

RESUME OF VESELIN DIMITROV MIHALEV'S PUBLICATIONS

Presented for participation in competition for the needs of Varna Free University „Chernorizets Hrabar“ for claiming an academic position „Associate Professor“ according to professional direction 1.1 Theory and management of education in the area of higher education 1. Pedagogical sciences, announced by Shumen's University „Bishop Konstantin Preslavsky“ in the State Gazette 12th edition/12.02.2021.

For participation in announced by Shumen's University „Bishop Konstantin Preslavsky“ competition for holding an academic position „Associate Professor“, VESELIN DIMITROV MIHALEV present for reviewing the following dissertations and publications, described in List of publications for reviewing and Reference for fulfilling the minimum national requirements by art.2b, par.2 and par.3 from ZRASRB.

TPOLOGY OF THE PUBLISHED PUBLICATIONS

- Books – 1 (from attached list of publications for the competition).
- Monographs – 3 (from attached list of publications for the competition).
- Habilitation work – monography – 1 (from attached list of publications for the competition).
- Studios - 3 (from attached list of publications for the competition).
- Articles - 14 (from attached list of publications for the competition).

The indicated above scientific publications fall into the following categories:

1. Habilitation work ,according to art.24, par.1, Item 3 from ZRASRB – monography – 1 item.
2. Published monographies ,not presented as main habilitation work-3 items.
3. Published book based on approved doctoral thesis in order to adjudicate a scientific degree „PhD“ -1 item.
4. Articles, published in unrefereed magazines with scientific reviewing-14 items.
5. Studios, published in unrefereed magazines with scientific reviewing-3 items.

**THE SUMMARIES OF THE SCIENTIFIC PUBLICATIONS FOR THE
COMPETITION REFER TO THE FOLLOWING AREAS:**

**I. THEMATIC AREA: MANAGEMENT OF BULGARIAN EDUCATIONAL
INSTITUTIONS**

- Habilitation work - monograph - 1 (№1) (from an attached list of competition publications).
- Monographs - 1 (№2) (from an attached list of competition publications).
- Articles - 10 (№1, 2, 4, 8, 10, 11, 12, 14, 16, 17) (from an attached list of competition posts).
- Studies - 2 (№6, 15) (from an attached list of competitions).

1. MONOGRAPH: MIHALEV, V. (2021) The delegated budget in conditions of financial decentralization of school education. *Habilitation work, according to Art. 24, para 1. item 3 of the Law for the development of the academic staff in the Republic of Bulgaria. Slavena Publishing House. Varna, ISBN 978-619-190-179-1, 214 p.*

SUMMARY: The presented habilitation work "**Delegated budget in conditions of financial decentralization of school education**" is characterized by the following *parameters:*

The study object is the delegated school budget of Dobri Chintulov Primary School - Varna for 2020, in conditions of financial decentralization of school education.

The research subject is drawing up a delegated school budget in the context of introducing the system of delegated budgets.

The study aims to analyze the main phases of the budget process, directly related to the functioning of the delegated school budget in Dobri Chintulov Primary School for 2020, following the institutional environment's parameters and the approved legislation.

To achieve the formulated goal, the following **main tasks** are performed:

- To study the degree of financial decentralization in school education through the provided financial autonomy, realized with the introduction of a delegated school budget. Based on its specific characteristics to prepare an institutional analysis of the process of financial delegation of public funds at all government levels.

- By applying desk-analysis to study the current legislative basis (laws and regulations) at different management levels of the delegated school budget as part of public financial resources.
- Based on the current legislative basis and by-laws to analyze the budget process phases, determining the studied delegated budget's economic parameters.
- To identify and analyze the specific mechanisms for monitoring and controlling the applied system of delegated budget in the studied educational institution.
- Through a standardized survey for the study of pedagogical specialists in Dobri Chintulov Primary School - Varna to identify and analyze assessments, opinions, and attitudes, which generate conclusions about the socio-economic consequences of implementing the delegated budget system.

In the course of the tasks, the author presents the main thesis, which has the following wording: *The effective implementation and management of the system of delegated school budget in PS "Dobri Chintulov" - Varna, in conditions of decentralization of school education, has a positive impact on increasing the financial autonomy of the school institution, optimization, and distribution of the public financial resource, the additional material stimulation of the personnel, improvement of the work of the pedagogical specialists, stimulation of the own incomes and modernization of the material base.*

The achievement of the goal and the implementation of the main tasks is carried out with a certain *research toolkit*:

1. Analysis of documents (desk - analysis), which includes:

- literature review of existing research and analysis on the problem;
- study of the legislative basis;
- study of empirical data;
- problem areas related to the practical implementation of the delegated budget system.

2. Method of the individual standardized survey - for research of opinions and evaluations of the pedagogical specialists as interested persons from applying the system of the delegated school budget.

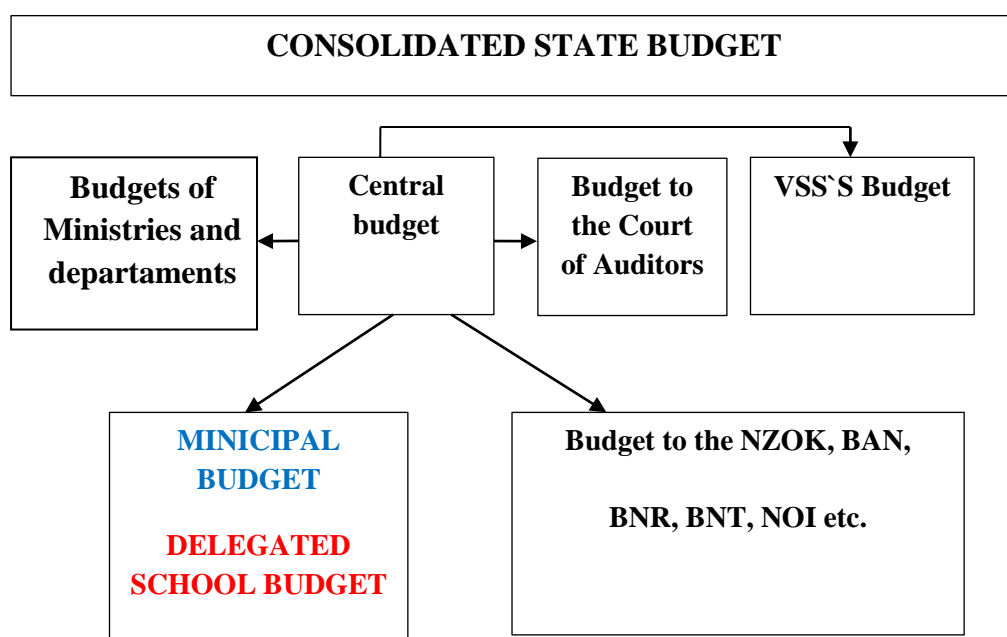
3. Logical methods - analysis, synthesis, summary, and comparison, which serve for a complete presentation of various economic characteristics, summaries, and conclusions.

The monographic study consists of an introduction, three chapters, a conclusion, and literature in a total volume of 216 pages. It has 16 tables, 5 diagrams, and 11 applications.

Chapter One: THE DELEGATED SCHOOL BUDGET - PART OF THE PUBLIC FINANCIAL RESOURCES is introductory. It outlines *the theoretical aspects* of financial decentralization as *a means of balancing resources, rights, and responsibilities* at all government levels, which is realized through the redistribution of services and powers from higher to lower levels of government. *The decentralization process* is considered, including areas related to the provision of powers, a delegation of managerial and financial power. The main characteristics of the delegated school budget are analyzed. *The delegated powers of the director* as a secondary administrator of public funds are outlined. The main motives for the introduction of the system of delegated budgets in Bulgaria are presented. *A methodology for assessing the degree of delegation* has been proposed. An analysis of the features of two types of the budget - "delegated" and "analytical." *Basic concepts* related to the implementation of the delegated school budget are clarified - "receipts-revenues," "transfers of funds" (received/provided, general and earmarked), "revenues from fees and property," "expenses" (labor and subsistence), "revenue and expenditure" (current and one-off) and "Unified Budget Classification."

An analysis of the *revenue and expenditure part* of the proposed delegated school budget has been carried out. *New moments* from the financing of the educational institutions are presented, related to the distribution of funds under *three main standards for financing* of activities delegated by the state - *standard for children/students, the standard for the institution, standard for group/class*, which are determined depending on a number indicators related to the overall process of education and upbringing in different types of educational institutions. *Scheme 1* visualizes the delegated school budget in the consolidated state budget of the Republic of Bulgaria.

Scheme 1



In this aspect, the *regulatory relations of the municipalities with the educational institutions* are clarified. The *specific characteristics of the system of delegated budgets in Bulgaria* are outlined. The presented *table 1* defines the expected *imbalances and consequences* in cases where delegation system is not introduced in school education.

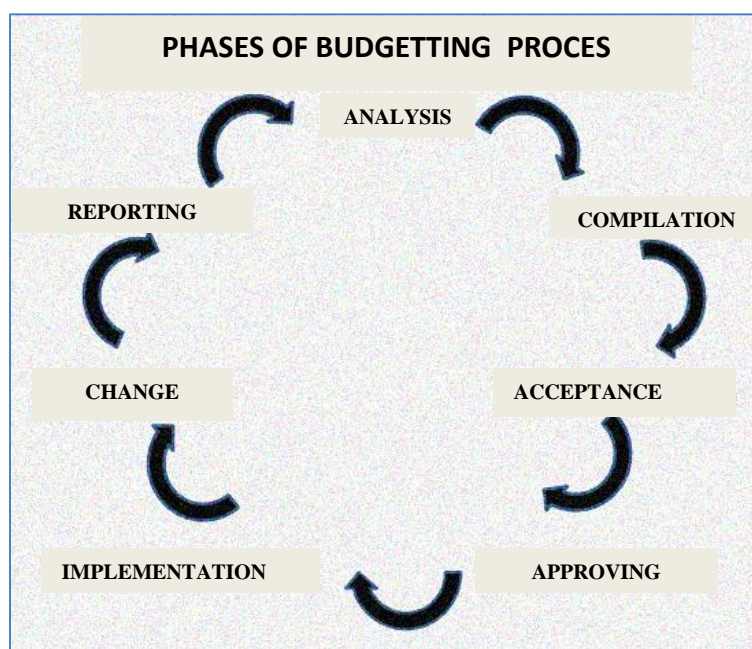
Table 1

DISBALANCES	CONSEQUENCES
The principal of the educational institution do not take part in making decisions in the activity	Unfair allocation of financial facilities in the school budget
Lack of management competences	High number of the staff members and low rechargeability of students in the classes
Lack of financial competences	Ineffectively use of financial facilities

A detailed *institutional analysis of the financial delegation at all government levels* has been made, which is an important step towards the implementation of the decentralization reform.

The *legal and legislative framework* for the introduction of the system of delegated budgets in educational institutions, including laws and regulations, internal school rules, procedures, systems, etc., have been thoroughly studied.

The second chapter: INTRODUCTION OF DELEGATED SCHOOL BUDGET, presents *the stages of introducing the system of delegated budgets and the rules and procedures for the formation and distribution of financial resources* in the delegated budget of Dobri Chintulov Primary School - Varna. The sources of funding have been identified. *Scheme 2* presents the main phases of the delegated school budget.



The author analyzes *the main mechanism of distribution of funds* from delegated budgets in the school education system. *Formulas for determining the financial resources* and their components in the context of the established legal framework are presented - *standards and norms* for activities delegated by the state for students' training and education. *A real functioning school budget* is presented, developed on the basis of the specific characteristics of the studied educational institution, laws and regulations related to the system of implementation of delegated budgets in the country, and the positive experience of Varna Municipality in this aspect of public school finance management.

This chapter analyzes *the main and additional components of the formulas for the distribution of funds* for each activity in school education by the primary administrator. *The funds under normative and supplementary standards*, which the educational institutions receive from the state budget for supporting equal access to education and personal development support, are indicated. *New points related to setting standards* in taking into account regional and municipal differences have been identified. Standards for state-delegated activities that apply to the developed school budget are clearly justified. *An analysis of the methodology and stages of elaboration and adoption of the municipal formula* for distribution of the educational institutions' financial resources in the municipality of Varna has been made. Based on a *comparative analysis* of the planned funds for the current and previous year, it is concluded that the increase in the number of

students in the educational institution, as well as the funds under standards for activities delegated by the state in 2020, leads to an increase in the school budget.

The formulas for determining the school budget's financial resources and their components in the context of the established legal framework are presented. According to the characteristics of the delegated budget and after evaluating the financial resources, an analysis of the revenue and expenditure part was made. The author outlines different approaches in distributing the expenditure function of the budget, the procedure for planning budget funds, which is based on the adopted internal rules for the organization of the salary in the studied educational institution. A comprehensive analysis of the budget paragraphs of the delegated budget for 2020 has been prepared. Based on the presentation related to the mechanism for allocation of financial resources by the primary spending unit to educational institutions, the following conclusions have been made:

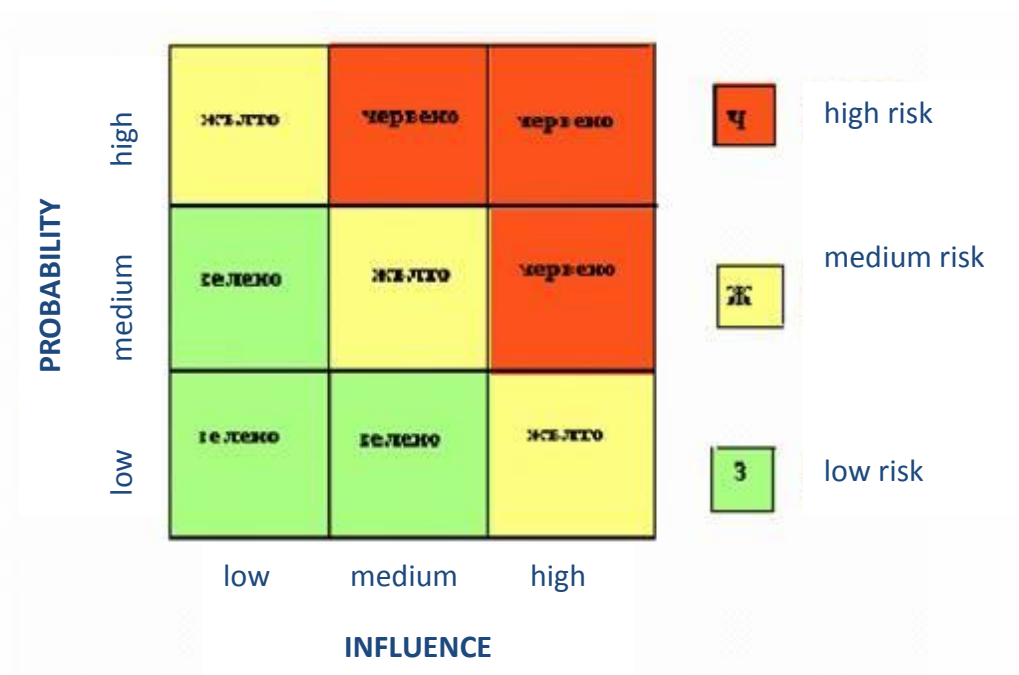
- The distribution of financial resources from high to lower government levels through the introduction of clear *mechanisms - formulas, rules, and procedures determines the school's financial stability.*

- An important element of the funding process is applying a *formula*, which is essentially an “allocation mechanism” that combines different indicators and a “set of rules.”

- In the process of financial security, formulas are an important *transfer mechanism*. Through them, one institution delivers financial resources to another in compliance with the principles of transparency, objectivity, and fairness.

- At the primary administrator level, *mechanisms and rules for allocation of funds* under the additional components of the formulas are approved.

The third chapter: MONITORING AND CONTROL OF THE DELEGATED BUDGET SYSTEM, presents *the stages of introduction* of the Unified Information System for School Education Management. *The current legal framework* for introducing the Financial Management and Control System has been outlined, and an analysis of its specific features has been prepared. Its *elements* are analyzed in detail - *control environment, risk management, control activities, information and communication, and monitoring*. Procedures introduced in the financial management related to the implementation of preliminary control, "before committing," and "execution of expenditure" are described. Certain aspects of the managerial responsibility of the school manager are analyzed. *The risk management system* is presented, in which its stages are outlined and analyzed - visualized in *scheme 3*.



An analysis of the socio-economic consequences of implementing the system of delegated budget in Dobri Chintulov Primary School in conditions of financial decentralization has been prepared. The System for financial management and control, which is successfully implemented in the studied budget organization, is analyzed in detail. The documentation related to the financial management and control system is presented. Procedures have been developed for the implementation of the "audit trail" activities.

In **conclusion**, conclusions are made related to positive and negative evaluations of the implementation of the delegated school budget:

- The pedagogical specialists *support* the introduced system of delegated school budget in the studied educational institution.
- The delegated budget system *is positively assessed as a tool for the optimization and distribution of budget funds*, which are a public financial resource.
- The introduced system of delegated budget leads *to increasing the financial autonomy* of the studied educational institution.
- *Improvement of the material base* in the school and the working conditions is reported due to the effective management of the school's financial resources.

- A good organization *for transparency and publicity* has been introduced in reporting the realized expenses every quarter of the financial year.
- The preferences for the social forms of determining the remuneration of the pedagogical work are clearly outlined and for the control of the head of the school institution.
- The forms of payment (basic and differentiated) *impact the career development* of pedagogical specialists and increase the results of work.

In the process of the overall study of the delegated budget in the primary school "Dobri Chintulov" - Varna, the following **results** have been achieved:

1. *Decentralization* in school education has been achieved at two levels of provision of rights, responsibilities, and resources of government - central-local government; local government - school.
2. A clear *mechanism for distribution of the school budget* has been approved, which creates conditions for regulating the financial relations at the level of the municipality - educational institution.
3. *The powers* related to the director of the educational institution's financial autonomy, who, together with the management team, assumes responsibility for maintaining and modernizing the material base, are exercised to a high degree.
4. The implementation of the system of delegated budget leads to *stimulation of the principal's initiative and entrepreneurial skills* for the search of alternative sources for additional financing of the school activity.
5. The undertaken school policies related to the planning of the financial resource allow exercising the principal's functions, related *to the restructuring of expenses*, which are directed as released resources, leading to improving the quality of the educational process, stimulating the work of pedagogical specialists.
6. The system of delegated budget introduced in the school's management gives a greater opportunity *for financial provision of the school curriculum* and satisfaction of *specific needs of the students*, contributing to the development of their creative potential.
7. In the course of the practical realization of the delegated school budget, there is a *positive change* regarding an educational institution's *financial autonomy*. In expanding the principal's managerial powers as a governing body, positive and lasting results are achieved in conditions of decentralized financial management of school education.
8. The delegated budget's applied system provides conditions for security, flexibility, and the possibility for the director *to prioritize the educational and financial needs* in rational planning and spending of the financial resources.

9. The absorption of the financial means provides an opportunity to *enrich the material and technical base* and stimulates the management of the educational institution for attracting additional sources for financing.

10. The management of public finances is carried out in strict compliance with the principles of objectivity, transparency, publicity, and accessibility in the development and management of budgetary resources, which requires *flexible and effective management decisions* consistent with the available financial resources.

In conclusion, **problem areas** have been identified, within which new solutions can be sought at all levels to improve the financial management of school education and increase its efficiency, namely:

- The lack of a Law on Delegated Budgets and the school education system regulation by a significant volume of normative acts (with a tendency of sustainability of by-laws) results in difficult management decisions and law enforcement processes.

- Insufficient technological time is reported to discuss the applied municipal formula for distributing funds for each municipal school.

- There is a need for greater motivation of pedagogical specialists for wide participation in project development to raise additional funds and wider penetration of program funding in school education.

- Reducing the relative share of non-allocated activities.

- Greater participation and motivation of the parent community to the educational process and improvement of the school's economic activity.

- Introduction of mechanisms and criteria at the municipal level by the first-level administrator to stimulate directors who effectively manage financial resources and achieve results.

AT CENTRAL LEVEL

- Improving the general distribution mechanism based on the delegated activities adopted by the state, to ensure financial sustainability of the school education system and guaranteed equal access and quality of the types and levels of educational institutions, regardless of the type of municipality and type of school.

- Differences in funding by type of municipality stimulate the preservation of small local schools and small classes in places, which leads to inequality in the "price" of students in different municipalities in the country.

- Using the European Social Fund opportunities for the development of human resources in education as a source for raising additional funds.

AT LEVEL - FIRST INSTANCE BUDGET MANAGER

- Coordinating the efforts of municipalities and school management to improve the components of the formula.
- When developing the main elements of the formula and the criteria based on which the financial subsidy will be distributed, certify the set indicators' correctness.
- It is necessary to compare the approved budget for each school at the end of the year with the report on its implementation and the implementation of the collective labor agreement for the system of preschool and school education in part related to funding. Incorrect decisions should be corrected so that the municipal council's formula can be applied with maximum accuracy in the next financial year, and the school budget can be closer to the funding project proposed by the principal.
- Depending on the degree of realization of the principal's managerial responsibility, the funds in the Reserve Fund should remain in the school to operate them more efficiently.
- To find opportunities for the enrichment of the components in the formula for distribution of financial resources of municipal schools, by introducing criteria for quality of education in the school institution (high learning outcomes, continuing education in vocational high schools, high achievements of students from national external evaluation, places won in national Olympiads, national competitions and international competitions).

AT LEVEL - SECONDARY BUDGET MANAGER

- Expanding the social basis of control and transparency in managing the delegated school budget through the active participation of trade union leaders, the school board, and the public council.
- Expanding the director's managerial potential to increase the share of own revenues, with an emphasis on active forms of entrepreneurship related to the provision of various educational services.
- Expanding the range of financial incentives for upgrading pedagogical specialists' professional qualifications and those with proven high achievements.
- High administrative capacity is needed to effectively manage the delegated budget, which should periodically increase its economic qualification to acquire new competencies.
- Creating financial conditions related to pedagogical specialists' remuneration to attract young people to the teaching profession.

Need to implement **policies** aimed at:

- Providing continuous training and management support for school principals.

- Stimulation of proposals from the principals for optimization of the expenses in the educational institution.
- Reducing the costs for maintaining the building stock through the development and implementation of energy efficiency projects.
- Development of projects for modernization of the material base.
- Use of the school base for conducting additional pedagogical services.
- Involvement of the school board and the public council in obtaining additional funds.
- Motivation of the pedagogical specialists for work on projects and programs for financial provision of the school's activities, for which funds are not provided in the school budget.

2. MONOGRAPHS: MIHALEV, V. (2020) Bulgarian school in Varna during the Renaissance. Pedagogical and managerial aspects. Slavena Publishing House. Varna. ISBN 978-619-190-175-3, 222 p.

SUMMARY: The monographic study is characterized by the following parameters that determine its specific dimensions:

The research object is the functioning of the new Bulgarian education in the city of Varna during the Renaissance, which is important for the development of Bulgarian education.

The subject of research is the initial activity of the first Bulgarian school in Varna city during the Renaissance.

The research aims to trace the origin and development of the Bulgarian educational institutions in chronological aspect, which form the appearance of the educational work in the city of Varna during the Renaissance and the place they occupy in the history of education in Bulgaria.

Based on the formulated goal, the following main **tasks** are derived:

- To study Varna's ethnic, demographic, economic, and trade image during the Renaissance as a projection of the socio-economic and cultural-spiritual development of the Black Sea city.
- Through the application of pedagogical analysis to study the stages of development of the Bulgarian school and the first Bulgarian Renaissance teachers' contribution.
- To study the overall process of education and upbringing of the Bulgarian Renaissance school - content and organization, curricula, principles, methods, and tools for education and upbringing and draw conclusions about the degree of development of Bulgarian education in Varna during the study period.

- To study **the contribution of specialized and non-specialized institutions for the Bulgarian school's management and support** during the Renaissance.

The scientific thesis has the following wording: *Despite the good socio-social, cultural-religious and material conditions for the development of non-Bulgarian schools (mostly Ottoman and Greek) and the lack of positive attitude of the Ottoman government to the Bulgarian Renaissance school in Varna, for less for two decades it has managed to establish itself and reach a high level for its time, becoming a decisive factor in the formation of the Bulgarian intellectual elite.*

The achievement of the goal, the realization of the tasks, and the scientific thesis are carried out with research tools, which is in the context of the generally accepted *methods* in pedagogical historiography: hermeneutic analysis of texts, archival, factual, chronicle, biographical, logical and local lore. The study is structured in an introduction, three chapters, a conclusion, and references.

Chapter One: THE CITY OF VARNA DURING THE RENAISSANCE is introductory. It reveals the development of demographic and ethnic processes that determine the city's appearance as a multicultural center due to the coexistence of Turks, Greeks, Armenians, Jews, Tatars, and Bulgarians. Two groups of the population are clearly differentiated - Muslims and non-Muslims. The guild organizations' role, which are public legal supporters of the sovereignty of the Bulgarian community, is outlined. Data on the development of the city's trade relations with other cities in the Ottoman Empire are presented. The conclusion is conditioned that the ethnic, demographic, economic, and trade image is a projection of the socio-economic and cultural-educational development of the city.

The second chapter: STAGES OF DEVELOPMENT OF THE BULGARIAN EDUCATION IN THE CITY OF VARNA DURING THE RENAISSANCE, presents the reasons for the later emergence of Bulgarian education in the city. The *stages of development of the Bulgarian school* and the contribution of the first Renaissance teachers to the educational work upbringing were outlined and analyzed in detail. Based on the in-depth pedagogical analysis, the organization of education, the principles, methods, and means of education and upbringing, and the curricula are studied. The author analyzes *various aspects of the management of the new Bulgarian school*, one of which is introducing *the first school regulations* for student discipline and changes in education, as a result of implementing the decisions of the Shumen Teachers' Council and the Diocesan

Council in Varna. Important conclusions about the development of the new Bulgarian education in the city of Varna during the Renaissance are presented.

In the third chapter: INSTITUTIONS FOR MANAGEMENT AND SUPPORT OF THE BULGARIAN SCHOOL, the activity of two types of Renaissance institutions is analyzed - *specialized and non-specialized*. The author accepts the mentioned classification and, on this basis, considers the activity of the Varna Renaissance institutions, which have a significant contribution *to the management and support* of the new Bulgarian education. These specialized institutions are directly related to the Bulgarian Renaissance School's management, which performs important in content and different in nature *functions*: management, financial, legislative, pedagogical, educational and methodological, and organizational. *The school board's management functions* as a governing body are analyzed in the context of adopted administrative documents, such as the "Statute of the rural schools in the Varna-Preslav diocese." It is concluded that the school's management and the care for its development lead to the creation of new organizational structures among the Bulgarian community - Orthodox municipality, school board, educational society, community center, and others. *The main managerial functions and contributions of the specialized and non-specialized institutions* directly related to managing the new Bulgarian school in Varna during the Renaissance are outlined.

In conclusion, the following **results** of the study are presented:

- The Bulgarian school *moved from the transformation of cell education and church-religious literacy to modern Bulgarian education* in exchange for medieval scholasticism with secular education.
- In less than two decades, the Bulgarian Renaissance school *managed to establish itself and reach a high level for its time, becoming a decisive factor in the formation of the Bulgarian intellectual elite*, which contributed to the formation of the national consciousness of Varna Bulgarians during the Renaissance.
- *The management of the new Bulgarian education* during this period was carried out in an atmosphere of fierce church-national contradictions, which lasted almost until the Liberation.
- The Shumen Teachers' Council of 1873 is *a new phenomenon in the development of the Bulgarian school* and a way to apply more progressive pedagogical teaching methods and search for forms for unification and centralization of educational work.
- *The New Bulgarian School is a tool for a public organization*. In the conditions of complete lack of state protection, the school and the related community center institutions

carry out their activity under the Varna municipality's direct administrative and financial protectorate, and after 1870 of the Exarchate.

- *The management of the new Bulgarian school in Varna leads to the improvement of new organizational structures* - Bulgarian municipality, school board, cultural-educational, and charitable institutions.

3. ARTICLE: MIHALEV, V. (2008) Institutions with a contribution to the management and support of the Bulgarian school in Varna city during the Renaissance. *In Electronic edition of the National Museum of Education - Gabrovo, issue 2, pp.10-19.*

SUMMARY: Based on researched documentary sources of different nature, the contribution of the *specialized and non-specialized* Bulgarian Renaissance institutions for developing the educational work in Varna during the Renaissance is highlighted. Due to *the diverse subject* of management of the Bulgarian Renaissance school, their differentiation arises. An analysis of the school board's activity and *management functions as a specialized management Renaissance institution*, which is directly related to the management of the new Bulgarian school. According to an adopted document, its goals, tasks, and main management functions have been clarified, "Statute of the rural schools in the Varna-Preслав diocese." According to its *managerial management functions*, the author examines the school board's financial, administrative, organizational, and economic activities. The publication concludes that it, as a public institution and local body for management and administration of Varna schools, establishes, maintains, and develops a democratic tradition, presented through the prism of its functioning - *election, mandate, public control, and independence* in decision-making. The conclusion is outlined that in the third quarter of the 19th century, *the Varna school board became the main Renaissance institution*, which took over the functions of organization and management of the new Bulgarian education in the Black Sea town. Information is presented about the activity of the *diocesan spiritual council* in the management of the educational work in Varna, and the role of the first diocesan council in 1873 is outlined, as well as the activity of the first head of the newly established church diocese - metropolitan bishop Simeon for development of the new Bulgarian educational work.

To the *non-specialized institutions* for supporting the Bulgarian Renaissance school, the author presents information about the activities of the Bulgarian municipality "Consent, audacity and success," community center "Vazrozhdenie," student society "Enlightenment" and women's charity, which contribute to the development of Bulgarian schools in Varna

during the Renaissance. In conclusion, *the Bulgarian church-school municipality's contributions for supporting the city's educational work* are presented, according to its main *functions* - organizational, legislative, financial, managerial, and educational. Following the management Renaissance institutions' activity and those supporting the modern Bulgarian school during the studied period, the author presents *summaries related* to the activity of the specialized and non-specialized Renaissance institutions, which the citizens and teachers of Varna created in the third quarter of the XIX century.

4. ARTICLE: MIHALEV, V. (2018) Punishments and incentives in the school regulations of the Bulgarian and Greek educational institutions in Varna from the 70s of the XIX century to the 20s of the XX century. *In the Yearbook of the Pedagogical Faculty of the Thracian University - St. Zagora. T. 15. ISBN 1312-286X, p.32-45.*

SUMMARY: The publication is *a source pedagogical research* based on researched archival documentary sources in Bulgarian and Greek, proving the *punishments and incentives* for students introduced in the school practice of the studied educational institutions. The problem of the application of *the system of punishments and incentives* in the Bulgarian and Greek schools in Varna during the studied period *has not been sufficiently studied* in the scientific and pedagogical literature, due to the fact that in some school regulations only the punishments to the students are indicated. The purpose of the publication is to outline on the one hand, the scope of their diversity, and on the other hand, the different forms of educational impact.

To achieve the research goal, a toolkit is applied, which is in the context of the generally accepted methods in pedagogical historiography. It is stated that the first written *school regulations*, which regulate the issues related to punishments and incentives in the Bulgarian and Greek schools in Varna, date from the early 70s of the XIX century and were developed by teachers and members of school boards. Their introduction in the school's management is a result of the perceived need for *regulated rules and prohibitions* to improve the school order. *The system for imposing* incentives and penalties in the Bulgarian and Greek schools (cell, mutual, class, and high school) is analyzed in detail. A special place is given to the famous Bulgarian Renaissance teacher Sava Dobroplodni *concerning educational influence* applied by him by analyzing his *principles* in imposing punishments. *A comparative analysis* of the punishments and incentives in the Bulgarian and Greek schools (class and high school) and the means for educational impact on the students based on the introduced school regulations in the studied institutions is presented. Emphasis is placed on *the scale's variety* for assessing Bulgarian and Greek students'

behavior and the forms for encouraging their "diligence." Based on researched archival documents in Greek from the Greek Municipality Fund in DA-Varna, the commitment and public position of school principals and members of the board of trustees of Greek schools to the issue related to the application of various forms of incentives are revealed. In conclusion, the author presents **conclusions** regarding:

- At the beginning of the twentieth century, there is a tendency for a wide perimeter and *differentiation* of types of punishment for students who do not comply with the regulated requirements, dictated by the desire of teachers to find the most accurate punishment corresponding to the severity of the offense.
- The first *school regulations* in the studied educational institutions from the 70s of the XIX century are evidence of the perceived need to introduce rules to achieve good school order. The enrichment of the arsenal of means for educational impact, applied in the Greek and Bulgarian schools, aims to create examples of good personal examples and education in high public morality.
- The manifestation of negative behavior related to the non-fulfillment of student obligations and disregard of the imposed prohibitions, according to the adopted school regulations, is sanctioned by the imposition of severe disciplinary sanctions.
- By applying a system of different types of incentives, control over students' behavior in the studied educational institutions is exercised.

5. ARTICLE: MIHALEV, V. (2019) Class - lesson organization of education in the Bulgarian school in the city of Varna during the Renaissance. In: VFU e-Journal. ISSN 1313-7514, No. 12, 19 p.

SUMMARY: The publication analyzes *the prerequisites* for introducing *class-lesson organization* in the new Bulgarian school in Varna during the Renaissance, which is a result of the decisions of the Shumen Teachers' Council in 1873. The conclusion is substantiated that the Bulgarian classroom school is established as a higher degree in the development of modern Bulgarian education and became a field for expressing the pedagogical abilities of several Bulgarian Renaissance teachers. As a result, *the advantages of the class-lesson organization* have been identified, pointing out that in Varna, conditions are created for the development of not only male but also girls' education, with which the new Bulgarian Renaissance school acquires a more modern look. A special place is given to *the organization of training* in the classes, related to the school day's duration, the length of the school year, vacations, and the conduct of annual exams. *The system of assessment of students' knowledge and behavior and forms of control*

are analyzed. Based on a wide range of archival sources studied, the *curriculum* introduced in school education, the *studied content*, and its *structuring* in the used *Renaissance* textbooks are presented. It is necessary to conclude that the subjects studied are related to students' national self-knowledge, through which their national identity is built. At the end of the publication, *conclusions* are made about the development of classroom education in applying the class-lesson organization of education.

6. STUDY: MIHALEV, V. (2020) The internal rules for the organization of the salary in the educational institution - a mechanism for standardization and remuneration of the staff. In: e - Journal VFU. ISSN 1313-7514, No. 13, 55 p.

SUMMARY: The study deals with issues related to the overall organization of wages as an internal act in the educational institution, which is a reliable source of quality and fairness in determining wages for work and *guarantees transparent management* of the institution because of public spending. Emphasis is placed on their *mandatory nature*, and their importance for the proper planning of the expenditure part of the educational institution's delegated budget is justified. Exemplary internal rules for the organization of the salary are proposed, through which the institutional policy regarding the salaries of the staff is determined. The school principal's obligations related to the process of their development are indicated based on certain normative documents. The study discusses the main goals and principles for their development. The obligatory elements that determine the structure of the internal rules for salary referring to the conditions, the order and the ways of forming the funds for salary (basic and gross), its change, the types and amounts of the additional salaries of the staff are presented in detail, the procedure for their receipt, the payment of various types of benefits, receipt of targeted prizes, etc. All types of additional remunerations that can be received by pedagogical specialists and non-pedagogical staff, for which the respective grounds must be present, are analyzed. Special attention is paid to the order and manner of formation of the staff's basic and gross salary, as an important part of the issues related to the rationing of labor. It is conditioned that the organization's internal rules of the salary in the educational institution are a reliable source for ensuring *quality and fairness in determining the remuneration for the work done and are a guarantee for transparent management of the institution* about public spending. At the end of the publication, the author presents a developed and tested model of internal rules for the organization of salary in the school institution and a sample checklist for registration of lawful preliminary control over the accrued monthly salaries of staff tested in school practice.

7. ARTICLE: MIHALEV, V. (2020) The first school regulations for the management of the Bulgarian school in Varna in the 70s of the XIX century In: e-Journal VFU. ISSN 1313-7514, No. 13, 10 p.

SUMMARY: The publication deals with issues related to introducing the *first school regulations*, "Students have a position" in the new Bulgarian school in Varna in the 70s of the XIX century by the headteacher Sava Dobroplodni. This document, in its importance, is the *first "legislative" basis for the management of the new Bulgarian school* in Varna. It refers to several student duties that the mutual teacher must strictly observe. As the *first written administrative document for the management of the new Bulgarian school*, it clearly regulates *Bulgarian students' rules of conduct and obligations*. Its introduction is a result of the need realized by the new Bulgarian teachers for regulated rules to improve the internal school order. The obligations of the Bulgarian students are analyzed in detail in 15 points of the regulations. It is concluded that this written document is borrowed from the Gabrovo Mutual School, which in Bulgarian historiography is considered a standard of Renaissance education. An important fact for the history of pedagogy is clarified that this school regulation are included in table №85 in the set of mutual teaching tables, translated from Greek and borrowed from the French language distributed in Paris in 1829, "A practical guide for primary schools, or a summary of the method of mutual learning, according to L. S. Sarazen". By translating other examples, a conclusion is substantiated for the Greek translation guides' contribution to the wide penetration of the Greek educational influence in the educational space of the Bulgarian mutual schools in Varna. The rules and norms of behavior indicated as students' obligations are differentiated into three groups - the obligations and behavior of students at school, those that have a pronounced moral and educational nature, and culture of behavior.

Conclusions are made related to the *general requirements* for the behavior of Greek and Bulgarian students, which are found in the Greek regulations: Πειθαρχικός κανονισμός των εν Βάρνη Ελληνικών Σχολών ("Disciplinary Regulations of the Greek Schools in Varna"), which for the purpose of the study was translated from Greek into Bulgarian. Facts are analyzed, leading to another conclusion: Bulgarian and Greek mutual students *have a common educational program for moral education and cultural behavior*, which is the basis for *a unified education*, and through the introduced school rules, *Bulgarian students join the Greeks' educational program*, adopting the system of mutual learning through the "Guide of Sarazen" translated from French into Greek. They are educated according to *the same rules of conduct together with the Greeks* and join the *common for*

Bulgarians and Greeks human, moral and cultural achievements, which largely determines one of the segments of *common spiritual and educational aspirations* objectified by certain similarities in their educational practice - achieved *the same educational ideal* - the diligent student who performs his school duties. The end of the publication contains summaries of *the degree of Greek influence of the rules of management of the new Bulgarian school "Students have a position"* on educational practice, which determine the conclusions on the one hand, *the integration of the Bulgarian Renaissance School in Varna with Greek pedagogical achievements* as part from the European ones, and on the other hand, *for the exchange of the achievements of the pedagogical theory and practice between Greeks and Bulgarians.*

8. ARTICLE: MIHALEV, V. (2020) The evaluation of the results of the work of the pedagogical specialists - technology and solutions. In: e-Journal VFU.ISSN 1313-7514, issue 13, 21 p.

SUMMARY: The publication deals with issues related to evaluating the work of pedagogical specialists from Dobri Chintulov Primary School - Varna for school year 2018/2019, according to the current legal framework for receiving additional remuneration. The evaluation of the results of the work is substantiated following the stages proposed by the author, in compliance with the normative requirements of Ordinance №4 of the Ministry of Education and Science for standardization and payment of labor. The author proposes a procedure for evaluating the work of pedagogical specialists. An example, "Map for evaluation of the results of the pedagogical specialists' work," with indicators and certain criteria is presented. The evaluation process is considered following the proposed stages of evaluating teachers' work. The functional obligations of the school committee for evaluation of the work of the pedagogical staff are outlined. The table presents the evaluation results of 56 pedagogical specialists from Dobri Chintulov Primary School - Varna for school year 2018/2019 based on certain indicators, an analysis of teachers' attitude to the processes related to labor evaluation is made. At the end of the publication, specific proposals are presented in areas that need improvement.

9. ARTICLE: MIHALEV, V. (2021) Status and functions of the regional bodies for management of education in Varna after the Liberation. In: Scientific-methodical magazine „ Preschool & school education. Educational Publishing House. ISSN 2535-0692, S., No. 1, pp.109-125.

SUMMARY: The article deals with issues related to the establishment and functioning, status, and functions of the first post-liberation *regional structures for education*

management in Varna - District School Council and District Inspectorate researched documentary archival material.

The author analyzes two important *administrative documents* related to the organization and management of *Bulgarian schools* - "Rules for organizing classes, exam sessions and vacations in schools in Varna province in the school year 1878/1879" and "Rules for organizing the activities of school boards of trustees in the Varna district." The district school inspectors' functions are analyzed based on the texts from the first legislative acts in education: "The Provisional Statute for the Public Schools" and "Instruction of the District Inspectors." Information about the Varna district school inspectors' activity - Todor Ikonov and Milan Radivoev, is presented. Important directions of the activity of the district school inspectors in Varna in the post-liberation period are outlined. In conclusion, summaries were made about the activities of *the first regional bodies for education management* in Varna after the Liberation, related to establishing the public principle, which is an original decision to open the school to society and public needs.

10. ARTICLE: MIHALEV, V. (2020) The Shumen Teachers' Fair - a form for leadership and management of the Bulgarian school. In: VFU e-Journal. ISSN 1313-7514, No. 13, 17 p.

SUMMARY: The article discusses the decisions taken at the Shumen Teachers' Council and their *reflection on the management of Bulgarian schools* in Varna during the Renaissance. The main text emphasizes the promotion of one of the most democratic principles of education - *universal and compulsory primary education for children over 6 years of age and regulation of parents, teachers, and school boards' obligations*. This council is considered *a specialized specific form of management of the Varna diocese's Bulgarian school*. The article analyzes an important document adopted at the council - "Statute for rural schools in the Varna-Preслав diocese," *which is one of the earliest detailed rules for managing school education in the Varna diocese*. It analyzes the obligations of parents to students and the school. It is concluded that the adopted statute raises the teacher's position as an important factor for the education of adolescents, and the management of the school largely depends on the implementation of the obligations of teachers regulated in it. A special place is given *to the school boards' status, duties, and main functions as a governing body of the school*. The contributions of the fair, related to *the organization of school education*, are outlined because only it, in comparison with the other fairs in the country, fixes exactly the time, regulating *the length of the school year* and its *borders*. The main text emphasizes an important contribution of the teachers' fair -

the determination of the daily hours and their duration, in which the classes are held by months. As a result of the fair's adopted decisions, the answer to the question about the changes that occur in the Bulgarian schools in Varna is given - *construction of classes, the introduction of the class-lesson organization of education, new curriculum, and textbooks*. The curriculum of the boys 'and girls' schools in Varna is presented in detail. An in-depth analysis of the textbooks used in school education in various subjects has been made. In conclusion, it is pointed out that *the Shumen Teachers' Council is an amateur and democratic form of school management*, which manages to develop local self-organization and activity. This fair provides an opportunity for teachers' real *participation in making management decisions* related to the methodological provision of education.

11. ARTICLE: MIHALEV, V. (2021) The Public Council - a body for support and development and for civil control over the management of the educational institution. *In: e - Journal VFU. ISSN 1313-7514, No. 13.*

SUMMARY: The article deals with issues related to the *status, conditions, and procedure for the establishment, organization, and activity of public councils as collective bodies for support and development and civil control* over the management of educational institutions. There are democratic tendencies related to public participation in the school's management in the Bulgarian educational system. Based on the applied models for participation in educational institutions, examples from the educational systems in Spain, Denmark and Greece are given. Based on the adopted by-laws, the status, order, and conditions for establishing the school organization's public council are outlined. *The powers of the public council as a new control body* are clearly distinguished and analyzed *compared to the school board's functional obligations*. Based on the adopted by-laws, related to the structure and activity of the public councils, summaries have been made, related to the fact that the public councils are *internal for the school organization collective management bodies for school development and civil control*, the main purpose of which is to ensure transparency and quality of the main internal processes in the educational institution. They have direct responsibility for the school organization's effective management, as internal governing bodies have different functional responsibilities than those of school boards.

12. STUDY: MIHALEV, V. (2021) Aspects of interaction between the school community and parents - possible solutions. *In: e - Journal VFU. ISSN 1313-7514, No. 14, 48 p.*

SUMMARY: The publication addresses issues related to the presentation of aspects of *school-family interaction*. The *areas* of parental participation in the activity of the educational institution are outlined. The main *goals and principles of cooperation* - school community - parents are indicated. An example plan and model for managing the interaction between the school and the family environment is proposed. The need for cooperation and interaction with parents is justified, which is part of the school policy to achieve good results in students' scope and inclusion in the educational process, creating a favorable educational environment and providing effective general support to each student. The conclusion is that parents and teachers are aware of the need to unite their efforts for effective cooperation, which should be realized through joint work. Working together between family and school is a challenge that requires establishing *partnerships*, openness, and recognition of existing problems, pooling resources to find constructive solutions. The family's role in the social structures and relations is outlined, which influences the *characteristics of the educational interactions* between parents and children and on the interaction between the parents and the educational institution. This process is discussed in detail in several main plans: motivation for interaction, the determinism of interaction effectiveness, areas, forms, and models of interaction. All this imposes the need to offer an exemplary management *model of the interaction* between the school community and parents following the laws and regulations. Based on the stated motives, the *areas of parental participation* are outlined. A detailed *analysis of the current state and trends* that determine this interaction is made, identifying *problem areas* in the parties' interaction. *Basic principles and areas* of interaction between the school community and parents - individual and collective forms of cooperation are presented. *The stages* in the development of the interaction process are analyzed in detail. At the end of the publication, a good pedagogical experience of interaction between Dobri Chintulov Primary School and the parent community is shared during the student year 2020/2021, and an interaction management plan is proposed. The role of the pedagogical specialists and the director's managerial functions in this process is clearly outlined. In conclusion, the directions in which the implementation of policies and successful practices in implementing effective school-parent interaction are outlined.

13. ARTICLE: MIHALEV, V. (2021) The managerial responsibility of the principal and the school team in risk management in the educational institution. In: e - Journal VFU. ISSN 1313-7514, No. 14.

SUMMARY: The publication addresses issues that outline the principal and the school team's role and *managerial responsibility* in the risk management process, which is an important element of the Financial Management and Control System in the educational institution. The reasons for the considered problem come down to the fact that it, as a key element of the Financial Management and Control System, on the one hand, remains insufficiently assessed, and on the other hand, are not clearly differentiated, do not know in-depth and do not effectively perform functional duties of the school team in risk management. The responsibilities at all levels related to the risk management process and their distribution in the three protection lines are outlined. *The main characteristics of the risk management process*, which the school principal must know to perform his managerial responsibilities effectively, are presented. *The management steps and management functions* that the educational institution director should apply in the risk management process are presented in detail. The obligations and scope of the *manager's managerial responsibility* and those of *the head of a structural unit* within the school, the role of the *employees* who implement daily control activities, and those of *the public council and the school board* are monitored. In conclusion, the principal's key role and managerial responsibility are emphasized, which should be supported by the entire school team, which should have the necessary knowledge and competencies related to effective risk management in the school institution.

14. ARTICLE: MIHALEV, V. (2021) Preparation of a strategy for the development of the school. In: e - Journal VFU. ISSN 1313-7514, No. 14.

SUMMARY: The purpose of the publication is to bring out the essence and peculiarities of the school's strategic management and prepare a draft strategy for its development. Strategic planning in the school institution can be defined as a system of school management decisions and actions related to the development and implementation of a strategy for its development. This is a comprehensive approach to the school's development, which emphasizes its purpose, structure, future, and desired state. The publication states that the choice of strategy largely depends on resources, the specifics of the environment, and the school's orientation towards competitiveness and innovation. Simultaneously, the school strategy must be in line with the national strategy for the development of education. The result of strategic planning is reflected in the school development strategy. The publication outlines *the stages of the strategic planning process* - building the vision of the school, formulating the mission, defining the strategic goals of the school, strategic analysis and evaluation of the external environment, strategic analysis

of strengths and weaknesses, implementation of the strategy and evaluation of the results. The guiding principles and the priority directions in its elaboration and adoption are outlined. The eight main phases of elaboration and adoption of the school strategy are analyzed in detail - analysis of diagnostics of the external environment (factors and tendencies), analysis of the internal state of the school (internal environment), choice of the type of strategy, the definition of the mission, values and strategic goals, development of a strategic plan, plan for maintenance or change of the strategy (for feedback), implementation and implementation, and further developing the strategy, control, and evaluation.

II. THEMATIC AREA: HISTORICAL ASPECTS OF THE MANAGEMENT OF NON-BULGARIAN (GREEK) EDUCATIONAL INSTITUTIONS

TYOLOGY OF PUBLISHED PUBLICATIONS

- Books - 1 (№1) (from the attached list of publications in the competition).
- Monographs - 2 (№ 1, 3) (from the attached list of publications in the competition).
- Studios - 1 (№5) (from the attached list of publications in the competition).
- Articles - 4 (№ 3, 7, 9, 13) (from the attached list of publications on the competition).

1. BOOK: MIHALEV, V. (2017) Greek educational institutions in settlements on the North Black Sea coast in the second half of the XIX century to the 20s of the XX century. Univ. publishing house VFU "Chernorizets Hrabar". Varna. ISBN 978-954-715-659-3, 394 p.

ABSTRACT: The published historical-pedagogical research has the main text of 394 pages and consists of an introduction, four chapters, a conclusion and used literature from 294 sources, of which 231 in Bulgarian, 52 in Greek, 4 in Russian, 2 in French, 3 in English, 1 in German, 1 in Romanian. The introduction presents its parameters - *object, subject, purpose, tasks, research thesis, chronological framework, geographical aspects, and source base.*

The study's object is the functioning of the Greek educational work in settlements on the Northern Black Sea coast in the second half of the XIX century to the 20s of the XX century.

The research subject is the Greek educational institutions that functioned in the study area in the second half of the XIX century to the 20s of the XX century (until 1914).

The study aims to trace in chronological terms the emergence and functioning of different typologies of Greek educational institutions and their interpenetration by analyzing the projections of the influence of "Greek-Hellenization" and its impact on school education, determining the specific appearance of geographical area studies.

In the context of the research the following main **tasks** are realized:

- To study the demographic, ethnic, spiritual-religious, economic, and commercial appearance of the Black Sea settlements on the Northern Black Sea coast, inhabited by representatives of the Greek ethnic group, as main factors (internal and external) for the initial emergence, spread, and functioning of Greek schools in this Black Sea area.
- By applying historical-pedagogical analysis to study the genesis of origin, the stages of the spread of Greek educational institutions, and the specific contribution of spiritual, educational, and public figures for their long-term functioning and prosperity.
- By applying research tools to make a comprehensive pedagogical analysis of the organization of training (the process of training and education, curricula and programs, principles, methods and tools of training and education, teachers and material support).
- Based on certain indicators (distribution of Greek schools, the scope of students, the main characteristic of education, level of literacy, qualification structure of teachers, institutions of management and material support, to conclude the level of development and spread of modern Greek education compared to the new Bulgarian and its specific features are identified with that prevalent in settlements on the southern Black Sea coast.
- To study the goals, tasks, main functions, and contributions of the *specialized institutions for the management of Greek schools* - Greek dioceses and their Orthodox churches and school boards and *non-specialized* - Greek Orthodox municipalities, Greek educational societies, Greek guilds, and charities, societies, philanthropic fraternities, Greek reading clubs, music societies, community centers and libraries, printing houses and bookstores, Greek diplomatic missions.
- Study of the research problem in the light of unpublished historical sources (Bulgarian and Greek) of high historical and pedagogical value.

The scientific thesis has the following wording: *The created favorable socio-social, cultural-religious and material-economic factors (internal and external) for the initial emergence, spread, and functioning of Greek educational institutions in the settlements on the North Black Sea coast in the second half of the XIX century to the 20 years of the*

twentieth century greatly contribute not only to increase the education of Bulgarians but also to expand the social and cultural base of Greeks, which makes Greek schools an effective means of broad spiritual expansion and an obstacle to the development of modern Bulgarian education in the second half of the 19th century in the studied geographical area.

To achieve the goal, tasks and scientific thesis are applied tools in the context of generally accepted pedagogical historiography research methods: hermeneutic analysis of texts, archival, factual, chronicle, biographical, logical, local lore methods, and study of school documentation.

Chapter One: MAIN FACTORS FOR THE ORIGIN AND DISTRIBUTION OF GREEK SCHOOLS IN SETTLEMENTS ON THE NORTHERN BLACK SEA IN THE SECOND HALF OF THE XIX CENTURY TO THE 20S is dedicated *to the main factors* for the emergence and spread of Greek schools, which are differentiated into internal and external. The author's conviction conditions their presentation that their combination creates favorable opportunities not only for the emergence of Greek educational institutions in settlements on the North Black Sea coast but also for *"bringing modern Greek education to the level of modern requirements."* Research sources reviewed the historical patterns in the development of the *demographic, ethnic, and spiritual-religious image* of the Greek Black Sea communities and traced the rise of *economic and commercial development* of the Black Sea settlements. The first group of internal factors outlines the role of permanently inhabiting Greek Black Sea communities and the processes related to the *demographic, ethnic, and spiritual-religious appearance* of the Black Sea settlements. In their analysis, the centuries-old influence and active role of the *Constantinople Patriarchate* and the *spiritual and religious institutions* residing in it come to the fore. The author presents the second group, determining the range of external factors related to the rise of *economic and trade development* of the Black Sea settlements and the growth of *trade and shipping*, which reflects on the supporting activity of the local Greeks. The conclusion is that the *ethnic, demographic, and cultural-religious appearance of the population in unity with the trade and economic development of the Black Sea settlements in the second half of the nineteenth century actively contribute to the long-term functioning of Greek schools.*

Chapter Two: DISTRIBUTION AND FUNCTIONING OF CELL AND MODERN GREEK SCHOOLS IN SETTLEMENTS ON THE NORTHERN BLACK SEA IN THE SECOND HALF OF THE XIX CENTURY TO THE 20S OF THE XX

CENTURY traces the initial discovery, distribution, and functioning of Greek educational institutions of different typologies. The author presents their stages of development - *social-cell, mutual, and classroom*. In the context of the Greek schools' overall development during the separate stages, their main characteristics are presented (organization and methodology of teaching, method of teaching, the content of education, teaching aids, teachers, and material support).

In the third chapter: DISTRIBUTION AND FUNCTIONING OF GREEK CLASSROOM AND HIGH SCHOOL SCHOOLS IN SETTLEMENTS ON THE NORTHERN BLACK SEA COUNTRY IN THE SECOND HALF OF THE XIX CENTURY TO THE 20TH OF THE 20TH CENTURY a rich factual material is presented, based on which a comparison is made between the Greek educational institutions in the studied geographical area and the new Bulgarian education, with an emphasis on the advantages of the former. The comparison is *systematized, based on clearly differentiated quantitative and qualitative indicators*, which gives grounds for formulating reasoned conclusions. The author thoroughly examines the pace of the spread of open Greek educational institutions. A complex *pedagogical and didactic analysis of the types of Greek schools was carried out* using *uniform* indicators. The applied research approach makes it possible to follow the development process by considering the quantitative and qualitative changes in the studied educational institutions. In the proposed *historical-pedagogical analysis*, the *historical-comparative method* of research is used on the one hand, and on the other hand, *the manifestation of the logical methods* (analysis, generalization, synthesis, comparison, and analogy). The analysis is based on studied documentary and archival sources in Bulgarian and Greek. The conclusion is substantiated that in the 90s of the XIX century, the number of Greek schools in Varna *exceeds* that of the Bulgarian ones, and compared to the schools of all ethnic groups - Bulgarian, Armenian, Jewish, and Turkish it reaches a relative share - 23.3% (Diagram 1).

Diagram 1

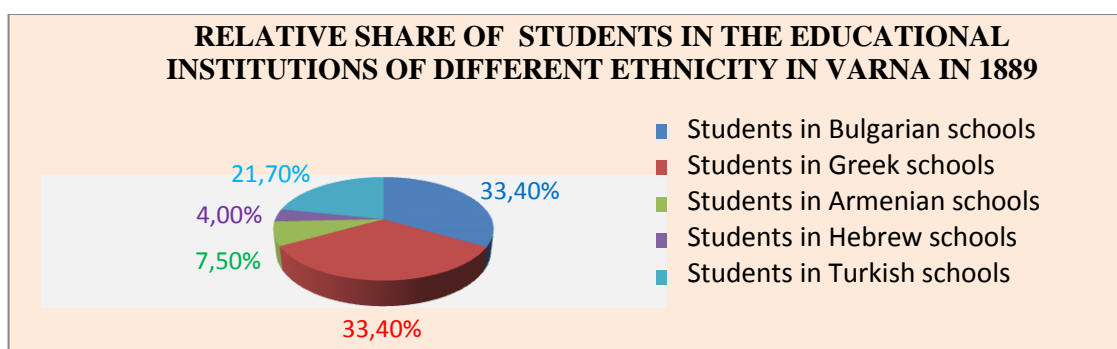
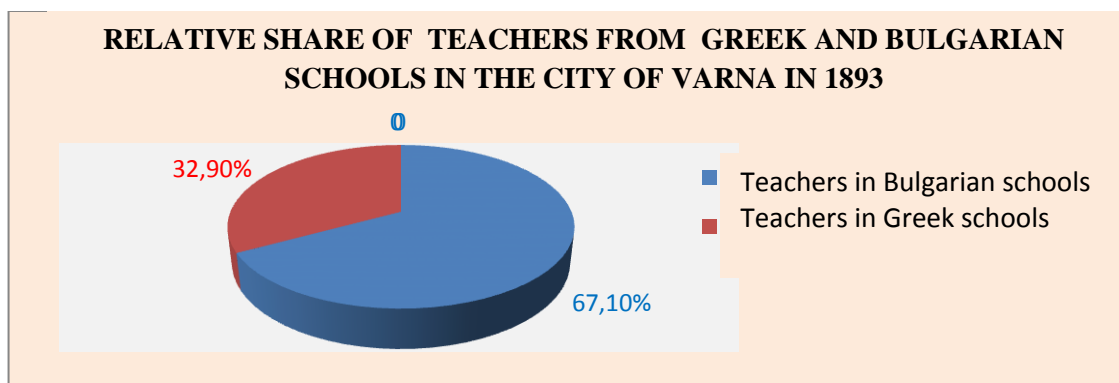


Diagram 2 shows the relative share of teachers in Greek schools, compared to that in Bulgarian schools and educational institutions of different ethnic groups in Varna.

Diagram 2



Chapter Four: INSTITUTIONS FOR GOVERNANCE AND SUPPORT OF GREEK SCHOOLS IN THE SETTLEMENTS ON THE NORTHERN BLACK SEA IN THE SECOND HALF OF THE XIX CENTURY TO THE 20S OF THE XX CENTURY is dedicated to the specialized and non-specialized institutions for management and support of the Greek schools. Their main functions and contributions to the prosperity of modern Greek education have been thoroughly and arguably studied. To the first group, the author considers the activity of the Orthodox Church and the school boards as management institutions and their leading functions: managerial, administrative-economic, financial, legislative, pedagogical, educational-methodical, and organizational. The functions and contributions of the non-specialized institutions - Orthodox municipalities, Greek educational societies, charitable and cultural organizations, and diplomatic missions, operating in the studied geographical area are outlined.

Based on researched archival sources in Greek with high historical value, related to the governing bodies of the Greek schools - the school boards are presented conclusions, determining their social significance and the extensive large-scale management activity.

CONTRIBUTIONS OF THE RESEARCH

- The main groups of factors (*internal and external*) related to the *demographic, ethnic, spiritual-religious, economic, and commercial appearance* of the Black Sea settlements, which contribute to the spread and long-term functioning of Greek educational institutions

in settlements on the North Black Sea coast in the second half XIX century to the 20s of the XX century.

- A *first-of-its-kind* historical and pedagogical study of Greek educational institutions (cell, mutual, class, high school, and professional) was conducted in the studied settlements during this period, which has a *full scope of their phasing and complex analysis of the content of the organization of education* (the process of education and upbringing, curricula and programs, principles, methods and means of education and upbringing), management and material support.
- The goals, tasks, main management functions, and contributions of the *specialized institutions for the management* of the Greek educational institutions (Orthodox Church and school boards), as well as those of the non-specialized institutions for their material support (Orthodox Greek municipalities, Greek educational societies (silogoses), Greek associations and charities, Greek reading clubs, music societies, community centers, and libraries, printing houses, and bookstores and Greek diplomatic missions), have been studied.
- Based on certain *indicators* - distribution of Greek educational institutions in the settlements on the North Black Sea coast, the scope of students, qualification characteristics of teachers, basic characteristics of training (process of education and upbringing, educational structure, curricula, principles, methods, and means of education and upbringing), level of literacy and institutions for management and material support, and by applying *comparative pedagogical analysis conclusions* are made about *the degree of development of modern Greek education concerning modern Bulgarian education* in the study area and its *specific features* are identified with the widespread modern Greek education in settlements on the southern Black Sea coast.
- *For the first time*, a systematic historical reconstruction was carried out in chronological terms of the emergence of Greek cells, mutual, primary, class, high school, and professional in the studied settlements by preparing extensive catalogs *with the earliest notices of their initial discovery, typology of distribution, educational structure, the scope of students, teaching staff, and sources of material support.*
- Through the open archival sources in Greek (katarevus) of great historical and pedagogical value, which through *specialized scientific translation* enter into scientific circulation, the source base for the functioning of Greek educational institutions in settlements on the North Black Sea coast *is highly enriched.*

According to Prof. Dr. Marinela Mihova, the research is: *“exceptional in its scale and is a serious achievement of pedagogy, and its contributions should be sought and discovered in this field of science, because it is the first of its kind, and its subject is a contribution from the point of view of the state of science and previous research. The results related to the staging of Greek educational institutions, the complex pedagogical and didactic analysis of the educational practice in them, and their management and material support, fill a white spot in science.”*

2. MONOGRAPH: MIHALEV, V. (2017) Greek educational institutions in settlements on the southern Black Sea coast in the second half of the nineteenth century to the 20s of the twentieth century. Univ. ed. of VFU "Chernorizets Hrabar". Varna. ISBN 978-954-715-663-0, 221 p.

SUMMARY: The grounds for scientific research of Greek educational institutions in settlements on the Southern Black Sea coast are dictated by the fact that this problem is insufficiently covered in both Bulgarian and Greek historiographical pedagogical literature. To more fully disclose the studied issues, the historical sources used are differentiated into three main groups. The first group of *Greek sources* includes studied *archival documents in Greek* related to the modern Greek education in the Black Sea centers of Sozopol, Anhialo, Pyrgos, Ahtopol, Mesemvria, Vasiliko, Burgas, Aytos, Tsarevo, Malko Tarnovo, Balgarovo, and others. The second group of *Greek sources* occupies regional publications by Greek authors in the Greek periodicals. The third group includes separate *Bulgarian sources*, covering local lore information, monographs, research and publications by Bulgarian authors, information in the local periodicals, information, and notes of Bulgarian Renaissance educators.

The pedagogical research is written based on studied source material from published and unpublished sources, translated from Greek (katarevus) into Bulgarian, and from newly discovered archival documents published for the first time. It is structured in 221 pages and covers an introduction, four chapters, a conclusion, and literature. The conclusion contains conclusions that correspond to the main scientific thesis and the goal and main tasks' implementation. In the monographic work are positioned 1 scheme, 13 tables, and 7 diagrams. The used literature is in 153 sources, 122 in Bulgarian, 2 in Latin, and 29 in Greek. The following parameters characterize the pedagogical *research*:

The study's object is the functioning of the Greek educational work in settlements on the southern Black Sea coast in the second half of the XIX century to the 20s of the XX century.

The study's subject is the Greek educational institutions, which functioned in settlements on the Southern Black Sea coast during the second half of the 19th century until the 1920s of the XX century.

The study aims to trace, in chronological aspect, the emergence and functioning of Greek educational institutions in the study area.

To achieve the formulated goal and following the established chronological framework, the following main **tasks** are performed:

- To study the demographic, ethnic, spiritual-religious, economic, and commercial appearance of the settlements on the Southern Black Sea coast, primarily inhabited by representatives of the Greek ethnic group, as fundamental factors for the initial emergence, spread, and functioning of Greek educational institutions.

- By applying historical and pedagogical analysis to study the genesis, stages of development, and typology of Greek schools' spread in settlements on the southern Black Sea coast.

- By applying certain research tools to analyze the process of education and upbringing in Greek schools (content and organization, curricula and programs), management, and material support.

- Based on certain indicators (distribution of Greek educational institutions, the scope of students, characteristics of training (process of training and education, educational structure, institutions of management and material support) to conclude the degree of development of modern Greek education in studied Black Sea area, compared to the new Bulgarian.

- To study the tasks and functions of the specialized institutions for the management of the Greek schools (the Orthodox Church and the school boards), as well as those of the non-specialized (local Greek Orthodox municipalities, Greek educational societies, charities, cultural institutions, and Greek consular representations) during the study period.

In the first chapter: **MAIN FACTORS FOR THE ORIGIN AND DISTRIBUTION OF GREEK SCHOOLS IN SETTLEMENTS ON THE SOUTHERN BLACK SEA IN THE SECOND HALF OF THE XIX CENTURY TO THE 20S YEARS OF THE XX CENTURY** the main factors for the spread of Greek schools in the studied geographical area are analyzed, which are *differentiated into two main groups*: internal and external. To the first group, determining the *internal factors*, are studied and analyzed the permanently inhabiting Greek communities, as well as the processes related to the demographic and spiritual-religious appearance of the population, conditioned by internal

migration. The second group, determining the range of *external factors*, is related to the rising economic and trade development of the studied Black Sea settlements, reflecting on the supporting activity of local Greeks, contributing to the early opening of Greek schools in major South Black Sea cities.

In the second chapter: DISTRIBUTION AND FUNCTIONING OF CELL AND MODERN GREEK SCHOOLS IN SETTLEMENTS ON THE SOUTHERN BLACK SEA COUNTRY IN THE SECOND HALF OF THE XIX CENTURY TO THE 20s OF THE XX CENTURY *the stages of development* of the Greek schools during the studied period are outlined. The *typology* of their distribution and their differentiation according to the trained staff is presented. The periods of distribution of mutual, primary, class, and high school Greek schools have been identified and analyzed. The mutual teaching and class organization of education is studied. A special place is given to the processes related to *applying the mutual learning method and the elements of the mutual learning organization of training*. The methods of teaching and education in modern Greek schools are analyzed. Conclusions are made about the degree of development of the modern Greek schools in the studied area. The author's research efforts are focused on studying a wide network of mutual and primary schools, which for a long time determine the appearance of the developing modern Greek education.

In the third chapter: DISTRIBUTION AND FUNCTIONING OF CLASSROOMS, HIGH SCHOOLS AND KINDERGARTENS IN SETTLEMENTS ON THE SOUTHERN BLACK SEA COUNTRY IN THE SECOND HALF OF THE XIX CENTURY TO THE 20s OF THE 20TH CENTURY the reasons for opening class Greek schools are analyzed and the periods of their spread in the studied Black Sea area. Based on researched archival documents in Greek, hitherto unknown information about the first Greek teachers is presented. The conclusion is that Greek schools' opening and conducting school education in them entirely in Greek is a clear example of how the very early Greek cultural and national penetration and spiritual and educational influence is realized. The positive importance of the Greek schools for increasing the Bulgarians' education is emphasized because until the Liberation in the big Black Sea cities Anhiolo, Sozopol, Mesemvria, and Ahtopol, there are no new Bulgarian schools in which children with Bulgarian roots receive their education in their mother tongue. The process related to the introduction of the classroom organization of education and the modern Greek teachers' contribution is analyzed in detail. *Differentiation of the open class schools* has been prepared, according to the teaching staff - male, girls and mixed and based on this

conclusions have been made about the pace of their spread during the studied historical period. Conclusions about the *level of development* of Greek class education are presented.

A comparative analysis of the extent of class Greek schools in the study area with those found in settlements on the northern Black Sea coast. The research emphasis is placed on research and analysis of the curricula in Greek high schools. The introduced organization of education in the class schools, related to applying the school regulations as a written regulated basis for their management, is analyzed. The reasons for the closure of Greek educational institutions are analyzed in detail. Generalizations have been made that determine the development of the "Greeks-Hellenization" connection in school education. At the end of the third chapter is presented an analysis related to laying the initial foundations of modern Bulgarian education in the two geographical areas - North and South Black Sea Coast, based on which it is concluded *that the continued existence of Greek educational institutions leads to delays in learning the Bulgarian language due to the late opening of Bulgarian schools in these lands*. The author's research is focused on outlining the advantages of Greek educational institutions in the studied geographical area, based on certain *indicators*.

In the fourth chapter: INSTITUTIONS FOR MANAGEMENT AND SUPPORT OF THE GREEK SCHOOLS IN SETTLEMENTS ON THE SOUTHERN BLACK SEA COUNTRY IN THE SECOND HALF OF THE XIX CENTURY TO THE 20S OF THE XX CENTURY are differentiated into two groups - *specialized and non-specialized*. The first group examines the manifestation of *the school boards' main management functions* in Pyrgos, Sozopol, Anhialo, Ahtopol, and Mesemvria. The second group analyzes institutionally organized Greek Orthodox municipalities' main functions, Greek educational societies in Anhialo, Sozopol, Mesemvria, Pyrgos, and Ahtopol, Greek charities, active cultural organizations, and Greek consular offices. Based on a thoroughly researched source of archival material from the Bulgarian and Greek historiography, for *the first time*, information about the Greek educational societies (*silogosi*) is presented as non-specialized institutions that actively support the development of Greek education in Anhialo, Mesemvria, Ahtopol, and Pyrgos. The conclusion presents *historical and pedagogical results*, which confirm the scientific thesis raised in the introduction.

CONTRIBUTIONS OF THE RESEARCH

- Based on historiographical source studies, a first-of-its-kind pedagogical study of Greek educational institutions in settlements on the southern Black Sea coast was conducted in the second half of the 19th century to the 1920s of the XX century.

- For the first time, a systematic historical reconstruction was carried out in chronological terms of the emergence of the studied Greek educational institutions in settlements on the southern Black Sea coast in the second half of the nineteenth century to the 1920s of the XX century.
- Based on a thoroughly researched source archival documentary material from Greek historiography, the author presents for the first time information about Greek educational societies (silogos), which operate in the major urban centers on the southern Black Sea coast - Anhialo, Mesemvria, Ahtopol, and Pyrgos.
- Based on historiographical research and analysis of the organization of training (training and education process, curricula, principles, methods, and tools of training and education), management and material support has been prepared.
- Through the open archival sources in Greek (katarevus) of great historical and pedagogical value, which through specialized scientific translation enter into scientific circulation, the source base for the functioning of Greek educational institutions in settlements on the southern Black Sea coast in the second half of XIX century to the 20s of the XX century.

3. MONOGRAPH: MIHALEV, V. (2020) Influence of the Greek educational institutions for the development of the new Bulgarian education in the city of Varna in the second half of the XIX century to the 20s of the XX century. Slavena Publishing House. Varna. ISBN 978-619-190-176-0, 161 p.

SUMMARY: The monograph examines the penetration of *the strong Greek influence in the management of the Bulgarian school* through the introduced rules "Students have a position." The conclusion is conditioned that this written document is borrowed from the Gabrovo mutual school. It is included in Table №85 in the set of mutual learning tables, first published in Belgrade in 1835. It was added to the other tables in the second edition in Bucharest in 1848. In the school regulations, the rules of conduct are translated from Greek (Fig. 1). This table, which was translated from Greek, is borrowed from the French-language booklet in Paris in 1829, "A Practical Guide for Primary Schools, or a Summary of the Method of Mutual Learning, According to L. S. Sarazen." *Conclusions are made related to the identification of the degree of Greek influence on the educational work and practice of the mutual Bulgarian school in Varna:*

- The school regulations "Students have a position" become *a common document* for educational work with mutual students and a basis for unified education of Bulgarian and

Greek students, where there is a pronounced closeness and similarity in the rules. Similar elements are found in the requirements for mutual Greek students in the Greek regulations Πειθαρχικός κανονισμός των εν Βάρνη Ελληνικών Σχολών (Fig.2).

- Bulgarian mutual students are educated according *to the same rules* of conduct together with the Greek ones and join the common for Bulgarians and Greeks human, moral and cultural achievements, which largely determines a segment of common spiritual and educational aspirations, objectified by certain similarities in their educational practice - achieved *the same educational ideal*.

4. STUDY: MIHALEV, V. (2020) The managerial functions of the Greek school board in Varna in the XIX century to the beginning of the XX century (source study).

In: e - Journal VFU. ISSN 1313-7514, No. 13, 34 p.

SUMMARY: The publication examines the main managerial functions in the activities of the Greek school board in Varna during the study period, as a governing body of Greek schools in the Black Sea city. For the purpose of the study were examined and translated documentary archive sources in Greek (katharevous) funds „Greek community” (Ελληνική κοινότητα) and „Greek bishopric” (Ελληνική επισκοπή) in TO-Varna and publications in the local Greek newspapers „Οδησός” and Πανδαισια. Based on open archival documents in Greek, one of which "Duties of the Board of Trustees of Greek Schools in Varna" are outlined and analyzed its main management functions - management, business, financial, legislative, educational and organizational. Examples of its large-scale activities are given in support of the implementation of these management functions. A number of reports by the school trustee Yanaki Flori related to the implementation of the financial function of the Greek school board were presented, representing annual reports on the implementation of the revenue and expenditure part of the budget. At the end of the publication, conclusions are made related to the high public importance as a result of the implementation of management functions in the activities of the Greek school board as an important governing body of Greek educational institutions during the study period, which are closely connected with the educational life of the local Greek Black Sea community.

5. ARTICLE: MIHALEV, V. (2019) The obligations of teachers from Greek schools in Varna since the beginning of the twentieth century. In: Preschool & school education. Educational Publishing House. S. ISSN 2535-0692, no. 4, pp.115-125.

SUMMARY: The article analyzes an open archival document's content after a scientific translation from Greek (katharevous) into Bulgarian. It is part of the documentary sources in Greek in the fund Ελληνική κοινότητα ("Greek Municipality"), stored in DA-Varna,

entitled: "Duties of teaching staff in Greek schools and guidelines for their implementation with psychological interpretation and finally the absences of the teachers, the parents of the students and the doctor of the schools "(ΔΑ-Βάρνη, φ.83Κ ωπ.1 α. ε. 73 σ.1). The author makes an in-depth analysis of the content of the document, presenting the main obligations of Greek teachers from the rules, which are presented in eight sections: "Friendly, fair with paternal love for students and decent behavior outside school," "Preparing teachers at home for lessons who will teach," " Teaching without a textbook by the teacher when possible," " Accurate application of the curriculum," " Mandatory presence of the teacher at the meetings of the teachers' council," " General instructions for teacher absences," "Regarding the parents of the students" and "Regarding the school doctor." At the end of the publication, summaries are made, which impose the conclusion that the strict requirements for Greek teachers are dictated by the manifestation of high public care, not only for raising the prestige, their dignity and establishing the teaching profession in society, but also for forming of certain criteria in students for moral education and virtue, respect for the individual and education in high public morality in the spirit of Orthodox values.

6. ARTICLE: Mihalev, V. (2020) The disciplinary rules of the Greek educational institutions in Varna from the beginning of the XX century and the obligations of the students. In: *Preschool & School Education. Educational Publishing House. S., ISSN 2535 - 0692, No. 1, pp. 131 - 138.*

SUMMARY: The publication's subject is the analysis of a rare archival document with high historical and pedagogical value. The presentation of its content is possible after a scientific translation from Greek (katarevus) into Bulgarian. It is part of the administrative documents in Greek issued by the Greek municipality of Varna and the school board, defining the appearance of the school "legislation" of the Greek educational institutions in Varna from the beginning of the twentieth century, entitled: Πειθαρχικός κανονισμός των εν Βάρνη Ελληνικών Σχολών ("Disciplinary Regulations of the Greek Schools in Varna"). The article analyzes the Disciplinary Regulations introduced by the school trustees as a "legislative-administrative" act, which strictly regulates students' obligations, responsibilities, and punishments, divided into three areas: obligations of students before classes, obligations of students during classes and breaks, and obligations of students outside school. These rules set out the requirements that students should comply with within their relationships with teachers and staff. The non-fulfillment of the restrictive decrees of the approved school acts determines the application of strict punitive measures

for the students, according to the gravity of the violations committed by them. The public belief dictates this approach that good school discipline is a prerequisite for an effective educational process. The publication analyzes the penalties provided for in the "regulations" for students who do not attend school regularly and do not comply with the mandatory provisions.

7. ARTICLE: MIHALEV, V. (2020) The "Prohibition Regime" in the educational law "Zhivkov" from 1891 and the end of the management of the Greek schools in Varna. In: e - Journal VFU. ISSN 1313-7514, No. 13.

SUMMARY: The publication's subject is issues related to the consequences of the practical application of the Bulgarian educational legislation, which regulates the final closure of the Greek schools in Varna in the second decade of the twentieth century. The "prohibition regime" introduced by the Bulgarian authorities in the Public Education Act of 1891 is a continuation of the support for the anti-Greek sentiments of 1906. As a result of all these actions, the Greek nation's representatives failed to preserve the autonomy of "their" educational institutions. An analysis of the legal norms of the Public Education Act of 1891 has been made, one of which is the norm of Article 10, which regulates the compulsory study of the Bulgarian language "by the various Christian denominations." District №7510 is cited, in which the motives of the law are substantiated in its most controversial part, referring to the fact that "it is in the common interest of all citizens in the Bulgarian state to know the official state language, which is the language of all state institutions." The publication clarifies that this legal norm's application enters into force in the year 1906/1907. At the end of the publication, summaries are made related to the changes in the management of Greek educational institutions, which are the result of the introduced "prohibitive regime" in the Public Education Act of 1891

8. ARTICLE: Mihalev, V. (2021) A regulation for the teachers' councils of the Greek schools in Varna in the XX century. In: e-Journal VFU. ISSN 1313-7514, No. 14.

SUMMARY: The publication discusses the requirements for Greek teachers, regulated in the "Regulations for teachers' councils of Greek schools in Varna" from 1902, stored in the fund "Greek Municipality" in DA-Varna, which in essence is part of the school "legislation" of the Greek educational institutions in the beginning of the XX century. The analysis of the content of this document is possible after a scientific translation from Greek into Bulgarian. In it, an important place is given to the requirements that the school board places on Greek teachers to participate in teachers' councils. The section "General instructions for teacher absences" indicates the cases in which absence from a meeting of

the teachers' council is allowed. Teachers are subject to punishment, including the imposition of the most severe - "dismissal". This administrative document regulates the number of monthly meetings. The school trustees explain to the teachers the importance of the decisions taken by the teachers' council as a collective body. The topics of the issues discussed at the teachers' councils are outlined. In conclusion, the author presents summaries related to the regulation of written norms, as part of the "school legislation" of Greek educational institutions in the early years of the twentieth century, which are constantly updating their content and approaching the model of modern law, where in the imperative form and the prescriptive tone in them remind of the non-alternative wording in separate provisions.

DATE:

TOWN OF SHUMEN

SIGNATURE:

(PhD VESELIN MIHALEV)