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METHODOLOGY OF THE RESEARCH IN CHARITY IN THE HISTORY OF EDUCATION

Critical for the development of the independent Ukrainian state are the issues of spiritual and cultural development of the society, which include not only positive, but also negative tendencies, such as rapid social stratification. The latter imminently affects both education and the opportunity for children from different social groups to socialize in this sphere. Any society seeks some way to attract private and public initiative to ensure equal access of all children to quality education. In our country, this process is governed by the Law of Ukraine "On Charity and Charitable Organizations" (2002), Policy Statement of the President of Ukraine "On Facilitation of Charity" (2000). Nowadays, charity as a facilitator of the social development of citizens is given national preeminence; it is understood as an instrument of the formation of the civil society by means of social capital creation on the regional and national levels. This is the reason why historical perspective of charity in the sphere of education is gaining importance. Charitable activities should be presented not as separate charity acts, but as a reflection of the nature of social relations specific to certain historical epoch, which influence the socialization of the child.

The historical context of charity in the sphere of education is presented in the form of conceptual framework of methodology of history of pedagogy and history of social pedagogy (L. Vakhovsky, N. Gupan, I. Zvereva, S. Zolotukhina, G. Laktionova, O. Sukhomlynska, L. Taran, S. Kharchenko, L. Shtefan, L. Borodkin, V. Kraevsky, I. Kovalchenko, I. Lypsky, M. Rumyantseva, V. Filatov, B. Shpotov, P. D'Ohrn (Netherlands), M. Pein (USA)); of general historical and general pedagogical frameworks of theory and history of charity (N. Barynova, V. Borysenko and I. Levchenko, I. Dobryansky, O. Donik, V. Kovalynsky,

V. Kornienko, T. Kurinna, A. Naradko, T. Nikolaeva, T. Pokotylova, R. Apresyan, V. Afanasiev and A. Sokolov, U. Korobeinikov, U. Maksimov, Z. Maslovska, A. Sokolov, F. Stupak, I. Surovtseva, U. Tazmin, O. Khorkova, D'Ossonvil, D. Bovua (France), S. Gogel, U. Fubenko, O. Degaltseva, L. Zashtovt (Poland), A. Lindermyer (USA)).

The objective of the article is to outline the essence of the major methodological approaches to the research in history of charity in the sphere of education in Ukraine.

It is difficult to construct scientific research methodology of history of charity because one cannot apply methodological apparatus of any other science directly to the research in this interdisciplinary area. Thus, V. Kraevsky defines methodology of pedagogy as a system of knowledge about the basis and structure of pedagogical theory, about the principles of approaching and ways of gaining knowledge that reflects pedagogical reality, as well as the actions that help gain such knowledge [1]. Methodology of social pedagogy (after I. Lipsky) is the result of resolving the contradiction between the processes of cognition and transformation of social pedagogical practice [2]. According to O.Sukhomlynska, the tendency towards "globalization" of modern methodology is a dangerous phenomenon. The author maintains that the desire "to cover all pedagogical phenomena in time and space is often illogic and non-systematic aspiration to attract to research as many scientific authorities, sources, and materials as possible, and is not compensated by the problem worth studying" [3, p.13].

We intend to outline three methodological levels of research in history of charity, such as *general philosophical* level, which defines major scientific approaches to the study of charity; *specific methodological* level, which gives the opportunity to define main scientific theories that can be applied to the analysis of history of charity; *applied* (instrumental) level provides a range of scientific methods and techniques that have been used to study the historical perspective of the development of charity in the sphere of education .

We believe that the first level is represented by hermeneutics and cognitivism, as well as systematic, civilizational, and culturological approaches; the specific methodological level contains narrative approach; the applied level of theories includes theory of socialization, status-role theory, theory of social mobility, theory of social elite (aristocracy), theory of social capital.

Cognitivism undoubtedly has considerably influenced the formation of the theoretical framework of our research. In spite of the vague definition of the term itself, cognitivism, in a wider sense, is understood as a methodological principle that means the ability to transform external information. It interprets the notion of "contextual knowledge" (as abstraction and concretization), whereas the notion of "context" is one of the fundamental notions of history; at the same time, abstraction and concretization can be used to study such complex social-pedagogical phenomena as charity. V. Filatov [4] believes that cognitive approach gives an opportunity to apply it to the process (study of charity) and result (creation of the author's vision of the formation and development of charity in the sphere of education within certain period of time, its theoretical framework). Employment of cognitive approach to constructing the methodological framework of our research seems meaningful, as it helps to create the interpretation of reality as "a reality-for-the-subject".

Also important for the analysis of history of social-pedagogical phenomena and processes, especially when working with the sources and references of the research, is the hermeneutic approach. Hermeneutics, as a science of the adequate comprehension of texts, in our case, expands the area of its original application and begins to contain the problems of worldview; in other words, as famous German philosopher M. Heidegger wrote, it contains philosophy of the text comprehension, where the text means any information that emerged between two subjects of comprehension [5]. At the same time, every interpreter continues real text's history elaborating upon it, projecting it to the social reality, adding his/her own vision and perception, thus creating a new text as the object of hermeneutics. German philosopher H.-G. Gadamer believes that every interpreter has the right to and should seek the ways that the text articulates with his/her own background, especially that

born of hermeneutic experience [6]. Philosopher and sociologist of 20th Century P. Ricoeur (1995) claimed that hermeneutics is a stage between abstractive and concrete reflection, "any interpretation is aimed at overcoming the distance between the past cultural epoch that the text belongs to and the interpreter himself/herself" [7, p.18], i.e., it is the instrument of the researcher's understanding of himself/herself through understanding of the historical text.

Materials that have been analyzed during our research allow to define them as systemic phenomenon. In scientific sources (V. Bespalko, 1977; T. Ilyina, 1977; A. Kuznetsova, 2001 et al.) [8-10], the following criteria of systems are defined: presence of common elements, each of them being a minimal unit that has certain divisibility limits within this system; presence of certain links and relations between the elements of the system; the system functioning and its qualities depend on the specific character of its structure; presence in the system of a certain level of integrity, i.e. internal integrative qualities that emerge as a result of the interaction of its elements; presence of a common structure that unites all the elements of the system and provides for the full presence of the mentioned elements and for their full coordination; presence of links with other systems; purposefulness of the system, that is its determination to solve a problem (in our case, it's a social-pedagogical problem) [10]. Systematic approach is applied in our research primarily as a criterion for outlining the main specific features of the stages of charity development in the sphere of education in Ukraine in 19th – early 20th Centuries that we have defined.

Research in charitable support of education is based on *culturological approach* because, in the first place, education is a component of the integral cultural space at a certain historical stage of its development. Adopting culturological approach as one of the primary approaches to investigating history of charity, we proceed from the notion of "culture" itself, analyzing charity in its formation and development, within certain period of time limited by the research, as a cultural phenomenon [11]. This said, the following axiological determinants of a cultural phenomenon are chosen:

1.   Culture as *a program of activity and behavior;* the essence of human activity as cultural activity (including charity) is its definition as a driving force of action.

2.   Culture as *heredity*. Culture is an experience of human activity, which descends from generation to generation, this being true for the experience of charitable support of education in 19th – early 20th Centuries. There is no doubt that culture is not only inherited, it develops and enriches.

3.   Culture as *accumulation* of socially meaningful experience. This determinant seems to unite two previous ones: socially approved and meaningful experience (experience of charity) that is a program of behavior is not only inherited, but is also accumulated, which allows to present it as a social historical phenomenon and study as the object of this scientific research. Culturological approach appears to be especially important for the analysis of how charitable support of education unfolded in history if one takes into consideration that researchers use cultural parameters to define the transmission of social experience to the generations ahead [11]. That is why, when envisaging the development of charity in the sphere of education in Ukraine, it is important (based on culturological approach) to employ the experience of its historical development.

Culturological analysis of charity in the sphere of education may be challenging because the phenomenon under examination and the researcher exist in different socio-cultural paradigms. Thus, there emerges the problem of relating different layers of socio-cultural experience, which are viewed as unique, specific, and non-intersecting.

Culturological approach is closely connected with *civilizational approach,* which has been proposed by German scientist H. Rickert (1857). Having transformed over *time* as a social, historical and civilizational phenomenon, modern followers of civilizational approach emphasize its social and historical anthropocentrism – placing the person into the center of research and studying social history through human dimension. In our case, civilizational approach pertains directly to the problems of the development of this component from the point of view of education.

Culturological and civilizational approaches in our scientific research give the opportunity to draw on the notion of *sociocultural* space as the basis for the analysis of charity as a social and pedagogical phenomenon. Sociocultural space consists of two sub-spaces – social and cultural. Social space, after P. Sorokin, can be presented as a separate world, where "to define the position of a person or a certain phenomenon … means to define their relation to other people or phenomena taken as reference points" [12, p.289]. Cultural sub-space is a reflection of the social one and it represents its main features; stable forms of social practice (which include charity as a social institution) give the opportunity for the moral and value systems that include charity as an axiological feature of the development of society on the regional and general levels to strengthen [12, p.300].

Specific methodological level of the analysis of the development of charity in the sphere of education is represented, primarily, by regional and narrative approaches. Thus, *regional approach* (O. Sukhomlynska, 2002) [13, p.4] is employed here to define peculiarities of the development of charity in the sphere of education in historical regions of Ukraine: Right Bank, Left Bank, Slobozhanshchina, South of Ukraine. This is the reason why regional approach itself is of importance; it influences the articulation of research conclusions and determination of main tendencies of the development of charity as a social and pedagogical phenomenon over certain period under examination.

Regional approach is a world-view concept that represents the reflection of social and cultural contradictions and distinctions within "region-center" and "region-region" dimensions and within certain territorial and historical borders [14]. It is necessary to mention that Ukraine as a region of the Russian Empire can be itself analyzed in the context of our research problem on the regional level.

Employing regional approach, we agree with the O. Betliy's (2007) point of view that, "regions are rather a space for action, meaning, and experience connected to historical and administrative borders, as a result of which cultural elements become meaningful signs of the region and, as such, often become dependent on different ideological and political programmes" [15].

Of particular importance in the research of formation and development of charity in the sphere of education is *narrative approach* (O. Sukhomlynska, 2005; L. Vakhovsky, 2006) [16, 17].

Narrative, or story, if these notions are viewed as synonyms, is a form of existence of the subjective (fiction, personal narrative) in the objective historical process and in the attempts to objectively describe it (again, from the point of view of the narrative). Narrative approach helps to shape and give meaning to, as well as methodize and structurally organize (beginning, middle, end of a stage, period, process, phenomenon) history of social pedagogy [18]. Contemporary Ukrainian researcher L. Vakhovsky maintains that history within narrative approach "is not what really happened in the past, but it is what we tell about the past" [16, p.43].

Narrative approach gives an opportunity to shift the emphasis of contemporary social pedagogy from analyzing "objective" (used in quotes because absolute objectiveness of social and pedagogical, as well as historical knowledge is impossible) social phenomena to the research of subjectivity of events, as, within a narrative, the person is understood as "an active social subject who influences major changes in macro- and microworld" [19, p.3].

We draw upon the narrative approach as the approach that allows to describe historical events by means of creating coherent context and, at that, "not only does the historical research maintains the value of diversity … but embodies its specificity and scientific nature, where a historian integrates a series of episodes" [20].

Main features of narrative approach are the following: *retrospective view* – analysis of past events through their projection on the present and future; *perspective view* – dependence of the historical estimation on the researcher's own view; *selectivity* – selection of the information that would allow multiple interpretations of social and pedagogical events within a certain cultural context; *specificity* – influence of social-pedagogic knowledge on the formation of the social identity of the past; *communicative character* – influence of cultural discourse on social-pedagogic knowledge; *fixed character* – interrelation of historical interpretations and social conditions, within which they are meaningful and important for the researcher [21].

Using narrative in social pedagogy studies allows to represent this theoretical approach as a certain social mechanism (this is the reason why it suits well historical and social studies), as a wide spreading combined with localization and its specific historical ways of formation of certain historical phenomena in the life of a society localized on a certain territory.

In this sense, the known mechanism of representing the individual, for example, story fixed in literature, against general history of a country, a large social group as a background does not always work. Taking into consideration that the study of history of charity in the sphere of education conducted by us is primarily based on the individual, historically personalized vision of this phenomenon given in letters (personal and formal), memoirs, and individual archive documents, narrative approach is gaining prominence for our research. Important for the research in history of charity are its own narrative categories. They are the following: plot, function, time, story (in the meaning of "narration"), discourse, point of view, etc., which we use as ready narrative categories.

Of particular significance in application of narrative approach to the research in history of charity is the work with texts (sources). Sources are also narrative phenomena, and their description is a narrative within a narrative. This being said, the axiological content of such a narrative is to create one's own social and pedagogical historical interpretation, give author's appraisal of social relations, value and motive context of human life, cultural background of events within the period under examination.

As stated in the description of the structure of methodological basis of the research, theories of the *applied* (instrumental) level include the theory of socialization, status-role theory, theory of social mobility, theory of social elite (aristocracy) and theory of social capital, which will be examined below.

Theory of socialization defines socialization as a continued and multifaceted process spanning the entire life. However, this process is most intensive in children and youth, when all basic orientations are established, main social norms and relations are determined, motivation of social behavior is formed. In this case, the

support of the socialization process by social institutions including charity institutions appears to be meaningful and can be the object of the research in history of charity [22].

Socialization involves a variety of means, which are specific for a particular society at a certain stage of its development [23]. Through such means and actions, human behavior is adjusted to the norms, examples, and values acceptable in this particular culture. The child's socialization, his/her development, formation of the child's personality occur in interaction with the environment, which influences the process with the help of agencies and vehicles of socialization. Definition of charity as a vehicle of socialization requires its inclusion to the system of socialization conductors studied by social pedagogy as of today. Charity belongs to such vehicles of socialization as, for example, regional social ecological environment, occasional communication, the Internet, etc. Pattern of relations among different vehicles of socialization, as well as the potential for resolving contradictions among them, lies, to our mind, in their interchangeability: for example, the Internet, at a certain stage of the child's socialization, can become the leading vehicle of socialization or, else, lead to social deviation. The same goes for charity as a vehicle of socialization: historical analysis of this phenomenon suggests that charity can define the trajectory of the person's life.

Status-role theory explains the individual's position in the system of social relations. Status-role theory has great potential for our research because it allows to explain socio-dynamic processes in the person as a result of his/her involvement into charitable activities (both giving and accepting help) that becomes the person's vehicle of socialization.

"Social status" and "social role" notions and possibility of their change for better are present at any society. If charity as social and pedagogical phenomenon becomes an instrument of the status change, then status-role theory can be used to explain status-role dynamics in the society in the 19th – early 20th Centuries. This, in its turn, allows to understand the motivation and reasons for the development of charity in the sphere of education.

Theory of social mobility gives the opportunity to monitor the processes of the person's socialization depending on the factors that affect the child's social development in a particular period of time. P. Sorokin (1951) believed that education is one of the main engines of vertical social mobility, so called social "elevator" within the social hierarchy of the society [12]. To our opinion, charitable support of children of certain social groups in the sphere of education moved such social "elevator" upwards and gave the opportunity of changing social status positions as a result of obtaining education with the help of charitable support. Charity can also be characterized as an instrument of realization of main social functions of education: testing, selecting, and distributing.

Theory of social elite (aristocracy) appears to be theoretically meaningful for our research, as every society confronts problems that can be resolved exclusively by this social group. According to contemporary native sociologist A. Novak, the role of social elite is to put forward suggestions how to resolve social problems on the regional or national level [24]. Problems in the sphere of education belong to the urgent social problems, their resolution being the function of the social elite as well. The latter employs charity in this sphere as an instrument of establishing social justice and realizing the principle of social responsibility. Furthermore, social elite enables the creation of intellectual and moral values, which are transmitted to the entire society through the system of education. Charity can be the instrument of such transmission facilitating it or giving it a new way. Theory of social elite (aristocracy) also deals with the elite's openness as a criterion of its viability. This criterion is important for our research, as charitable support of socially disadvantaged groups by the social elite is a measure of the elite's openness to other social groups [24]. At the same time, we do not analyze the problem of the elite and mass confrontation that is defined by some scientists as the essence of the theory of social elite [25], as the elite itself can exist only if there is a mass phenomenon.

Theory of social capital (Y. Chaputovich, 2005) gives prominence to the notion of "social capital" as a type of social behavior that provides for creating mutual trust and cooperation within different social groups with different social status

[26]. The measure of the development of social capital is the amount of "the individual" that members of a society are able to devote to "the common" (good, virtue, development). Thus, as we can see, the level of charitable support is closely connected with the level of the development of social capital on the regional and national levels.

Conclusion. Therefore, methodology of research in history of charity in the sphere of education can be defined as multi-disciplinary for it contains several methodological levels and leading methodological approaches – systematic, cognitive, civilizational, culturological, etc. *The perspective of further research* is seen in the application of the described methodological approaches to the investigation of history of charity in the sphere of education in Ukraine in the 19th – early 20th Centuries.

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Seiko N. A. Methodology of the Research in Charity in the History of Education

The article contains the analysis of the main methodological approaches to the matter of Ukrainian education, including systemic, civilizing, culturological, narrative, and cognitivistic ones, and review of the certain scientific theories, e.g. the social mobility theory, the social йlite theory, and the social capital theory. The place and the role of above-mentioned approaches in analysis of beneficence development in Ukrainian education in XIX – beg. XX cent. are defined in this article.

Key words: beneficence, methodological approaches, scientific theories, Ukrainian education.

Сейко Н. А. Методологічні проблеми дослідження доброчинності в історії освіти

У статті подано аналіз головних методологічних підходів до проблеми історії доброчинності у сфері освіти України – системного, цивілізаційного, культурологічного, наративного, когнітивістського, а також окремих наукових теорій – теорії соціальної мобільності, теорії соціальних еліт, теорії соціального капіталу. Визначено місце та роль зазначених підходів в аналізі проблеми розвитку доброчинності у сфері освіти в Україні у XIX – на початку XX століття.

Ключові слова: доброчинність, методологічні підходи, наукові теорії, сфера освіти України.

Сейко Н. А. Методологические проблемы исследования благотворительности в истории образования

В статье подан анализ главных методологических подходов к проблеме истории благотворительности в сфере образования Украины – системного, цивилизационного, культурологического, наративного, когнитивистского, а также отдельных научных теорий – теории социальной мобильности, теории социальных элит, теории социального капитала. Определено место и роль отмеченных подходов в анализе проблемы развития благотворительности в сфере образования в Украине в XIX – в начале XX века.

Ключевые слова: благотворительность, методологические подходы, научные теории, сфера образования Украины.