

**European and Latin American Higher Education
Between Mirrors**

ÓSCAR ESPINOZA

Chapter 10

**THE EQUITY GOAL ORIENTED MODEL
REVISITED¹**

INTRODUCTION

The implementation of the Interuniversity Framework Programme for an Equity and Social Cohesion Policy on Higher Education -financed by the Alfa Programme of the European Union (2011-2013)- represents an enormous challenge for the Riape3 Network. It is important to note that this network was formed from a previous work developed since 2006 by European and Latin American university researcher teams and managers that created at the time the Riaipe1 and Riaipe2 networks.

The starting point of the Riaipe Network's tasks was the need to build an alternative to the education policies promoted by European and Latin American governments, which in most cases are part of the neoliberal globalization agenda where knowledge and access to quality education is conceived as commodity rather than a public good. The proposal we are developing and running -which seeks to consolidate and broaden an emancipatory education project for all that generates greater cohesion and social justice- contrasts with that hegemonic look.

1 This paper is based on research conducted for my doctoral dissertation entitled "The global and national rhetoric of the educational reform and the practice of (in) equity in the Chilean higher education system (1981-1998)". The preparation of this work was supported in part by the grant awarded by the *William and Flora Hewlett Foundation* and the *Center for Latin American Studies Research and Development Fund, University of Pittsburgh*, as well as by the *School of Education Research Fund* and the *Institute for International Studies in Education, University of Pittsburgh*. The original version of the model and its subsequent adaptation was published in: O. Espinoza (2007). Solving the Equity/Equality Conceptual Dilemma: A New Model for Analysis of the Educational Process, in *Educational Research*, 49, N°4 (December 2007), pp.343-363, London, England; and in O. Espinoza & L.E. González (2012). Políticas de Educación Superior en Chile desde la Perspectiva de la Equidad, in *Revista Economía y Sociedad*, 22 (Enero-Junio), pp.69-94, Facultad de Ciencias Sociales y Económicas, Universidad del Valle. I appreciate the comments on earlier drafts provided by my friends and colleagues Mark Ginsburg, Luis Eduardo González, Ann Matear, Javier Loyola and Carlos Velasco.

In this context, this chapter seeks to set up the theoretical foundations that guide and surround the “equity” concept, one of the two essential components of the Interuniversity Framework Programme for an Equity and Social Cohesion Policy on Higher Education.

By means of a theoretical discussion on the concept of ‘equity’ and the recreation of a model of equity made in the early last decade by the author -oriented towards objectives which combines different dimensions of the concept either with resources and/or with different stages of the educational process-, this document aims to achieve two purposes: (1) to clarify the notion of ‘equity’ among researchers, educators, evaluators, analysts, managers and policy makers; and (2) to encourage a critical review and synthesis of the research/intervention on equity among researchers, managers at the institutional level and evaluators.

UNDERSTANDING THE MEANING AND SCOPES OF THE “EQUITY” CONCEPT

The notion of “equity” has run through many debates on social and public policy, and yet in many contexts there seems to be no very clear idea of just what “equity” mean. Questions have been raised among policy analysts, policy makers and evaluators concerned with issues of inequity and inequality regarding the feasibility of achieving equity, or social justice, in a society characterized by inequality. This is manifested in the family environment, in occupational status and level of income; it is also evident in educational opportunities, aspirations, attainment and cognitive skills. It is debatable whether we can have “equity” in a society that prioritizes efficiency in resource management over social justice. Certainly, such questions have shaped and guided many discussions and theoretical debates among scholars, policy analysts and policy makers. However, the use of the “equity” concept and the dimensions involved in it in many cases demonstrates that there are confusions and misunderstandings even among scholars and researchers. Consequently, embodied in this chapter is an attempt to clarify the nature of “equity” and debates and definitions, particularly those that develop even when people appear to be looking at the same set of information. Greater understanding of such debates about the concept guiding the analysis of this paper is the first goal.

Over the past four decades there have been a number of controversies when discussing the concept of “equity”. This concept is often invoked by policy analysts, policymakers, government officials and scholars in order to justify or critique resource allocation to different levels of the educational system. In this section, the meaning, goals, and assumptions of “equity” will be considered in terms of their interacting implications for social and educational policy. Instead of arguing for a unique or simple conception of “equity”, a set of definitions of this concept as well as a discussion related to theoretical and policy issues associated will be presented. Moreover, a new model for analyzing equity in relation to education made by the author of this chapter, which might be a valuable tool for researchers, evaluators, educators, policy analysts and policy makers will be discussed.

“Equity” and “equality” must be considered as the main basis of distributive justice, which Morton Deutsch (1975: 137) notes “is concerned with the distribution of the conditions and goods which affect individual well-being.” Deutsch (1975: 137-138) argues that

“the sense of injustice with regard to the distribution of benefits and harms, rewards and costs, or other things which affect individual well-being may be directed at: (a) the values underlying the rules governing the distribution (injustice of values), (b) the rules which are employed to represent the values (injustice of rules), (c) the ways that the rules are implemented (injustice of implementation), or (d) the way decisions are made about any of the foregoing (injustice of decision-making procedures).”

In debates about distributive justice, “equity” is often used as if it were interchangeable with “equality” (Lerner, 1974; Warner, 1985). Secada (1989), for instance, makes numerous strong arguments that “equality” is not synonymous with “equity” and, thus, rather than striving for equality amongst groups of people we should work towards equitable inequalities that reflect the needs and strengths of the various groups. He poses that students must be dealt with on an individual level. Unfortunately, human beings are creatures of bias and, thus certain inequalities are bound to exist. When these inequalities can be identified along the line of a particular group, it is important to examine the source of inequality and determine the reasons for the inequality.

The “equity” concept is associated with fairness or justice in the provision of education or other benefits and it takes individual circumstances into consideration, while “equality” usually connotes sameness in treatment by asserting the fundamental or natural equality of all persons (Corson, 2001).

While “equality” involves only a quantitative assessment, “equity” involves both a quantitative assessment and a subjective moral or ethical judgment that might bypass the letter of the law in the interest of the spirit of the law (Bronfenbrenner, 1973; Gans, 1973; Jones-Wilson, 1986; Konvitz, 1973). Equity assessments are more problematic because people differ in the meaning that they attach to the concepts of fairness and justice and because knowledge of equity-related cause and effect relationships is often limited (Harvey & Klein, 1985).

The conception of “equity”, commonly associated with human capital theory, is based on utilitarian considerations (Bentham, 1948; House, 1980; Rawls, 1971; Strike, 1979). In other words, it demands fair competition but tolerates and, indeed, can require unequal results. On the other hand, the concept of “equality” associated with the democratic ideal of social justice demands equality of results (Strike, 1985). In some cases “equity” means equal shares, but in others it can mean shares determined by need, effort expended, ability to pay, results achieved, ascription to any group (Blanchard, 1986) or by resources and opportunities available (Larkin & Staton, 2001). Greater “equity” does not generally mean greater “equality”; quite the opposite, for more “equity” may mean less “equality” (Gans,

1973; Rawls, 1971). As Samoff (1996: 266-267) has stated the issues in relation to schooling:

“Equality has to do with making sure that some learners are assigned to smaller classes, or receive more or better textbooks, or are preferentially promoted because of their race...Achieving equality requires insuring that children [students] are not excluded or discouraged from the tracks that lead to better jobs because they are girls...Equity, however, has to do with fairness and justice. And there is the problem...[Indeed,] where there has been a history of discrimination, justice may require providing special encouragement and support for those who were disadvantaged in the past...To achieve equity – justice – may require structured inequalities, at least temporarily. Achieving equal access, itself a very difficult challenge, is a first step toward achieving equity”.

Often “equity” is used as a synonym for justice and especially as a negation when inequity is equated with injustice. One interpretation of “equity” is grounded in the equity theory, which is a positive theory pertaining to individual conceptions of fairness (Blanchard, 1986; Wijk, 1993). The fundamental idea underlying the “equity” theory is that fairness in social relationships occurs when rewards, punishments, and resources are allocated in proportion to one’s input or contributions (Adams, 1965; Cook & Parcel, 1977; Deutsch, 1975; Greenberg & Cohen, 1982; Messick & Cook, 1983; Tornblom, 1992). At this level of the discussion it is important to clarify the concepts of input and output. Whereas the term input refers to the perceived contributions that individuals make, output (which represents one of the main dimensions shaping up the equity-equality model here discussed), refers to the perceived benefits enjoyed by individuals.

Deutsch (1975), for example, suggests that in pure cooperative systems a person’s share of economic goods should be determined by his relative skill in using such goods for the common weal and that he/she should share in the consumer goods with others according to need. But fairness also takes place when rewards and resources are allocated on the basis of individual needs. Either taking into account individual needs or contributions, “equity” might be defined, according to Salomone (1981: 11), in terms of three dimensions: motivation, performance and results:

If equity is defined in terms of motivation, and if rewards are allocated in terms of it, then the deeper and stronger our motivation, the greater our rewards. If equity is defined in terms of performance, and if rewards are allocated in terms of it, the more outstanding the performance, the greater our rewards. If equity is defined in terms of results, and if rewards are allocated to it the more plentiful the results, the greater our rewards. In each case, inequalities may be magnified rather than reduced.

The basic problems of “equity” theory are that it employs a one-dimensional concept of fairness and that it emphasizes only the fairness of distribution, ignoring the fairness of procedure. An alternative to “equity” theory is based on two justice

rules: the distributional and the procedural. Distribution rules follow certain criteria: the individual's contribution and his/her needs. Preceding the final distribution of reward, a cognitive map of the allocative process is constructed. Hence, fairness is judged in terms of the procedure's consistency, prevention of personal bias, and its representativeness of important subgroups (Deutsch, 1975; Leventhal, 1980).

"Equity" principles and "equity" assessment are frequently applied to the individual level and or to the group level (including within the latter some groups based on their socio-economic, racial, sexual, ethnic, residential, age, educational, and religious characteristics, to mention a few examples). As Weale (1978: 28) has pointed out "equity" arguments and "equity" assessment "are normally used in a context where one social group is being benefited relative to another". For instance, in most countries some portion of the cost of securing training at the higher education level is assumed by society and the remainder by the individual. The way in which those charges are divided significantly determines who does and who does not have access to higher education. On the face of it, equity would seem to require that access to higher education be extended to as many as possible, and perhaps even to all. But to do that would deny one of the basic functions of today's university, that is, to serve as screen or filter in the identification of those presumed to be the most talented and hence the best able to assume key positions in the labor market or other roles in society.

In this scenario, access to higher education (as well as persistence, achievement, and outcomes) has been studied in very general terms from different perspectives. Those who take a critical perspective consider that unequal access derives not from inefficiencies in "free" market economy development, but is the direct result of the capitalist system functioning (e.g., Arriagada, 1993; Carnoy, 1976a, 1995; Espinoza, 2002; Petras, 1999), which generates both unequal class relations within societies (Bowles & Gintis, 1976; Pattanayak, 1996; Petras, 1999) and dependency relations between 'developing' and 'developed' countries (Carnoy, 1976b; Espinoza, 2002). In contrast, some scholars have approached this topic from an equilibrium or functionalist perspective, assuming that unequal access to higher education stems from differences in individuals' ability (cognitive and intellectual skills) and motivation (Gardner, 1983; Herrnstein & Murray, 1994; Sternberg, 1985, 1988) or from minor biases or inefficiencies in educational and economic systems (Blomqvist & Jiménez, 1989; Crossland, 1976; Jiménez, 1986; Johnstone & Shroff-Mehta, 2000; Psacharopoulos & Woodhall, 1985; Salmi, 1991; World Bank, 1994, 2000).

Certainly, unequal performance, and hence the threat of unequal rewards, becomes a social and political issue only when the unit of assessment shifts from the individual to aggregates of individuals, such as socio-economic and ethnic groups. Usually such group identities are strengthened, when a preponderance of the group's members are socially or economically disadvantaged. While individual differences can be analyzed in terms of actual performance, group differences are viewed in terms of the percentages of each group which fall above (or below) some given criterion of successful performance.

THE MULTIDIMENSIONAL EQUITY MODEL REVISITED

The multidimensional equity goal oriented model represents my understanding of educational “equity” goals and it attempts to fulfill two purposes: (1) to clarify among researchers, educators, evaluators and policymakers the notion, senses and scopes of “equity”; and (2) to facilitate efforts of researchers and evaluators to critically examine and synthesize equity-based research through mapping interrelations that is possible to set up among distinct equity dimensions, available resources and different stages of the educational process which might be faced by individuals in their lives.

It is important to mention that the model is sufficiently ductile and flexible to be adapted and used for any educational institution either at the school or the university level depending on the pre-established institutional needs and action plans that have been defined for implementation. In that sense, the equity model constitutes an easy-to-use tool, which allows to conduct analysis of various kinds at any level of the educational system.

The theoretical model here presented is an adaptation and revision (Espinoza, 2012) of the original version (Espinoza, 2002, 2007), which considers two axes: on the one hand, the concepts of equality² and equity in its different dimensions, and on the other the resources (financial, social and cultural) and the different stages of the educational process (access, survival, performance and results).

With regard to the “equity” concept, the revised model recognizes three dimensions (first axis), including:

- *Equity for equal needs*: it implies to intervene through different types of actions to guarantee that persons with similar requirements are able to satisfy them. These range from the most basic to the most complex needs (Maslow, 1943; 1991; 1994; McClelland, 1961). Therefore, it is understood that all human beings share basic subsistence needs (food, shelter and clothing) but as vital experience enriches and society becomes more complex needs diversify and turn more sophisticated. For example, a person who becomes more educated will demand or will have the need for greater independence and autonomy.
- *Equity for equal capacities*: it implies to intervene through different types of actions so as persons with similar potential are able to accomplish equivalent goals in different areas of action. By capacity we will understand a set of features that a person can accomplish and with it the freedom he/she has to be able to choose among different ways of life (Sen, 1992, 1997; Lorenzeli, 2005). According to

2 In relation to the concept of equality the model identifies three dimensions: (i) Equality without restrictions: it implies that there is equality of opportunity for a free choice without political, legal, social or cultural limitations; (ii) Equality without exclusions: it implies that all people without any distinctions are considered equal for all purposes associated to their quality of life such as health, housing, employment, welfare, income and education; (iii) Equality without discrimination: it implies that all social groups (socioeconomic, ethnic, gender, creed and others) have on average the same chance to reach a similar quality of life and possibilities to reach power positions.

this definition, people who have equal access to primary goods may increase it in differentiated forms if they possess different capacities. This means that there may be produced deep differences in the generation and distribution of primary goods according to differentiated capacities. Following Sen (1992; 1997), by equal capacities we will understand equivalent freedom to all people so that they accomplish to achieve their life projects and can cooperate with society. This highlights the importance of evaluating the goals achieved (achievements or accomplishments) which can be measured in several ways: utility (fulfilled desires, satisfactions), opulence (incomes, consumption) and quality of life. In this definition freedom would be to have an effective opportunity to reach what is valued. The means (resources, basic goods) increase the freedom to realize the own goals, but equality in means is not equal to equality in freedom since there are other factors involved in that freedom, such as sex, pregnancy possibilities and exposure to diseases, among others.

- *Equity to equal achievement*: it implies to intervene through different types of actions so as persons with similar achievement backgrounds are able to achieve equivalent goals in different areas of action. By achievement we understand the perception that people have about the fulfillment of their aspirations. Each individual sets his/her own goals in different areas, including family, social and work spheres. These goals are continuously developed and adjusted since childhood on the basis of experiences which are daily meaningful to people (Rodríguez, 2004). Therefore, it is common that people who in certain moment of their lives aspired to certain goals which were not achieved concrete other options which from their point of view are equivalent or better than their initial aspiration. From this definition it can be argued that people who have an equal level of achievement are those who perceive to have successfully met the objectives or goals proposed, although these are different from their initial aspirations (see Table 1).

The second axis of the model includes two aspects: resources and educational stages.

- Resources refer to the tangible and intangible goods to which people can access. In this sphere it is possible to identify three types of resources: financial, social and cultural.
- Financial resources refer to monetary assets or financial capital and consider both tangible and intangible goods delivered.
- Social resources are social support networks.
- Cultural resources are associated to behavior codes of the dominant culture.

The stages of the educational process refer to the phases, progress and success conditions that give life to the educational trajectory of an individual. In this sense, four stages can be distinguished:

- *Access*: it is the possibility of joining a particular level of the educational system of creditable quality. In the case of access to higher education there must be considered both the students who enter the system and the students who apply.

- *Survival*: it is the condition of survival and progress within the education system.
- *Performance*: it is the recognition of academic performance obtained by the student, as measured by grades and evaluations.
- *Outcomes*: it is the final consequence of the educational process and gives account of the implications and impact of academic certifications obtained by people, which result in employability, wage levels and the possibility to move up or to link to political power (see Table 1)

Matching “equity” dimensions with resources and different stages of the educational process

With regard to equity, the dimension ‘equity for equal needs’ can be contrasted with ‘equity for equal potential’ and ‘equity for equal past achievement’. Those three dimensions of “equity” may pertain to different stages of the educational process, including, access, survival, performance, and outcomes. For instance, if ‘equity for equal needs’ is matched in relation to access to quality education, then, according to *the goal-oriented definition* (Harvey & Klein, 1985), access at the individual and group level must be based on need. However, ‘equity for equal needs’ might also be associated with survival, meaning that the goal would be achieve an equal level of educational attainment for those with equal needs. Likewise, ‘equity for equal needs’ might be coupled with performance. In this sense, *the minimum achievement definition* (Gordon, 1972) stipulates that there should be enough resources applied to bring every student to at least a minimal needed achievement level, which implies obtaining satisfactory performance and grades. Implicit in the ‘equity for equal needs’ dimension is the fact that differences in achievement beyond that are based on need. Regarding outcomes, ‘equity for equal needs’ might be accomplished just if individuals having equal needs obtain equal jobs, incomes or political power.

Through the ‘equity for equal potential’ dimension, it is assumed in the model that individual abilities can be matched with resources, access to quality education, survival, performance, and outcomes. In relation to resources, for instance, it is reasonable to bring out in our model’s discussion *the full opportunity definition* (Tumin, 1965), which calls for resources devoted by governments to each student in the amount necessary to guarantee that each individual will be able to maximize his or her potential. However, if ‘equity for equal potential’ is matched to access to quality education, then the goal to be accomplished would guarantee that all individuals with similar abilities and skills will gain access to quality education. Besides, if ‘equity for equal potential’ is coupled with survival, then the goal would be for those individuals with equal abilities and skills to obtain equal educational attainment. If ‘equity for equal potential’ is planned in relation to performance (educational achievement), then the goal would be to ensure that students with similar abilities will learn (not just be taught) the same contents at a defined point in the educational system.

Table 1. The multidimensional equity model

CONCEPT	DIMENSIONS	RESOURCES	STAGES OF THE EDUCATIONAL PROCESS			OUTCOMES
			ACCESS	SURVIVAL	PERFORMANCE	
EQUITY	Equity for equal needs	Guarantee that all people who have same needs have same amount of social, financial and cultural resources (<i>The reasonable classification definition</i> , Carlson, 1983).	Provide access at the individual and group level on the basis of need (<i>The goal-oriented definition</i> , Harvey & Klein, 1985).	Insure that those with equal needs gain equal level of educational attainment.	Ensure that students with equal needs have equal performance (<i>The minimum achievement definition</i> , Gordon, 1972)	Make sure that those individuals with equal needs obtain equal jobs, income, and or political power
	Equity for equal potential (abilities)	Make sure that all individuals with certain potential have same amount of social, financial and cultural resources (<i>The full opportunity definition</i> , Tumin, 1965).	Guarantee that all individuals having equal abilities will gain access to quality education.	Make sure that students with equal potential realize equal educational attainment	Make sure that students with similar abilities will learn the same things to the same levels at a defined point in the educational system.	Make sure that those individuals with equal potential when born obtain equal jobs, income, and or political power
	Equity for equal achievement	Insure that people who achieve or whose parents achieve the same educational level will have equal resources	Provide equal access to quality education for students having equal past achievements	Make sure that educational resources are allocated on a competitive basis according to how effectively students have used the resources in the past (<i>The competition definition</i> , Warner, Havighurst & Loeb, 1944)	Ensure equal achievement for those who have achieved the same performance in the past	Ensure that individuals with similar academic achievement will obtain similar job statuses, incomes, and political power

Fuente: Adaptación del autor sobre la base de Espinoza (2002; 2007; 2012).

However, matching ‘equity for equal potential’ with performance tends to arouse fears of ‘elitism’ and false ‘meritocracy’ in which some ethnic and socio-economic groups may be disproportionately represented. These concerns motivate the attack on all forms of assessments of aptitude and performance, since group differences, if not caused by externally imposed inequalities, would be revealed more clearly when education and opportunity are equalized (Jensen, 1975; Wood, 1984). If educational institutions are allowed to impose standardized tests, then competitive academic testing and normative approaches will perpetuate inequality. In this regard, it has been emphasized that high expectations and stringent standards have been used to predetermine educational and social destinies before the contestants have even entered the race (Nicholson, 1984; Shapiro, 1984). Similarly, if ‘equity for equal potential’ is coupled with outcome, then individuals with equal potential should obtain equivalent jobs, income and or political power.

As with other definitions, *the full opportunity definition* has two major problems. First, there is the problem of ascertaining what a student’s potential is, which represents an unsolvable problem. Indeed, “ability” tests do not measure ability except insofar as they measure achievement, which is not the same as the ability to achieve. The second major problem is to decide how much to spend to develop a person’s potential. In practical terms, *the full opportunity definition* involves significant government commitment and financial resources, which most of times are scarce.

Last, but not least, is the dimension labeled ‘equity for equal achievement’. If this dimension is coupled with resources, then individuals who have the same achievement level would have equal amount of financial, social and or cultural resources. And if ‘equity for equal achievement’ is tied with access to quality education, then students with equal past achievements should have equal access to quality education. But if ‘equity for equal achievement’ is matched with survival (educational attainment), then *the competition definition* (Warner, Havighurst & Loeb, 1944) suggests that educational resources should be apportioned on a competitive basis according to how effectively students have used the resources in the past. Equally, if ‘equity for equal achievement’ is tied with performance, then the goal is to make sure that individuals with the same past achievements are able to obtain equal performance in the present. Finally, if ‘equity for equal achievement’ is coupled with outcomes, then the goal is to guarantee that students with similar academic achievements in the educational system will enjoy equal incomes and jobs of similar status.

CONCLUSION

It has been argued that there is a profuse discussion around the “equity” concept, its senses, goals and applicability. In fact, “equity” is frequently used as synonymous of “equality”. In order to achieve a better understanding of this concept and its applicability at the future research and the policy design level a new multidimensional model goal oriented model associated with resources and stages of the stage educa-

tional process is discussed. Therefore, it will be feasible to clarify and guide future discussions related to “equity” in the public policy arena.

Most of the definitions of “equity” identified in the literature are frequently used by many researchers, evaluators, policymakers, policy analysts, scholars and educators as if they were interchangeable. As a result, it is very common to see in the literature ambiguity and confusion among those social scientists when using this concept. The multidimensional equity model developed in this paper suggests several new directions for analysis and research. It has provided some ideas about how “equity” (i.e., ‘equity for equal needs’, ‘equity for equal potential’ and ‘equity for equal achievement’) could be treated and measured in future research in relation to different kind of resources (social, financial and cultural) and features of the educational process (access, survival, performance and outcome).

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Oscar Espinoza
Universidad UCINF, Chile