

REFERENCE FRAMEWORK FOR THE EVALUATION OF INSTRUCTIONAL MATERIALS

Sociocultural Framework



Coordination and content

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SOCIOCULTURAL FRAMEWORK

All instructional materials submitted to the Ministère for approval must reflect the composition and values of Québec society, which advocates sexual equality and openness to others and their differences. Representations of relationships between the sexes and among the various groups that make up society must be free of discrimination and stereotypes.

Drawing on the stipulations of the *Charter of Human Rights and Freedoms* and the recommendations of the Conseil du statut de la femme, the Bureau d'approbation du matériel didactique (BAMD) provides a framework for evaluating the sociocultural aspects of the instructional materials used in elementary and secondary school. Because of the subtleties involved in this type of evaluation, the main statements in the framework are supported by a method of analysis that is both quantitative and qualitative.

TWO MAIN PRINCIPLES

1. Gender equality

Relationships between all people must be egalitarian.

It is essential that:

1. texts be written in a non-sexist manner, according to the principle of gender-neutral writing
2. instructional materials be free from [discrimination](#) and [stereotypes](#) (unless their use is warranted by the specific context, e.g. a historical context)
3. the sexes be represented in an egalitarian manner and generally as interacting with one another:
 - gender equality is reflected as much in the social roles attributed to people as in their characteristics, attitudes and behaviours
 - interpersonal interactions take place in a climate of respect
4. the sexes be represented in equal proportions

2. Representation of sociocultural diversity

People who are different from the majority must be represented in ways that recognize diversity as positive.

It is essential that:

1. instructional materials be free from [discrimination](#) and [stereotypes](#) (unless their use is warranted by the specific context, e.g. a historical context)
2. people be represented in an egalitarian manner and generally as interacting with one another:
 - instructional materials promote the inclusion of all people
 - interpersonal interactions take place in a climate of respect
3. [people with characteristics different from those of the majority](#) be well represented, as well as members of Aboriginal communities, different ethnic backgrounds and minority cultures

QUANTITATIVE EVALUATION

Quantitative evaluation ensures that gender diversity and sociocultural diversity are accurately represented in documents. It requires a breakdown of all the characters in documents according to gender and sociocultural background.

Regardless of the size of a document, all illustrations (photographs, drawings, sketches) featuring easily identifiable people are evaluated. If the document is over 1000 pages long, textual evaluation is conducted on the basis of a random sample representing all sections of the document and constituted as follows:

- 40% of continuous texts (presentations, stories, comic books, newspaper and magazine articles)
- 40% of short texts (instructions for students, statements of problems, examples, legends, etc.) or 25% in the case of dictionaries

Generally, the discrepancy between the numbers of men and women represented must not exceed 10% (or 15% if the subject or the historical context justifies it).

The proportion of people who have characteristics different from those of the majority must be at least 25% but no more than 30%. It can be between 20% and 25 %, if the subject or the historical context justifies it. In addition, at least 15% of those represented must be members of an Aboriginal nation or another ethnic community or minority culture.

In other words, out of a total of 100 characters, 70 to 75 must belong to the majority and 20 to 25 must be different from the majority. At least 15 of those who are different from the majority must belong to minority ethnic communities or cultures (Aboriginal, Italian, African, Arab, etc.). The rest of the characters who are different from the majority may represent another type of difference, such as a disability ([see page 7](#)).

DETAILS RELATING TO COUNTING

In illustrations

- A group is generally counted as one person. A “group” in this case comprises all the people in an illustration who, due to a reduced scale or a lack of clarity, cannot be counted accurately. However, the context determines whether the illustration is intended to show a group as such, or merely the people in the foreground.
 - A group of people of the same gender (e.g. a professional football team), or members of the same sociocultural group (e.g. an Amerindian tribe), is counted as one person.
 - People who stand out in a group due to gender or sociocultural differences (e.g. a white female nurse surrounded by a group of young African men) must be counted separately.
- In comic books, each main and secondary character must be counted only once.
- Close-ups of parts of the body other than the head must not be counted.
- Mascots that accompany the student throughout the book must not be counted.

- Only characters of identifiable gender are counted. In other words, fantasy characters (such as extraterrestrials), animals, elves and animated objects are counted only if their gender is foregrounded (e.g. a “Mama bear” is dressed as a woman).
- Characters in works of art are not counted. However, depictions of historical figures born before the era of photography (e.g. a sculpture of Plato or a print depicting Pythagoras) are counted when they are used to illustrate the characters.

In texts

- To be considered representative, characters must play an active role. Therefore, only major or secondary characters are counted.
- A character who is represented in more than one text must be counted each time he or she appears.
- Texts that are part of illustrations (e.g. dialogue in comic books).
- Groups mentioned in texts, such as peoples (e.g. the Jewish people) or social categories (e.g. homosexuals), are counted only if some individuals in the group are expressly named (e.g. the three rabbis who have had the greatest influence on Jewish history, or Michel and Sarah, who lead a group of students fighting homophobia in their school).

DISABILITIES THAT CAN BE TAKEN INTO CONSIDERATION

Illustrations

- **Only disabilities presented in an explicit manner can be taken into consideration in the evaluation.**
 - Physical disabilities associated with a permanent impairment that requires the use of equipment such as orthopedics, wheelchairs, walkers, canes, etc. Note that the use of crutches (while wearing a cast, for example) or prescription glasses does not indicate a disability in this context, nor does baldness.
 - Auditory impairment: the presence of an easily identifiable interpreter and the use of sign language or clearly related technology (hearing aid).
 - Visual impairment: the use of a white cane or guide dog, braille and specialized equipment (magnifying glass, computer with braille display, etc.).
 - Intellectual impairment

In text

- **In addition to the above-mentioned disabilities, texts may raise various issues that can be taken into consideration.**
 - Organic impairments: cystic fibrosis, leukemia, kidney disease, asthma, diabetes, lung disease, etc.
 - Learning difficulties: the person exhibits pronounced learning difficulties that could lead to repeated failures. This does not include minor or temporary learning difficulties.
 - Serious behavioural difficulties: the person stands out due to the intensity and frequency of certain behaviours. This category does not include disobedience, shyness or occasional aggressive outbursts.
 - Language disorders: dyslexia, dysphasia, dyspraxia, etc.

- Eating disorders: anorexia, bulimia, etc.
- Pervasive development disorders: autism, Rett syndrome, Asperger’s syndrome, etc.
- Any other psychological syndrome or disorder of an ongoing nature: bipolar disorder, borderline personality disorder, anxiety disorder, etc.

QUALITATIVE EVALUATION

Qualitative evaluation is a necessary complement to quantitative evaluation; it helps ensure that instructional materials are free from discrimination and stereotypes. It is important, therefore, to look not only at the characters in the texts but also at the situations in which they find themselves. This type of evaluation covers illustrations and text as well as audio and video documents.

This section lists a set of observable indicators that can serve as reference points when conducting a qualitative evaluation of gender relationships and representations of sociocultural diversity.

GENDER RELATIONS

Gender equality

- **The social roles of people of different genders are of equal value.**
 - People of different genders must be depicted doing paid work.
 - Paying jobs must be varied in nature and go beyond the traditional breakdown of gendered roles.
 - People of different genders must be depicted carrying out community-related tasks.
 - Gender-based roles in school must be diverse, similar or equivalent.
 - The distribution of parental roles must not be based on gender.
 - Men’s and women’s household tasks must not be restricted to the traditional gender-based breakdown, but simply inverting all roles is to be avoided.
 - Power relationships must not refer to any specific gender.
 - People of different genders must have equivalent recreational activities that are not restricted to the range of traditionally gendered roles.
- **People of different genders must be treated equally.**
 - Story themes must not restrict the characters to traditional roles but recognize that women have contributed just as much as men to different spheres of activity.
 - Collections of literary texts presented for students to study must be selected in a way that ensures gender balance. Exceptions are allowed, however, when the subject or historical context warrants it.
 - Original-source texts and historical, scientific, technological and political texts should, as much as possible, present male and female characters. Texts must show the contributions that women have made in these fields and refer to recent documents that give specific examples of this.
 - Contemporary history textbooks must also highlight women’s contributions to history and point to the efforts they have made to have their rights fully recognized.

- Terms and expressions that today would be considered obsolete or pejorative must be placed in their historical context and framed with the appropriate caveats.
- The selection of art works reproduced in the materials must ensure gender balance in terms of the characters depicted and the artists represented. Gender balance need not be maintained in certain circumstances, as when the subject or historical context warrants it.

Absence of discrimination and stereotypes

➤ **Based on skill level**

- The skill levels displayed by characters in the performance of their duties must not be attributed to gender.
- The aspirations, interests and skills attributed to characters must reflect gender equality.
- The roles attributed to girls and boys must be diversified and non-stereotypical; they must not be simply reversed.

➤ **Based on character**

- Character traits, emotional reactions, expressions of affection and abilities must be diversified and distributed independently of gender.
- Psychological portraits must be complex and balanced irrespective of gender.

➤ **Based on physical appearance**

- Neither the characters' physical appearance nor the type of clothing they wear are likely to reinforce stereotypes commonly found in society.
- Images of animals or anthropomorphic characters must not reinforce gender-based clichés.

Gender-neutral writing

- The tone must be neutral yet preserve the clarity and cohesiveness of the message.
- The texts must comply with the requirement of gender balance.
- Job titles and positions must be written out in full.
- Neither parentheses nor other graphic signs must be used to indicate gender.
- No explanatory note can be used to justify exclusive use of the masculine gender.
- "He" and "she" must be used for the third person singular in conjugation tables.

REPRESENTATION OF CULTURAL DIVERSITY

Egalitarian relationships

- **Characters have equivalent roles regardless of the sociocultural groups to which they belong.**
 - People with characteristics different from those of the majority must be represented interacting with others (who may or may not be associated with the majority) while at work or in school, involved in recreational activities or at home with their families.
 - They must not be represented only in situations traditionally associated with their cultural or social group.

- They must not be marginalized or idealized with regard to the roles they play.

➤ **Diversity must be valued.**

- Cultural, social and ethnic diversity must be presented as enriching for the community as a whole without, however, being idealized.
- Representations of immigrants must show a variety of origins.
- Diversified family structures (homoparental, monoparental, adopted children, foster families, etc.) must be presented without suggesting, however, that any one is better than any other.

Absence of discrimination and stereotypes

➤ **Based on character**

- Characters must be presented in diversified social conditions. Their skills, behaviour or attitudes must not be related to their social conditions.
- The aspirations, interests and skills attributed to characters must not propagate stereotypes.
- Character traits, emotional reactions, expressions of affection and abilities must be diversified and distributed independently of cultural or social background.
- Psychological portraits must be complex and balanced. People with intellectual impairments or learning difficulties must be presented in contexts that portray them in a positive light.

➤ **Based on physical appearance**

- Neither the characters' physical appearance nor the type of clothing they wear are likely to reinforce stereotypes commonly found in society.
- Anthropomorphic animals or other characters representing human beings must not reproduce the clichés that are sometimes attributed to individuals or groups who present characteristics different from those of the majority.

➤ **Based on roles**

- Representations of the elderly must not convey a stereotypical image of this group: the elderly must be depicted in active and diverse roles that portray them in a positive light.
- Members of Aboriginal nations or ethnocultural communities can be depicted wearing "traditional clothing" or performing "traditional" tasks only if these are consistent with their usual customs and practices.

Note: When stories deal with discrimination (e.g. racism or sexism) or risk propagating discriminatory stereotypes, the underlying pedagogical aims must be clearly explained.

SOME DEFINITIONS

Discrimination

Unequal and prejudicial treatment of people on the basis of gender, background, religious belief, etc.

Stereotype

A reductive image that, by means of an unfair generalization, expresses a mostly biased judgment with regard to a person or a group of people.

Persons presenting characteristics different from those of the majority

- Any person who can be distinguished from the majority of people on the basis of:
 - membership in an Aboriginal nation
 - membership in a cultural community
 - visible, inherited anatomical features (black skin, kinky hair, etc.)
 - distinctive cultural characteristics (language, culture, customs, etc.)
 - an intellectual or physical disability, a learning or behavioural problem, or some other psychological disability that requires specific treatment (see the list of [disabilities](#), page 3)
 - civil status, religious or political affiliation
 - sexual orientation
 - distinctive physical characteristics (weight outside the median range, skin problems, etc.)
 - advanced age
- Any person who presents specific characteristics, such as type of clothing, that make it possible to identify him or her with a given group

