Corps subculture is truly an occupational subculture with common attitudes and beliefs created by the job. Being a Marine is a distinct identity because of the character of the Corps.

Subculture theory in general, and more specifically the subculture of violence theory, help explain how violent activity among humans is responsive to specific sets of circumstances. The behavior is learned and shared in a cultural setting, and violence becomes the expected reaction to certain environmental stimuli (Shoemaker & Sherman, 1987). Marvin E. Wolfgang and Franco Ferracutti developed a theoretical framework for the theory in their book, The Subculture of Violence (1967). Violent subcultures place positive value on the use of violence to resolve personal problems.

The subculture of violence theory is an attempt to explain violence among specific categories of people who are thought to exhibit particularly high rates of violence. Wolfgang and Ferracutti suggest that a subculture of violence is likely to exist among societies that are characterized by "machoism," or the equation of maleness with aggression, and societies that are characterized by "frontier mores," where the rule of "gun and fist" are idealized.

DISPERSION AND HOMOGENEITY

Subcultures are characterized by lack of dispersion. Subcultures are often isolated in certain geographic areas, with definite boundaries. When one lives and works upon a military installation, they are removed from the dominant

10

culture, they are geographically separated from the
general public. Although Marines and their families are
stationed around the world, as figure one demonstrates,
when compared to the other services, the Marine Corps is
unquestionably much less dispersed. Figure one
shows that the Marine Corps has only 18 installations, as
compared to 82 for the Army, 86 for the Navy, and 97 for
the Air Force.

The Marine Corps is much smaller than any of the other
services, with 174,507 personnel, which is less than half
of any of the other services (Figure 2). The small
population demonstrated in figure two suggests that the
Marine Corps may be less socially active than the other
services, particularly when one considers that this small
number of Marines is only disperesed throughout eighteen
installations world-wide.

The lack of dispersion and small population
demonstrated in figures one and two makes the Marine Corps
less socially integrated in the larger surrounding
community and perhaps much more socially inactive than any
of the other services. Marines will meet fewer people and
be stationed at fewer installations than any of the other
service members. Marines and their families have a much
better chance of being stationed at the same base several
times throughout a Marine's career. Marines and their

FIGURE 1
TOTAL NUMBER OF INSTALLATIONS

Note. From Marines (1994, January). Almanac '94
Special Edition. 19

12
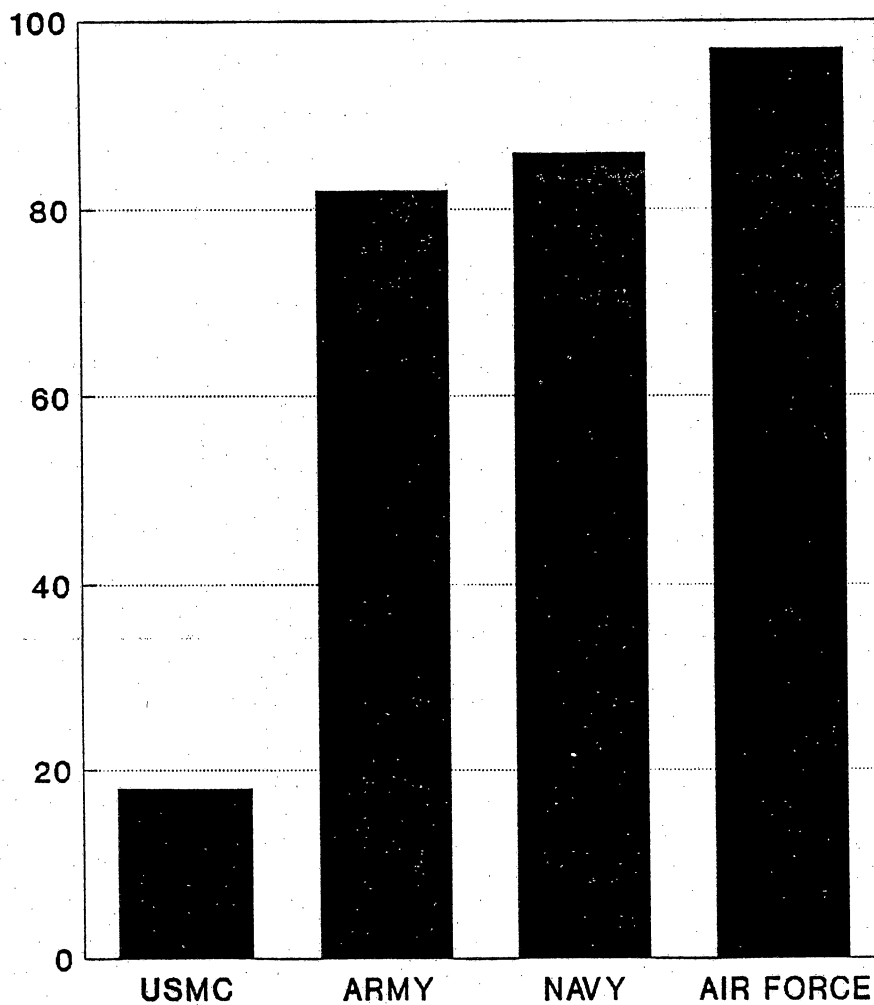
FIGURE 2
ACTIVE DUTY MILITARY

ARMY
533074

NAVY
460169

USMC
174507

AIR FORCE
416482

Note. From Marines (1994, January). Almanac '94
Special Edition. 19

13
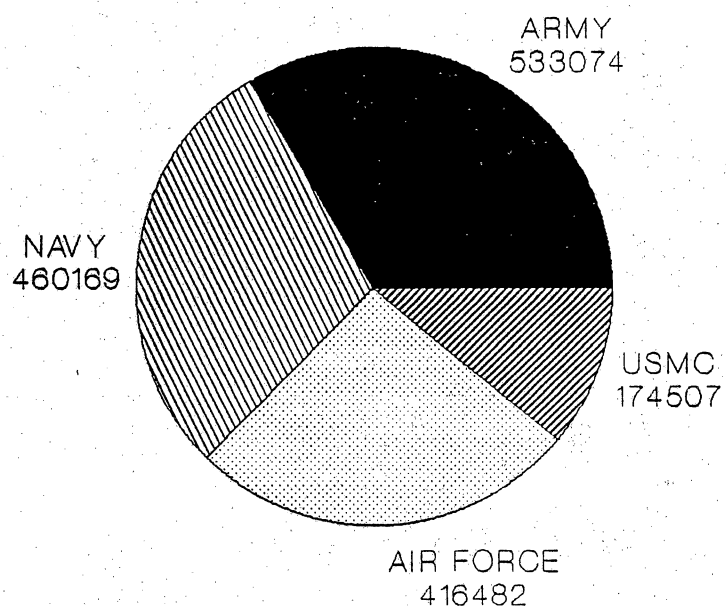
families are much more likely to live near and to meet and work with the same people time and time again.

The Marine Corps is the only service to have twenty-four hour a day military police presence at the entrances to all of their installations. This "closed gate" policy leads to lack of socialization with the surrounding civilian communities, further isolating Marines and their families. This sends a message that the Marine Corps is interested in keeping those not in the subculture away from those who are.

It is in homogeneity that the subculture has strength and durability (Wolfgang & Ferracutti, 1967). Members of a subculture are most often very similar with regard to race, ethnicity, and gender. The most obvious characteristic of homogeneity within the Marine Corps is the fact that it is almost entirely male. In 1994, the representation of women in the Department of Defense Armed Forces was twelve percent. The Marine Corps had by far the lowest percentage of women (4.3%), while the Air Force had the highest (15.3%) (Figure 3). The Marine Corps' low percentage of women demonstrated in figure three makes it much more homogeneic than the other services.

The overwhelming majority of Marines are concentrated in the lower pay grades, with eighty-three percent of enlisted Marines between the paygrades of E1 to E5. The

FIGURE 3
PERCENTAGE OF WOMEN IN THE SERVICES
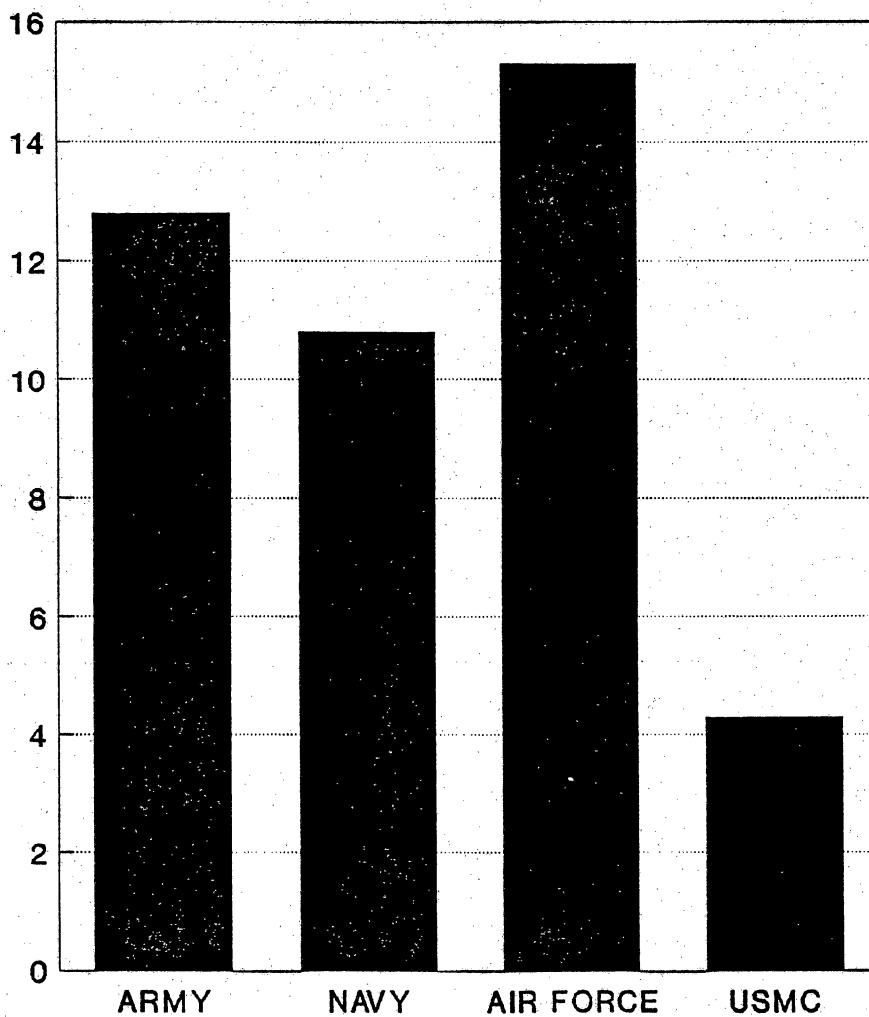
Note. From Marines (1994, January). Almanac '94 Special Edition. 19

evidence linking crime and economic inequality is strong,
particularly when analyzing the subculture of violence.
Marvin Wolfgang's study of youth crime in Philadelphia
found that when the city's youths were divided into two
groups of higher versus lower socioeconomic status (SES),
the youths with the lower SES committed substantially more
criminal activity (Currie, 1985).

The military is clearly a subculture in the most
traditional sense. In the Marine Corps, behavior is
developed as a result of learning and adjusting to the
environment produced by the Marine Corps. From the minute
a recruit steps off the bus at recruit training until the
day he/she is discharged (and probably even after that),
this environment is unavoidable.

The Marine Corps has the characteristics of a
subculture of violence (such as its homogeneity with regard
to age, sex, income, and lack of dispersion). This chapter
suggests that as traditional subculture research indicates,
the subculture of the Marine Corps has the potential to
cause deviant activities. The problem being investigated
is how the violent training of Marines effects the lives of
Marines and their families, and in turn, how that effects
the mission of the Marine Corps.

CHAPTER TWO

Related Sociological Perspectives

There are several theories and perspectives that are
related to the subculture of violence theory that help
explain and define violent subcultures and their
characteristics. This chapter reviews this literature and
attempts to show how the Marine Corps has many of the
characteristics commonly found in some of the related
violent subculture theories and perspectives.

FRUSTRATION-AGGRESSION HYPOTHESIS

One explanation of why violence occurs in a subculture
is based on the theory that frustration often provokes an
aggressive response. The occupation of soldiering can be
much more frustrating than that of civilians, as noted in
chapter one. Steinmetz and Straus (1974) found that the
more normal the aggressive behavior is defined within the
occupational role, the greater amount of violence there
will be. Aggression is the essence of the Marine Corps.
The inherent nature of Marine Corps operations and training
requires that Marines have the ability to behave
aggressively. This is explained perfectly in the mission
of the Marine Corps rifle squad: "To locate, close with,

and destroy the enemy by fire and maneuver (FMFM 1-0)."
From boot camp on, at every level of training, Marines are
taught aggressiveness. This pro-aggressiveness attitude is
reinforced from the very top of the rank structure to the
very bottom. For example, in a recent interview, Sergeant
Major Lewis G. Lee, the Sergeant Major of the Marine Corps
(the highest ranking enlisted Marine) said, "Marines are
naturally aggressive, and we have to encourage that (Navy
Times, 1994)."

ENVIRONMENTAL THEORIES

According to environmental theories, the environment
that the Marine Corps creates for its Marines may be one of
the causes of the subculture of violence. Every service is
based on discipline, honor, and obedience to orders.
However, the Marine Corps, in particular has a world
renowned reputation as being the most disciplined and
demanding of all the services.

The slogan, "First to fight," has appeared on Marine
recruiting posters ever since World War One.
"Leathernecks," the Marines' long standing nickname was
bestowed upon Marines because the original Marine uniform
had a leather neck piece which protected the neck from
sword slashes. "The Scarlet Trouser Stripe," worn by
officers and noncommissioned officers is in honor of Marine
officers and noncommissioned officers who were killed or

wounded during the battle of Chapultepec during the Mexican War. "Band of Brothers," this slogan recognizes that a brotherhood concept depends on all members belonging. These slogans and traditions are just a few examples of the environment which is commonplace throughout the Marine Corps and helps to create and encourage aggressive behaviors.

The primary goal of Marine Corps leadership is to instill in all Marines the fact that they are warriors first (FMFM 1-0, 1995). Marines are taught that the only reason the United States of America needs a Marine Corps is to fight and win wars. Everything else is secondary. Feared by enemies, respected by allies, and loved by the American people, Marines are a "special breed" (FMFM 1-0). It is these guiding beliefs and principles that influence Marines attitudes, and regulate their behavior.

This matter of being different than any of the other services is at the very heart of the Marine Corps. A sense of elitism has grown from the fact that every Marine, whether enlisted or officer, goes through the same training experience. Only the Corps requires uniform training for all its members. Both the training of recruits and the basic education of officers have endowed the Corps with a sense of cohesiveness enjoyed by no other American service. The determination to be different has

manifested itself in many ways over the years, but most of

all, to an unyielding conviction that Marines exist only to

fight.

SYMBOLIC INTERACTIONISM

Symbolic interactionism maintains that it is not

possible to understand crime merely by studying criminals,

nor can one study violence without considering the

environment that develops the aggressive behaviors (Vold,

1979). Therefore, one who is considered deviant in a given

society depends very much on the society itself.

In the Marine Corps, violent, aggressive behaviors are

not considered as deviant as in society as a whole.

Marines are taught to act and behave in violent, aggressive

ways and these behaviors are positively reinforced,

supported, and rewarded. Furthermore, non-aggressiveness

represents a clear and present danger (Eisenhart, 1975).

In symbolic interactionism, meaning is regarded as the

central concept in the explanation of behavior, and the

influence of the psychology of sociological conditions must

be assessed in terms of the meaning those conditions have

for the individual (Vold, 1979). To a Marine, violent

behavior "means" less than it does to others. Military

basic training, in general, creates those meanings. The

plausibility of this hypothesis was explored by Ekman,

Frieson, and Lutzker (1961) who, while studying

psychological reactions to infantry basic training,
administered the MMPI to recruits in the first, fourth, and
eighth weeks of basic training. The change in the shape of
the profiles suggests that aggressive, impulsive, and
energetic features became more prominent, and that recruits
became less prone to examine their own responsibility for
conflicts, and more ready to react aggressively (Ekman,
Frieson, & Lutzker, 1962). This study was administered to
only Army recruits; however, the psychological agenda of
aggression is more clearly etched and blatant in the Marine
Corps (Eisenhart, 1975).

Individual action is a construction and not a release,
being built up by the individual through noting and
interpreting features of the situation in which he acts
(Blumer, 1969). Marines "construct" a definition of
aggression that is tolerant of violence, and this
definition, over time and continuous reinforcement, becomes
real. Certain types of behavior begin to symbolize
aggressive behavior. These symbols, or interpretations,
define violence and aggression as acceptable acts. This
interpretation is not an automatic response, it is
formulated through self-interaction. When a Marine is
engaging in an act, he interprets the act and develops a
meaning for it. With regard to violence, the Marines'
meaning is that it is acceptable.

Society's reaction to an individual's behavior is the most important element of symbolic interactionism. If society reacts positively to an individual's behavior, the individual is more likely to continue acting in that manner. The Marine Corps subculture responds favorably to aggressive, violent behaviors. Aggressive behaviors may be further instilled during training scenarios that require aggressive behaviors. Eisenhart (1975) illustrates this with what he was told as a recruit on the bayonet field upon his last lesson, "The next time you are in a bayonet fight, one of you will die and that will be the one who is not aggressive enough".

CORRECTIONAL BOOT CAMPS

Correctional boot camps offer an opportunity to demonstrate how military style boot camps help create the subculture of violence. Correctional boot camps generally involve a short period of incarceration with an intensive regimen very similar to military boot camps. However, the "recruits" are offenders, usually first time offenders and emphasis is on strict discipline, physical training, drill and ceremony, military bearing and courtesy, physical labor, and punishment for minor misconduct. The idea is to turn lawbreakers into disciplined, authority respecting men (Morash & Rucker, 1990).

The important element for the current discussion is

22

that correctional boot camps offer the opportunity to study whether boot camps alone lay a foundation that sets the stage for a subculture of violence. Although correctional boot camps do not provide training in the use of weapons, and/or physical assault, they promote an aggressive mode of leadership and conflict dominated style of interaction that could exacerbate tendencies toward aggression (Morash & Rucker, 1990).

Studies of correctional boots camps indicate that at the very least, military boot camps do not make offenders any less violent than they were before the boot camp. An evaluation of two-hundred eighty-one graduates of a Florida correctional boot camp found little difference between their performance and a control group: twenty-five percent were rearrested over the next twenty-five months, compared with twenty-eight percent of the control group (Walker, 1994).

Further research will tell us more about the effectiveness of correctional boot camps. However, for purposes of the current discussion, there are differences between correctional boot camps and military boot camps that renders them incomparable. Correctional boot camp graduates often return to the same neighborhoods with the same bleak prospects and delinquent peers that may have led to their initial arrests (Walker, 1994). These

neighborhoods are often characterized by bad economies and high crime rates. Although not by design, a correctional boot camp offers nothing positive at the end, while military boot camps offer entry into a career. Most importantly, military boot camps offer entry into the military subculture, where the aggressive behaviors taught at boot camp are rewarded and supported, while correctional boot camp graduates return to neighborhoods, where the positive aspects of their experiences are negated by peers and family.

The message being sent in correctional boot camps is, "Play the game and you get out early" (Salerno, 1994). Offenders know that all they need to do is get by and they will be free at an earlier date. In military boot camps, however, recruits view their harassment as necessary to accomplish some worthwhile goal (Salerno, 1994).

OCCUPATIONAL SUBCULTURES

"Occupational subcultures" are subcultures created by the jobs people perform. These subcultures are not necessarily criminal or deviant; however, they still have many of the same characteristics as criminal subcultures such as shared sentiments, beliefs, and customs.

Occupational subcultures do not have geographical boundaries as do many delinquent subcultures, they are more often bordered by the job. Police and correctional officer

24

subcultures are examples of occupational subcultures. A common value that both police and correctional officer subcultures share is bravery. The potential to become the victim of a violent encounter, the need for support by fellow officers during such encounters, and the legitimate use of violence all contribute to a subculture that stresses the virtue of bravery (Kappler, Blumberg, & Potter, 1993). Similar to military personnel, police and correctional officers must insert themselves into dangerous and violent situations and encounters that ordinary citizens are not required to do (Singer, 1993).

All occupational groups undergo a socialization process, through informal gatherings such as "coffee pot stories" or "scuttlebutt." However, few occupational groups rival the intensity with which the Marine Corps develops the subculture of violence. Few occupational groups can compare to the regimented system by which the Marine Corps instills its conduct norms. Military sociology is unique and different.

The occupation of police officer, however, does have very similar characteristics to those of the military subculture. A very important similarity between the military subculture and police subculture is that both occupations require an intense training evolution prior to obtaining the job. The military has its boot camp and the

police have their academy. Both are isolated, intense
programs where the conduct norms of the subculture begin to
be taught.

Part of the controversy in occupational subculture
literature is whether personality traits of the members are
similar prior to indoctrination, or developed on the job.
As stated earlier, Ekman, Friesen, & Lutzker (1960), found
similar aggressive behaviors among military recruits.
Similarly, Reiss and Bordua (1967) report many significant
differences on personality trait scores between a group of
police recruits at the beginning of training, but few
significant differences in comparison with a group of
experienced police officers. Moreover, the recruits scores
were similar across four geographically separated cities.
These findings suggest that in both the military and the
police, personality traits, attitudes, and beliefs are
developed as a result of the occupation.

The police are a generally homogenous group and, as in
the military, women are not represented in police work in
proportion to their percentage of society. In 1985, women
constituted five percent of the police work force while
constituting fifty-one percent of the population (Garrison,
Grant, & McCormick, 1988, p.34).

Studies show that in both the military and in police
work, the central problem women face comes from their male

counterparts. Janus, Lord, & Power (1988) found sixty-nine percent of women police officers reported the public's attitude toward them was the same or equally supportive as their male contemporaries. However, less than perfect relations with male officers were revealed, with fifty-five percent reporting that they had been assigned a demeaning detail solely because they were women (Janus, Lord, & Power, 1988, p.126).

Similar to the findings of women in police work, Larwood, Glasser, & McDonald (1980) found that women were viewed as less reliable than men in nontraditional military specialties. Further, they found that the longer men are in the military, the more negative they became toward women.

Both the military and police lack females in command positions. In 1994, only two percent of all general officers were female, and the Marine Corps had only one female general officer (Marines, 1994). Warner, Steel, & Lourich (1989) found that among more than two hundred cities studied, representation of women on city councils plays a major independent role in estimating the level of utilization of women as police officers. They found that the higher the percentage of women on city councils, the higher the utilization rate for women officers.

Police officers are isolated because their work

carries into their off duty hours. Some people may not socialize with police because of the jobs they perform. Police show an unusually high degree of solidarity, which stems from the dangers associated with the job. The conclusion reached here is that the personalities of police officers differ from the rest of the population in many of the same ways as the military subculture.

While the military subculture and the police subculture seem to have many like characteristics, one distinct difference is significant. Research on the police subculture is rather extensive, while the military subculture has been practically ignored. Police researchers identified the problems created by the subculture, and many departments have used those research findings to develop programs that deal with the problem. Community-oriented policing has helped create a better relationship between the police and the communities for which they serve. Physical ability tests and entrance standards have been changed to make the requirements equal for all applicants. Affirmative action programs have allowed more minorities and women to fill the ranks.

As more research on the military subculture is established, perhaps the Department of Defense will also be able to establish policies and standards that will help ease the troubles faced by service members and their

families. This is particularly important in the face of studies such as Segal, Lynch, & Blair (1979) which indicates satisfaction among members of the armed forces is significantly lower than that of civilians.

Correctional officers also possess a distinct subculture that is similar to the military subculture. Kauffman (1988) interviewed correctional officers at three different correctional facilities and found characteristics similar to those discussed here describing military subcultures. The officers considered group solidarity essential not only to the accomplishment of shared goals, but also to their very survival as individuals. As a group, they were willing and able to bring considerable pressure on members to conform. The demographic characteristics of correctional officers are also similar to that of the military. Kauffman (1988, p.24) found most of the officers she studied were young, white men who had no formal education beyond high school.

In chapter one, it was noted that military life presents several stressors unique to members of the military and their families. Some of these stressors were low pay, family separation, isolation, and lack of support from the institution of the military. Long, Shoudsmith, Voges, and Roache (1986) studied correctional officers and compared them to a control group of Army personnel. A

conclusion which may be reached from the findings of this study is that correctional officers produce significantly more stress reactions than does a group of Army personnel. This is an interesting finding in light of the fact that there are several similarities between the two professions. Many prisons are located in remote, rural areas, and often times the officers and their families live in the same neighborhoods. There may even be special living arrangements where only prison staff can live in a specific neighborhood. This is very similar to the military installation. Much like the military, prison staff is almost completely closed off from the free society (Fox, 1983).

Long, et al. (1986) concluded that the correctional officer subculture was the reaction of the "person" to the "social environment." This is the same way by which the military subculture has been formed. As the military member enters the "institution" of military, their entire life becomes the result of working and living in the military subculture.

SKINHEAD SUBCULTURE

The American Skinhead subculture offers the most recent opportunity with which to compare the Marine Corps subculture. Mark S. Hamm provides an analysis of the American Skinhead subculture in <u>American Skinheads: The</u>

<u>Criminology and Control of Hate Crimes</u> (1993). Hamm's work
suggests that subcultures are constantly being formed and
evolving. Subcultures may be a very important element of
all societies.

More than anything else, skinheads are depicted as
vitriolic racists (Hamm, 1993). Skinheads have earned
their title from their shaven heads, and the term has come
to symbolize young, white males who behave violently
against minorities simply because of their race or
ethnicity. Skinheads have been the center of recent media
attention, which has depicted them as a neo-Nazi gang
responsible for many beatings, and even murders of
minorities.

It is not the purpose of the current discussion to
explore the causes or beliefs of the skinhead subculture.
Instead, Hamm's (1994) work provides a more recent example
of a violent subculture, one that is alive and well today,
that has many of the same characteristics of the Marine
Corps.

Hamm (1994) found the conduct norms of skinhead
subcultures to be transmitted most intensely through peers.
Violence is the norm among skinheads, non-violence is a
form of deviancy. Therefore, violent acts are expected or
one will feel as though he is not doing his part, as if
he does not belong. Further, Hamm found that skinheads

felt more comfortable behaving violently with other

skinheads nearby. Violence became an act of imitation, and

group reinforcement for this behavior came to define

violence as acceptable in the minds of the skinheads (Hamm,

1994).

This current, modern-day subculture develops its

conduct norms the same method by which the Marine Corps

develops its conduct norms. During training, Marines are

"performing" for other Marines. Acts of non-aggression are

considered weak, and dangerous. When Marines witness other

Marines behave aggressively, and then are rewarded and

praised for their actions, they imitate that violence in

hopes of receiving the same rewards and praises. From the

moment a recruit enters boot camp, he or she will never be

alone. He or she will constantly be in the presence of

other members of the subculture, where they will feel more

comfortable when behaving aggressively.

CHAPTER THREE

Domestic Violence as a Product of the Subculture

This chapter uses domestic violence rates in the
military as a way to demonstrate the military subculture,
particularly the Marine Corps subculture of violence.
Domestic violence can be used in the theoretical context
discussed here to show that the Marine Corps has many of
the characteristics of subcultures.

DOMESTIC VIOLENCE AS A NATIONAL PROBLEM

Child abuse, spouse abuse, and other physical violence
occur in more than half of all U.S. households (Kadushin &
Martin, 1988). An estimated fifty million people fall
victim to physical harm at the hands of another family
member each year. In this country, a woman is more likely
to be assaulted, injured, raped, or killed by a male
partner than by any other type of assailant (Brown &
Williams, 1987).

Suzanne Steinmetz and Murray Straus (1974) have noted:
"It would be hard to find a group or an institution in
American society in which violence is more of an everyday
occurrence than it is within the family." Violence not
only causes physical harm in families; each incident also

weakens the loyalty, attraction, and trust between members
that are basic to positive family functioning (Zastrow,
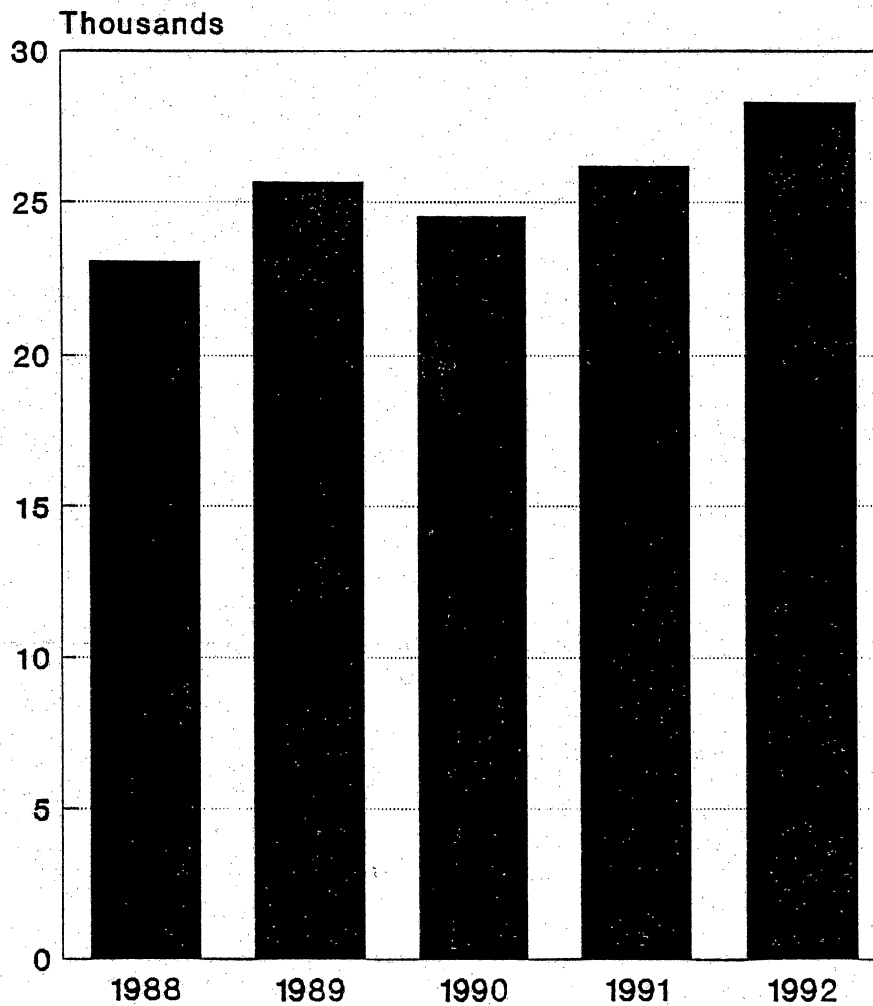1993).

DOMESTIC VIOLENCE AS A MILITARY PROBLEM

Domestic violence is indeed a serious national
problem, and recent attention has been given to domestic
violence and military personnel. Just as domestic violence
remains a problem for all Americans, members of the
American Armed Forces also face the dilemma of what to do
about domestic violence. Figure four shows how abuse cases
within the Department of Defense has increased since 1988.
Figure four is particularly alarming considering that
the total Department of Defense population has been
reduced every year since 1988 (Navy Times, 1995). While
the population shrinks, the amount of abuse cases is
climbing. The Marine Corps has a particularly difficult
challenge, with the highest rates of spouse and child abuse
when compared with the other services. Figures five and
six show that the Marine Corps' rates of child and spouse
abuse are the highest of all the services.

LACK OF PROSECUTION OF MARINE CORPS OFFENDERS

Since Marines are taught that violent behavior is
good, they develop a different meaning of violence than
most people. Violence may "mean" less than in the other
services or as in society in general. It may not be

FIGURE 4
DOD ABUSE CASES

Thousands

Note. From United States Department of Defense, Family Advocacy Committee's Research Subcommittee (1993).

FIGURE 5
RATE/100 OF SPOUSE ABUSE
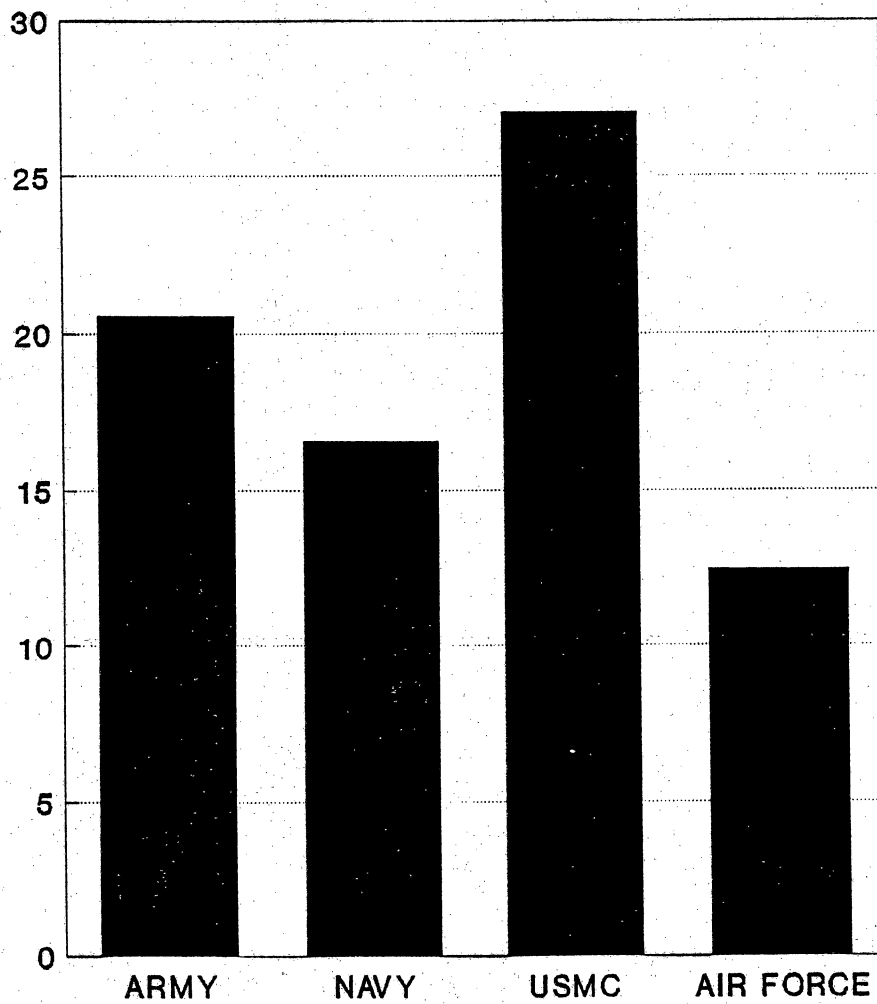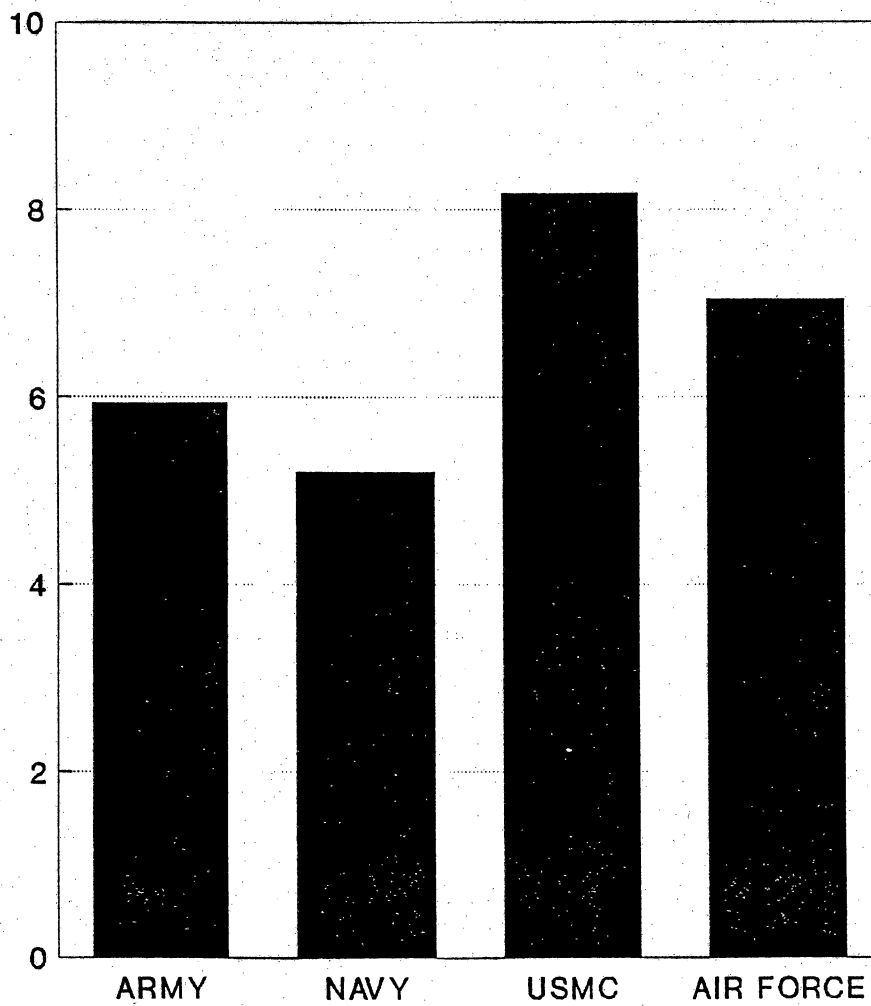

Note. From United States Department of Defense,
Family Advocacy Committee's Research Subcommittee
(1993).

FIGURE 6
RATE/100 OF CHILD ABUSE

Note. From United States Department of Defense,
Family Advocacy Committee's Research Subcommittee
(1993).

37

regarded or defined as abnormal. This different definition
of violence ultimately leads to the lack of any deterrence
of domestic violence in the Marine Corps. In most civilian
communities, if an individual is arrested for domestic
assault, he is taken to jail, at a minimum for the night,
and faces stiff penalties as well as the humiliation of
being arrested and going to jail. This provides some form
of deterrence. However, in the Marine Corps, if a Marine
is apprehended for a domestic assault, he is released that
night to his unit representative. The unit representative
will recommend to the Marine that he spend the night in the
barracks. Usually the Marine will spend the night in the
barracks, and the following day the domestic assault will
be on the blotter, and the Marine's unit commander will
receive a copy of the incident report.

At this point it is left up to the unit commander to
punish as he/she sees fit. However, often there is very
little, if anything, done. The Marine may receive formal
counseling, but most of the time there is no further
disciplinary action taken.

Marines can be punished by commanders with
non-judicial punishment (NJP). NJP refers to a limited
range of punishments which can be imposed for disciplinary
offenses by a Commanding Officer or Officer in Charge to
members of their command (Military Justice, 1992). Article

128 of the Uniformed Code of Military Justice (UCMJ) is entitled, "Assault (Spouse and child abuse)." Therefore, there is an article that allows the commander the authority to charge and punish Marines for this crime.

A Marine has the right to refuse NJP in lieu of a Trial by Courts Martial. A Trial by Courts Martial is a formal hearing much like a normal civilian trial, but the jury is made up of senior enlisted and Marine officers. Usually, however, Marines accept NJP. At NJP the commander is the judge, jury, and executioner. He/she determines guilt or innocence and punishes as he/she deems appropriate. At NJP the commander's authority to punish is more restricted than if the Marine were to elect to go to a Trial by Courts Martial.

In essence, NJP is the Marine Corps form of plea bargaining, and therefore, is a regular occurrence. Examples of violations for which Marines commonly receive NJP are; drunk and disorderly, dereliction of duty, or unauthorized absence. Rarely, however, is a Marine given NJP for a domestic assault. The Department of Defense Family Advocacy Committee's Research Subcommittee (1993) initiated action to complete a survey of all of the branches of the military. The survey counted the number of cases prosecuted under the UCMJ for domestic violence offenses (article 128 or other appropriate articles of the

<u>Manual for Courts Martial</u>). Also surveyed was the number
of cases which had administrative separation as a result of
domestic violence assaults. The Family Advocacy Program
Managers for each branch of the services worked with their
headquarters Staff Judge Advocates (Marine lawyers) to
count the number of cases in 1992.

The survey identified 19,281 substantiated domestic
violence cases for 1992. The study counted 250 cases as
prosecuted under the UCMJ and 482 cases were identified as
having been administratively separated. The total number
of cases found in this study indicates that a very small
number of cases faced legal action for abusive behavior.

The lack of prosecution lends support to the theory of
symbolic interactionism. The entire system, including the
Military Police, Staff Judge Advocates, and unit commanders
seem to define domestic violence as almost non-criminal,
allowing it to happen without punishment or any other kind
of deterrence. Systematic and thorough investigation and
prosecution of domestic violence acts under the UCMJ would
appear to be a secondary response to this criminal and
violent behavior. It appears, from the low numbers of
cases prosecuted or administratively separated, that
diversion into treatment remains the primary intervention
for domestic violence offenders.

<u>VICTIM MISCONCEPTIONS ABOUT PUNISHMENTS</u>

There seems to be a misconception by the victims of abuse in the Marine Corps that if their spouse is identified as abusive, he/she will face stiff penalties. While very few Marines are formally punished for abusive behaviors, one analysis found Marine corps victims to be more afraid of military consequences for their spouse than of any other consequence (Caliber, 1994).

In September, 1994, Caliber Associates prepared an analysis of the Marine Corps spouse abuse responses to a Department of Defense victim intake survey. The abuse victims study was designed to examine both perceptions of the consequences of reporting abuse as well as actual system responses to reported abuse by military sponsors (Caliber, 1994). Analysis of the survey data indicates a number of significant differences between the responses from Marine Corps spouse abuse victims and spouse abuse victims from the other services. The Caliber (1994) analysis found that about two-thirds of all Marine Corps victims were very or somewhat afraid that their spouse's military career would be in trouble, their spouse would be punished by the military, their spouse would be kicked out of the Marine Corps, or that it would be unpleasant for their spouse at work.

The survey respondents were asked, "How afraid are you that any of the following will happen because your problem

is known by the military?" When compared to the other

services, the Marine Corps victims are much more afraid of

the military consequences. Table one shows that in every

single aspect examined, the Marine Corps victims were much

more more likely to be affraid of the military

consequences. Perhaps the most important aspect examined

was that almost half of all Marine Corps victims feared

that their spouse would hurt them, while only about a third

felt this way in the other services. This may indicate

that Marines exhibit aggressive tendencies while in the

home much more frequently than members of the other

services.

Table one indicates that Marine Corps victims strongly

believe their spouse will suffer disciplinary action for

abusing them. However, the Department of Defense

statistics on prosecution rates clearly show that this is

not the case. What is it, then, that makes Marine Corps

victims more fearful? It may again be the environment.

The same environment that makes Marines more aggressive and

violent may make the victims more fearful.

Marine spouses often hear the stories of Marines being

punished swiftly and harshly for acts that to them seem

ridiculous. These punishments create an environment that

leads the spouses to believe a Marine will be punished

harshly for a crime as serious as spouse abuse. Force

TABLE 1
VICTIMS' FEARS OF CONSEQUENCES BY MILITARY SERVICE

VICTIMS' FEARS	USMC	ARMY	NAVY	AIR FORCE
Things will get worse at home	52%	40%	34%	31%
Spouse will hurt her	47%	33%	27%	22%
Spouse will be kicked out of the military	63%	54%	45%	54%
Spouse will leave her	44%	29%	25%	25%
Will not be able to support self/kids	52%	41%	35%	36%
Family will think bad of her	33%	12%	9%	13%
Friends will think bad about her	32%	15%	6%	7%
Too many people will hear about it	57%	43%	29%	40%

Note. From Caliber Associates (1994). Analysis of the Marine Corps spouse abuse responses to the department of defense victim intake survey. (Contract No. M00027-94-M-2658). Washington, DC: U. S. Government Printing Offices.

drawdown has made promotion and retention very difficult. Spouses believe a black-mark such as a domestic assault on a Marine's record will surely force them out of the service. This will create an even worse economic situation for the family, and this is the last thing the spouse wants. Also, one of the most common punishments given at NJP is to garnish wages.

Top-ranking officers publicly proclaim to take a tough stance against domestic violence. On May 11, 1993, the Commandant of the Marine corps issued the following order to all General Officers, all Commanding Officers, and all Officers in Charge, "We must maintain a coordinated response in which family violence is reported to proper authorities whenever suspected...commanders should...initiate administrative or disciplinary proceedings to hold offenders accountable for their actions."

It would appear as though the Commandant is publicly proclaiming that the Marine Corps is taking a tough stance against domestic violence. Essentially, he is ordering officers to prosecute cases against Marines who behave violently while in the home. Quite simply, it is not happening. But if the commandant said it should happen, most Marines and their families believe it is happening. This helps create the environment that sponsors fear and

develops these misconceptions regarding punishment.

AGE GROUPS AND SOCIO-ECOMOMIC STATUS OF MARINE CORPS

ABUSERS AND THEIR VICTIMS

A subculture may be made up of all ages, however, the

violence is usually most prominent in a limited, segmental

age group (Wolfgang & Ferracutti, 1967). The Caliber study

found that in each service, the majority of abusers were in

the paygrades E4 to E6, but Marine Corps abusers were

consistently more likely to be in the E1 to E3 paygrades

(Table 2). Table two shows that Marine Corps abusers fit

the description given by Wolfgang & Ferracutti with

regards to the violence being most prominent within a

certain age group.

Forty-three percent of the Marine Corps is within the

E1 to E3 paygrades (Marines, 1994). Almost all Marines are

promoted above the E3 paygrade during a normal four year

enlistment, and most Marines enlist within a year or two

after graduation from high school. Therefore, the

overwhelming majority of domestic violence assailants in

the Marine Corps are in a younger age group.

Table two also suggests that Marine Corps abusers are

of a lower socio-economic status. Social class is an

important factor in many studies of violent crime, and the

subculture theory is no different. Studies of subculture

since 1958 consistently report the same observation:

that the overwhelming majority of assaultive crimes are committed by persons from the lowest stratum of a social organization (Wolfgang & Ferracutti, 1967).

Just as Marine Corps abusers tend to be younger, so do the victims of domestic assaults (Table 3). More than two-thirds of Marine Corps spouse abuse victims are twenty-five or younger, while about one-half of the victims in the Army, Navy, and Air Force combined were twenty-five or younger. Conversely, eight percent of victims in both the Army and Navy were thirty-six or older, while only one percent of Marine Corps victims were over the age of thirty-six.

Domestic violence within the Marine Corps is an example that fits the subculture model theory. It appears as though the violent, aggressive behaviors taught to Marines carries over into their family life. It also appears that the institution, the environment created by the Marine Corps allows, and almost encourages, violence at home. Finally, family violence is isolated to a very segmented group of young, economically troubled families.

IMPORTATION EXPLANATION AND SELECTION PROCESS

There seem to be two competing theories that may explain the origins of the Marine Corps' subculture. According to social learning theory, the majority of violence exhibited by Marines is a learned behavior. This

TABLE 2

ABUSER PAYGRADE BY MILITARY SERVICE

	MARINE CORPS	ARMY	NAVY	AIR FORCE
E1-E3	41%	23%	14%	13%
E4-E6	52%	68%	79%	82%
E7-E9	5%	7%	6%	4%
OFFICERS	2%	2%	1%	2%

TABLE 3

VICTIM AGE BY MILITARY SERVICE

	MARINE CORPS	ARMY	NAVY	AIR FORCE
16-20	33%	16%	9%	11%
21-25	37%	41%	42%	36%
26-30	17%	24%	22%	33%
31-35	12%	10%	19%	14%
36+	1%	8%	8%	6%

Note. From Caliber Associates (1994). Analysis of the Marine Corps spouse abuse responses to the department of defense victim intake survey. (Contract No. M00027-94-M-2658). Washington, DC: U. S. Government Printing Offices.

is an occupational view that suggests that the institution

of the Marine Corps assists in developing and creating

violent behavior. The other theory is that the high rate

of domestic violence in the Marine Corps is directly

correlated with recruiting practices. This "importation"

explanation suggests that the Marine Corps tends to recruit

and enlist individuals who have a predisposition for

violence. This theory is similar to the early literature

by Cohen (1955) in which juveniles join gangs as a result

of ineffective parental authority, family supervision, and

shared experiences of failure in traditional middle-class

social systems.

Perhaps the Marine Corps subculture is the result of

both schools of thought. If so, the Marine Corps recruits

those with a predisposition for violence and then develops

the violent traits even further. As Cohen has noted,

juveniles join gangs to achieve a status that they can not

achieve in the larger, more dominant culture. In one

sense the Marine Corps is similar to Cohen's gang, where

violent juveniles view the Marine Corps as a means to

achieve a status that to them seems unattainable in the

civilian world.

Marine Corps recruiting practices support this

importation explanation, and the high rate of violence in

the Marine Corps may be directly related to recruiting

practices. While the other services have changed

recruiting practices to stay competitive with civilian

employment opportunities, the Marine Corps recruiting

practices have remained the same. The other services

advertise enlisting for the purposes of "learning a trade"

or "learning a skill." However, the Marine Corps continues

to present the image of "warrior" or "knight" in most

recruiting media. While the Marine Corps mission requires

combat effectiveness, today there is a need for more

intelligent and technically proficient recruits. The

message the Marine Corps may be sending is, "come join our

gang, come join the Marine Corps to vent all of your

violent, aggressive tendencies, and we will pay you for

it." Individuals with a attitudinal predisposition for

abuse may find this appealing. Also, Marine

Corps recruiting practices legitimize violence by

indicating, "this is the reason why we want you, and you

better not let us down."

CHAPTER FOUR

Conclusions

COMPARISON TO NATIONAL PROBLEM

The historical sequence of events concerning the United States Marine Corps' policies and actions to stop domestic violence seems to replicate the problems faced by the nation's criminal justice system over the last twenty years. While the nation's criminal justice system's response has evolved dramatically over the last two decades, the Marine Corps response has remained the same. The Marine Corps has failed to shift to defining domestic violence assaults as a crime. As both a crime and a social problem, offenders must be both prosecuted and treated. One of the problems for the Marine Corps in addressing this critical issue of domestic violence lies in its failure to adopt the same changes many of the leading states and cities in the country have adopted. Domestic violence is a crime under specific state criminal penal codes, and it is a crime under article 128 as defined in the Manual for Courts Martial. To be effective in addressing this problem, the Marine Corps must change its policies and practices. The Marine Corps must adopt a pro-prosecution

policy calling for systematic, universal investigation and prosecution of the perpetrators of such acts.

The Marine Corps faces a unique opportunity to become the leader among the armed forces. Legal, investigative, and command personnel must work together to develop the prosecution policies and practices required to stop family violence in the Marine Corps. Specifically, the Marine Corps must increase the conviction rates of accused batterers; and enhance penalties for convicted batterers. This tough position must be communicated to all Marines, and Marines must be trained to know what the Marine Corps response will be.

PREVENTING DOMESTIC VIOLENCE IN THE MARINE CORPS

Outside of combat, reacting quickly and intensely with anger and aggression is usually problematic. The Marine Corps needs to capitalize on the fact that most of its abuse cases are among young couples who have not yet had time to establish patterns of chronic and escalating abuse. The Marine Corps should place substantial emphasis on primary prevention to sensitize young Marine couples to the definitions, symptoms, and dynamics of abuse. Marines and their spouses need to know that the Marine Corps defines family abuse as criminal. This could be done with a violence prevention program at recruit training to educate recruits about domestic violence and provide them

with skills to help them avoid destructive behavior. Also,
this program would educate recruits on the possible
disciplinary actions that could be taken if they are
arrested for a domestic assault.

This training should stress that even though Marines
are required to behave violently, this behavior must be
contained to training and the battlefield. The training
should show that it is inappropriate to respond to every
day circumstances as if they were situations encountered in
the life-threatening context of combat. Specifically,
Marines need to be shown that violence against their
defenseless spouse and children is not appropriate.
Marines are constantly put in training situations that
require quick decisions to be made at a moments notice
under the most stressful of situations. This decision-
making training should be carried over into the family
setting. Marines should be shown that it is feasible
to control emotions in a family setting because it
is similar to the requirements on the battlefield. The
distinction between home and training needs to be clearly
defined. This distinction can be established with broader
training situations that are not just limited to wartime
scenarios.

A generalized uncertainty of the consequences, as well
as the concern about negative career impact to the service

member, inhibits many spouse abuse victims in the military from coming forward. The Marine Corps needs to acknowledge that these young women are frequently scared and confused--scared of both their husbands and the Marine Corps institution, which seemingly have total control over their lives. Commanding officer sanctions will only work to the extent that commanding officers, who have authority to impose sanctions, understand and begin to sanction Marines for family violence.

DETERMINE ORIGINS OF SUBCULTURE

Perhaps the Marine Corps should set out to clearly determine whether the subculture is occupational or traditional. That is, does the Marine Corps tend to recruit and enlist individuals who have a predisposition for violence before they enter the Marine Corps? Or, is the high rate of violence a result of the environment created by the Marine Corps? This could be determined by conducting studies of recruit's awareness, understanding, and attitudinal predisposition to violence. The test should be administered to new recruits entering boot camp, and again after the adjustment has taken place. This pre-test/post-test should be designed to capture information of family abuse history, definitions of violence, attitudes towards violence, and some socio-economic information.

The Marine Corps should analyze the entire Marine Corps criminal justice system, and identify how it contributes to the subculture of violence. This includes the Military Police, Staff Judge Advocate, and Unit Commanders. Each of these components continues to allow family violence to happen by unofficially defining it as non-criminal, thus contributing to the subculture of violence.

Marine Corps military police training and practices should be analyzed with regard to handling domestic violence situations. Military police investigators should be trained to conduct more effective evidence collection and to respond sensitively during victim interviews.

The Marine Corps should perhaps capitalize on the established research and literature on subcultures to aid them with overcoming violence. The literature presented here on police subcultures is an example of a similar institution that is taking steps to overcome an identified problem. The Marine Corps should take steps similar to those of police agencies across the country.

The Marine Corps should identify factors that create or contribute to the subculture of violence. The Marine Corps has an opportunity to lead all the other services on this issue, and the Marine Corps' leadership should advocate and fight to develop solutions to handle this

devastating social problem. If the Marine Corps leads, the other services will follow, and ultimately, these recommendations may make the Marine Corps even more effective in combat, by making the individual Marine's family life more pleasant.

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