

Washington DC 開発フォーラム

途上国の識字問題に如何に取り組むべきか - 文書管理アプローチの視点から -

A Case Study of Non-Formal Education for
Indigenous People:
Enhancement of Document Management Skills in
the Knitting Course near Sucre, Bolivia

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Literacy Training and Livelihood

- **Today, literacy is considered as a key element for better livelihood of individuals and socioeconomic development of the world.**
- **Previous field-oriented literacy studies have found three facts:**
 - **Main and Sub:** Literacy component should be integrated into Livelihood training.
 - **Targeting Needs:** One literacy achievement doesn't necessarily lead to another.
 - **Bolivian Context:** Literacy nurtures social and economic development.
- **They may sound reasonable. But is it ever appropriate to tackle these issues with the concept of literacy?**

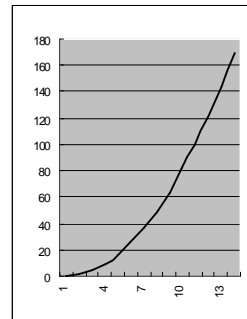
Operationalize *Literacy* – Document Management Perspective

- Problems with Current *Literacy* Concepts
 - **Too much focus upon letters**
 - Letters are just one particular kind of visual symbols on documents.
 - **Excessive analogy with oral language**
 - Little attention is paid to preservation (filing) and disposal phases of our document uses.
- "Document Management"
 - *Literacy* issues actually concern a particular kind of *tool-use*. We call it *Document Management*.

Three Symbols on Documents: Figures, Numerals & Letters

.....
I, II, IV, IX, XIV, XXV, XXXVI,
1, 2, 4, 9, 16, 25, 36, 49, 64, 81,
one, two, four, nine, sixteen,

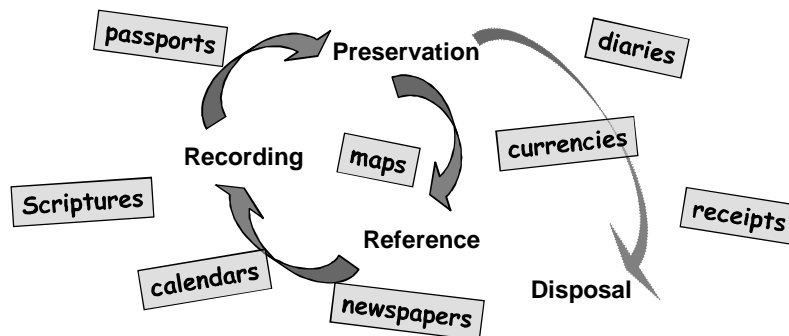
$$Y = X^2$$



When thoughtfully combined, they become powerful tools
of thought, communication and expression.

How are different visual symbols associated on the
surface of each document?

Document Cycles & Document Communities



In the end, smooth circulation of documents is backed up by
trust among people involved. In other words, we form
communities through documents without seeing each other.

Who manage what documents in what way for what?

NFE Organizations for Poor Adults as Weak Document Communities

In addition to scarce resources and instability of members,

- Members are poor at managing documents.
 - Weak in handling different visual symbols flexibly.
 - Unaccustomed to managing documents in cyclical perspective
- Intra-organizational communications are barely mediated through documents.

The two tend to constitute a vicious cycle.

Research on DM in NFE Organizations (1) Assessment

- Two Criteria:
 - Are convenient and user-friendly mixes of visual symbols realized for different situations?
 - Is the circulation of documents contributing to the enhancement of trusty communities and well-being of their members?

Research on DM in NFE Organizations (2) Introduction of Exercises

- Introduction of DM Exercises Relevant to Ongoing Activities in the Organizations
- Constant Monitoring and Quick Feedbacks for Improvement of DM Exercises
- **Long-term Goal:** Establishment of Trusty and Sustainable Document Communities in/from the Organizations

Why Bolivia, Why Craft Workshop for Urban Poor?

- Poverty is severe.
 - According to Census 2001, 58.6% of the population (4.695.464 people) live in poverty: lacking basic infrastructures such as water supply, using inadequate fuels, receiving low level of education...
<http://www.ine.gov.bo/#>.
- Livelihood skills need document management.
 - Illiteracy rate (2001): 13.0%; urban 6.3%, rural 25.2%.
- Non-formal education is appropriate for trying various DM exercise.
 - Target areas are clear.
 - Flexible in comparison with FE.

Knitting Course of Centro Educativo Multifuncional, Villa Armonia (CEMVA)

As of the **year of 2000:**

- Monthly tuition fee: 15 Bolivianos (3 US dollars)
- Number of the participants: 35, all women
- Age (years): 11 ~ 38, mean = 18.7, mode = 16 (6 women)
- Civil State: married = 13, single = 22
- Languages: Quechua & Spanish
- Average of Educational Background (years): = 5.8
- Main Daily Activities: Domestic chores
- Interests in the Craft Workshop: To acquire craft skills, School-like atmosphere, to meet friends etc.
- The participants are qualified as "**functionally illiterate**" using the ordinary parlance of development aid circles.

Investigating Prior DM and Related Practices

- At the start of the research project, most participants had:
 - **Fair craft skills**
 - **High fluency in both Spanish & Quechua**
 - **Minimum literacy skills in Spanish**
 - **Poor written arithmetic skills**
 - **Poor graphic skills**
 - **Low quality reference book for knitting**
 - **Few sustainable document cycles**

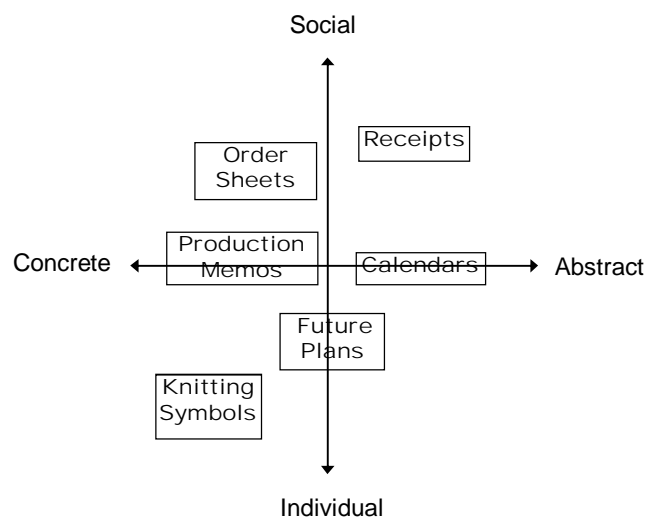
Introducing DM Exercises

- **Future Plans**
- **Calendars of Activities in the Workshop**
- ***Sociodramas* (Role play games of commercial transactions with DM)**
- **Editing of a New Hand-Knitting Reference Book with Knitting Symbols**
- **Production by Order**
- **Filing of documents made for the above exercises for reference in the future.**

Motto: in a relaxed and casual way

From 1999 to 2001, about 50 people participated in the exercises in total.

Panorama of DM Exercises



Main Results of DM Exercises (1)

- **Uneven distribution of skills of, and preferences for visual symbols among the participants**
 - For **Future Plans**, bipolar distribution of preferences of representational modes were found: texts or drawings.
 - **Knitting symbols** were quickly picked up. Several non-schooled women even learned them with much interest and showed better understanding than their more educated peers are.
 - Most learners showed little interest in the instrumental potential of **drawings** throughout the DM exercises, although some already possessed fair drawing skills.
 - Few learners did **written arithmetic** in order to deal with exercises such as gauge count and price calculations.

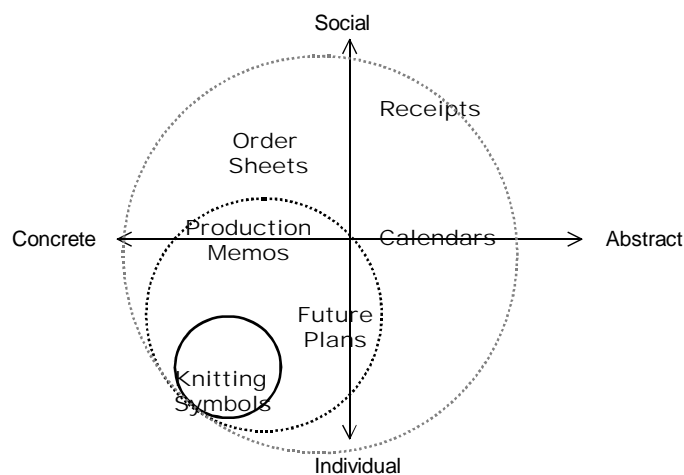
Main Results of DM Exercises (2)

- **Lack of cyclical perspectives in the participants' DM practices**
 - **Calendars** were barely referred to, although the participants picked up how to fill out and read them quickly.
 - Many participants were careless about the minute differences of designs indicated with **knitting symbols**.
 - **Filed documents** were rarely consulted after exercises.

Main Results of DM Exercises (3)

- **Most participants continued to mishandle contractual documents such as receipts appropriately.**
 - **Confusions of entries:** "*recibe*" ("customer") and "*por concepto de*" ("item/description") were often wrongly filled out.
 - **Confusions of the roles:** receivers of receipts often signed them.
 - **Persistence of confusions:** these failures occurred repeatedly even though similar exercises were carried out several times.

Schematic Summary of the Major Tendencies of the DM Practices of the Participants in the Knitting Course



Lessons for the Future

- Importance of High-quality Documents: Search best mix(es) for each situation
- Starting with the DM Practices Close at Home
- Hand-knitting as a Good Entry Point for Effective DM Practices
- Quick Feedback and Constant Repetition
- Limitations of DM Exercises (resources & external factors)

Suggestion for Practitioners

- **DM Perspective as Diagnostic Tool**
 - What kind of DM practices (“literacy-required issues”) are there in a specific livelihood training?
 - In which DM practices do the participants show their skills?
- **DM Perspective as Learning Tool**
 - What type of DM practice is beneficial as well as appropriate to a specific livelihood training?
 - How can we devise participants-friendly DM exercises which lead to autonomous and sustainable DM cycles by the participants?

A Few Cautious Remarks

- There is no ultimate manual on document management. (There is no perfect document manager, either.)
- DM is an evolutionary process involving both individual practices and societal transformations.
- Some of the problems concerning DM reside at societal level rather than in the incapability of "illiterate" individuals.

Note:

Tentative Definitions of *Literate Societies* and *Literate People* from DM Perspective

- Viewing from the DM perspective, what are called "**mature *literate societies***" are in fact a cluster of various document communities in which diverse documents circulate along the lines of their own cycles backed up by norms and trust among the members.
- The "***literate people***" are those who can properly deal with countless documents they meet everyday (fill out, sign, modify, preserve, pass on to other people, ignore, throw away, etc.) depending on the contexts and following the norms and ethics shared by the document communities they belong to.