

**SCHOOL-UNIVERSITY PARTNERSHIPS IN TEACHING THE MANDARIN
CHINESE LANGUAGE: THE CONFUCIUS INSTITUTE EXPERIENCE**

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University of Pittsburgh, 2011

While the study of major foreign languages faded in thousands of U.S. schools in the last decade, many schools rushed to offer Mandarin Chinese (Dillon, 2010). Despite financial crises and drastic budget cuts since late 2007, the number of K-12 schools offering Mandarin Chinese has been growing. However, no in-depth research has been conducted to capture and study this historical development. We knew very little about how U.S. schools developed Mandarin Chinese instruction through a school-university partnership. This qualitative research investigated how six U.S. secondary schools (five public and one private) developed Mandarin Chinese programs through partnership with the Confucius Institute at University X, and explored how the partnership helped those schools achieve their educational goals and desired outcomes. Two theoretical lenses, i.e. the partnership theory (e.g. Briody & Trotter II, 2008; Clark, 1988; Edwards et al., 2009; Goodlad, 1988; Kloth & Applegate, 2004) and the “loosely coupled system” theory (e.g. Murphy & Hallinger, 1984; Orton & Weick, 1990; Weick, 1976, 1982 & 2001), were employed in this study to explore how the schools and the Confucius Institute partnered as “loosely coupled systems” to achieve their common goal, when the common goal was defined as promoting Chinese language and culture in U.S. schools. This research was designed to focus on the schools’ perspective only. Qualitative data were collected from documentation and open-ended interviews with 22 participants (N = 22), including nine school/school district administrators, five regular school teachers and eight Chinese guest

teachers. The study found that the partnership was complimentary and cooperative (not collaborative) in nature and the schools worked with the Confucius Institute on a need-response basis. Working in the partnership as “loosely coupled systems”, the schools enjoyed autonomy and flexibility, but they were challenged with much uncertainty and a lack of consistency and communication on a regular basis. Moreover, financial crises and sharp budget cuts threatened the future of those schools’ Chinese language programs and the partnership. Despite these challenges, those schools confirmed that they had gained some valuable experiences with the development of Mandarin Chinese education and the partnership. Recommendations for further research have been provided.

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1.0 CHAPTER ONE: INTRODUCTION

1.1 BACKGROUND

While the study of major foreign languages has faded in thousands of U.S. schools in the last decade, many schools have rushed to offer Mandarin Chinese (Dillon, 2010). For decades, Mandarin Chinese instruction had been offered sporadically in U.S. secondary schools. It did not become a regular subject of foreign language curricula until recent years. Researchers pointed out that such a development was driven by the rapid growth of China's economy and China's goal of building its soft power worldwide on the one hand, and by students and parents who saw that fluency in Chinese meant more opportunities on the other hand. This study argues that the economic crises and budget cuts are also among major factors that prompted many school districts to offer Mandarin Chinese, because the "free" resources (e.g. cash money and "free" teachers) provided by Hanban/Confucius Institute Headquarters (hereafter termed Hanban/CIH) through its Confucius Institutes (hereafter termed CI or CIs) are too good to refuse. In this respect, it is not overstatement to say that the economic crises and budget cuts in many school districts have provided a perfect opportunity for Mandarin Chinese to enter U.S. schools.

To be more specific, many U.S. schools have been operating in a financially disadvantaged environment since late 2007, when an economic crisis occurred nationwide. Tang (2008) reported that the nation's losses significantly affected schools and school districts from

the east coast to the west coast, and they suffered from three categories of losses: (1) losses caused by the downfall of their investment in stock, e.g. with Lehman Brothers; (2) losses caused by falling property values that led to the decline of annual tax revenues; and (3) losses of advantages in schools' short-term loans with local banks.

Researchers also reported that, despite the federal government's billions of dollars in stimulus funds, school districts nationwide faced severe setbacks (e.g. Johnson, 2010; Llanos, 2010; Paiva; 2009; Tang, 2008). The Center for Public Education (2010)¹ described the situation as follows:

In 2008-09 and 2009-10 school years, many school districts were able to cut their expenditures with minimal impact on students by adjusting thermostats, deferring maintenance and construction projects, laying off central office staff and eliminating nonessential travel. But for the current school year (2010-11), most districts have had to make cuts that affect students more directly. Those cuts include:

- Laying off teachers, which in turn increases class size
- Cutting extracurricular activities
- Cutting courses not required for graduation
- Eliminating summer school
- Adopting a four-day school week
- Eliminating field trips
- Cutting instructional programs
- Cutting professional development for teachers and staff.

The Center also reported:

Nearly half of a school district's funding comes from the state, and the cuts states have been making to their budgets are hitting school budgets hard. Local funding for schools has also been hurt by the sharp decline in housing values.

What was described above was not uncommon to many public schools. One of the six schools in this study had experienced almost all of the above.

¹ See "Cutting to the bone: How the economic crisis affects schools."

In addition, school construction projects were delayed, classroom budgets reduced, and teacher salaries were frozen (Tang, 2008). Some specific examples showed that more than 1,700 employees of Detroit Public Schools (including 1,000 teachers) were laid off (Paiva, 2009); and about 22,000 teachers and administrators of California school districts faced layoffs, which constituted 7 percent of the professional workforce (Johnson, 2010). Worst of all, many teachers in core subject areas such as English, math, science, and social studies did not survive budget cuts.² Unfortunately, some of the primary areas that typically suffer from cuts first are art, music and language classes. Teachers of those subjects are often the first ones to go. It is not uncommon for schools to not hire replacement teachers in those subject areas when former teachers retire. W. James Jacob of the University of Pittsburgh (2011) recalled that some Chinese guest teachers³ informed him that the supervising teachers they worked with at the partner schools had been laid off; and language programs (including Mandarin Chinese) had been discontinued. This is an unfortunate phenomenon occurring nationwide in U.S. schools, a trend that is slated to continue for the years to come. Johnson (2010) reported that 90 schools in New York City had been closed and more would follow. All of this confirms a growing trend of closing schools and losing foreign language programs, including Mandarin Chinese.

Despite the economic crisis, the number of K-12 schools offering Chinese instruction was growing. A national survey conducted in 2008 on the “less commonly taught languages” in U.S. schools showed that the number of elementary and secondary schools offering Mandarin Chinese programs grew from 1 percent in 1997 to 4 percent in 2008 (Rhodes & Pufahl, 2009). During

² See “Cutting to the bone: How the economic crisis affects schools.”

³ News media in the U.S. has been using the term “Chinese guest teacher,” while the term used by Hanban/CIH and teachers from China is “volunteer Chinese teacher” (http://english.hanban.org/node_7583.htm). For the sake of simplicity, this study uses the term “Chinese guest teacher.”

the same period, the number of elementary and secondary schools offering other foreign languages dropped as follows: French, 18 percent; German, 10 percent; Japanese, 4 percent; and Russian, 2.7 percent. Spanish, which was offered by the largest number of schools, showed no growth in 2008 (Rhodes & Pufahl, 2009). The study conducted by the American Council on the Teaching of Foreign Languages (ACTFL) in 2008 also confirmed the growth in the learning of Mandarin Chinese, reporting that the number of K-12 public school students learning the Chinese language rose from about 20,000 in 2005 to nearly 60,000 in 2008 (Dobuzinskis, 2011).

Despite the rapid growth of Mandarin Chinese programs nationwide, no in-depth research has been conducted to capture and study this historical development. We know very little about how U.S. secondary schools developed Mandarin Chinese education; why those schools chose Mandarin Chinese over other “world languages;” why they developed Mandarin Chinese programs through partnership with CIs; and what challenges and issues those schools have encountered in the course of developing Mandarin Chinese education.

This study investigated how six U.S. schools (five public and one private) formed partnerships with the CI at University X (the school-university partnership⁴) and developed Mandarin Chinese instruction. Moreover, it attempted to explore in what ways the school-university partnership had helped those schools achieve their educational goals and desired outcomes in the development of Mandarin Chinese education. The reason for choosing those schools as the subject of this study is twofold. One, Hanban/CIH and CIs mainly targeted the U.S. school system and, in many cases, Mandarin Chinese was relatively new to many schools, public and private. Two, although more educators called for learning Mandarin Chinese at an earlier age and more and more elementary schools and middle schools began offering Mandarin

⁴ I use the term “school-university partnership” because the CI is considered a sponsored project under University X.

Chinese, in many cases, formal (non-exploratory) Mandarin Chinese language programs started at the high school level. At least, it was the case among the six schools in this study.

Figure 1 below illustrates the what, who, when, why, how and where of the research topic for this study.

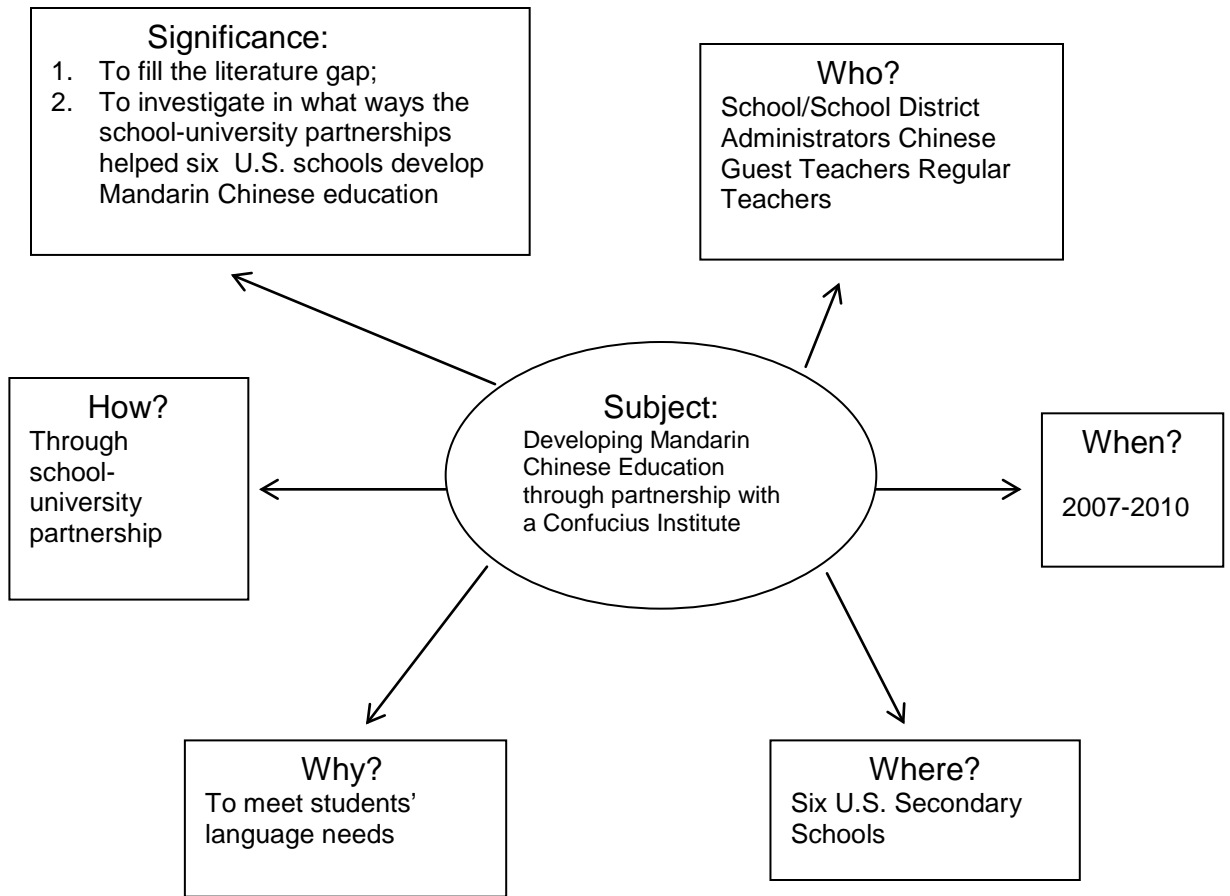


Figure 1. Concept map of the research topic⁵

⁵ Created based on the format from <http://www-personal.umich.edu/~jmargeru/conceptmap/types.htm>.

1.2 STATEMENT OF THE PROBLEM

Prior to this study, I found no in-depth research conducted to capture and study the rapid growth of Mandarin Chinese education in U.S. schools. For example, the public knew very little about how U.S. schools developed Chinese language curricula; why those schools chose Mandarin Chinese over other “world languages;” why they developed Mandarin Chinese programs through partnership with CIs; what held the partnership together and why it was what it was; and what challenges and issues those schools had encountered during the development of Mandarin Chinese education.

Moreover, it was not clear how the expectations and the needs of U.S. schools were met and what strategies Hanban/CIH and its CIs took to assist U.S. schools in achieving their educational goals and desired outcomes. For example, in addition to qualified Chinese language teachers and quality textbooks, what other needs did U.S. schools have? What educational goals and desired outcomes did U.S. schools expect to achieve through partnership with CIs? In addition, it is not really understood how, and to what degree, Hanban/CIH and CIs would respond to schools’ needs.

A further debate along this line among national language experts was the issue of language opportunity versus language proficiency. While published reports and statistics showed an increase in the number of pre-K-16 schools offering Mandarin Chinese instruction, experts

such as Pufahl (2010)⁶ pointed out during an online discussion that “many U.S. school programs offer general exposure to languages but don’t expect proficiency,” suggesting that schools might have met students’ language needs in quantity but not in quality.

1.3 PURPOSE OF THE RESEARCH

The purpose of this study was to describe how six U.S. secondary schools developed Mandarin Chinese programs through partnerships with the CI at University X, and to determine the relationship between the development of Mandarin Chinese education and the partnership between the six schools and the CI.

While many researchers and theorists were anxiously looking for “successful” partnership models, some were “trying to make sense of what is happening around them” (Weick, 2001, p. 5). This study attempted to achieve the latter. Without understanding what the schools have done and their needs, it is impossible to identify the issues that prevented them from achieving their educational goals and desired outcomes, when the “goals” and “outcomes” are defined as providing quality Mandarin Chinese education and meeting students’ language needs. In addition, this study also attempted to find “if ... partnerships are helping education” and “to know how, when and which parts of the partnership are improving education (Chavkin, 1998, p. 83).”

⁶ See reference Jacoby, Susan, Ingrid Pufahl, Marcelo Suárez-Orozco, Carola Suárez-Orozco, Norman Matloff, Hongyin Tao, and Bruce Fuller. 2010. *Will Americans really learn Chinese?*, <http://roomfordebate.blogs.nytimes.com/2010/02/07/will-americans-really-learn-chinese/> (accessed July 10, 2011).

1.4 RESEARCH QUESTIONS

As mentioned earlier, researchers know very little about how U.S. schools have developed Mandarin Chinese education and in what way partnerships helped schools develop Mandarin Chinese education. To address those two issues, four research questions were generated to guide this study:

- (1) What motivated six U.S. secondary schools to start developing Mandarin Chinese education?
- (2) Why did the six schools develop Mandarin Chinese education through partnership with the CI at University X?
- (3) In what ways did the partnership help the six schools achieve their educational goals and desired outcomes?
- (4) How did the six schools describe the value of the partnership?

The data collected to answer those four questions would explain why the six schools offered Mandarin Chinese; why they chose to develop Mandarin Chinese programs through partnership with a CI; what is the nature of the relationship between the Mandarin Chinese program and the partnership; and what long-term effects the partnership might have on those schools.

1.5 THEORETICAL FRAMEWORKS

This study was grounded in the assumption that there was a possible relationship between the development of Mandarin Chinese education and the school-university partnership.

Edwards et al. (2009) pointed out that “little of the research on school-university partnership has utilized explicit theoretical frameworks” (p. 9). They observed that the theoretical frameworks utilized in research studies of recent years were much more sophisticated than the theoretical basis in the studies of earlier years. According to Edwards et al. (2009, p.9), examples of the theories employed in those studies included the complexity theory (Zelleramayer & Margolin, 2005), Theruau’s course-of-action theory (Chalies, Ria, Bertone, Trohel, & Durand, 2004), context-appropriation theory (Gimbert, 2002), and Interorganization theory (Borthwick, 2001).

Upon analyzing 18 empirical studies on school-university partnerships from an outside reader’s perspective, Nelson (2008) found that the number of empirical studies completed between 2000 and 2005 utilizing “traditional academic research models of a theoretical lens” was small and had “a narrow topic focus” (p. 7). She observed that very often researchers failed “to view the whole S-UP [school-university partnership] field;” and “the use of a single theoretical lens by researchers prevented them from viewing the S-UP as a dynamic system” (p. 8). This study followed Nelson’s advice and utilized two theoretical lenses to examine the school-university partnership, namely, the “loosely coupled system” theory and the partnership theory.

Traditionally, the “loosely coupled system” theory was employed in organizational studies. This study challenged the tradition by applying Weick’s “loosely coupled systems” approach to a school-university partnership study, aimed at finding how the two “loosely coupled

systems”---a school and a university affiliation (a CI) worked together to achieve their common goals. Such an attempt was supported by the following perspectives: (1) educational organizations such as schools and universities are “loosely coupled systems” (Murphy & Hallinger, 1984; Orton & Weick, 1990; Weick, 1976, 1982 & 2001); and (2) a partnership is an organization (Borthwick, 2001; Borthwick et al., 2003). The question is: if an educational organization is a “loosely coupled system,” could a school-university partnership be studied as a “loosely coupled system?”

This line of reasoning also generated the following questions, showing the linkage of the two theories: (1) How realistic could it be that two types of “loosely coupled systems” (school and university) work together in the most casual organizational form, but expect to achieve the most satisfactory outcomes? (2) If both school and university are “loosely coupled systems,” what are some of the “coupled elements” that hold the partnership together? (3) In what ways are the partners affected by their differences while they attempt to achieve common goals? (4) Will a partnership of two types of “loosely coupled systems” (e.g. a school and a university) lead to more complexity, flexibility and uncertainty than a single “loosely coupled system”? Those questions shaped the direction of the study.

1.5.1 The “loosely coupled system” theory

Although the term “loose coupling” first appeared in the literature by organization theorists and scholars such as Glassman (1973) and March and Olsen (1975), Weick is one of the few pioneers who have studied educational organizations, i.e. schools, as “loosely coupled systems.” Two examples of his works were “Educational Organizations as Loosely Coupled Systems” in 1976 and “Administering Education in Loosely Coupled Schools” in 1982.

In “Educational Organizations as Loosely Coupled Systems” (1976), Weick attempted to find what held an educational organization together and why it did what it did. He challenged the traditional view of organization, pointing out that one should not only study the formal structures, goals and activities of an organization, but also the informal, chaotic, yet somehow productive, adaptable, and crudely organizing components, which Weick called the "soft" side of organizations. He suggested that “more time should be spent examining the possibility that educational organizations were most usefully viewed as loosely coupled systems” (p. 6). Weick (1976) stated that researchers were usually preoccupied with “rationalized, tidy, efficient, coordinated structures” and did not see “organizations as loosely coupled systems before” (p. 3). As a result, little attention was given to “some of the attractive and unexpected properties of less rationalized and less tightly related clusters of events” (Weick, 1976, p. 3), which he called “blindspots.”

Weick (1976) extended Glassman’s (1973) view of “the degree of coupling between two systems on the basis of activity of the variables which the two systems share” (p. 3). He noted that “loose coupling” took place when “two systems either have few variables in common or share weak variables” (p. 3). Weick (1976) asserted that an educational organization was held together by various “coupled elements;” and “the two most commonly discussed coupling mechanisms are the technical core of the organization and the authority of office” (p. 4). According to Weick, the “technical couplings” refer to “technology, task, subtask, role, territory and person,” which are “task-induced,” while “the authority of office” consists of “positions, offices, responsibilities, opportunities, rewards, and sanction and it is the couplings among these elements that presumably hold the organization together” (p. 4). However, he did not think any of those couplings “is prominent in educational organizations found in the United States” (p. 4).

Weick (1976) believed that an organization was held together by “coupled elements,” but was affected by the strength of coupling, which “both appear and disappear over time...within the individual, group, and/or organization” (p. 5). He studied how “loose coupling” and “loosely coupled systems” functioned within individual, group and/or organization. Thus, it is unknown whether those concepts could be applied to the study of a partnership, in particular, an international school-university partnership.

Weick (1976) pointed out that “loosely coupled systems” often had the following manifestations: (1) situations where several means can produce the same result; (2) lack of coordination; (3) absence of regulations; and (4) highly connected networks with very slow feedback times (p. 5). Despite those “negative” characteristics, he believed that they actually might help an organization by “allowing it to temporarily persist through rapid environmental fluctuations”; “improving the organization's sensitivity to the environment”; “allowing local adaptations and creative solutions to develop”; “allowing sub-system breakdown without damaging the entire organization”; and “allowing more self-determination by actors” (pp. 6-7).

Weick (1976) argued that a “loosely coupled system,” though messy, has valid functions within organizations. For example, it might allow parts of the organization to persist (despite changes in environment) and “to adapt quickly to conflicting demands” (Weick, 1982, p. 674). Weick (1982) also argued that loosely coupled systems are a good system for localized adaptation, meaning that local groups could adapt to their part of the environment without changing the entire system. Weick (1982, p. 674) described the characteristics of loosely coupled systems as follows:

“Loosely coupled systems” would allow more novel solutions and mutations to occur than a tightly coupled system. They were less affected by a breakdown in part of the system (isolate trouble spots and keep from spreading) but more difficult to repair a subsystem. With “loosely coupled systems,” educational organizations had more room

available for self-determination by actors (like teachers, classes, etc.). Compared to tightly coupled systems, “loosely coupled systems” appear to be a more appropriate organizational form when “local changes in the environment are continuous rather than discontinuous, transient rather than permanent, inconsequential rather than consequential, and if there are sufficient resources to permit local self-contained adaptations.

Loosely coupled systems did not come without limitation. Weick (1982) observed that the systems were often unable to communicate about small problems “until a crisis occurs and it is too late” (p. 674). According to Weick (1982), although a school was well known as a “loosely coupled system,” a major change could only be introduced when the system was tight, not loose. Weick pointed out that “large-scale change is seldom needed in a loosely coupled system that continually updates itself. But if such a change is needed, it is difficult to design it and diffuse it” (p. 674).

Despite those disadvantages, Weick (2001) argued that “a loosely coupled system is not a flawed system” (p. 44). He called “loosely coupled systems” “good reservoirs of flexibility” because they “preserve novelty” (Weick, 1982, p. 674). He believed that “loosely coupled systems” could “adapt to small changes in an environment, especially when that environment is diverse and segmented” (p. 674). Perhaps, these traits, in conjunction with those mentioned above, could be used to explain what holds a partnership together. A further discussion on this subject is presented in the section of Discussion and Conclusion.

While acknowledging that those “coupled elements” described by Weick were internal units existing within the same organization, e.g. a school, this study explored: (1) whether a school-university partnership could be studied as a “loosely coupled system”; (2) what “coupled elements” existed within the partnership, i.e. between two partners; and (3) how those “coupled elements” functioned and in what ways they held the partnership together.

It is worth mentioning that, upon studying approximately 300 works that invoked the concept of loose coupling, Orton and Weick (1990) reported that those works could be categorized into five relatively distinct voices: causation, typology, effects, compensations and organizational outcomes. The researchers then further identified “eight most frequently recurring types of loose coupling: loose coupling among individuals, among subunits, among organizations, between hierarchical levels, between organizations and environments, among ideas, between activities, and between intentions and actions” (p. 208). Examples of studies on loose coupling between organizations include Provan’s (1983) work, which differentiated five types of organizations: coalitions, participatory federations, independent federations, mandated federations and intraorganizational systems (p. 83). Provan illustrated the characteristics of those organizations “from loosely coupled (coalitions) to tightly coupled (intraorganizational system),” described by Orton and Weick (1990, p. 208). Orton and Weick posited that “loose coupling” existed in all those five types of organizations, which suggested that “loose coupling” could also exist in a partnership.

Murphy and Hallinger (1984) addressed the “conceptualizations of loosely coupled schools” and “the connections between school district offices and schools and between school offices and individual classrooms” (p. 7). They proposed three frameworks for policy analysis at the local level (in comparison to the federal and state levels), namely, “loosely coupled organizational models, school effectiveness models that focus on community or social organization variables, and school effectiveness models based on teacher effectiveness research” (p. 7). They explained “how school districts can move from loose coupling toward the achievement of desired outcomes” (p. 8). The researchers concluded that “the difference in perspectives presented by the loosely coupled organizational literature and the effectiveness

literature is not a difference between what must be and what should be, but between what is and what can be” (p. 10). This study attempted to explore Murphy and Hallinger’s prediction, focusing on finding the “loose coupling” in the school-university partnership and in what ways the “loose coupling” helped the partnership achieve desired outcomes.

1.5.2 The partnership theory

The partnership theory is not one theory, but consists of many perspectives. Some partnership experts (e.g. Goodlad, 1988) considered “complementarity” the essence of a partnership, while others (Edwards et al., 2009) suggested “collaboration.” Weick (2001) sided with Campbell (1990) about some key factors of a successful partnership, namely trust, honesty and self-respect. According to Weick, the lack of those qualities may lead to the collapse of a system or organization (p. 115).

Briody and Trotter II (2008) described partnerships as “various types of arrangements (e.g. alliances, networks) in which specific individuals, groups, organizations, and agencies set out to act collectively” (p. 7). They defined partnerships as “collaborative arrangements in which participants enter into relationships (the dynamic component), combine their resources, time, and expertise through the various roles they play (the structural component), and work toward the creation of new knowledge, products, and services (outcomes)” (p.7). This study pointed out that not all partnerships were “collaborative,” but they could be cooperative, like the school-university partnership in this study. Discussion on the differences between collaboration, coordination and cooperation is presented in a later section of the study.

Nelson (2008) suggested a broader framework for partnership studies. She acknowledged the complexity and dynamics of a school-university partnership and proposed to study it as a

whole. She attempted to establish a general framework based on “nine characteristics that were facets in most S-UPs,” hoping that it could be used as a model for future partnership studies.

The nine characteristics proposed by Nelson (p. 9) are as follows:

- (1) An orientation for initiating the partnership (circumstances surrounding start up)
- (2) Communication among participants of each partner
- (3) Individuals from two or more groups that combine
- (4) Location of partnership activity
- (5) Ability to implement the partnership activity (resources needed and obstacles)
- (6) A degree of structure for functioning
- (7) Relationships between the participants
- (8) Roles played by the participants
- (9) A definition of success for their effort-assessment.

Nelson’s proposal of establishing a general framework may generate some concerns and questions. For instance, one may argue that Nelson’s view may have focused on “a forest” but neglected the unique characters of “the trees.” Her framework may have addressed what is included, but neglected what is outside the box. It is evident that different people define “partnership” and “success” differently. Therefore, inconsistency and confusion may exist in discussions between those who employ Nelson’s framework and definition and those who do not.

Despite the arguments, I believed that it would be beneficial to this study if two theoretical lenses were employed to make sense of the school-university partnership from the perspectives of “loosely coupled systems” and a partnership theory, as illustrated in Figure 2.

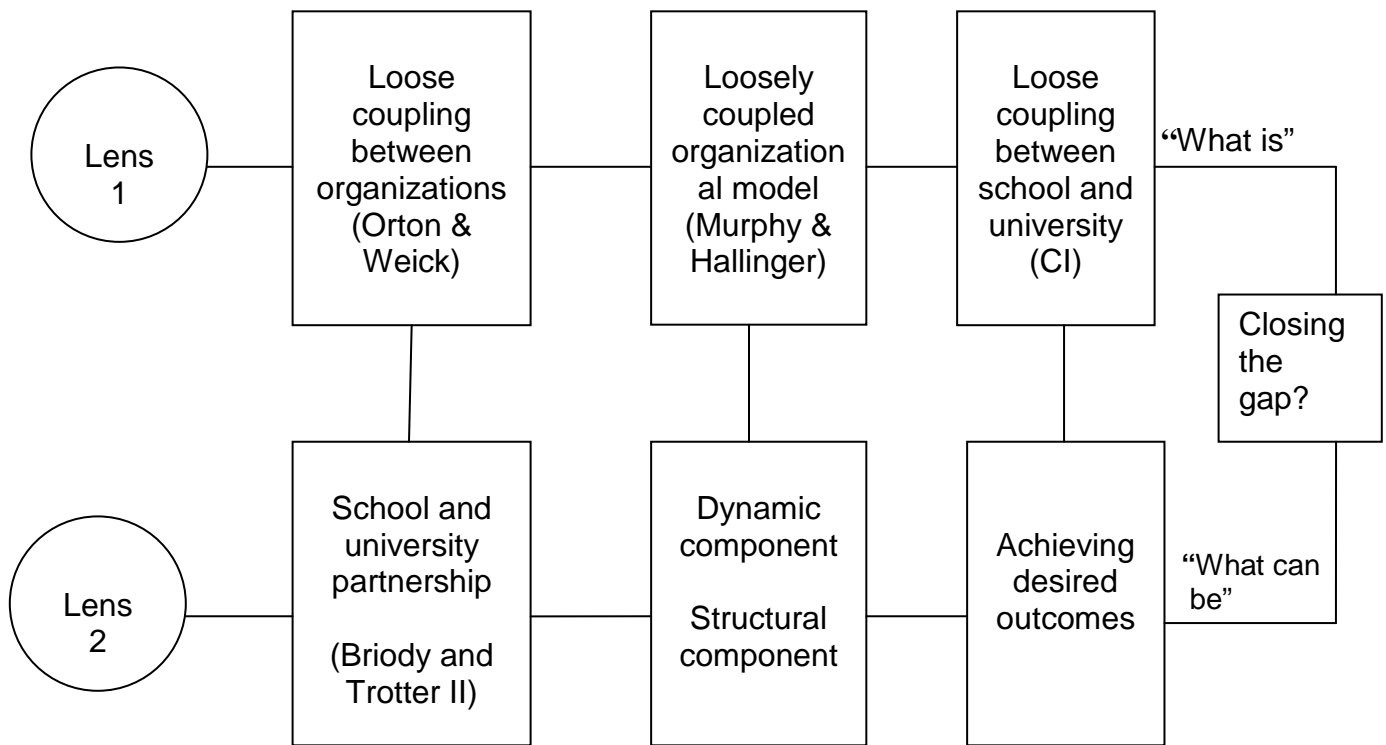


Figure 2. Theoretical and conceptual frameworks for the study

Lens 1 = "Loosely coupled system" theory

Lens 2 = Partnership theory

Figure 2 illustrates how two theoretical lenses were employed to explore how the “loosely coupled systems” worked as partnerships in the development of Mandarin Chinese education. In other words, the framework was used to find how, and to what degree, a school and the CI worked together as “loosely coupled systems” while being partners; and in what ways the partnership helped the schools achieve their educational goals and desired outcomes.

The analysis started with identifying the relationship between a school and the CI by utilizing Orton and Weick’s (1990) concept of “loose coupling between organizations” and then the “loosely coupled organizational model” by Murphy and Hallinger, attempting to find how the partnerships moved from “loose coupling” to achieving (or not achieving) desired outcomes. Through the second lens, the study followed Briody and Trotter II’s definition of partnership and explored the dynamic and structural components of the SUPs, attempting to find in what ways those components affected the partnerships and helped develop Mandarin Chinese education and achieve schools’ educational goals and desired outcomes. The two theoretical application processes attempted to pursue Murphy and Hallinger’s (1984) concepts of “what is” and “what can be” (p. 10). Murphy and Hallinger described a loose coupling research process as “what is,” and the school effectiveness research as “what can be” (p. 10). Since the purpose of this study was not to assess effectiveness or success of the partnerships, this study described “what is” only.

Weick (2001) also discussed “sensemaking” as an organizational dimension of global change. He felt that making sense of global change was challenging because it would be more difficult to comprehend “loosely coupled systems” in a global context. This study offered an excellent opportunity to explore that perspective. Further discussions on this topic are presented in the section of Discussion and Conclusion.

1.6 RESEARCH PERSPECTIVE

Research experts (e.g. Rossman & Rallis, 2003; Miles & Huberman, 1994; Maxwell, 2005; Rubin & Rubin, 2005; Yin, 2009) pointed out that a researcher's biases could never be eliminated and it would be impossible to eliminate them without affecting a researcher's theories, beliefs and perceptual "lens." While there are few well-developed and explicit strategies for solving the bias problem, experts have offered some techniques to avoid it. For example, Yin (2009) suggested that one discuss his or her study with colleagues. Rubin and Rubin (2005) suggested hearing "interviewee's ideas" in order to understand a researcher's bias. They also recommended techniques to examine one's preconceptions and to formulate questions to offset one's biases (2005, p. 82).

Like many other researchers, I did not enter this study as a blank page. Prior to this research, I worked for the CI at University X for two years, performing various administrative and liaison responsibilities between the CI and its partner schools and school districts. While my experience gave me some advantages in conducting this research (it made me "a person of foresight" on this research topic and equipped me with a unique perspective), the same advantages might also have affected my unbiased expression and interpretation of the data. With the understanding that it is impossible to eliminate personal biases and expectations, I guarded against imposing my personal feelings and opinions in the processes of interviews and data analysis. I made every effort to be open-minded and study the research subject from an outsider's perspective. For example, when hearing a school administrator was frustrated with the partnership, I stayed focused on the purpose of this study, looking for the reasons and making unbiased judgments. By listening to school/school district administrators, Chinese guest teachers and regular school teachers, I included the voices of all, not just one, of the groups in the study.

1.7 LIMITATIONS OF THE STUDY

Mauch and Birch (1998) defined that “a limitation is a factor that may or will affect the study, but is *not under control* of the researcher” (p. 104). Although I could choose which school and which groups of people to interview, I had little control over which person I should question because the candidate pool was very small and I had to choose the person(s) recommended to me by a key informant, e.g. a school administrator.

As mentioned earlier, my previous experience with the CI at University X and some schools could give me some advantage in conducting the research, as well as affecting my unbiased expression and interpretation of the data. Although I was no longer working for the CI at the time this study was conducted, it did not completely eliminate the fact that some participants might still be concerned that what they said might affect the relationship between their schools and the CI, or their personal relationships with the CI, China’s Hanban/CIH, the Chinese university or the schools and school districts they worked for. Some Chinese guest teachers might worry that their future would be put in jeopardy and the images of their university in China and the country they represented might be harmed because of what they said, even constructive criticism. Thus, they might withhold some of their thoughts and focus on “success” stories only.

The participants might define “partnership” and “success” differently, which could complicate the process of the data analysis and affect the outcome of the study. Thus, to establish clear definitions and understand them could be a real challenge.

This study may lack representativeness, because only 22 participants from six schools were interviewed. While the results may be generalizable to similar groups of participants in those six schools, they may not be valid for other schools that are in partnership with the CI. My

experience with the six schools indicates that schools vary. Additional studies with a broader population should be conducted before attempting to generalize the findings of this study to other partner schools with the same CI or a different CI.

Moreover, I tried, but was not successful in getting Hanban representatives for interviews. Two officials of the Chinese university accepted my interviews in summer 2010, but the data were not included because this study was designed to focus on schools' perspective only, excluding students. For the same reason, I did not invite any representative of the CI and University X for interview. However, future research could be more comprehensive and include more than a single CI and interviews with a more comprehensive set of stakeholders.

1.8 DESCRIPTIONS AND DEFINITIONS RELATED TO THE STUDY

The descriptions and definitions below are provided to help the reader understand the specific meanings of some key terms frequently appearing in this study.

Commonly taught languages:

This term refers to foreign languages that are commonly taught in the U.S. public school system, such as French, German, Italian and Spanish.

Critical languages:

As defined by the National Security Language Initiative (NSLI), “critical languages” refer to Arabic, Chinese, Korean, Japanese, Russian, and the Indic, Iranian and Turkic language families. Jackson and Malone (2009) also included “Portuguese” in this category (p. 3). In some studies, the terms “critical languages” and “less commonly taught languages” were used interchangeably.

Less commonly taught languages:

The term includes languages such as Arabic, Korean, Chinese, Pashto, Persian-Farsi, Serbian-Croatian, Japanese, Russian, Portuguese and any other language identified by the Secretary of Education, in consultation with the Defense Language Institute, the Foreign Service Institute and the National Security Education Program. Janus (1998) referred to less commonly taught languages as “all world languages except English French, German and Spanish” (p. 165). Other similar terms used for this group of languages include “critical languages, uncommon languages, less commonly spoken languages, exotic languages, and exceptional languages” (p. 165).

Brecht and Walton (1994) divided “less commonly taught languages” into four groups, namely, (1) the principal less commonly taught languages, which include Arabic, Chinese, Japanese and Russian; (2) the much less commonly taught languages, consisting of approximately thirty non-European, non-North American languages, such as Armenian, Czech, Hausa, Hebrew, Hindi, Indonesian, Korean, Thai and Turkish; (3) the least commonly taught languages, which include approximately eighty languages rarely offered in U.S. educational institutions; and (4) the rarely (or never) taught languages, such as some African languages.

Foreign Languages and Modern Foreign Languages:

In the U.S. education system, “foreign languages” include “commonly taught languages” such as French, German, Italian and Spanish, and “less commonly taught languages,” such as Chinese, Japanese, Russian, Greek, Latin, Korean, Dutch, Portuguese, as well as American Sign Language. However, not all states consider American Sign Language a foreign language.

According to the National Association of Secondary School Principals (NASSP), “modern foreign languages” refer to non-English languages currently spoken by major population groups in other countries; this definition does not include Latin, Ancient Greek and American Sign Language, as they are neither modern languages nor spoken languages (Modern

Foreign Languages in the Comprehensive Secondary School. The 1958-59 Major Project of the NASSP Committee on Curriculum Planning and Development, p. 27).

The Office of Chinese Language Council International (中国国家汉语国际推广领导小组办公室; a.k.a. *Hanban* 国家汉办)

“Hanban” (国家汉办) is the abbreviation in Chinese for The Office of Chinese Language Council International (中国国家汉语国际推广领导小组办公室)⁷. For the sake of convenience, we hereafter use the term “Hanban.”

Established in 1987 and initiated by the State Council of China, Hanban is a joint effort of 12⁸ national-level ministries and commissions in China, including the General Office of the State Council, the Ministry of Education, the Ministry of Finance, the Overseas Chinese Affairs Office of the State Council, the Ministry of Foreign Affairs, the State Development and Reform Commission, the Ministry of Commerce, the Ministry of Culture, the State Administration of Radio, Film and Television (China Radio International), the State Press and Publications Administration, the State Council Information Office, and the State Language Committee. In 2004, Hanban “was charged...with the mission of establishing a global network of overseas Chinese learning centers called the Confucius Institutes” (Stetar et al., 2010, p. 195).

As a “nonprofit organization” directly under the Ministry of Education of China, Hanban is entrusted with the authority to perform the following responsibilities: “to develop policies and plans for promoting Chinese language worldwide; to provide educational institutions and organizations of all levels with support for teaching Chinese language; to establish international

⁷ Source: <http://www.nenu.edu.cn/intramural/content/news/3404.php>

⁸ Some sources mentioned 11 participants.

standards for teaching Chinese language; and to develop and promote Chinese textbooks and teaching materials.”⁹

Ning (2006) points out that many nonprofit organizations in China have the governmental-nongovernmental dual nature. In his view, those non-profit organizations “are not partners of the government; they play a role as assistants or extensions of the government” (p. 38). Hanban/CIH is one example. On the one hand, Hanban/CIH functions as a representative office of the Chinese government in promoting Chinese language and culture worldwide; on the other hand, Hanban/CIH works as a nonprofit organization between the Chinese government and nonprofit organizations outside China. Ning (2006) believes that the “governmental-nongovernmental dual nature” is due to the government’s “dual management system” over nonprofit organizations in China. He sides with other Chinese scholars (e.g. Wang et al., 2001) and predicts that nonprofit organizations in China will soon become independent from the government’s control and influence.

⁹ Source: <http://www.hanban.org/hb>

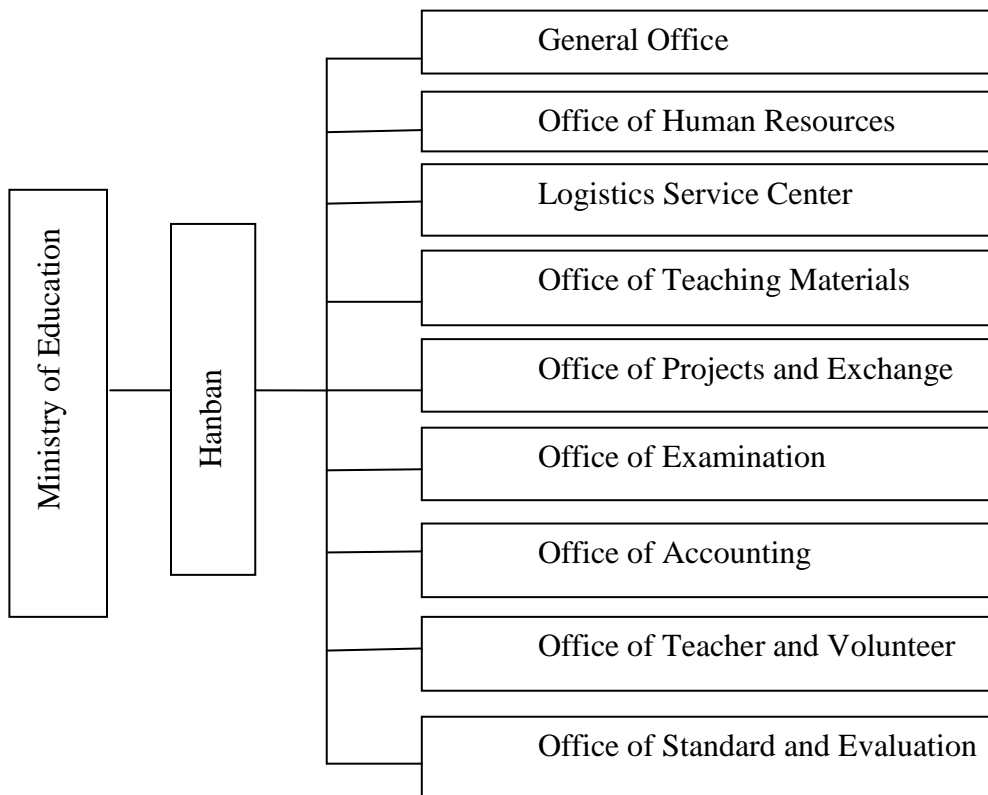


Figure 3. The Organization chart of Hanban¹⁰

SOURCE: <http://www.hanban.org/hb/>

The Confucius Institute Headquarters/CIH (孔子学院总部):

Established in 2007, the Confucius Institute Headquarters/CIH (孔子学院总部. Hereafter termed CIH) is “the supreme governing body” that oversees and manages CIs and Confucius Classrooms (CCs) worldwide. Overseen by the Confucius Institute Headquarters Council (孔子学院总部理事会), CIH is responsible for

- planning for the development of CIs and developing evaluation standards;
- examining and approving applications of CIs;

¹⁰ The names of the offices were translated from Chinese to English by Muriel M. Zhou.

- examining and approving CIs' annual project planning and budgets and final accounts; evaluating CIs' events and activities and performing effective quality control;
- providing CIs worldwide with teaching resources, support and services;
- appointing Chinese directors of CIs and training administrators and teachers for CI, and organizing and hosting annual CI conferences.¹¹

The relationship between Hanban and CIH has been described as “two signs, one team.” Thus, the expression of the “governmental-nongovernmental dual nature” also fits Hanban and CIH, although the two offices differ in several aspects, such as administrative jurisdiction and division of labor.

¹¹ Source: http://www.hanban.org/hb/node_7446.htm

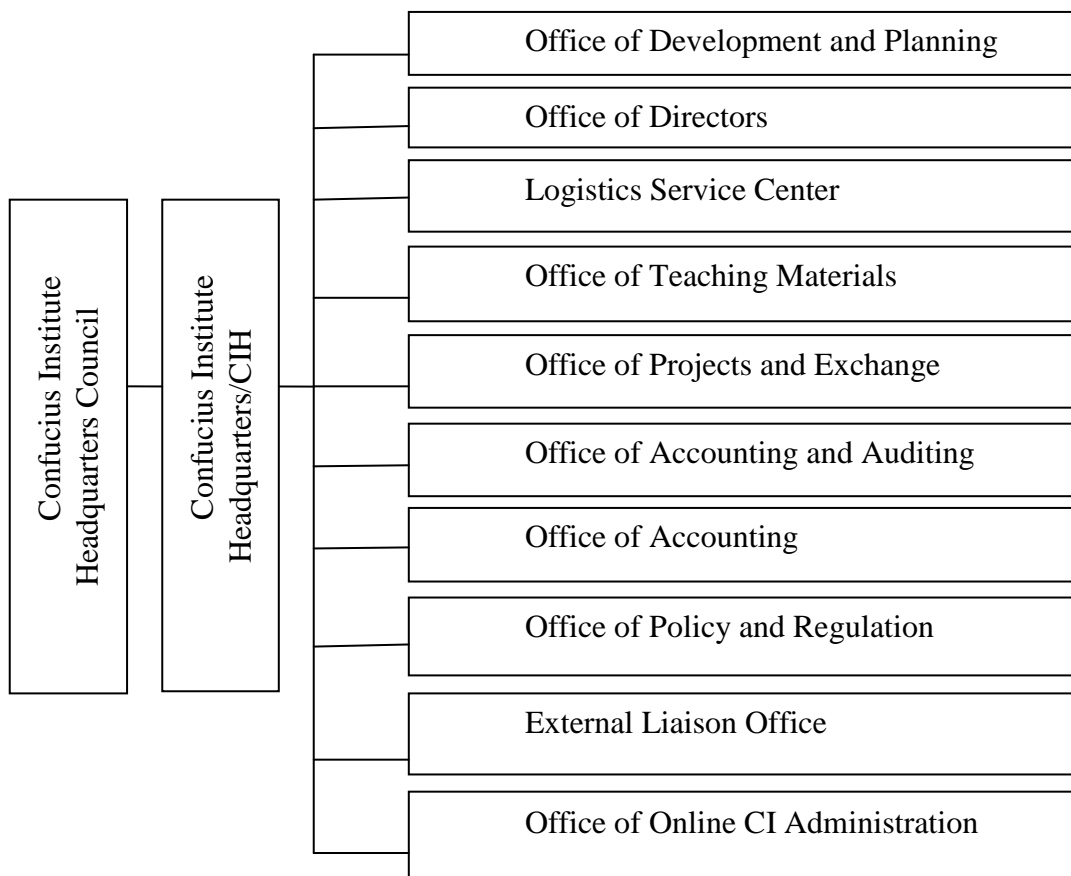


Figure 4. The Organization chart of Confucius Institute Headquarters¹²

SOURCE: http://www.Hanban.org/hb/node_7446.htm

¹² The names of the offices were translated from Chinese to English by Muriel M. Zhou. They might be slightly different from the English translation performed by the organization.

The Confucius Institute Headquarters Council (孔子学院总部理事会):

According to the “Constitution of Confucius Institutes,” the Confucius Institutes Headquarters Council oversees CIH. Established in 2007, the Council consists of a chairman, several vice chairmen and standing directors, and 15 directors, 10 of who are council chairmen of CIs overseas.¹³ The 2010 Council roster showed that the positions of chairman, vice chairmen, and standing directors were held by Chinese government officials.¹⁴

The Confucius Institutes Headquarters Council is responsible for the development plans for CIs, review of annual reports and plans, review of strategic planning for CIs worldwide, and amendment and revision of the “Constitution of Confucius Institutes.”¹⁵

Confucius Institute (孔子学院):

“Confucius Institute” is defined as a “non-profit, educational organization” under the leadership and supervision of China National Office for Teaching Chinese as a Foreign Language (a.k.a. Hanban) and CIH, located in Beijing, China, with the sole purpose of promoting Chinese language and culture and enhancing the understanding of China and other countries. Learning from the experiences of some other international language institutes and services in France, Germany, Spain and the United Kingdom, CI has become the fastest growing language and culture promotion agency in the world.

CI’s mission is “to enhance the understanding of the world toward Chinese language and culture; to develop friendship between China and other countries; to promote diverse cultures,

¹³ Source: http://www.hanban.org/confuciousinstitutes/node_7537.htm

¹⁴ Source: http://www.chinese.cn/college/article/2009-12/28/content_97106.htm

¹⁵ Source: http://www.hanban.org/hb/node_7446.htm

and to build a harmonious world.”¹⁶ According to the “Confucius Institute Constitution and By-Laws,” CIs are responsible for providing the following services:

- Teach Chinese language;
- Train Chinese language instructors and provide Chinese language teaching resources;
- Administer the HSK examination (Chinese Proficiency Test) and tests for the Certification of the Chinese Language Teachers;
- Provide information and consultative services concerning China's education, culture and so forth;
- Conduct language and cultural exchange activities between China and other countries.¹⁷

While most CIs provide services such as Chinese language and culture lessons, Chinese language teacher training and teacher placement; some CIs conduct Chinese language proficiency testing (e.g. *Hanyu Shuiping Kaoshi/HSK*) or distribute and publish Chinese language textbooks and teaching materials. Previous research studies (e.g. Ning, 2006) indicated that CI collaboration models vary, but the most common model worldwide is the type illustrated in Figure 5 below, which consists of Hanban/CIH, one Chinese university, one host university outside China and one or more schools (public and/or private).

¹⁶ Source: http://www.hanban.org/hb/node_7446.htm

¹⁷ Source: http://english.hanban.org/node_7880.htm

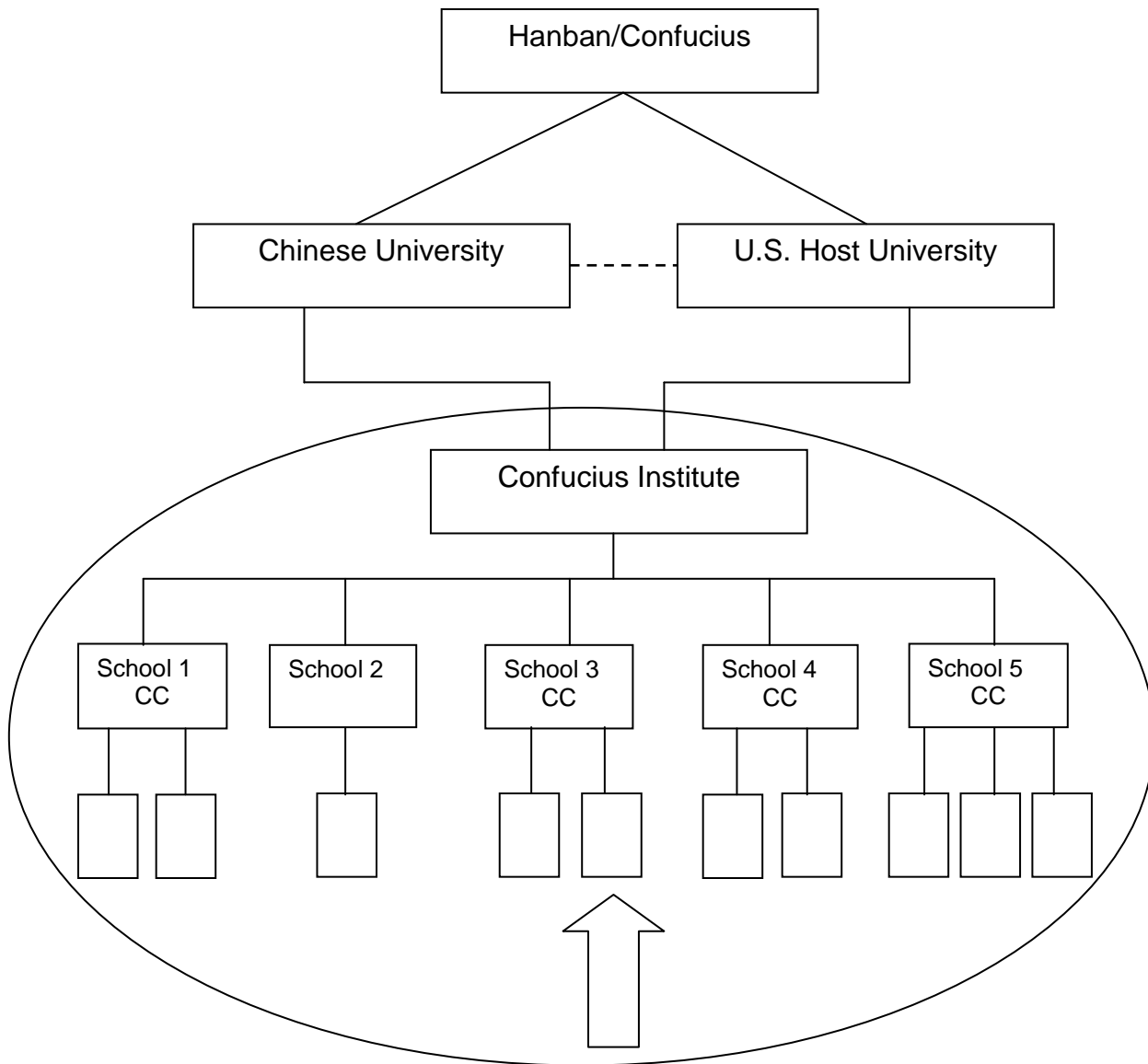


Figure 5. A conceptual framework of the school-university partnership in this study

CC = Confucius Classroom

S = School

↑ = Indicating that this study would adopt a bottom-up approach and examine the partnership from the schools' perspective.

Note: This is just a sample structure of one type of CI. Within this structure, the CI was the liaison and the sole contact point between the schools and Hanban/CIH and the Chinese university. It is worth mentioning that, prior to the establishment of the CI, University X and the Chinese university already started academic exchange and cooperation under some agreements and Memorandum of Understandings (MOUs).

The Confucius Institute at University X:

The term “CI at University X” refers to the CI in this study only. Although the university’s name is linked with the CI, the university’s involvement in the partnership was very limited, mainly in logistics such as some personnel, office space and utilities. The university has no jurisdiction over schools and school districts, and vice versa. The CI was not considered part of the formal university system, but an affiliation of the university, although some university officials were listed on the roster of the CI advisory council.

As mentioned earlier, the “CI at University” model is the most common one in the U.S. and other countries. Located in the U.S. and partnering with Hanban/CIH and a Chinese university, the CI in this study worked with over 50 K-12 schools and higher learning institutions, public or private.

The relationship between the schools and the CI was based on a mutual agreement. Conditions and terms were negotiated by administrators of participating schools and the CI. Since participation was voluntary, schools could withdraw from the agreement at any time, although discontinuation usually took place after a school year ended.

The schools and school districts:

In this study, the terms “schools” and “school districts” refer to the six schools (Grades 7 -12) and their school districts that offered or used to offer Mandarin Chinese programs through partnership with the CI at University X.

1.9 SUMMARY AND OVERVIEW OF THE STUDY

In this chapter, I presented a rationale for the study, the purpose of research and researcher perspective. In addition, I developed four research questions to guide the study. Descriptions and definitions of some key terms were provided to help readers understand various concepts in the study. Some limitations were identified so readers would be able to recognize any bias and use this study critically.

1.10 SIGNIFICANCE OF THE STUDY

This study explores the relationship between the development of Mandarin Chinese education and the partnerships among the six schools and the CI. The study addresses the relationships that existed, examining in what ways they existed, how they could be identified and what effects they had on the development of Mandarin Chinese education at the school level. The research is intended to provide information that might be useful to the CI and Hanban/CIH, so they might be able to respond to schools' needs in a timely manner and serve those needs effectively. As a result, those schools might benefit from the partnership and be able to provide quality Mandarin Chinese education to meet their students' language needs.

As noted earlier, foreign language education expert Pufahl (2010) pointed out during an online discussion¹⁸ that “many schools offer foreign language instruction but do not expect proficiency,” suggesting that schools should not only provide students with language opportunities, but more importantly, increase students’ language proficiency.

Although there was no lack of studies on SUPs, there was a relatively limited amount of knowledge about international partnerships in basic education. I also found that no similar study had been conducted pertaining to how U.S. schools develop Mandarin Chinese education through partnership with CIs in the United States. Published studies either focused on CIs and the teaching of Chinese as a foreign language (e.g. Ning, 2006; Dai, 2008; Sun, 2008), or discussed how Chinese heritage community language schools developed Mandarin Chinese education (e.g. Liu, 2010). This study attempts to fill a gap in the research literature and, therefore, has both theoretical and practical significance.

Theoretically, this research study challenges two existing theories, i.e., the “loosely coupled systems” theory and the partnership theory. As mentioned earlier, although some researchers studied Chinese language education and CIs through theoretical lenses such as nonprofit organization theory, cultural diplomacy theory and “soft power,” no study described and explained how U.S. secondary schools developed Mandarin Chinese instruction through a school-university partnership from a school’s perspective. Moreover, no researcher had ever utilized the “loosely coupled systems” theory to analyze an international school-university partnership and explained what held the partnership together and why the partnership was what it

¹⁸ See Reference “Will Americans Really Learn Chinese?”

was. This study is groundbreaking because it attempts to make sense of the relationship between the development of Mandarin Chinese education and the school-university partnership.

In practice, this study is the first of its kind, with the understanding that each school and each CI was unique. As many U.S. schools are still “crossing the river by feeling the stones” (Siow, 2011), struggling with building Chinese curricula on the one hand and carefully developing their partnership with a CI on the other hand, this study contributes to the literature in a couple of ways. One, it fills the literature gap by being the first detailed study describing how six U.S. schools developed Chinese language education and what they learned from their experiences. Two, while it was not intended to establish any model of school-university (CI) partnership, this study attempts to explore, describe and explain what was going on within a school-university (CI) partnership from a practical perspective. Three, though the cases presented in this study might not be representative, the study provides a complimentary view on the partnership between schools and the CI, as well as some guidelines for other schools that wish to follow suit.

2.0 CHAPTER TWO: REVIEW OF LITERATURE

LeCompte and Preissle (1993) suggested that “literature review” should not just cite a few confirmatory studies to support the legitimacy of one’s research questions, but should also “explain to the reader the theoretical underpinnings of the study” (p. 151). Maxwell (2005) sided with LeCompte and Preissle, stating that simply summarizing some body of theoretical or empirical publications in literature review may mislead a researcher (1) to have “a narrow focus on ‘the literature’”; (2) to miss “those studies and theories that are particularly *relevant* to [one’s] research”; and (3) have a wrong idea that his or her job is “to report what previous researchers have found or what theories have been proposed” (p. 35). Maxwell (2005) advised us not only to be descriptive in the review, but also critical while constructing a conceptual framework. He also suggested that the “literature review” should present “what is already known” and “explain the theoretical framework that informs study” (p. 123). This chapter was guided by the professional insights above.

To learn “what is already known,” this chapter first reviews the development of foreign language education in U.S. public schools from a historical perspective, particularly related to “less commonly taught languages,” then followed by a brief review of the development of Mandarin Chinese education in the U.S. school system. Since Chinese Heritage Community Language Schools have played an important role in promoting Chinese language among school age children in the U.S., a brief review of that development is also included in this chapter. To

illustrate the uniqueness of the school partnerships with the CI in this study, some characteristics of general SUPs in the U.S. were outlined.

For years, terms such as “partnership,” “network,” “collaboration,” “cooperation” and “coordination” had been used interchangeably in partnership studies. This was no exception when researchers described the relationship between schools and a CI. Scholars (e.g. Clark, 1988) suggested that one should “define those [terms] before attempting to discuss school-university partnership” (p. 33). To clarify whether the relationship between the six schools and the CI was a “partnership” or a “network,” whether it was “collaboration,” “cooperation” or “coordination,” a small section was devoted to review some definitions of those terms. The outcome of this review provided a clear picture and a better definition of the relationship between the schools and the CI. Finally, “the theoretical underpinnings of the study” (LeCompte & Preissle, 1993, p. 151) were discussed from the perspective of the “loosely coupled systems” theory and the partnership theory, which helped identify three types of relationships, namely, the need and response in the development of Mandarin Chinese education; the need and response in the school-university partnership; and the relationship between the development of Chinese language programs and the partnership.

2.1 FOREIGN LANGUAGE EDUCATION IN THE UNITED STATES: A HISTORICAL PERSPECTIVE

Foreign language education in the U.S. has undergone “substantial cyclical changes” (Moore, 1992) and “frequent ups and downs” (Schultz, 2001, p. 3). Historically, European languages dominated foreign language education in U.S. public high schools, namely, Latin, Greek, French,

German and Spanish. Greek and Latin were the two major languages taught in U.S. schools in the 19th century. In the early 20th century, German was taught in high schools as the most common modern language, followed by French (Schultz, 2001). Spanish used to be considered a “less commonly taught foreign language.” For example, in 1910, only 0.7% of U.S. high schools offered Spanish (Parker, 1961). By the end of the 19th century, Spanish had become one of the most popular foreign languages taught in U.S. high schools, while German, French and Latin were losing their advantages.

The need for training skilled speakers of languages other than English is not new. According to Jackson and Malone (2009), the need for foreign language study was first addressed during World War II, “when the American Council of Learned Societies was asked by the U.S. government to develop programs teaching several less commonly taught languages” (Jackson & Malone, 2009, p. 1). Then, a similar request was brought to the government’s agenda after the USSR’s launching of Sputnik I in 1957 (Parker, 1961; Jackson & Malone, 2009), and then during the Cold War between the late 1970s and the early 1980s (Perkins et al., 1979; Jackson & Malone, 2009).

During the Cold War (1957-1975) and the Space Race between the late 1950s and the early 1960s, languages such as Arabic, Chinese, Hindi-Urdu, Japanese and Russian were identified as the languages in need, also known as “less commonly taught languages” or “critical languages.” A number of deliberate attempts were initiated “to intervene at the national level in the free-market foreign language system to expand the number of institutions offering, and the number of students enrolled in, the non-Western European languages” (Moore, 1992, p. 2).

The section below describes the development of foreign language education in the U.S. school system since 1958. Based on the language policies and reform efforts at the national

level, as well as some major historical events, the history was divided into the following three periods: 1958-1977, 1978-2000 and 2001-present.

2.1.1 1958-1977: Sputnik and the National Defense Education Act (NDEA)

Although foreign language education existed in U.S. public schools prior to 1890 (Parker, 1961), it was not until 1957 when it became the focus of school curriculum reforms in the United States. The launch of Sputnik by the former USSR on October 4, 1957 created concerns and fear among the American public that school education in the Soviet Union was better and that Communism might spread worldwide. In response, the National Defense Education Act (hereafter termed NDEA) was signed into law on September 2, 1958 during President Eisenhower's administration as a response to the Soviet launch of the satellite Sputnik. For the first time, the federal government addressed the concerns of science, math and modern foreign language education in U.S. public high schools. As Edwards et al. (2008) described, "Until Sputnik was launched, schooling in substantive disciplinary subject area had been a matter of state and local discretion, with virtually no federal involvement" (p. 12). Many educators believed that Sputnik shaped the U.S. policy on foreign language education and changed the U.S. school curricula.

Table 1 below illustrates the high school modern foreign language enrollments before and after the NDEA of September 1958. A brief review of the situation prior to Sputnik may help the reader better understand the impact of the NDEA on U.S. foreign language education. After World War II, due to the fact that 46 colleges and universities (including Johns Hopkins, Minnesota and Princeton) abandoned the language requirement for the B.A. degree, high school foreign language programs were affected greatly nationwide. In 1952, the then U.S. Commissioner of Education, Earl J. McGrath, informed the public that he considered foreign

languages a very important element in general education (Parker, 1961). After the Rockefeller Foundation contributed a grant of \$120,000 to the Modern Language Association (MLA) in 1952, followed by an additional grant of \$115,000, 42 of the 46 institutions restored or instituted their language requirement for the B.A. degree and 26 institutions “restored the foreign language entrance requirement” (Parker, 1961, p. 94). As a result, modern foreign language enrollments increased quickly in 1958 and 1959, as illustrated in Table 1.

Table 1. High school modern foreign language enrollments in 1949, 1954, 1958, and 1959

<i>Year</i>	<i>Total H.S. enrollment</i>	<i>% Modern languages</i>	<i>% French</i>	<i>% German</i>	<i>% Spanish</i>
1949	5,399,452	13.7	4.7	0.8	8.2
1954	6,582,300	14.2	5.6	0.8	7.3
1958	7,897,232	16.4	6.1	1.2	8.8
1959	8,155,573	19.1	7.4	1.5	9.8

SOURCE: Parker (1961, *The National Interest and Foreign Languages. A Discussion Guide*, p. 94.)

Note: Since this study focuses on modern foreign languages, this table excluded the statistics for Latin, which was listed in the original table.

Parker (1961) pointed out that the increase from 16.1% in 1958 to 19.1% in 1959 in a single year reflected the immediate impact of the NDEA on high school foreign language enrollments. I believe that the restorations of college admission and graduation requirements (e.g. language requirement for the B.A. degree and the foreign language entrance requirement), and the timely financial aid from The Rockefeller Foundation also played a vital role in the increase of foreign language enrollments.

Table 2 below shows the percentages of public high schools offering modern foreign languages in Fall 1959 in comparison to that of 1954 (1954 in parentheses).

Table 2. Percentages of public high schools offering modern foreign languages (1954 & 1959)¹⁹

100.0	Del. (94.1), D.C. (70.6), Mass. (95.2), R.I. (100.0)	66.4	Idaho (33.3)
99.6	N.J. (100.0)	65.2	Colo. (49.1)
99.8	Calif. (97.6)	64.2	La. (26.7)
98.7	Vt. (97.3)	62.8	Ill. (54.4)
97.7	N.H. (94.6)	61.9	Fla. (45.3)
95.4	Wash. (62.8)	60.0	U.S.A. (43.6)
95.1	Ariz. (88.3)	54.8	W. Va. (39.5)
94.4	Maine (100.0)	47.5	Ky. (19.5)
93.7	N.Y. (87.1)	46.3	Ind. (24.5)
92.0	Pa. (54.3)	43.9	Mont. (21.3)
90.7	Conn. (100.0), Md. (75.5), N. Mex. (66.7)	43.0	Minn (22.9), Wis.
88.7	N.C. (80.1)	-----	Tex. (39.4)
86.7	Hawaii	37.5	Iowa (8.3)
86.1	Va. (83.0)	36.6	Kans. (19.3)
79.4	Nev. (75.0)	35.4	Tenn. (26.6)
76.3	S.C. (64.7)	34.5	Alaska
75.3	Utah (68.4)	31.1	Mo. (21.8)
74.4	Oreg. (38.4)	29.0	Ala. (23.0)
69.6	Wyo. (56.3)	25.1	Nabr. (9.9)
69.4	Mich. (58.1)	23.8	Ark. (12.9)
67.4	Ohio (49.9)	22.3	Okla. (10.1)
66.6	Ga. (42.4)	22.1	N. Dak. (4.4)
		20.5	Miss. (18.1)
		20.1	S. Dak. (7.6)

SOURCE: Parker (1961, p. 26)

¹⁹ Figures show the situation in fall 1959 as compared with 1954 (parentheses following).

Table 3 below illustrates the percentage of U.S. public high school populations enrolled in modern foreign language classes in fall 1959 in comparison to that of 1958 and 1954, which are shown in parentheses.

Table 3. Percentages of public high school enrollments in modern foreign languages (1954, 1958, & 1959)

66.8	<i>New York City</i>	15.2	Wyoming (11.7, 8.8)
39.7	New York (36.5, 30.2)	15.0	Ohio (11.7, 9.7)
37.1	New Jersey (32.7, 28.1)	14.2	Alaska (13.2, ¹)
35.0	Rhode Island (32.3, 33.4)	13.2	Kansas (8.5, 2.3)
34.3	Massachusetts (30.3, 30.1)	13.1	Idaho (11.7, 6.6)
34.0	Delaware (22.5, 16.0)	12.9	Michigan (11.3, 8.3)
30.8	California (29.2, 24.0)	12.8	South Carolina (10.6, 9.2)
29.7	New Mexico (27.1, 22.0)	12.5	Montana (9.3, 4.7)
28.7	Arizona (25.1, 21.8)	11.6	Georgia (11.3, 8.8)
26.9	Connecticut (25.0, 23.4)	11.1	Minnesota (7.4, 4.6)
26.9	<i>District of Columbia</i> (22.2, 21.2)	10.2	Oklahoma (6.2, 3.9)
24.6	Nevada (23.5, 24.7)	10.1	Indiana (7.9, 5.5)
24.0	Maryland (20.3, 15.7)	9.9	Louisiana (7.5, 11.9)
23.0	New Hampshire (24.2, 19.7)	9.2	Tennessee (7.2, 5.1)
22.2	Washington (17.1, 11.5)	9.0	Wisconsin (9.0, 5.1)
21.8	Vermont (19.7, 14.7)	8.9	Nebraska (8.1, 4.9)
21.7	Colorado (17.4, 14.0)	8.5	Missouri (7.1, 5.9)
21.3	Pennsylvania (18.1, 14.4)	8.1	Hawaii (7.9, ¹)
20.1	Illinois (17.8, 14.9)	7.7	Kentucky (5.4, 5.1)
20.1	Maine (21.0, 16.6)	7.4	Alabama (3.8, 2.3)
19.7	<i>U.S.A.</i> (16.4, 14.2)	7.1	South Dakota (4.9, 2.2)
18.3	Virginia (13.1, 11.9)	6.7	Iowa (5.2, 3.9)
18.0	Florida (13.1, 10.3)	6.6	West Virginia (5.2, 4.7)
17.3	North Carolina (15.7, 14.2)	5.1	North Dakota (3.6, 1.9)
	Texas (15.3, 11.7)	4.7	Arkansas (2.7, 2.8)
16.2	Utah (8.2, 6.6)	3.9	Mississippi (2.0, 2.2)
15.2	Oregon (12.5, 6.1)		

SOURCE: Parker (1961, p. 27)

Table 1 above indicated that Spanish was studied by half (9.8 percent of 19.1 percent=51.1 percent) of high school students in modern foreign language programs and became the most popular modern foreign language in U.S. secondary schools (Parker, 1961, p. 27).

French became the second most popular modern foreign language in public high schools and attracted 7.4 percent of the student population. German was not taught in any public high schools in ten states in 1954, and only 0.8 percent of the high school student population studied German in 1954. But in 1959, every state (except Hawaii) taught German and enrollments almost doubled (to 1.5 %) (Parker, 1961). As shown in Table 2 above, there was an increase of high schools offering modern foreign language programs, as well as an increase of high school student enrollments in foreign language education. The length of language instruction was also increased, that is, “more and more high schools making possible 3, 4, or even 6 years of study” (Parker, 1961, p. 26). Meanwhile, Table 3 showed a three-year comparison of student enrollment in foreign language programs in 1959, 1958 and 1954, with a steady increase of foreign language enrollments in 1958 and 1959.

Other foreign languages offered during that period included Italian and Russian, which had 21,118 [students] in the public high schools of 13 states and 7,533 [public high school students] in 32 states, respectively (Parker, 1961, p. 30). Moreover, at least 11 other foreign languages (making a total of 18) were taught in the public secondary schools of some states, including two high schools in San Francisco that introduced the study of Chinese in 1952 with 21 students in the fall of 1959. Other foreign languages included Japanese, Arabic, Ancient Greek, Portuguese, Polish, Swedish, Norwegian, Hawaiian, modern Greek and Czech, all of which were considered in “negligible numbers” (Parker, 1961, p. 31).

In addition to the number of foreign languages offered in high schools, the longer length of study also generated some debates. Although the enrollment of foreign language programs seemed promising in the first and second years of study in public high schools, quite a few states did not offer third and fourth year foreign language education. Parker (1961) observed that “in

the nation as a whole, only one out of five students of a modern foreign language continued from the second year of instruction into a third” in 1959 (p. 32). He explained that one of the reasons for the high dropout rate was that many public high schools were too small (had an enrollment of less than 100) to support more than 2 years of foreign language study (Parker, 1961). As Parker described, “The typical public high school offering in language is a 2-year course in grades 9 and 10, or 10 and 11, meeting 5 times a week for 40 or 45 minutes” (p. 33). A promising development at that time was that about 20 states agreed to require at least 2 years of foreign language instruction in public high schools beginning in 1963.

The NDEA of 1958 was also viewed as a response to James B. Conant’s (1959) criticisms in “The American High School Today.” After visiting fifty-five high schools from coast to coast, Conant (1959) found no radical change made to high school education except for the foreign language curriculum. He pointed out that modern language instruction and enrollment was one of the weakest areas of the secondary school program. According to Conant (1959), the situation of foreign language education was “distressing” and “deplorable” (p. 69), because “the able boys too often specialize in mathematics and science to the exclusion of foreign languages and to the neglect of English and social studies. The able girls, on the other hand, too often avoid mathematics and science as well as the foreign languages” (p. 40). Conant (1959) argued that “a two-year requirement [of foreign language education] is worse than none because it wastes the student’s time” and “if there is to be a requirement, it should mean mastery, or the equivalent of four years of study” (1959b, p. 53). He suggested that schools offer a third and fourth year of foreign language instruction, “no matter how few students enroll” (1959b, p. 52). Of the 21 recommendations he made for improving public secondary education, Conant (1959) insisted that students “should be grouped according to ability, subject by subject” (p. 49) and “the

academically talented” students should complete “four years of one foreign language” in addition to other required subjects such as English, science and mathematics. Conant (1959, p. 69) wrote:

The school board should be ready to offer a third and fourth year of foreign language, no matter how few students enroll. The guidance officers should urge the completion of a four-year sequence of one foreign language if the student demonstrates ability in handling foreign languages. On the other hand, students who have real difficulty handling the first year of a language should be advised against continuing with the subject. The main purpose of studying a foreign language is to obtain something approaching a mastery of that language. And by mastery is surely meant the ability to read the literature published in the language and, in the case of a modern language, to converse with considerable fluency and accuracy with an inhabitant of the country in question.

The six-year study conducted by the National Association of Secondary-School Principals (NASSP) echoed most of Conant’s concerns and criticism over foreign language education in U.S. public high schools. The NASSP report, entitled “Modern Foreign Languages in the Comprehensive Secondary Schools,” was released in May 1959, when U.S. secondary schools were described in “a most distressing situation in the teaching of foreign languages” and the nation was “at a serious disadvantage because of the difficulty of finding persons who can deal with the foreign language problem” (1959, p. 27).

As the nation was searching for an answer to respond to “what went wrong with foreign language teaching in high school,” educators proposed “more science, mathematics, and foreign language” in the high school curriculum (Vocolo, 1974, p. 294). As a result, billions of dollars of federal aid were committed to restoring science, mathematics and foreign language programs.

Different from Conant’s view that foreign language education should not be for all, but for talented students only, the NASSP recommended that election of modern foreign language study should be open to all interested students. Moreover, the organization suggested that students should be given the opportunity to begin studying a modern language no later than grade 9. To acquire a proficiency in modern foreign language, students in a modern foreign

language program should complete a three-year sequence of study in grades 10, 11 and 12, but a minimum of four years of sequential study of modern foreign language was highly recommended.

The NASSP's recommendations were fully supported by the Modern Language Association (MLA). In their report of September 1959, MLA urged principals, guidance counselors and teachers to encourage students to select modern language study and to master the language as a means of communication. The Association agreed with Conant and the NASSP that it would take students longer than two years to master a foreign language and students should begin a study of modern language no later than grade 9 in order to develop proficiency in communication and to gain cultural insight. Moreover, MLA recommended that a 3-year sequence for all students electing a modern foreign language be offered in grades 10, 11 and 12, but a minimum of four years of sequential study of modern foreign language be available to students.

According to MLA, Spanish, French, German and Italian, in that order, were the modern languages most widely offered in U.S. high schools in the 1950s. Although colleges and universities had the major stake in teaching Russian, Chinese, Japanese, Arabic and Hindi-Urdu, some secondary schools with large enrollments introduced the study of the Russian language because they were able to find competent teachers (NASSP, 1959).

Beginning in the 1960s, more and more American schools became interested in the study of the non-western world such as Asia, Africa and Latin America. Commissioned by the Office of Education of the U.S. Department of Health, Education and Welfare, James M. Becker and Lee F. Anderson of the Foreign Policy Association conducted research on the necessity of offering international education in U.S. elementary and secondary schools. The purpose of the

study was to explore the process and the need for change in the international education of American children and adolescents. The authors believed that it would be critical for U.S. schools to have curricula “acquiring a more global focus and comparative orientation,” and suggested that the curriculum should focus on “education for international understanding” (Becker, 1969, p. 264).

The final report “An Examination of Objectives, Needs, and Priorities in International Education in U.S. Secondary Schools,” released in 1969, offered several recommendations that could serve as stimuli and guides to a continuing dialogue and exploration as well as to new research and development efforts in the field of international education in elementary and secondary schools. Unfortunately, the study did not result in increased federal support for international education (Edwards, 2006; Edwards et al., 2008/2009). Had the effort succeeded, the curriculum innovation of international education might have led to increasing foreign language education in secondary schools.

Despite the federal government’s effort to strengthen foreign language education in the 1950s, the outcomes were not unexpected: enrollments of foreign language “soared through the sixties,” but began to decline in the seventies (see Table 4 and Figure 6). Educators found that foreign language education in U.S. schools had regressed to the situation before Sputnik and the NDEA. One reason was that college admission did not require any foreign language education (Vocolo, 1974). Another was that, like Conant, many teachers did not believe that foreign language education should be for all, but instead for the brightest students and those college-bound. To make things worse, many students seemed not to be motivated, feeling that foreign language was “too difficult, not important, boring, and a waste of time” (Vocolo, 1974, p. 296). School administrators, school boards and taxpayers were to learn with alarm that less than 25

percent of this nation's secondary schools offered foreign language programs and only six percent of students stayed long enough to complete [not master] their language studies (Vocolo, 1974). Table 4 below shows an increase in the number of students enrolled in Spanish, French, German and Italian between 1960 and 1976. However, of the total high school student population, the actual percentage of students taking those languages and Russian went down in 1976 (see Table 4), which confirmed Vocolo's (1974) finding that foreign language education in U.S. schools in the 1970s went back to the situation before Sputnik and the NDEA, i.e. 24.2 percent of all public high school students were enrolled in foreign language studies in 1958, but only 22.7 percent in 1976.

Table 4. U.S. foreign language enrollments in public high schools (1958-1976)

(In thousands [8,649.5 represents 8,649,500], except in percentage. As of fall 1976, for grades 9 through 12)

	1958	1960	1965	1968	1970	1974	1976
Total enrollment	7,897.2	8,649.5	11,611.2	12,721.4	13,301.9	13,648.9	13,952.1
Enrolled in all foreign languages	1,913.4	2,522.0	3,659.1	3,890.4	3,779.3	3,294.5	3,174.0
Percentage of all students	24.2%	27.1%	31.5%	30.6%	28.4%	24.1%	22.7%
Enrollment in modern foreign language							
languages ²⁰	1,295.9	1,867.4	3,067.6	3,518.4	3,514.1	3,127.3	3,023.5
Spanish	691.0	933.4	1,426.8	1,698.0	1,810.8	1,678.1	1,717.0
French	479.7	744.4	1,251.4	1,328.1	1,230.7	977.9	888.4
German	93.0	150.8	328.0	423.2	410.5	393.0	352.7
Italian	22.1	20.0	25.2	26.9	27.3	40.2	45.6
Russian	4.0	9.7	26.7	24.3	20.2	15.1	11.3
Percentage of all students ¹							
Spanish	8.8	10.8	12.3	13.3	13.6	12.3	12.3
French	6.1	8.6	10.8	10.4	9.3	7.2	6.4
German	1.2	1.7	2.8	3.3	3.1	2.9	2.5
Italian	0.3	0.2	0.2	0.2	0.2	0.3	0.3
Russian	0.1	0.1	0.2	0.2	0.2	0.1	0.1

SOURCE: Draper & Hicks (2002, Foreign Language Enrollments in Public Secondary Schools, Fall 2000)

²⁰ Includes other foreign languages, not shown separately.

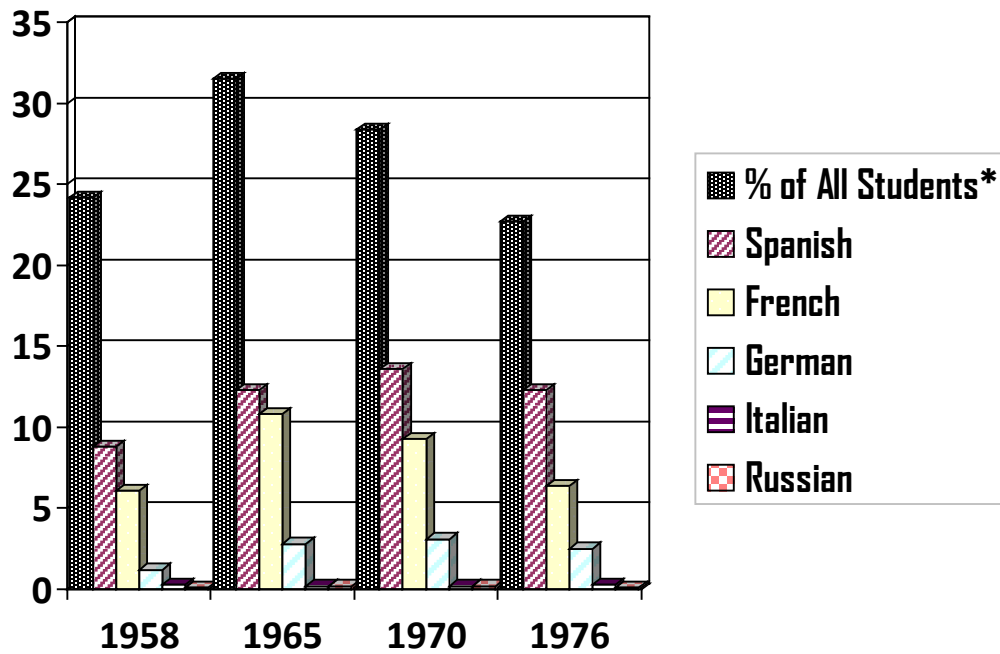


Figure 6. U.S. foreign language enrollments in public high schools (1958-1976, in percentage)

*Includes other foreign languages, not shown separately.

% of All Students = the percentage of students enrolled in foreign language programs in U.S. public schools.

Note: Created based on information from Draper & Hicks (2002, Foreign Language Enrollments in Public Secondary Schools, Fall 2000)

2.1.2 1978 – 2000: “The Sputnik of the 1980s – Toyota” and the impact of “A Nation at Risk”

In response to the declining student enrollment in foreign language programs in the seventies, several efforts were made at the federal level to improve American school education during this period. Examples included the establishment of the President’s Commission on Foreign Language and International Studies in 1978 and the release of the Commission’s report in 1979, the release of “A Nation at Risk” report in 1983, the Goals 2000: Educate America Act (1994), as well as constructive criticisms and recommendations made by policy makers such as James A. Perkins (1979) and Paul Simon (1980).

The President’s Commission on Foreign Language and International Studies (PCFLIS) was formed at the direction of President Jimmy Carter in April 1978 to investigate the status of foreign language and international studies in the UNITED STATES. Its task was to realize the final goal of the Helsinki Accords, that is, “to encourage the study of foreign language and civilization as an important means of expanding communication among people” (Perkins, 1979, p. 11). The Commission was expected to accomplish several objectives, focusing on enhancing and improving foreign language and international studies at all levels of schools.

The Commission’s report, entitled “Strength through Wisdom: A Critique of U.S. Capability,” was submitted to the President on October 15, 1979. In that report, the Commission addressed the importance of competence in foreign languages and international understanding, identified the greatest weaknesses of U.S. foreign language education in schools of all levels, and

presented carefully considered recommendations for remedial action (Perkins, 1979, *Strength through Wisdom: A Critique of U.S. Capability*). The Commission found that “American’s incompetence in foreign language is nothing short of scandalous” (Edwards et al., 2008/2009, p. 2). They felt “profoundly alarmed” by the facts that (1) enrollments of U.S. high school students in foreign languages and other international courses declined from 24 percent in 1965 to 15 percent in 1978; and (2) only one out of 20 public high school students studied French, German or Russian beyond the second year, compared to 1959 when “one out of five high school students of a modern foreign language continued from the second year of instruction into a third” (Parker, 1961, p. 32). In addition, there was “a serious deterioration in this country’s language and research capacity” and “instruction in foreign languages and cultures has virtually disappeared” (Perkins, 1979, p. 11). The Commission pointed out that “Americans’ scandalous incompetence in foreign languages” would negatively affect their “understanding of world affairs” (Perkins, p. 13) and prevent the nation from keeping its leading position in the world. Some examples of “persistent problems in foreign language instruction” included (1) inadequate training of teachers at all levels; (2) a lack of imaginative curricula dealing with other countries and cultures; (3) a shortage of well-conceived methodologies; 4) inattention to the less commonly taught languages such as Japanese, Chinese and Russian; and (5) a lack of sound criteria for measurement of progress and for testing actual proficiency (Parker, 1961, p. 20).

The Commission suggested that special attention should be given to “less commonly taught languages;” and foreign language and international studies should be treated as a top priority. Unlike previous studies, the recommendations made by the Commission in regard to foreign language education in secondary schools seemed to have a long-term effect. For example, the Commission suggested that “school,...should reinstate foreign language

requirements;” “language education should start earlier and last longer;” and “special attention should be given to encouraging ethnic and other minority-group members to enter linguistic and international studies, and to build on their existing linguistic resources so they may contribute more to American education, diplomacy and international business” (Perkins, 1979, p. 19).

However, the Commission’s report did not come without limitations. For example, little encouragement was given for U.S. public schools to work with local community heritage language schools so the two schools could share resources and avoid “reinventing the wheel.” The Commission showed concerns over the declining enrollment in foreign language programs, but they failed to provide any strategic guidelines for schools and school districts to correct the problems, such as how to motivate students and improve the student retention rate. Moreover, several “persistent problems” were identified, but no study was initiated to find ways to meet schools’ needs for “adequate training for teachers,” “Imaginative curricula” and “well-conceived methodologies.” The Commission suggested that “foreign language be reinstated either as a requirement for college admission or for college graduation” (Perkins, 1979, p. 19), but the implementation was voluntary, not mandatory. It was not clear who set standards, what the standards were about or how the implementation would be assessed and measured. Moreover, the Commission listed several specific responsibilities for states to have, but it was not clear how the federal and state governments would coordinate, cooperate or even collaborate to assume those responsibilities; and what strategy they would take to promote foreign language education at the school level.

Several studies were published around that time addressing concerns over foreign language education in U.S. public schools, among which was Paul Simon’s book, “The Tongue-

Tied American. Confronting the Foreign Language Crisis” in 1980; and Richard D. Bretch and William P. Rivers’ analysis of Language and National Security in the 21st Century in 2000.

The concerns and problems Simon (1980) addressed were not new. For example, he pointed out that more and more colleges stopped requiring foreign language for entrance, which not only severely affected students’ motivation for learning a foreign language at the secondary level, but also weakened parents’ wishes for their children to be enrolled in a foreign language program. Upon receiving survey responses from the embassies of 76 nations, Simon was convinced that “none can compare with the United States in neglect of foreign languages” (Simon, 1980, p. 77). In his view, the weakness in foreign language education was not only an educational problem, but also a security problem and a cultural one. Moreover, Simon believed that inadequate foreign language education had severely affected the U.S. economy, the job market and national security. Another problem Simon found was that “most high school students who sign up for foreign language take them for one or two years.... [but] most schools offer no more than two years” (Simon, 1980, p. 94). He also found it problematic that some school authorities decided to offer fewer electives, including foreign languages.

There was widespread public perception in the 1970s that something was seriously remiss in the U.S. education system (A Nation at Risk: The Imperative of Educational Reform, 1983). In response to the public’s concerns, the National Commission on Excellence in Education was created during Ronald Reagan’s administration to examine the quality of education in the U.S., focusing on teenage youth and high schools (A Nation at Risk: The Imperative of Educational Reform, 1983) (hereafter “A Nation at Risk”).

The public’s concerns were soon confirmed. The Commission found that, among many other problems, secondary school curricula were “homogenized, diluted, and diffused,” without

any central focus. Moreover, American schools had “a cafeteria style curriculum in which the appetizers and desserts can easily be mistaken for the main courses” (A Nation at Risk, 1983). Having surveyed various studies that pointed toward academic underachievement in the U.S., the Commission found that average achievement of high school students on most standardized tests was lower than 26 years ago when Sputnik was launched (A Nation at Risk, 1983).

Of the many problems within U.S. school education, the Commission discovered that only 31 percent of high school graduates completed intermediate algebra; only 13 percent completed French I and only 16 percent completed geography. Calculus was available in schools enrolling about 60 percent of all students, but only 6 percent of all students completed it. In a 1980 State-by-State survey of high school diploma requirements, the Commission found that only eight states required high schools to offer foreign language instruction, but none required students to take the courses; and there was a severe shortage of teachers in the fields of mathematics, science and foreign languages (A Nation at Risk, 1983).

One of the 38 recommendations made by the Commission stated that “college-bound students should complete two years of foreign language study as part of five main elements of high school education” (Edwards, 2006; Edwards et al., 2008/2009, p. 18). Such a recommendation apparently went against some educators’ (e.g. Conant, 1959; Parker, 1961) proposal that students should take more than two years of foreign language study, although the Commission members supported the notion that achieving proficiency in a foreign language would require from 4 to 6 years of study and should, therefore, be started in the elementary grades. They believed that it would be desirable for students to achieve such proficiency because study of a foreign language would “introduce students to non-English-speaking cultures, heighten awareness and comprehension of one's native tongue, and serve the Nation's needs in

commerce, diplomacy, defense, and education.”²¹ The Commission concluded that the American schools produced “mediocre educational performance,” and urged that “schools, colleges, and universities adopt more rigorous and measurable standards” (A Nation at Risk, 1983).

Some efforts and studies were generated after the Commission’s report “A Nation at Risk” in 1983. One example was the Foreign Language Assistance Program (FLAP), established in 1988, which “provides grants to SEAs [State Education Agencies] for innovative model programs providing for the establishment, improvement, or expansion of foreign language study for elementary and secondary school students.”²²

Meanwhile, the Commission’s report seemed to lead to several positive outcomes. The statistics published by the American Council on the Teaching of Foreign Languages (ACTFL) in 1985 showed a big jump in total enrollment in foreign languages, from 21.3% in 1982 to 30.9% in 1985. Rohter (1987) reported that the state of North Carolina passed legislation ordering “every district...to offer foreign languages starting at the kindergarten level and continuing through high school” (p. 1). Several states followed the lead of North Carolina in promoting foreign language education in U.S. schools, such as Florida, New York and Louisiana. Rohter (1987) also reported that beginning in 1988, the California State University system began requiring “the successful completion of two years of language study as an admission requirement for all incoming freshmen” (p. 1). In addition, more school students became aware of “practical benefits to be gained from command of a second language” (Rohter, 1987, p. 1). Despite the efforts, the number of states and educational institutions that followed suit remained low.

²¹ Source: <http://www2.ed.gov/pubs/NatAtRisk/risk.html>

²² Source: <http://edocket.access.gpo.gov/2010/2010-6369.htm>

It is worth noting that around the time when “A Nation at Risk” was released, the U.S. was once again challenged by a foreign competitor: the Toyota Motor Corporation. The history of Toyota was recorded as follows:

As Toyota celebrated its 25th anniversary in America during 1982, it opened a new national sales headquarters complex that it occupies today in Torrance, California. Toyota's success continued, and in 1986, it became the first import automaker to sell more than one million vehicles in America in a single year, racking up sales of 1,025,305 cars and trucks. That year also marked the company's debut as a manufacturer in the United States, with the rollout of the first Toyota car built on American soil. The vehicle, a white Corolla FX16, was produced on October 7, 1986, at the New United Motor Manufacturing, Inc. plant, a joint venture with General Motors.²³

Such a development was viewed by many American politicians and business leaders not only as commercial competition, but also a threat to this nation's security and its world leadership. Some experts (e.g. J. David Edwards, executive director of the JNCL) called it “the Sputnik of the 1980s.” Perhaps, it is not an exaggeration to say that the Toyota “invasion” triggered the increase of student enrollments in Japanese programs between 1985 and 1997 (see Table 5).

Debates about the impact of “A Nation at Risk” continued. A decade and a half after the release of “A Nation at Risk,” Bennett et al. (1998) reported that “American 12th-graders scored near the bottom on the recent Third International Math and Science Study (TIMSS): U.S. students placed 19 out of 21 developed nations in math and 16 out of 21 in science. Our advanced students did even worse, scoring last in physics. This evidence suggested that, “compared to the rest of the industrialized world, our [U.S.] students lag seriously in critical subjects vital to our future” (Bennett et al., 1998). Bennett et al. (1998) argued that the Excellence Commission had the right diagnosis but was vague--and perhaps a bit naive--as to the

²³ Source: http://www.toyota.com/about/our_business/our_history/u.s._history/1970s_&_1980s.html

cure, because the real issue was power. Bennett et al.'s view was echoed by the nonpartisan organization Strong American Schools, which stated in its analysis:

While the national conversation about education would never be the same, stunningly few of the Commission's recommendations actually have been enacted. Now is not the time for more educational research or reports or commissions. We have enough commonsense ideas, backed by decades of research, to significantly improve American schools. The missing ingredient isn't even educational at all. It's political. Too often, state and local leaders have tried to enact reforms of the kind recommended in *A Nation at Risk* only to be stymied by organized special interests and political inertia. Experts commented that without vigorous national leadership to improve education, states and local school systems simply cannot overcome the obstacles to making the big changes necessary to significantly improve our nation's K-12 schools.

Another government effort was Goals 2000: Educate America Act, which was signed into law by President Bill Clinton on March 31, 1994. The Act focused on the commitment to educational standards, which was also proposed in "*A Nation at Risk*" (Mulcahy, 1994). One of the major contributions of Goals 2000 was the recognition of foreign languages among the core subjects (Schulz, 2001). Goal 3 of the Act stated that "all students will leave grades 4, 8, and 12 having demonstrated competency over challenging subject matter including English, mathematics, science, foreign languages, civics and government, economics, the arts, history, and geography..." (Summary of Goals 2000: Educate America Act). Another contribution of Goals 2000 was the creation of The National Education Standards and Improvement Council (NESIC), aimed at establishing educational standards through examining and certifying national and state content, student performance, opportunity-to-learn standards and assessment systems voluntarily submitted by states.

Prior to the creation of NESIC, the movement to develop voluntary national standards had already begun. For example, the U.S. Department of Education provided funding to develop national standards for the arts, civics and government, English language arts, foreign languages, geography, history and science. The National Council of Teachers of Mathematics (NCTM) had

also developed national standards for school mathematics. According to Edwards et al. (2008), the “Standards” were the outcome of an 11-member task force, including representatives of nine nationally recognized foreign language associations, such as the American Council on the Teaching of Foreign Languages (ACTFL), American Association of Teachers of French (AATF), American Association of Teachers of German (AATG), American Association of Teachers of Italian (AATI), American Association of Teachers of Spanish and Portuguese (AATSP), American Classical League (ACL), American Association of Teachers of Russian (AATR), Chinese Language Association of Secondary-Elementary Schools (CLASS), the National Council of Language Teachers of Japanese (NCLTJ) and the Association of Teachers of Japanese (ATJ). The “Standards for Foreign Language Learning: Preparing for the 21st Century” was first published in 1996. According to ACTFL, the standards reflected five educational goal areas, known as “5C’s”: communication, cultures, connections, comparisons, and communities. U.S. school teachers, administrators and curriculum developers at both the state and local levels have been utilizing the “Standards” to improve their foreign language education programs (Edwards et al., 2008/2009). It is beyond the scope of this study to discuss the content of the ACTFL standards.

Table 5 and Figure 7 below were created from the statistics ACTFL generated on foreign language enrollment in U.S. public high schools between 1978 and 2000. Table 5 shows a steady increase of high school student enrollment in foreign language programs from 1985 to 2000, particularly in Spanish, Italian and Japanese.

Table 5. Foreign language enrollments in public high schools (1978-2000)*(In thousands [8,649.5 represents 8,649,500], except for percentage. As of fall 2000, for grades 9 through 12)*

	1978	1982	1985	1990	1994	2000
Total enrollment	13,941.4	12,879.3	12,466.5	11,099.6	11,847.5	13,457.8
Enrolled in all foreign languages	3,200.1	2,909.8	4,028.9	4,256.9	5,001.9	5,898.1
Percentage of all students	23.0	22.6	32.3	38.4	42.2	43.8
Enrollment in modern foreign language						
languages ²⁴	3,048.3	2,740.2	3,852.0	4,093.0	4,813.0	5,720.7
Spanish	1,631.4	1,562.8	2,334.4	2,611.4	3,219.8	4,057.6
French	856.0	858.0	1,133.7	1,089.4	1,105.9	1,075.4
German	330.6	266.9	312.2	295.4	326.0	283.3
Italian	45.5	44.1	47.3	40.4	43.8	64.1
Japanese	(NA)	6.2	8.6	25.1	42.3	50.9
Russian	8.8	5.7	6.4	16.5	16.4	10.6
Percentage of all students²						
Spanish	11.7	12.1	18.7	23.5	27.2	30.2
French	6.1	6.7	9.1	9.8	9.3	8.0
German	2.4	2.1	2.5	2.7	2.8	2.1
Italian	0.3	0.3	0.4	0.4	0.4	0.5
Japanese	(NA)	0.1	0.1	0.2	0.4	0.4
Russian	0.1	(Z)	0.1	0.2	0.1	0.1

NA = Not available. Z = Less than .05 percent.

SOURCE: Draper & Hicks (2002, Foreign Language Enrollments in Public Secondary Schools, Fall 2000)

²⁴ Includes other foreign languages, not shown separately.

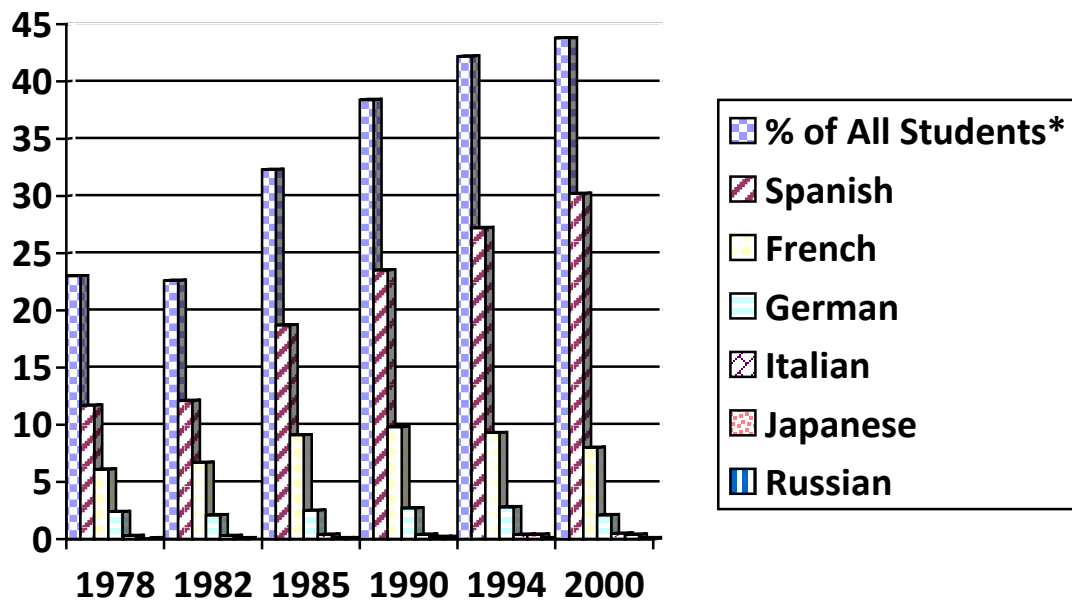


Figure 7. Foreign language enrollments in public high schools (1978 - 2000, in percentages)

* Includes other foreign languages, not shown separately.

% of All Students = the percentage of students enrolled in modern foreign language programs in comparison to the total number of students in U.S. public schools.

Note: Created based on information from Draper and Hicks (2002, Foreign Language Enrollments in Public Secondary Schools, fall 2000)

2.1.3 2001-Present: “9.11” and the National Security Language Initiative (NSLI)

The terrorist attacks on U.S. soil on September 11, 2001 sparked a number of new policies to increase national security and international communication (Edwards et al., 2008/2009). Numerous studies, reports, hearings and proposals were generated soon after “9.11.” Once again, foreign language education was under scrutiny. The federal government was urged to increase and improve U.S. language capacities (Edwards, 2006). As a result, several acts were proposed and policies were established “dealing with critical languages and international study for the

purpose of national security in the coming years” (Edwards et al., 2008/2009, p. 24). While most of those policies focused on foreign language education in higher education institutions, several targeted issues were addressed at the school level. One example was the Homeland Security Education Act, which was introduced in December 2001. Proposed by Senators Daniel K. Akaka (D-HI) and Richard Durbin (D-IL), the Act called for increasing math, science and foreign language instruction (it sounded similar to what NDEA proposed in 1958) and meeting critical needs of elementary and secondary schools and higher education institutions in the U.S. (Edwards et al., 2008/2009). Two major concerns were addressed. One was that U.S. school education lagged behind in math and science education; the other focused on foreign language education, especially “less commonly taught languages” (LCTLs), such as Arabic, Farsi, Chinese and Korean, and other languages that are of particular value to the UNITED STATES. The Act also called for establishing grants to fund math and science education and for assessing long-term needs in these areas, although foreign languages were not addressed. Moreover, it suggested amending the Elementary and Secondary Education Act (ESEA) of 1965 and establishing language learning pathways to train students from kindergarten through graduate education (K-16) to be proficient in critical foreign languages. Despite the effort, this Act did not become law.²⁵

Another example was the National Security Language Act (NSLA), which was introduced by Representative Rush Holt (D-NJ) in 2003 and then in 2007. This Act was geared toward strengthening national security by expanding and improving foreign language study in the U.S. and, in particular, improving the performance of students in the study of foreign languages; developing more rigorous foreign language curricula that were aligned with

²⁵ Source: <http://www.govtrack.us/congress/billtext.xpd?bill=s109-2450>

professionally accepted standards for elementary and secondary education instruction; and demonstrating increased participation by students in advanced courses in foreign language. In addition, the Act encouraged early foreign language instruction, which was also mentioned in the earlier Homeland Security Education Act and by many scholars (e.g. Conant) since the 1950s.

Ted Crump identified in a 1985 survey that there was a demand for translators in 49 foreign languages in 19 different federal agencies. By 2001, the problem still remained, perhaps even to a greater degree. Soon after “9.11,” several federal agencies discovered a severe shortage of individuals with high proficiency in LCTLs. In response to the urgent need for skilled language personnel, several government-led foreign language initiatives were launched, such as the Department of Defense Language Transformation Roadmap (Department of Defense, 2005); the Department of State’s “Language Continuum” (which aimed at providing career guidance to Foreign Service Officers [Department of State, 2004]); government funding from the Department of Education to aid the fifteen nonprofit national Language Resource Centers at major universities;²⁶ and the establishment of the Center for Advanced Study of Language at the University of Maryland for the purpose of conducting basic and applied research into questions of interest to government agencies and other researchers (Jackson & Malone, 2009).

Other studies and reports included the National Association of State Boards of Education’s (NASBE) report entitled “The Complete Curriculum: ensuring a place for the arts and foreign languages in America’s schools” in 2003; the Call to Action of the 2004 National Language Conference; the establishment of the National Security Education Program (NSEP) in 2005; the Committee for Economic Development’s Education for Global Leadership: The Importance of International Studies and Foreign Language Education for

²⁶ Source: <http://nflrc.msu.edu/lrcs.php>

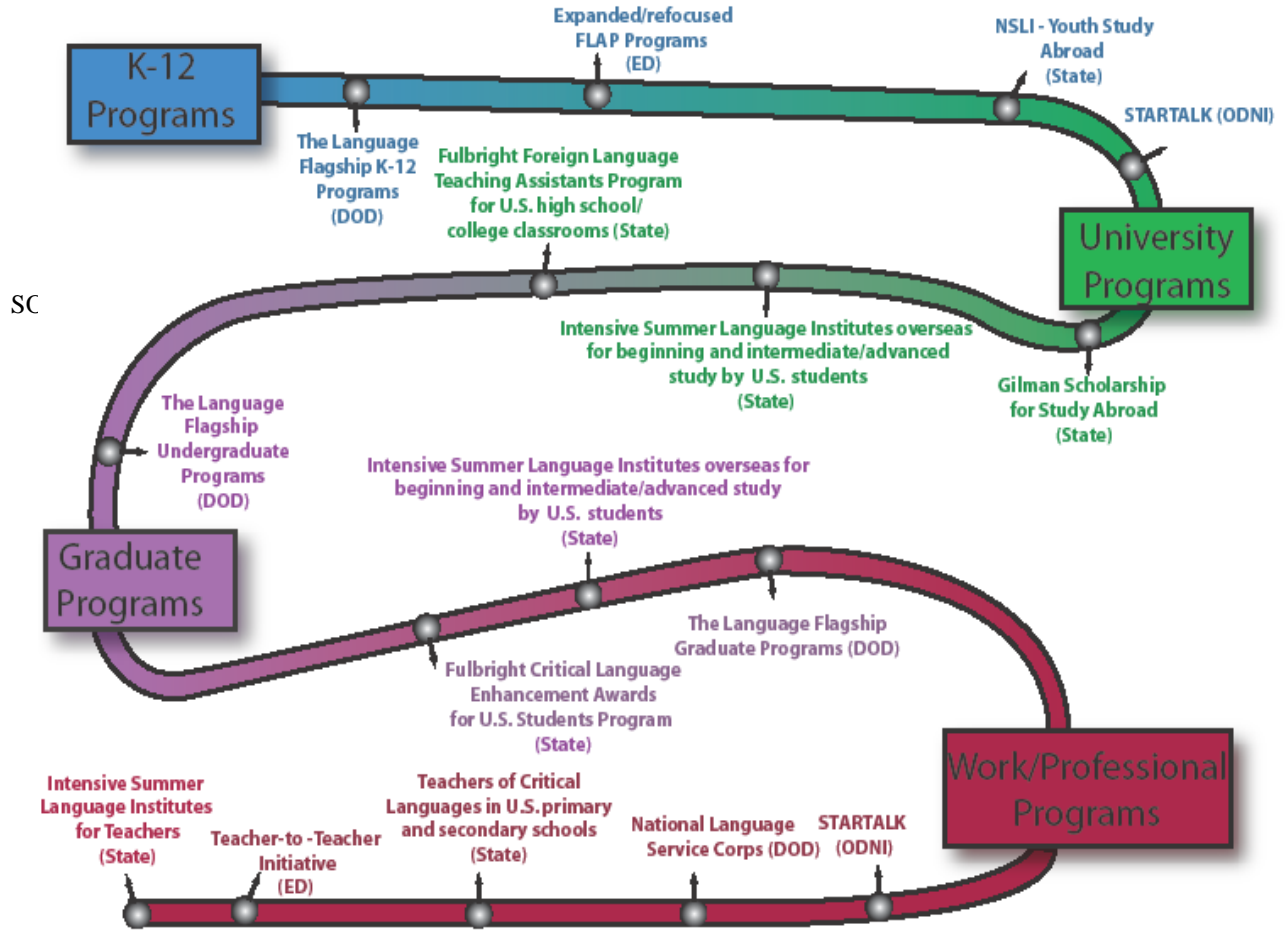
U.S. Economic and National Security” released in 2006; and the Association of American Universities’ “National Defense Education and Innovation Initiative: Meeting America’s Economic and Security Challenges in the 21st Century” (Jackson & Malone, 2009). Once again, foreign language education became the focus of school curriculum reforms in the U.S.

Of the many government proposals and initiatives since 2001, the National Security Language Initiative (NSLI) appears to be the largest in scale. Announced by former President George W. Bush at the U.S. University Presidents’ Summit on International Education On January 5, 2006, NSLI was a White House-coordinated inter-agency effort of the Department of Education, Department of Defense, Department of State and the Office of the Director of National Intelligence. Targeting LCTLs, this comprehensive and coordinated national initiative was based on a strategy developed during more than a year of joint, advanced planning to expand U.S. critical foreign language education beginning in kindergarten and continuing through elementary, secondary and postsecondary education and into the workforce. The objective of NSLI was to dramatically increase the number of Americans mastering critically needed languages and expanded programs from kindergarten through university and into the workforce. About \$114 million was proposed to cover the costs of 14 programs that promote critical language and international studies. NSLI reopened the national discussion of the need for better language education beginning in the elementary years and continuing through university and adulthood and resulted in a number of new policies and programs (National Security Language Initiative [NSLI], 2007; Edwards et al., 2008/2009, pp. 32-33). Moreover, NSLI aimed at increasing the nation’s capacity by providing experts with those critical language skills that were determined to be vital to the U.S. national security and foreign policies. The Initiative drew on evidence suggesting that mastery of LCTLs required many years of study and that learning

should begin at an early age. Those suggestions echoed what Conant and many other experts had proposed since 1959.

Figure 8 is the flowchart of the National Security Language Initiative Pipeline, which illustrates the process of four major federal-funded language programs (i.e. K-12 programs), university programs, graduate programs and professional work programs.

National Security Language Initiative Pipeline



Of many NSLI programs, four foreign language programs have been chosen, which are offered in high schools but were sponsored by different federal agencies for different purposes (see Table 6). For example, the Foreign Language Assistance Program (FLAP) is sponsored by the Department of Education and was the only federally funded program that exclusively targeted foreign language instruction in elementary and secondary schools.²⁷

The National Security Language Initiative for Youth (NSLI-Y) program, which includes Summer Language Institutes for High School Students, is funded by the U.S. Department of State. The program provides merit-based scholarships for eligible high school students to LCTLs in summer, semester and academic year international immersion programs. NSLI-Y encourages a lifetime of language study and cultural understanding by supporting K-12, undergraduate, graduate and professional language programs for languages that have traditionally not been taught in the U.S.²⁸

Sponsored by the Department of Defense, Language Flagship is the largest initiative of the National Security Education Program (NSEP), aimed at changing the way Americans learn languages through a groundbreaking approach to language education for students from kindergarten through college as well as graduate school. The program attempts to lead the nation in designing, supporting and implementing a new paradigm for advanced language education.

Flagship languages include Arabic, Chinese, Hindi and Urdu, Korean, Persian and Russian. Through an innovative cooperation among the federal government, education and business, Language Flagship seeks to graduate students who will command a superior level of

²⁷ Source: <http://www.ncela.gwu.edu/grants/flap/>

²⁸ Source: <http://www.nsliforyouth.org/nslicms-1.1/>

proficiency in languages critical to U.S. competitiveness and security.²⁹ The goal of Language Flagship is to educate all Americans to learn foreign languages. Flagship programs seek not only to graduate students at a professionally-proficient level of language, but also to “push the model” down to elementary, middle and high schools so that students will enter college with an established and measurable skill in a second language.³⁰ Currently, there are ten Chinese Flagship Programs in the U.S. Participating higher learning institutions include Arizona State University, Brigham Young University, Indiana University, San Francisco State University, Ohio State University, University of Mississippi, University of Rhode Island, Western Kentucky University and University of Oregon.

STARTALK is a Presidential Initiative established during George W. Bush’s administration, with the mission of funding summer programs in critical languages. Initiated in 2007 by the National Foreign Language Center and sponsored by the Office of the Director of National Intelligence, STARTALK is one of the projects of the National Security Language Initiative (NFLI) with the purpose of increasing the number of students learning Arabic and Chinese and providing professional development opportunities to instructors who teach these languages.³¹

²⁹ Source: <http://www.thelanguageflagship.org/overview>

³⁰ Source: <http://www.thelanguageflagship.org/k-12-programs>

³¹ Source: <http://startalk.umd.edu/2007/>

Table 6. NSLI programs that target foreign language education in high schools

Program	Elementary School	Middle School	High School	Under-graduate	Graduate	Teacher/Prof'l Development
Foreign Language Assistance Program (FLAP)	x	x	x			x
NSLI-Youth (includes Summer Language Institutes for High School Students)			x			
The Language Flagship	x	x	x	x	x	x
STARTALK			x			x

SOURCE: <http://www2.ed.gov/about/inits/ed/competitiveness/nsli/nsli-faq.pdf>
(Retrieved on April 28, 2011)

Another government-led effort was the America Creating Opportunities to Meaningfully Promote Excellence in Technology, Education and Science Act (America COMPETES), which was signed into law under the George W. Bush administration on August 9, 2007. As a bipartisan response to the National Academies' "Rising above the Gathering Storm" report and the "Innovate America" report by the Council on Competitiveness, the legislation was geared toward improving the competitiveness of the U.S. in the global economy. In addition to expanding Advanced Placement (AP) and International Baccalaureate (IB) programs as well as funds for math, science, engineering and technology, the America COMPETES Act developed and implemented programs for bachelor's and master's degrees in critical foreign languages with concurrent teaching credentials. Furthermore, it expanded critical

foreign language programs in elementary and secondary schools in order to increase the number of students becoming proficient in those languages through a Foreign Language Partnership Program provision. The legislation also proposed to develop and train more teachers in those subject areas (Edwards et al., 2008/2009, p. 35).

Signed into law by President Barack Obama on February 17, 2009, The American Recovery and Reinvestment Act (ARRA) was designed to stimulate the economy, support job creation and invest in critical sectors including education. ARRA has laid the foundation for education reform by supporting investments in innovative strategies that are most likely to lead to improved results for students, long-term gains in school and school system capacity, and increased productivity and effectiveness.³² ARRA provided \$4.35 billion for the “Race to the Top Fund,” a competitive grant program designed to encourage and reward states that could demonstrate success in raising student achievement with the best plans to accelerate their reforms in the future. Forty states and the District of Columbia submitted applications to compete in Phase 1 of “Race to the Top.” Those states were expected to offer models for others to follow and would spread the best reform ideas across other states, and across the country (Race to the Top Program Executive Summary, 2009, p. 2).

The competitive grant program generated various debates. Some critics questioned the fairness and transparency of the selection process and criteria. They believed that the “Race to the Top” selection for funding quantified the criteria and awarded selective states rather than the most needed. Others considered the process “subjective and arbitrary.” For example, William Peterson and Richard Rothstein of the Economic Policy Institute (2010) argued that the selection of the winning states (Delaware and Tennessee) was subjective and arbitrary, more a matter of

³² Source: http://www.educationcounsel.com/files/Narrative_Summary_FINAL.pdf

bias or chance than a result of these states' superior compliance with reform policies (Peterson & Rothstein, 2010). Moreover, the governors of Texas and Virginia announced to the public that their states would not compete for the funding, claiming that federal funding might do more harm than good to their educational reforms and their state educational standard.

What impacts did the government efforts and language policies mentioned above have on U.S. foreign language education at the school level?

Rhodes and Pufahl (2009) reported that the number of secondary schools offering Spanish remained the same (93%) in 1997 and 2008, but French and German showed a substantial decrease (i.e. French from 64% in 1997 to 46% in 2008 and German from 24% in 1997 to 14% in 2008). Of less commonly taught foreign languages, the number of secondary schools offering Arabic was 0.6% in 2008 (up from 0% in 1997) while Chinese increased from 1% in 1997 to 4% in 2008. Meanwhile, the number of schools teaching Japanese decreased from 7% in 1997 to 3 % in 2008. Rhodes and Pufahl (2009) also reported that 89% of the public secondary schools utilized curriculum standards in 2008, compared to only 31% in 1997. However, about one third of public elementary and secondary schools with language programs reported that “their language instruction had been negatively affected by the federal No Child Left Behind (NCLB) education legislation” (Rhodes & Pufahl, 2009, p. 7). The reason was that “NCLB’s focus on mathematics and reading instruction had drawn resources away from foreign languages,” while foreign languages “are not included in the law’s accountability measures” (Rhodes & Pufahl, 2009, p. 6). Although there was a small increase in the number of secondary schools offering LCTLs such as Arabic and Chinese, “the overall picture of foreign language instruction in 2008 was no better—and in some areas worse—than in 1997” (Rhodes & Pufahl, 2009, p. 7).

Those reports and statistics generated two primary concerns. One, the decrease in the number of middle schools might have an impact on high school foreign language enrollment after 2008. Two, no explanation was given about the reasons why student enrollment decreased in French, German, Russian and Japanese. Where did those students go? And why did so many middle schools (from 75% in 1997 to 58% in 2008 - see Table 7) drop their foreign language programs?

Table 7. Foreign language education in U.S. secondary schools (1987, 1997, 2008)³³

Schools	1987 (%)	1997 (%)	2008 (%)
Total secondary school offer foreign language education	87	86	79
Middle school with foreign language programs	72	75	58
High school with foreign language programs	95	90	91
Commonly Taught Languages			
Spanish	86	93	93
Spanish for Spanish Speakers	1	9	8
French	66	64	46
German	20	24	14
Less Commonly Taught Languages			
Arabic	0	0	0.6
Chinese	0	1	4
Japanese	1	7	3
Russian	2	3	0.3
Other			
Latin	20	20	13
Advanced Placement	12	16	21

³³ Created based on information from “World Language Teaching in U.S. Schools” (<http://www.cal.org/flsurvey/prelimbrochure08.pdf>) and “Foreign Language Instruction in the United States: A National Survey of Elementary and Secondary Schools. Executive Summary” (<http://www.cal.org/projects/executive-summary-08-09-10.pdf>)

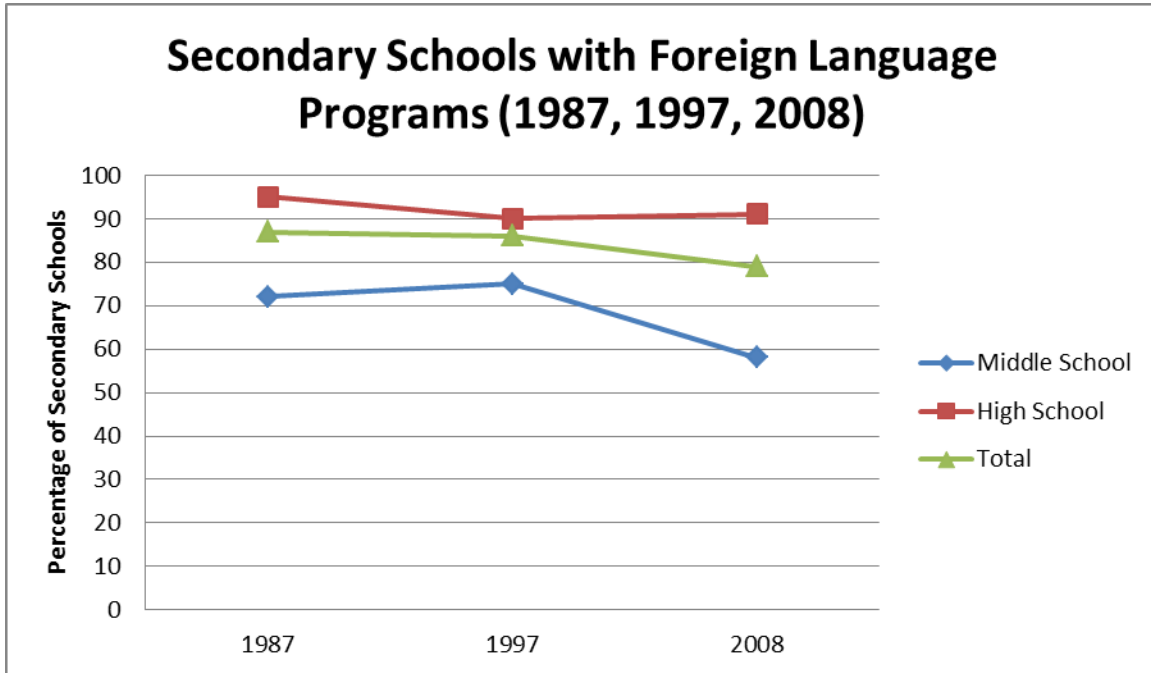


Figure 9. Secondary schools with foreign language programs (1987, 1997, and 2008) ³⁴

Middle School = Grades 7 – 8; High School = Grades 9-12; Total = Grades 7 - 12

³⁴ Created based on information from “World Language Teaching in U.S. Schools” (<http://www.cal.org/flsurvey/prelimbrochure08.pdf>)

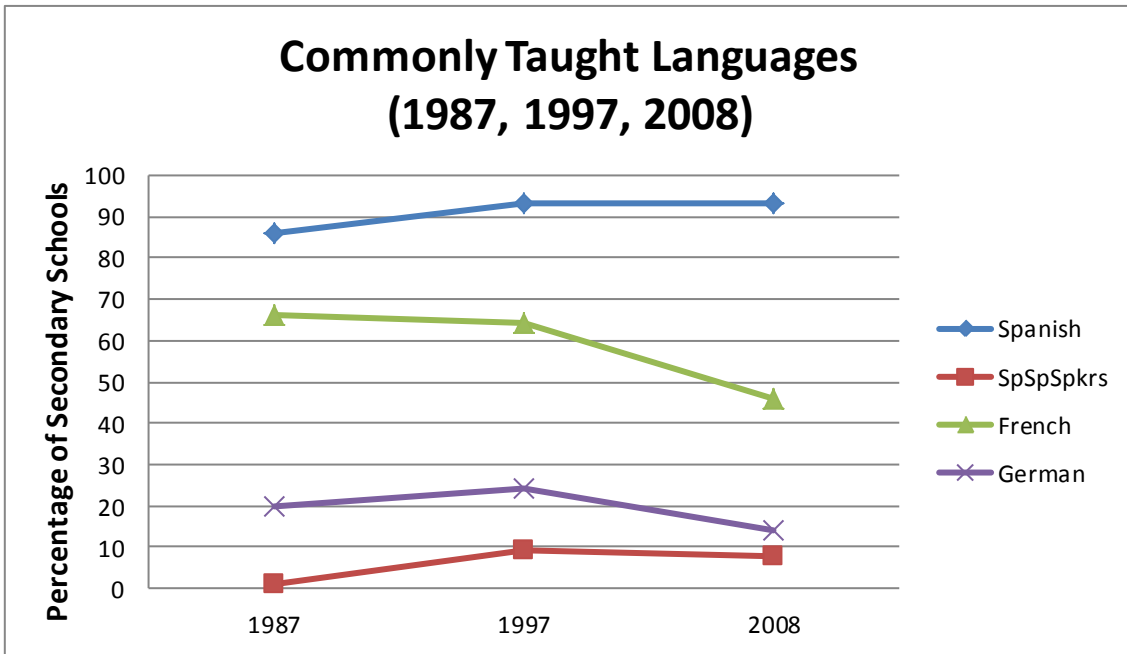


Figure 10. Commonly taught languages in U.S. schools (1987, 1997 and 2008)³⁵

³⁵ Created based on information from “World Language Teaching in U.S. Schools” (<http://www.cal.org/flsurvey/prelimbrochure08.pdf>) and “Foreign Language Institution in the United States: A National Survey of Elementary and Secondary Schools. Executive Summary” (<http://www.cal.org/projects/executive-summary-08-09-10.pdf>)

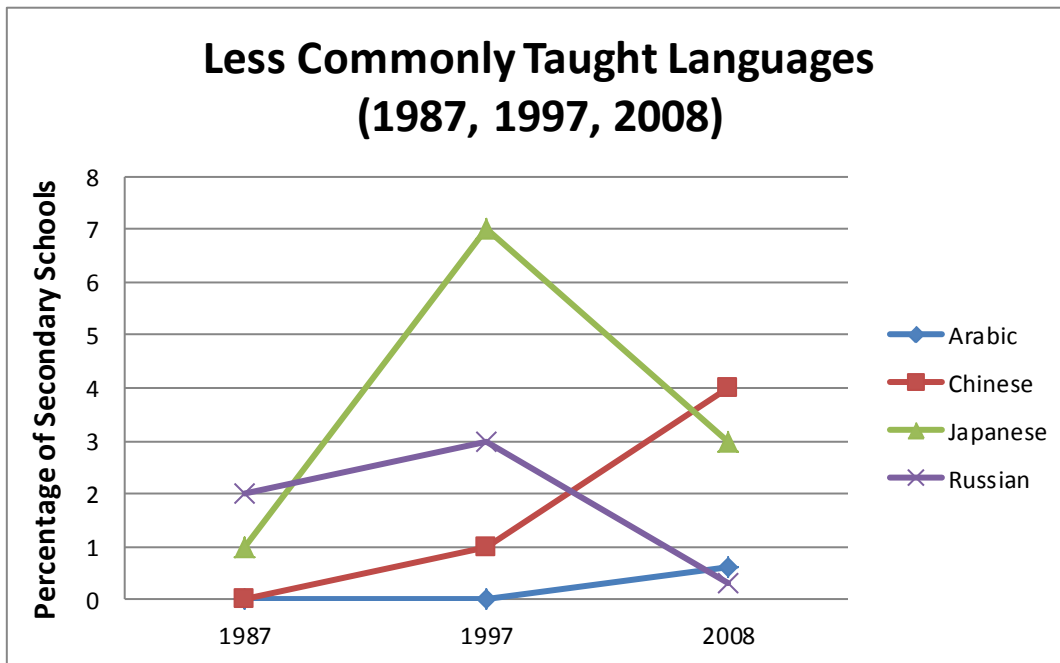


Figure 11. Less commonly taught languages in U.S. schools (1987, 1997 and 2008)³⁶

Figure 11 showed a sharp increase in secondary schools offering Chinese language programs between 1997 and 2008 and a slow growth in Arabic programs. However, a serious decrease appeared in schools offering Japanese and Russian programs between 1997 and 2008. During a high school visit, I was told that there used to be more students learning Japanese, but now more students were taking Chinese. Without any further research, no one could confirm that the decrease in the Japanese program was caused by the increase in the Chinese program. However, it is evident that a nation’s economy attracts the talent. At least that is the case for the U.S., Japan and China.

³⁶ Created based on information from “World Language Teaching in U.S. Schools” (<http://www.cal.org/flsurvey/prelimbrochure08.pdf>) and “Foreign Language Institution in the United States: A National Survey of Elementary and Secondary Schools. Executive Summary” (<http://www.cal.org/projects/executive-summary-08-09-10.pdf>)

In summary, foreign language education in the U.S. experienced “substantial cyclical changes” (Moore, 1992) and “frequent ups and downs” (Schultz, 2001, p. 3) over the past 60 years. Literature revealed that the NDEA had a positive impact on the growth of foreign language programs in the 1950s and 1960s, but it did not have a long-term effect. Government-led efforts in foreign language education were criticized as “often sporadic, often *ad hoc*, and typically temporary” (Jackson and Malone, 2009, p. 19). Much funding was invested, but student enrollment in foreign language programs and the number of schools offering foreign language instruction decreased overall, except for Spanish and Chinese programs. The enrollment rate of foreign language programs in public high schools remained low, especially for LCTLs; and few high school graduates completed four years of foreign language education with competency.

Some scholars blame the problems on insufficient government funding, misconceptions about learning foreign languages, lack of motivation and interest, and poor teaching (Parker, 1961). Some critics linked the failure to the fact that the law’s accountability measure focused exclusively on English and Mathematics, and therefore, many schools dropped foreign language classes and other non-tested subjects (Spolsky, 2011). Others believed that “the real issue is power” (Bennett et al., 1998).

Although the teaching of Arabic and Chinese increased in elementary and secondary schools and more language teachers utilized standards integrated from national and state guidelines, the 2008 national survey by CAL revealed a number of “disturbing trends.” These included inequities in access to foreign language education between rural/lower socioeconomic schools and urban/suburban schools; a decrease in foreign language enrollments in elementary and middle schools; the lack of a high-level language proficiency goal in the vast majority of

elementary and middle school foreign language programs; little articulation of language programs from one level to the next; and an acute shortage of qualified foreign language teachers. Rhodes and Pufahl (2009) concluded: “The overall picture of foreign language instruction in 2008 was no better---and in some areas worse---than in 1997” (p. 7). Perhaps, what concerned the public the most was “many schools offer foreign language instruction but do not expect proficiency” (Pufahl, 2010).

2.2 CHINESE LANGUAGE EDUCATION IN U.S. SCHOOLS

The review below mainly focuses on the development of Chinese language education in U.S. public schools because five of the six schools in this study are public secondary schools.

Although the first Chinese language class in the U.S. education system was instituted at Yale University in 1871 (Tsu, 1970), the history of U.S. public high schools offering Chinese language education began in 1952, when two public high schools were established in San Francisco, with 21 students in the fall of 1959. John B. Tsu of Seton Hall University (1970) pioneered the teaching of Chinese in secondary schools in the 1950s because of slow student enrollment in Chinese programs at colleges and universities. Tsu (1970, p. 568) described:

The pupils in secondary schools are young in age, flexible in tongue, animated by novelty and curious to hear [an] exotic language. If they are interested in Chinese, they can learn it well.

It was reported in 1962 that about 30 U.S. public high schools offered Chinese language, taught by part-time volunteers (Education: A Start in Chinese, 1962). Two years later, Frederick H. Jackson (1964) reported that seventy-five schools offered Chinese instruction, mainly in six metropolitan areas: Boston, New York, Chicago, St. Louis, San Francisco and Los Angeles.

Summer institutes for teachers of Chinese were initiated at San Francisco State College in 1961 and at Seton Hall University in 1962.

A survey conducted by the National Foreign Language Center (NFLC) in 1991-1992 showed a significant growth of Chinese language programs in secondary schools between 1962 and 1992 (More, 1992). For example, in 1962, 55 junior high school students and 254 senior high schools students in six states were enrolled in Chinese language programs. By 1990, 76 junior high school students and 7, 278 senior high school students in 32 states were studying Chinese language, with a growth rate of over 220 percent compared to the 1962 statistics. Unfortunately, the number did not specify how many students in each level of the programs (basic, intermediate or advanced).

It was not until the end of the 20th century that the number of students who studied the “less commonly taught languages”---Chinese, Japanese and Russian---began to increase (Moore, 1992). The Second School Chinese Language Center at Princeton University reported that “the number of high school students studying Chinese went from 6,227 in 1996 to 12,280 in 2000. At the middle school level, student enrollment went from 760 in 1996 to 3,386 in 2000” (Asia Society, 2001, p. 27). In 2008, there were about 60,000 students between the ages of four and 19 studying Chinese language in U.S. public schools, according to the American Council on the Teaching of Foreign Languages (ACTFL, 2010). However, some language experts point out, “many U.S. school programs offer general exposure to languages, but don’t expect proficiency” (Pufahl, 2010). As a more specific example, from 1997 to 2008, the proportion of secondary schools offering Chinese instruction rose from 1 percent to 4 percent (Rhodes & Pufahl, 2009, p. 5). According to Hon (2011), although the number (4 percent) was minuscule compared to the six million American students who took Spanish classes, it represented the most significant

growth in recent years (Hon, 2011), especially when most modern foreign language enrollment faded in public high schools. While many western political analysts believed that the growing interest in the Chinese language learning was driven by China's economic rise and its goal of building soft power worldwide, a Chinese teacher's survey of her classes showed that her students were interested in learning Chinese because they thought they might do business with, find jobs in or travel to China someday. They wanted to be able to speak a "cool" language (Interview with Respondent 15, June 27, 2011).

2.2.1 The early initiatives to promote Chinese language

Early efforts to promote Chinese at the secondary school level came from both the government and private sectors, such as the Carnegie Foundation, the Dodge Foundation and the United States Office of Education (currently known as the US Department of Education).

2.2.1.1 The Carnegie initiative

John B. Tsu of Seton Hall University (1970) and his colleagues Dr. Gordon Thayer of the Thayer Academy and Dr. K. Y. Hsu of San Francisco State College successfully gained support from the Carnegie Foundation and the Federal government in the 1960s and collaborated to introduce the teaching of Chinese in secondary schools. According to Tsu, the Carnegie Foundation allocated grants three times totaling over a million dollars. The grants were designated to support six regional metropolitan centers developing the teaching of Chinese in secondary schools. Seton Hall University, San Francisco State College and Thayer Academy were the three recipients of the first, one-year grant from the Carnegie Foundation in 1962. The second one-year grant was offered to the three institutions mentioned above plus Evanston Township High School,

Washington University in St. Louis and the University of Southern California in 1963. The following year, the same six institutions received a third-year grant from the Foundation. Funding was channeled through, and controlled by, university centers (except for one high school) with a strategic plan that called for each center to be responsible for promoting the teaching of Chinese in secondary schools in designated areas. For example, Seton Hall University was responsible for the New York-New Jersey metropolitan area; San Francisco State College responsible for the San Francisco Bay area; Thayer Academy responsible for Greater Boston area; Evanston Township High School responsible for greater Chicago area; Washington University in St. Louis responsible for greater St. Louis area; and University of Southern California responsible for greater Los Angeles area (Tsu, 1970, pp. 570-572). Most of the funding for high schools was used for salaries (Moore, 1992). The United States Office of Education also offered support by funding the training of language teachers and the compilation of instructional materials (Tsu, 1970).

The Carnegie investment was short-term, in hope that schools and universities would be able to develop self-sustaining programs after the initial support period. Most of the efforts seemed spent on developing materials and training teachers. For example, “San Francisco State College completed a series of four volumes, while Seton Hall compiled three sets of textbooks in twelve volumes in addition to two Chinese-English and English-Chinese dictionaries” (Tsu, 1970, p. 574). Moore (1992, p. 6) wrote:

While most efforts went to materials and training, programs developed in different parts of the country varied with regard to which students were targeted and when they were trained. Only one of the programs---developed in southern California---was opened to all students; two programs were for talented students who spent an intensive summer program learning Chinese followed by a weekend maintenance program during the academic year.

With the support of the NDEA and funding from the U.S. Office of Education, San Francisco State College added Chinese language teacher training to its Russian teacher training program in 1961. With its success, the Federal government provided more funding to support teacher training at both San Francisco State College and Seton Hall University. About 95 percent of secondary school Chinese language teachers at that time were graduates of those two institutions. By the end of the 1960s, over 200 high schools across the country offered Chinese as a credit course (Tsu, 1970).

Some major challenges and issues that the Carnegie programs encountered included (1) the language was perceived as too difficult for high school students to learn; (2) the Chinese program would draw students away from other more entrenched programs; and (3) studying Chinese was somehow a non-academic frill” (Moore, 1992, p. 6).

Despite those challenges and issues, the Carnegie Initiative left us invaluable experience for future initiatives for promoting Chinese language instruction in public secondary schools. For example, it identified student motivation, teacher training and the compilation of instructional materials as the key elements in the development of Chinese language education, regardless of the school level (the findings of this study also supported those key elements). Most importantly, that first attempt at teaching Chinese in public secondary schools would not have taken place without the generosity and the timely financial aid from the Carnegie Foundation and the U.S. Office of Education.

2.2.1.2 The Dodge initiative

The 1982 Geraldine R. Dodge Foundation Initiative was considered the second nationwide effort at expanding the teaching of Chinese in secondary schools in the U.S. (Moore, 1992). The decision of the Dodge trustees could be interpreted as either unusual or visionary, because they

chose to fund projects of teaching Chinese over Russian and Japanese in U.S. secondary schools. It was not clear why the Board of the Trustees chose Chinese over Russian. Perhaps, the Dodge trustees might have been influenced by Paul Simon's famous work "The Tongue-Tied American. Confronting the Foreign Language Crisis." As described in a 1984 letter to the Board of Trustees, what the Board hoped to achieve was "the quality of instruction be improved, enrollment grow, and the number of schools climb slowly and steadily for the balance of this decade" (Moore, 1992, p. 7). Considering that \$2.7 million was invested, the vision of the Dodge Initiative seemed very modest. It is worth mentioning that the Department of Education was about to publish the well-known report "*A Nation at Risk*" when the Dodge Initiative was about to launch. The report called for attention to education; and "both private and public schools were actively looking for ways to enhance the educational opportunities of their students" (Moore, 1992, p. 15). Meanwhile, China became increasingly visible in the international market.

Different from the Carnegie Foundation Initiative, the Dodge effort desired to "introduce and broadly support Chinese language instruction in American high schools" (Moore, 1992, p. 6). The Dodge Initiative attempted to build upon the strategy that Carnegie had developed in the 1960s, but with a difference. For example, Carnegie worked with high schools through colleges/universities (except for one high school), while Dodge focused solely on high schools. "There were 200 high schools offering Chinese classes at the peak of the Carnegie program, but only two high schools were with the program after 20 years; and only 20 schools had enrollment of more than ten students" during the entire program (Moore, 1992, p. 6). Other than the reason that Chinese was too difficult to learn, no research study had explained why only two of the 200 high schools offered Chinese 20 years after the Carnegie Initiative.

In comparison to Carnegie, the Dodge Initiative seemed more innovative. For example, efforts were made to develop textbooks “specially geared to high school needs” (Moore, 1992, p. 7); to provide teachers with professional development opportunities by offering summer training workshops; and to bring Chinese teachers from mainland China to teach in U.S. high schools.

While the Carnegie Foundation distributed its funds to schools through college/university centers in six metropolitan areas, Dodge distributed funds directly to individual schools, which was considered as the most significant characteristic of the Dodge Chinese Initiative. Dodge selected programs based more on academic quality than geographical location. “Whereas Carnegie looked for local colleges that could serve as models and mentors for the high school programs” (Moore, 1992, p. 7).

To maximize the chances for success, Dodge chose schools mainly based on their academic strength and hired outside professional experts to assist in the selection process (Moore, 1992). Schools were selected based on a substantial list of requirements and against criteria such as “high academic standards, high average Scholastic Aptitude Test scores, a high percentage of students continuing on to college and a high percentage of students studying foreign languages” (Moore, 1992, p. 10). Fifty-five schools were selected to participate in the project. Those selected seemed geographically representative, because about 46 percent of the participating schools were located in urban areas, while 44 percent were suburban and ten percent rural. Moreover, about two thirds of the participating schools were public, 25 percent were non-religious private schools and ten percent were church-related schools (Moore, 1992, p. 16).

While the Carnegie Foundation grants lasted three years, “Dodge support of the Chinese Initiative has continued for a decade---a long time for any foundation to focus on a single area”

(Moore, 1992, p. 7). According to Moore (1992), “most of the principals (94.8%) were very sure about the following year and the following three years (69.7%), but about half of them (45.7%) were not sure if the programs would exist in five years” (p. 23).

When asked about the factors that contributed to the success of the programs, according to Moore (1992), the principals of the Dodge programs stated that student interest, gifted teachers and school board support were the top components of successful programs. Parents’ interest, the importance of the language in the world and external funding were secondary. Other components included support of language teachers and support of the local ethnic community. “The survey from non-Dodge programs showed that the following reasons led to discontinued Chinese programs: decline in enrollment, decision external to the school, departure of teacher, external funding ended, general budgetary cutbacks on programs, and program quality” (Moore, 1992, p. 24).

Little information was found as to whether Dodge schools ever worked with Chinese heritage community language schools. Perhaps, Dodge programs might have benefitted much more if they had cooperated with Chinese language schools.

2.2.1.3 U.S. federal government-led efforts

Although the U.S. Office of Education began to provide funding to support the teaching of Chinese in public high schools in the 1960s, the first time that the U.S. government made a strategic plan for implementing Chinese language instruction was with the Chinese K-16 Pipeline Project announced by the National Security Education Program (NSEP) on May 4, 2005. The pipeline project focused on developing an articulated and sequenced language program for students in elementary school through college with the goal of “produc[ing] significant numbers of graduates, across disciplines, with advanced levels of proficiency in

languages critical to national security” (National Security Education Program, 2005, p. 3). This program responded to a number of the national language needs that were expressed at the 2004 National Language Conference at the University of Maryland. For the first time, the needs of elementary, secondary and post-secondary education systems and a need for coordination at the national level were addressed in the same document. Moreover, the NSEP released a Request for Proposals (RFP) for IHEs working in collaboration with elementary, middle and high school systems that already offer Chinese language instruction to establish such a Flagship program. The intention was to produce student speakers with a superior (ILR 3=Professional Working Proficiency) level of proficiency in Chinese through the end of the pipeline project (National Security Education Program, 2005, pp. 3-4; Edwards et al., 2008/2009, p. 30).

Another government effort was the United States-People’s Republic of China Cultural Engagement Act introduced by Senators Joseph Lieberman (D-DE) and Lamar Alexander (R-TN) on May 25, 2005. The Act expressed the Federal government’s commitment to enhancing mutual understanding between the two nations. The Senators suggested that the US Government should allocate \$ 1.3 billion in the following five fiscal years to expand and strengthen Sino-American exchanges and cooperation in the fields of education, science and culture.³⁷ According to the act, government grants would be allocated to Chinese language and cultural studies at the elementary, secondary and higher education levels. This plan was carried out through the Chinese Language Flagship programs at ten universities in the U.S.

³⁷ Source: <http://www.usa-china.org/news/index.php?func=detail&detailid=368&catalog=01&lan=en>

2.2.2 Chinese heritage community language schools

Operating outside the public school system, Chinese heritage community language schools (a.k.a. Chinese Language Schools) have been considered the first “organized” effort providing Chinese language education to school-aged children in the U.S. Many researchers and scholars have studied how Chinese language was taught in Chinese heritage community language schools (a.k.a. Chinese language schools) in the U.S. Examples included “Chinese Heritage Community Language Schools in the United States” (Chao, 1997); “Heritage Language Learners” (Wang & Garcia, 2002); “Ethnic language schools and the development of supplementary education in the immigrant Chinese community in the United States” (Zhou & Li, 2003); “Heritage Learners in the Chinese Language Classroom: Home Background” (Xiao, 2006); “Chinese Language Schools’ Language Policy for Non-Mandarin-Speaking Students (Wu, 2009); and “The Role of CIs in Chinese Heritage Language-Community Language (HL-CL) Schools: Stakeholders’ Views” (Liu, 2010).

Some scholars (e.g. Chao, 1997) traced the history of Chinese language schools in the U.S. back to 1848, when the immigration of Chinese laborers took place. Others (Liu, 2010) thought that the history began with the first Chinese language school founded in San Francisco in 1886, followed by the ones subsequently established in New York and Chicago (Chao, 1997) and then in other cities in the 1930s, such as Los Angeles, San Diego, Washington, D.C., New Orleans, Minneapolis and Oakland (Chao, 1997). By 1996, there were about 643 Chinese language schools and 82,675 students enrolled nationwide, most of Chinese descent (Wang, 1996, p. 1). Over the past few decades, there was an increase in students of non-Chinese heritage enrolling in Chinese language schools (Chao, 1997) (hereafter “Chinese language schools”).

Chinese language schools in the early years were considered family-oriented and shared the following characteristics: taught traditional Chinese, offered classes (and many still do) after regular school hours and had the sole purpose of continuing Chinese language and culture. Some Chinese language schools were for-profit, while others were non-profit. The for-profit schools included kindergartens, childcare centers and tutorial programs for secondary school students. Non-profit schools were usually affiliated with non-profit organizations, such as Chinese-American associations or religious organizations (Chao, 1997). Since most of the Chinese language schools are non-profit, the review below focuses on non-profit Chinese language schools.

Chao's study (1996) found that small schools (less than 150 students) operated in a much less formal manner and usually did not have a board of directors. Large Chinese language schools usually had a structure similar to that of public schools. The funding of Chinese language schools usually came from tuition and fundraising. "Only a few schools connected with religious organizations are tuition-free" (Chao, 1997, p. 8). In many Chinese language schools, parents participated as volunteers and were involved in various school functions, from teaching to performing administrative duties. In some cases, a "Parent Service Plan" was developed to make sure those volunteer parents fulfilled their promise of responsibilities (Chao, 1997, p. 10).

Chao further described:

Due to a limited number of teachers, students of small Chinese language schools were grouped in the same class, regardless of their level of knowledge or age. In large schools (more than 300 students), students of similar age with compatible levels of Chinese were assigned to the same class. To meet the needs of various types of students, Chinese language schools usually offered the following three types of classes, i.e. Mandarin Chinese Only Classes, Mandarin Chinese as Second Language Classes, and Chinese Language High School Credit Classes, with the first type offered in some small schools. Students who attended "Mandarin Chinese Only Classes" were usually of Chinese descent. Patterned after English as Second Language (ESL) programs, "Mandarin Chinese as Second Language Classes" were designed for students who are from families

of non-Chinese speakers or of other Chinese dialects. “Chinese Language High School Credit Classes” were for high school students (Grades 9-12). Those classes offered advanced level training in the four skills (listening, speaking, reading, and writing). Those who successfully completed the program would earn credits counted toward graduation by certain public high schools.

Recognition by the public school system has been a long-term issue among Chinese language schools. It was not until the 1990s that some public schools began to accept credits earned from Chinese language schools (Chao, 1997). One of the most significant changes was the establishment of the “mutually beneficial relationship” between Chinese schools and the formal education system in the U.S. (Liu, 2010). McGinnis’ (2005) proposal of promoting inter-institutional articulation among the various formal instructional settings such as K-12, Chinese schools, colleges and universities, and study abroad programs appeared to be quite foresighted. The current K-16 foreign language programs funded by the federal government can be considered a partial realization of such proposal.

Learning outcomes were mainly measured by exams and tests. In addition to quizzes, tests and exams given by the schools, several Chinese language tests were available to assess students’ learning outcomes. Examples included the tests designed by the Center for Applied Linguistics (CAL), SAT II Chinese by the College Board and the Chinese Proficiency Test (a.k.a. *Hanyu Shuiping Kaoshi* 汉语水平考试/HSK) by Hanban/CIH . The first Advanced Placement Test for Chinese Language and Literature was launched by the College Board in 2007. About 6,388 students took it and 6,163 exam takers scored 3 or above (5 = highest), which yielded 96.5% of the total participants in this exam, the highest average score of all the subjects. It’s not known how many of those exam takers were native Chinese speakers; how many of them were of Chinese descent; and how many were from non-Chinese speaking families. During a school visit, I was informed that native Chinese speakers (e.g. teenagers who

came from China with proficiency in Mandarin Chinese), were allowed to take the AP Chinese exam. A public school administrator felt that it was not fair to non-Chinese speakers. Some of the respondents in this study commented that it would be very unlikely for their students to pass the AP exam, even after completion of four or five years of Chinese language study.

2.2.2.1 Some major challenges and issues

As mentioned earlier, recognition by the public school system had been a long-term issue among Chinese language schools. Through the years, advocates of Chinese language schools had been seeking recognition from the formal education system. Many ideas and suggestions were proposed, such as building a link between Chinese language schools and U.S. public schools and having the formal education system accept credits and grades from Chinese language schools (Chao, 1997). Although the situation was improved, acceptance of credits and grades by public schools was still ongoing on a school-by-school basis. Some Chinese language experts (e.g. Wang, 1996) suggested that accreditation of Chinese language schools might lead to recognition from public schools, which might further increase students' interest and motivation to learn Chinese. They believed that collaboration between the formal education system and heritage community language schools might “enhance language learning for heritage students as well as native English speakers” (S. Wang, 1996, p. 6).

Chuang's (1997) survey found that despite the long history of Chinese language schools, the fast growth of Chinese learners and the support of Chinese immigrants and communities, some teachers of Chinese language schools felt that they were not very successful in teaching students to speak Chinese. But optimists argued that Chinese language schools could last more than one hundred years because of their “nonlinguistic functions,” such as promoting a sense of

cultural and ethnic pride, providing a socializing environment for parents and acting as a cultural base for Chinese immigrant communities (Liu, 2010).

Research studies also found that Chinese language schools experienced challenges and issues similar to those of public schools, such as how to motivate students to learn Chinese, find qualified teachers and suitable textbooks, improve curriculum and materials, increase public awareness, cultivate broad-based support, cooperate with state and local school districts, develop teacher training and certification, foster support among parents, improve articulation with other groups and institutions, and seek accreditation so studies completed at a Chinese language school could be recognized by the formal education system (P. Wang, 1996; Liu, 2010).

2.3 SCHOOL-UNIVERSITY PARTNERSHIPS IN THE UNITED STATES

Experts predicted that the twenty-first century would be the era of collaboration, and therefore, strategic alliances and collaborative partnerships would be the focus of research and practice in both business and social sectors (Alter & Hage, 1993, Achrol, 1997, Austin, 2000). The increasing interest in forming strategic alliances and collaborative partnerships across the public and private sectors in the U.S. thus far has supported the prediction.

Many strategic alliances and partnerships have been formed in the U.S. to increase mutual competitive capabilities and shared resources, aimed at solving problems and providing better products and services. New types of alliances and collaborations continue to emerge, which challenge the existing theories and require further research. “Partnership” became the buzzword of the 1990s (Chavkin, 1998), which continuously remains popular in the 21st century. More than ever, educational partnership is considered an effective vehicle for reforming school

education and raising the quality of education (Nelson, 2008). One example is the school-university partnerships that were formed upon an agreement between the U.S. and China, aiming to promote Mandarin Chinese in U.S. schools and colleges through a cooperative effort with Hanban/CIH and its CIs since 2004.

The concept of improving school education through partnership is not new in the U.S. Literature reveals that, for centuries, U.S. public schools have carried out reform efforts through partnership with various entities, such as businesses, educational institutions (e.g. universities), organizations and local communities. In the section below, I will briefly review the development of school-university partnerships (hereafter SUPs). The reason for studying SUPs is twofold. First, of various types of school partnerships, it is evident that SUPs have a long history and they are the most popular model used in school improvement and reforms. Second, this study is about how six U.S. schools worked with a university affiliation---the CI to develop Mandarin Chinese instruction.

2.3.1 A historical review

The history of schools improving education through partnerships could be traced back to after the American Revolution when U.S. secondary schools and postsecondary institutions became almost completely independent of one another (Greenberg, 1992; Greene & Tichenor, 1999; Matoba et al., 2007; Peel et al., 2002). Although other researchers held different views of how the historical period of SUPs should be divided, I suggest the following: 1855 – 1940s, 1950s – 1970s, 1980s – 1990s and 2000 – present. The reason is based on the development and purpose of school improvement and reform efforts, as well as the change of reform directions.

2.3.1.1 1855-1940s: “The search for a coordinated system”

Greenberg (1991) observed that education beyond the basic literacy level in the early years was heavily influenced by the European tradition and exclusively served the social elite and the privileged. Therefore, efforts were made to change the situation. One example was the establishment of the New England Association of College and Preparatory Schools in 1855. The purpose of that partnership was to improve communication, admissions procedures, curriculum coordination and high school certification among member schools. That was the first of many events called by the Carnegie Commission “the search for a coordinated system” (Greenberg, 1991, p. 24).

Another example was the establishment of the “model school for preparation of teachers through a living laboratory” by Illinois State Normal University (currently known as Illinois State University) in 1857 (Nelson, 2008, p. 3). Afterwards, efforts were made mostly in bridging the gaps between secondary and postsecondary education. One example was the recommendations made by the National Council of Education based on the report presented by James Baker, Denver High School principal in 1891 (Clark, 1986, p. 24). According to Clark (1986), the recommendations called for “an earlier introduction of basic elements of all the disciplines, interdisciplinary instruction, emphasis on study skills and critical thinking, upgrading of grammar school studies and uniformity of teaching for all students—college bound or not,” as well as “improvement of teacher preparation for elementary and secondary schools” (p. 24). Clark called it “one of the earliest...efforts at school/university collaboration” (p. 24). Other efforts were made to standardize and improve the college admission processes. Examples include the establishment of a comprehensive system of statewide Regents Examinations by the state of New York in 1878; founding the College Entrance Examination Board by the Middle

States Association in 1910; introducing the Scholastic Aptitude Test/SAT by the College Entrance Examination Board in 1926, which gained national acceptance in the 1940s. Clark (1988) characterized the school partnerships during that period as “prescribing entrance requirements, specifying courses, and establishing entrance examinations” and “to produce similarity among schools, to promote the personal power of individuals in the networks, and to establish conceptual, ‘scientific’ approaches to school management” (p. 46).

2.3.1.2 1950s-1970s: Emphasizing “in-service education” and “continuing professional development”

As Greenberg (1991) described, “the onset of the Korean conflict in the early 1950s and the deepening Cold War between the United States and the Soviet Union heightened the urgency to increase military and technological development and led to a call for the universal conscription of all 18-year olds” (p. 27). As a result, “five models for student acceleration ...underwritten by the Ford Foundation through its Fund for the Advancement of Education” were established to “bridge the gap between school and college” (Greenberg, 1991, p. 27). Several programs were established to “accelerate high-performing students into college at earlier ages” (Greenberg, 1991, p. 27), which led to the creation of the Advanced Placement (AP) Program in 1955.

Some scholars described “a screeching halt” (Maeroff, 1983, Maeroff et al., 2001) and “a period of relative quiescence” (Greenberg, 1991, p. 27) in the 1960s, but Clark (1988) argued that many cooperative efforts took place at that time. Examples include the workshop “sponsored by the Association for Student Teaching and the American Association of Colleges for Teacher Education,” and “the League of Cooperating Schools initiated by John Goodlad between the Graduate School of Education at UCLA and a number of Southern California schools” (Clark, 1988, p. 47). The concerns over several issues such as “the worth and

competitiveness of American education” and “the continuing failure of schools and colleges to adequately address issues of access and equity” (Greenberg, 1991, p. 28) led to several serious reforms in the 1980s.

2.3.1.3 1980s-1990s: “Enhancing the quality of teacher preparation and school education”³⁸ through SUPs

Although partnerships between high schools and colleges/universities had existed for over 100 years, the contemporary history of SUPs in the U.S. began in the mid-1980s. The National Commission on Excellence in Education report “A Nation at Risk: The Imperative for Education National Reform” was released in 1983, urging improvement in the quality of education by reforming the education system in the U.S. (Tsui et al., 2009). Public schools and universities responded to the call by forming partnerships to improve the quality of teacher education in universities and that of classroom teaching in public schools (Borthwick, 2001; Osguthorpe, 2001; Tsui et al., 2009).

The most renowned effort to train better teachers and build better schools at that time was made mainly by three groups (although many other types of SUPs also existed at that time), i.e. the Holmes Partnership (a consortium of ninety-six research universities), the American Association of Colleges for Teacher Education, and the National Network for Educational Renewal (NNER), a consortium of school-university partnerships.

One of the most notable SUPs during that period was The Holmes Group, which was established in 1987 as “a consortium of education deans and chief academic officers from 96 major research universities across the United States who came together in the knowledge that

³⁸ Edwards et al., 2008/2009, p. 8

their own schools and universities were not doing well in education” (Tsui et al., 2009, p. 5). In response to the Holmes Group’s 1986, 1990 and 1995 reports, Professional Development Schools (PDSs) were established to be “a site where initial teacher education, professional development of teachers, improvement of teaching and learning and educational research are integrated” (Tsui et al., 2009, p. 5). The Holmes Group movement “sought to improve pre-service and in-service teacher education through increased ties to colleges of arts and sciences and to school-based educators” (Borthwick, 2001, p. 24).

Another example was the BYU-Public School Partnership, which focused on “strengthening teacher education programs, developing more effective approaches to professional development for teachers, designing more effective curriculum, and conducting research and inquiry projects that lead to better education practice” (Osguthorpe, 2000, p. 38).

Partnerships aimed at school improvement and restructuring (Greenberg, 2001) included The Boston Compact, a local-level partnership formed as a product of the educational reform in 1982 between troubled public school systems and business leaders. The University of Southern Colorado/School District 60 Alliance was yet another. Formed in July 1991, the partnership between the university and the local school district aimed to develop closer curricular coordination while looking for a creative way to use college and public school teachers, such as college teachers teaching in public schools.

Two examples of partnerships that resulted from statewide reforms were California’s Achievement Council and Mississippi’s Project 95. The former was known for its effort to integrate public and private resources in order to better serve the under-represented population of the public schools. The latter, beginning in the spring of 1990, attempted to get Mississippi’s three major public education governing bodies (the Board of Trustees of State Institutions of

Higher Learning, the State Board for Community and Junior Colleges and the State Board of Education) to work together and raise education standards at all levels throughout the state.

At the national level, several school-college partnership efforts were initiated as a result of the nationwide reforms. One example was the establishment of the National Network for Educational Renewal (NNER) in 1985, which was aimed at influencing state policy makers. Another example was the Coalition of Essential Schools, a partnership between Brown University and schools in the Rhode Island and Massachusetts areas. Perhaps the most complicated partnership nationwide in the 1980s was the EQ Models Program for School-College Collaboration of the College Boards (Greenberg, 2001). Launched in 1980, the project's long-term goals were to improve the quality of secondary education and to ensure equal access to postsecondary education for all students. By 1987, the partnerships involved 125 school systems or individual high schools and 60 colleges and universities (The College Board, 1987). The EQ model was considered the most complicated partnership at that time because of its unique and diverse characteristics, such as school-college partners, at-risk students, use of combined high school and college expertise to improve student learning, the involvement of both public and private institutions, regional, racial, ethnic and financial diversity, and a blend of urban, suburban and rural areas (Greenberg, 2001).

Literature revealed that the 1980s were the turning point for the SUP development. On the one hand, SUPs continued their traditional route focusing on school renewals and teacher preparation. On the other hand, new partnership approaches were introduced, such as increasing student learning outcomes, seeking "equal status" and developing a symbiotic relationship between partners. Those characteristics were reinforced in the 1990s. In addition to enhancing student learning outcomes, the focus was also on professional development education and the

sharing of resources. Such changes and emphases were recognized and supported by researchers such as Feldstein and Benner (2004) and Firestone and Fisler (2002), who found in their studies that the expectations of the partnership had been met through increasing academic development, student knowledge and student's interest in learning. In the same studies, researchers also identified three interrelated issues: the organization of the partners, the absence of the elements of the professional community and the effectiveness and transformation of leadership in politicized situations. Although Firestone and Fisler (2002) had a clear idea of building an ideal professional community for a successful school-university partnership, how to create effective leadership among the leaders and potential leaders in a partnership remained a challenge.

It was evident that increasing and enhancing student learning outcomes were the main focus of SUPs during the period of the 1980s – 1990s. One example was the Massachusetts Coalition for School Improvement (MCSI), which was “built on parity and designed to increase the amount and quality of student learning” (Sinclair & Harrison, 1988, p. 87). In addition to improving student learning, MCSI was also unique for emphasizing the importance of leaders and increasing the community awareness and involvement in educational problems and issues. Another example is the Puget Sound Educational Consortium (PSEC) partnership with the University of Washington, College of Education (Keating & Clark, 1988). Formed in 1985, PSEC “was an interaction of peers” in response to “the public rhetoric regarding educational reform and renewal” (Keating & Clark, 1988, p. 149). Different from other scholars who focused on “antecedent coupling” and “the events,” Keating and Clark (1988) emphasized “the insights” for “understanding the evolution of the consortium and the fragility of [the] interorganizational relationships” (p. 148). In their view, the development of the partnership was unique for its efforts in building leadership through a “Leadership Academy,” its “commitment to equity and

excellence in education” (p. 159) and its initiation of a finance project “to improve educational funding” (p. 159).

Allexaht-Snider et al. (1995) appraised the SUPs effort during that period, saying that “one sustaining legacy of the critical reports of teaching and teacher education in the 1980s is the emergence of local school-university partnerships committed to educational renewal throughout the U.S.A.” (p. 519). Osguthorpe (2001) commented that “one of the positive outcomes of the 1980s school reform movement has been a subtle improvement in school-university collaboration” (p. 1).

Most of the SUPs in the 1980s were characterized as: (1) usually initiated by colleges/universities; (2) the goals of the partnerships usually focused on student preparation for college admissions, college recruitments and teacher education; (3) formed to meet the expectations of colleges and universities for high school graduates; and (4) some SUPs work in cooperation with professional organizations. The SUPs in the 1990s and afterward continuously enhanced student learning while focusing on professional development and sharing of resources. Feldstein and Benner (2004) considered improving teacher education and schools part of the changing effort, which could be achieved through increasing student learning.

2.3.1.4 2000 – Present: Heading toward “whole school reform” and “community support”

The school-university reform efforts in the 21st century were characterized as continuous efforts to build “better teachers, better schools” (Goodlad, 1994), developing and implementing the “whole school reform” models (Vernez et al., 2006) and soliciting “community support” (Narcisse, 2007). While continuous efforts were made to improve the quality of public school education and teacher preparation (Prater & Sileo, 2004), “schools establish partnerships with

community organizations” to “create a more holistic picture of student success” (Gutierrez et al., 2007, p. 333).

Researchers (e.g. Vernez et al., 2006) informed us that the concept of the “whole school reform” originated from the “No Child Left Behind Act” of 2001, which “requires that schools reach 100 percent proficiency in reading and mathematics for all students by 2014” (p. 1). As Vernez et al. (2006) described, under steadily increasing pressure for improving student achievement, many schools undertook the “whole school reform,” which was also known as “comprehensive school reform (CSR).” Vernez et al. (2006) considered CSR one of a limited set of interventions that the “No Child Left Behind Act” explicitly identified for schools that needed to improve their performance. Martinez and Harvey (2004) described that “whole-school reform connotes a coherent strategy to improve all aspects of a school, from instruction to school structure, with a focus on improving the learning of all students in all subjects rather than focusing solely on particular populations of students within a school or performance in specific subjects” (p. 5).

One example of the developments of school-community partnerships was the approval of the state of Tennessee on July 7, 2010 allowing Pearson K-12 Solutions to provide Whole School Reform, Professional Development and Technical Assistance to improve the state’s struggling schools as part of its “Race to the Top” implementation (PEARSON, 2010). It was reported that Pearson K-12 Solutions’ School Turnaround Education Partnership (STEP) plan had consistently demonstrated gains in student achievement as well as in school culture and distributed leadership. One of the 10 core elements in the (STEP) plan was to “create collaborative education partnerships” (PEARSON, 2010).

Another example was the study conducted by Monica Solomon and Maria Voles Ferguson, which focused on how to involve the key stakeholders — teachers, parents, students and community members — in building long-term, community-based support for the CSR efforts.

2.3.2 The common SUP models in the United States

As mentioned earlier, schools in the U.S. formed partnerships for various reasons. Some were to produce “better teachers” and “better schools” to meet students’ learning needs, while others worked together to “increase student learning” (Sinclair and Harrison, 1988, p. 87). To understand school partnerships in the U.S., scholars (e.g. Greenberg, 1992; Handler and Ravid, 2001) suggested that one should first learn about some common school partnership models.

Through the years, various school-university partnership models have been developed. Handler and Ravid (2001) pointed out that SUPs usually fell under the following four models: the Professional Development School (PDS) Model, the Consultation Model, the One-to-One Collaborations Model and the Umbrella Model. The PDS Model referred to a partnership between a university and a PDS, which Dolly and Oda (1997) described as “a teaching hospital--a place where professionals are prepared for and introduced to the best practices to improve the lives and learning of children” (p. 179). The main purpose of such a partnership was to develop pre-service teacher training, that is, “a university works with one or more schools or districts” in a formal or informal relationship (Handler & Ravid, 2001, p. 3). Examples included a multi-year collaborative relationship between a university faculty member and a school principal and teachers (Gates-Duffield & Stark, 2001); the development of collaborative relationships between two elementary schools and a university (Hasslen et al., 2001); the partnership between a School

of Education and a local PDS (Rafferty and Leinenbach, 2001); a three-way, “virtual collaboration” developed by a university faculty member and a high school teacher (Steffel & Steltenkamp, 2001); and a 10-year collaboration between a school of education and a nearby inner-city school (Sosin & Parham, 2001).

The Consultation Model referred to arrangements in which one or several university faculty members worked with one or several school teachers. The main purpose of this partnership was “to improve instruction and teacher’s professional development” (Handler & Ravid, 2001, p. 3). Examples of this type of model included a collaboration growing out of a vision shared by a university faculty member and a junior high school principal (Robb & Cronin, 2001); an eight-year study on an initiative by the National Humanities Center (Schramm et al., 2001); and a study of a three-year university-public school collaboration by Wiburg & Lozano (2001).

In the One-to-One Collaborations Model, a university faculty member worked as an equal partner with a school-based practitioner. Both partners “plan and carry out the research project” (Handler & Ravid, 2001, p. 4). Examples of this model included a six-year collaboration between a university faculty member and a school based practitioner (Freedman & Salmon, 2001); a unique collaboration between a school district researcher and a classroom teacher (Lafleur & MacFadden, 2001); and a school-university partnership initiated by a school principal’s application for a grant for professional development (Vozzo & Bober, 2001).

In the Umbrella Model, multiple project teams were collaborating under one umbrella organization that acted as the facilitator. Each project team was composed of university-based and school-based educators, as well as other possible stakeholders. Collaboration in this model took place within each team and across teams (Handler & Ravid, 2001). One example of the

Umbrella Model given by Handler and Ravid (2001) was the Center for Collaborative Research at National-Louis University (CeCoR), which was co-directed by the two authors. The CeCoR collaborative initiative began in the fall of 1990, with the purpose of “bring[ing] together school-based practitioners and university faculty who were seeking opportunities to work collaboratively on topics of mutual interest” by creating an umbrella organization (2001, p. 237). According to Handler and Ravid, their umbrella organization was based on the partnership model created by Cole and Knowles (1993), who believed that “each partner contributes particular and important expertise; the relationship between the partners is multifaceted and does not follow a hierarchy of power” (Handler & Ravid, 2001, p. 238).

The umbrella partnership model was found different from other SUPs in several aspects. First of all, the umbrella partnership model provided a forum for school-based practitioners so their voices could be heard and their expertise could be added to the body of knowledge in the field. Secondly, this model created an environment in which all participants would benefit from the partnerships and professional growth opportunities. Thirdly, the model “bridges the gap that often exists between university faculty and school-based practitioners” (Handler & Ravid, 2001, p. 239), e.g., the inequality between university faculty and school-based practitioners. As mentioned earlier, traditionally in a school-university partnership “university faculty” were often viewed and acted as “experts” and “leaders,” while “school-based practitioners were often treated as the less knowledgeable” and “followers.”

The structure of the partnership in this study was somewhat similar to the Umbrella Model described by Handler and Ravid (2001) above. For example, each partner school and/or Confucius Classroom worked as an individual unit with the CI. However, a major difference

between the two was that the SUPs in this study consisted of a group of school-university partnerships, while the Umbrella Model had several “teams” working within one SUP.

2.3.3 Some characteristics of SUPs in the United States

Tsui et al. (2009, p. 25) pointed out the complex nature of SUPs as follows:

School-university partnership is an immensely complex enterprise. Schools and universities have different missions and they set out to achieve different goals. No matter what model of school-university partnership is adopted, whether complementary or collaborative, the involvement of universities and schools in the provision of teacher education necessarily generates conflicts because of their different perspectives, cultural norms and priorities.

Upon review of the SUPs mentioned above, the following characteristics emerged.

Characteristic 1: University-led efforts vs. school initiatives

Historically, SUPs were initiated and led by university faculty or researchers. However, the trend in recent years was that schools reached out and sought outside partners. The concept of “HEI [Higher Education Institution]-led” SUPs in the U.S. had existed for some time. As Tsui et al. (2009) pointed out, “the majority conformed to a ‘HEI-led’ model of partnership in which the university defines roles and relationships and maintains tight control over the structure and content of teacher education programs” (p. 13). Some early “HEI-led” examples included the Metropolitan School Study Council, a partnership between Columbia University Teachers College and local public schools aiming to improve teacher education (Lieberman, 1988, p. 69); the Massachusetts Coalition for School Improvement, (Sinclair and Harrison, 1988, p. 87), the Southern California Partnership (Heckman, 1988, p. 106), the Brigham Young University-Public School Partnership (Williams, 1988, p. 124), and the Puget Sound Educational Consortium, a partnership between the University of Washington College of Education and some urban and

suburban school districts focusing on improving “[school] leadership for educational renewal” (Keating and Clark, 1988, p. 148). Although SUPs formed in the 1990s attempted to achieve “equal status” between partners, researchers found that the “HEI-led” and “university-expert” phenomena still remained an issue in many cases. A main reason was that universities usually had more grants for research projects.

Characteristic 2: Most participation was voluntary, while some seemed against schools’ will.

Participation in a partnership was voluntary in most cases, though in some cases school participants felt reluctant to participate in the early stage of the partnerships. As Osguthorpe (2000) pointed out, “participation must be voluntary for a partnership to achieve its stated goals” (p. 3). Previous literature indicated that very often SUPs in the U.S. were voluntary. In many cases, participants were very willing and enthusiastic about a partnership. Some examples included the 15-year BYU-Public School Partnership (Osguthorpe, 2003); the Center for Collaborative Research at National-Louis University (Handler & Ravid, 2001) and the Rider PEOBE (Feldstein & Benner, 2004). However, in some cases, participating schools were reluctant when they were required to work with universities due to low performance of their teachers and students, such as schools with “at-risk” and “under-represented” students.

Characteristics 3: Aimed at improving the teaching and teacher education, student learning and school performance

School-university partnerships were usually formed to improve teaching and teacher education, student learning and school performance. It was evident that many SUPs were formed to solve some common problems such as improving pre-service teacher education and teacher professional development; restructuring/renewing schools, increasing student learning; improving curriculum and for “individual and institutional renewal” (Goodlad, 1988, p. 4).

Examples of such efforts included the Holmes Group, which consisted of 96 major research universities working with local schools (and later “with seven national professional associations”) on “improving pre-service and in-service teacher education” (Borthwick, 2001, p. 24); “the Learning Connections Lab” (Hasslen et al., 2001), an initiative by St. Cloud State University with St. Cloud School District focusing on producing qualified teachers and improving student learning; and “the Center for Collaborative Research at National-Louis University” (Handler & Ravid, 2001). Few studies have been conducted on how U.S. secondary schools developed a Mandarin Chinese curriculum through an SUP in an international context.

Unlike the SUPs prior to the late 1980s, which mainly focused on improving pre-service teacher education, the SUPs since the 1990s had emphasized increasing student learning through improving teacher education. One example was Kirschenbaum and Reagan’s study (2001) on how one university (the University of Rochester) partnered with one city school district (the Rochester City School District) running 57 collaborative programs. Other examples included the “Massachusetts Coalition for School Improvement that focused on classroom instructional practices and student learning” (Sirotnik & Goodlad, 1988, p. ix); the school-university partnership study conducted by Goduto et al. (2008), which enhanced student learning through improving school leader preparation programs; and the study conducted by Bartholomew and Sandholtz (2009), which fostered student learning through enhancing teacher’s professional development. Based on the BYU-Public School Partnership experiences, Osguthorpe (2000) advised us that SUPs should always have “the aim of improving pupils in the schools and students in the university” (p. 3). However, the SUPs in this study were about improving pupils in U.S. schools and student teachers in a Chinese university.

Characteristic 4: “Dissimilar in fundamental ways and yet share some common goals”

Osguthorpe (2000) pointed out that SUPs were organizations that “are dissimilar in fundamental ways and yet share some common goals”; and “have evolved from disparities in institutional funding and resources, student bodies, teachers and teaching, faculty roles in decision making, and institutional leadership style” (p. 1). Goodlad (1988) defined a partnership as “a deliberately designed, collaborative arrangement between different institutions” (p. 13). French & Bell (1999) found that a partnership was two separate groups aimed at achieving “an objective but has separate accountability” (p. 73). Borthwick (2001) compared a partnership to an organization that was formed with a shared goal, but maybe different motivations. Those findings described a partnership that was formed by different entities with different goals, interests, motivations and responsibilities, but sharing some common goals and interests at the same time. Different from the SUPs mentioned above, the SUPs in this study were “dissimilar in fundamentals ways” and their goals were yet to be common. For example, though both Chinese and U.S. partners shared a common goal of promoting Chinese language and culture for the purpose of enhancing the understanding of each other, both countries also had their own agenda to increase their competitiveness in the global market and establish and secure their leadership in the world. At the operation level, U.S. schools focused more on their students, curricula and programs, while the CI could be more concerned about the university’s publicity and reputation.

Characteristic 5: “Equal status” as a shared goal in SUPs

Although “equal status” has yet to reach its maximum, it has been a shared goal in many partnerships. As early as in the 1980s, scholars (e.g. Clark, 1988; Goodlad, 1988) emphasized the importance of “equal partnership.” Many studies since then have shown that SUPs functioned well when partners felt they were treated equally and respected for their knowledge and expertise. In many cases, participants reported that the “expert model” and the “top down”

approach did not seem effective in the real world. For example, while developing their partnership project, Rafferty and Leinenbach (2001) questioned the “university expert” model and felt uncomfortable working in a hierarchical environment. They concluded that SUPs would work more effectively if participants of both institutions “proceed as equal partners” (p. 77). Steffel and Steltenkamp (2001) also testified that in a “virtual collaboration” between a university and three high school classrooms in different locations, the collaboration worked much better when the university “expert” gave up “the need to control” and worked as an “active participant” (p. 91). In a similar vein, Lefever-Davis et al. (2007) suggested that SUPs should be in a position of equal status, unlike the traditional type in which the needs of the university carried more weight; and the effectiveness of the partnership was often measured based on whether the university’s expectations had been met. The researchers believed that “equal status” among partners was crucial to a successful partnership, but is it possible for a partnership to succeed without achieving “equal status?”

Characteristic 6: Problem-solving projects funded by government or foundation grants

Scholars (e.g. Borthwick, 2001; Cavallo et al., 2007; Lefever-Davis et al., 2007; Narcisse, 2007) pointed out that SUPs were often problem-solving projects and usually funded by grants from government agencies or private foundations. As Borthwick (2001) stated, “grant funding encourages proposals involving partners in the Teacher Quality Enhancement, Preparing Tomorrow’s Teachers to Use Technology, and Comprehensive School Reform Development programs” (p. 24). Other examples included the Holmes Group and the partnerships as part of the Holmes Group movement, the National Council for Accreditation of Teacher Education (NCATE)’s development, and the national networks such as the National Center for Restructuring Education, Schools and Teaching (NCREST), the National Network for Education

Renewal (NNER), and the Learning Connections Lab (LCL), a partnership between St. Cloud State University and St. Cloud School District #742 (Hasslen et al., 2001, p. 60).

Although few studies found how and why partnerships ended, researchers believe that lack of funding was one of the main reasons that a partnership dissolved. During the interviews, several respondents informed me that some schools and school districts had lost their Chinese language programs due to the lack of funding, which was not uncommon when many schools and school districts suffered from economic crises and budget cuts nationwide.

Characteristic 7: The trend of increasing community involvement

Although SUPs in the U.S. were usually academic alliances, community involvement had become increasingly emphasized. In the case of the Massachusetts Coalition for School Improvement, one of the goals set by the Coalition was “to promote increased community awareness and involvement in educational problems and issues” (Sinclair and Harrison, 1988, p. 89). Despite this, community participation in educational partnerships prior to the 2000s was rare. As Sosin and Parham (2001) described, few SUPs had community involvement in the 1990s; and few research studies had discussed community involvement in SUPs. According to Sosin and Parham, “community involvement” in early years mainly referred to the involvement of “parents and community organizations” (p. 100) and “the community school advisory board” in partnerships with schools (p. 104). One example was the long-standing collaboration of more than thirty years’ duration between a public school called “Center-City School” and “Metropolitan University” (p. 99). In that case, the school Board “provides opportunities for members from all community organizations to interact on current and proposed projects” (p. 104), and parents could advocate as “Center-City’s Community School liaisons” (p. 105).

Researchers (e.g. Narcisse, 2007) believed that a community's involvement and support was crucial to the sustainable development and success of SUPs. According to Narcisse (2007), strong partnerships would benefit both the school and community and vice versa. As Narcisse (2007) described, the purpose of the school-community partnership was "to help students achieve academically for better opportunities in society" (p. 20). By getting local communities involved in education, schools would be able to engage students in active learning, share the community's resource pools, and increase the school's and community's visibility and sustainability. In return, the partnerships would serve the community's needs. Narcisse (2007) also pointed out that knowing and understanding the key players in the school-community partnership would also be critical to the effectiveness and success of a partnership. Moreover, SUPs would become sustainable when stakeholders and local communities were involved. It was evident that community involvement had left long-term effects on partnership sustainability.

Characteristic 8: Government initiative vs. school-university effort

Historically, SUPs were usually considered a top-down effort, i.e. inspired by research grants from the government and "through government policy, laws, and public programs" (Nelson, 2008, p. 1). Examples included the school renewal reforms in the early years as well as those that took place in recent years, such as the New England Association of College and Preparatory Schools in 1855; the comprehensive system of statewide Regents Examinations by the state of New York in 1878; the creation of the Advanced Placement Program in 1955; the Holmes Group in 1986; the "No Child Left Behind" (NCLB) in 2001; and the "Race to the Top" in 2010, a \$4.35 billion reform effort funded by United States Department of Education to improve K-12 education.

Since the 1980s, more SUPs had been initiated by schools and/or universities. Examples included the one-on-one collaboration initiated “at the classroom level” (Steffel & Steltenkamp, 2001, p. 98); the partnership initiated by “six teachers from a suburban junior high school and [a] university faculty member” (Robb & Cronin, 2001, p. 116); and the partnership between Central Michigan University and West Intermediate School that grew out of discussions about “becoming a PDS school” (Gates-Duffield & Stark, 2001, p. 47). Researchers also noticed that it was not uncommon for SUPs to start in an “informal” and “loose” form, in which key participants “meet irregularly and informally” (Keating & Clark, 1988, p. 164).

Another phenomenon was that partner schools and universities were usually located in the same geographic area, and some were across states. For example, the Metropolitan School Study Council, a network of Columbia University Teachers College and 48 school districts, aimed at improving teacher education in three states (Lieberman, 1988).

Characteristic 9: A successful SUP usually had a shared vision, common goals, mutual self-interests and an organic and reciprocal relationship

Partnership experts agreed that successful SUPs were bonded by a shared vision, common goals, mutual self-interests and organic and reciprocal relationships. In other words, a partnership could only succeed when school and university partners quickly realized the importance of those traits and worked collaboratively to achieve them. One example was the Massachusetts Coalition for School Improvement, in which the partnership was committed to a common goal--- “increasing the amount and quality of student learning” (Sinclair and Harrison, 1988, p. 87). The researchers observed that the Massachusetts Coalition “join[ed] public elementary and secondary schools and the University of Massachusetts,” identified their shared goals, obstacles and premises, and developed symbiotic and reciprocal relations. They believed that “educational

change depends on parity among participants and reciprocity between schools and universities” (p. 87). They explained that schools needed better teachers; and universities carried the responsibility of training better teachers. As Goodlad (1985) described, universities had a stake in school improvement and schools had a stake in teacher education.

Kirschenbaum and Reagan (2001) attempted to gain understanding of the extent and complexity of the partnership process and the types and quality of collaboration. Their research results showed that partnerships served a large number of city school students and the outcomes generally met the university’s expectations, though I would question the fairness of measuring the outcomes of the partnership against the university’s expectations only. They also reported that, like many other SUPs, dissatisfaction and problems existed, such as “inconsistent commitment to the collaboration by school personnel, poor communication, and lack of shared program development and ownership” (p. 501). Their findings shared the same view of many previous research studies on SUPs, especially in the aspects of communication between partners and the level of commitment to partnerships. One valuable suggestion from Kirschenbaum and Reagan’s study (2001) was to periodically assess the quality of partnerships.

One of the most interesting debates between partnership scholars such as Sirotnik and Goodlad (1988) and Schlechty and Whitford (1988) was about “a symbiotic relationship” over an “organic” one. Sirotnik and Goodlad proposed “a symbiotic relationship” as one of the essential conditions for the formation of collaboration, while Schlechty and Whitford (1988) pointed out that “symbiotic relationships were inherently fragile, temporary, and even given to fickleness” (p. 191). Schlechty and Whitford insisted that there was a fundamental difference between the “symbiotic” and “organic” relationships: the former emphasized “mutual self-interest,” while the latter stressed “the common good” of the “whole” relationship (p. 192).

Schlechty and Whitford asserted that the outcomes would be much better “if collaborative efforts moved from symbiotic relationships to organic relationships” (p. 191). They suggested that “a boundary-spanning organization should be invented to promote the common good and only organic relationships could help achieve this goal” (p.194). It is beyond the scope of this study to find who would win the debate, but the concepts of “boundary-spanning organization” and “organic relationships” were worth exploring.

2.4 CONFUCIUS INSTITUTE AND CONFUCIUS CLASSROOM

2.4.1 Confucius Institute (孔子学院)

Although Chinese language education had existed in U.S. public schools for decades, Mandarin Chinese did not become popular in the U.S. school system until the mid-2000s, when Hanban/CIH began promoting the teaching of Chinese on a large scale through its CIs. Like the Carnegie Foundation, which “looked for local colleges that could serve as models and mentors for the high school programs” (Moore, 1992, p. 7), Hanban/CIH’s strategy was somewhat similar in that it established CIs within selected universities or educational organizations and marketed Mandarin Chinese through its CIs in local public and private K-12 schools and colleges and universities that did not have Chinese language instruction. Learning from the experiences of other international language promotion organizations such as *Alliance Française* (France), *Goethe Institut* (Germany), *Instituto Cervantes* (Spain) and the British Council, Hanban/CIH became the most influential language and culture promotion agency in the world in less than five years.

After the establishment of a pilot institute in Tashkent, Uzbekistan in June 2004, the first CI was opened on November 21, 2004 in Seoul, Republic of Korea. According to Hanban/CIH, by November 2010, 322 CIs had been established in 91 countries and 369 CCs in 96 countries, spanning all major continents. Siow (2011) reported that “China aims to open one thousand Confucius Institutes by 2020.” As Osnos (2006) pointed out, “it took Germany 50 years to establish *Goethe-Institute* in 79 countries³⁹; China has surpassed that mark in four years.” “Every three days a Confucius Institutes was born,” said a Chinese source.⁴⁰ As noted earlier, just in the U.S. alone, about 75 CIs and 285 CCs were established between 2004 and 2011 (Confucius Classroom, 2011).

According to Hanban/CIH, “Confucius Institute” is defined as a non-profit, educational organization, with a mission “to enhance the understanding of the world toward Chinese language and culture; to develop friendship between China and other countries; to promote diverse cultures; and to build a harmonious world” (About Confucius Institute, 2010). According to the “Confucius Institute Constitution and By-Laws,” CIs were responsible for providing the following services:

- Teach Chinese language;
- Train Chinese language instructors and provide Chinese language teaching resources;
- Administer the HSK [*Hanyu Shuiping Kaoshi*] examination and tests for the Certification of the Chinese Language Teachers;
- Provide information and consultative services concerning China's education, culture, and
- Conduct language and cultural exchange activities between China and other countries

³⁹ According to Michael Kahn-Ackermann, General Director, Goethe-Institute (China) who spoke at the 5th Confucius Institute Conference in Beijing, China, by December 2010 *Goethe-Institute* had 120 branch offices in 72 countries, with 130 thousand learners. (Source: “Forum III (the first half): Benchmarking and Evaluating Performance of Confucius Institutes” http://www.chinese.cn/conference10/article/2010-12/11/content_207801.htm)

⁴⁰ Source: http://www.hwjyw.com/info/news/200712/t20071203_9574.shtml

CIs operate in various models. Previous research studies (e.g. Ning, 2006) indicated that the most common model worldwide involved Hanban/CIH, one Chinese university, one host university outside China and one or more schools (public and/or private) as illustrated in Figure 5 (see Page 30).

Services provided by CIs vary, as instructed by the “Confucius Institute Constitution and By-Laws” above. The partnerships in this study focus on teaching Chinese language and cultural exploration classes.

Each year the Chinese government spent about \$145 million⁴¹ to support CIs (including Confucius Classrooms⁴²) worldwide. While supporters praised the achievements of CIs, some “anti-China hands” viewed the fast expansion of CI as an aggressive, political strategy of the Chinese government to gain “world power.” They were concerned that, with the significant increase of China’s publicity and “soft power” worldwide, the country would not only become an economic super power, but would soon be a military super power as well (Broomfield, 2003). It is beyond the scope of this study to discuss China’s political motivation and strategies, its rapid economic growth, its goal of building soft power, as well as how many more CIs China plans to build worldwide by 2020. Rather, this study focused on exploring how six U.S. schools developed Chinese language programs to meet their students’ language needs through partnership with the CI at University X; and in what ways the partnership met (or did not meet) those schools’ needs to achieve their educational goals and desired outcomes.

Although the U.S. hosted more CIs than any other country in the world, research on the development of Chinese language education in public schools was seriously lagging behind.

⁴¹ The information is from “China’s Confucius Institutes: Crossing the River by Feeling the Stones” by Maria Wey-Shen Siow (2011) http://www.eastwestcenter.org/fileadmin/stored/pdfs/apb091_1.pdf

⁴² Since the focus of this study is on a school partnership with a Confucius Institute, we will not discuss about Confucius Classrooms.

After searching various literature sources in China and the U.S. since the summer of 2010, I found that most studies related to CIs were “Made in China.” Most of them focused on the development and expansion of CIs. Newspaper articles often reported “success” stories. Little had been said about how schools developed Mandarin Chinese education; in what ways the partnership had helped schools achieve their educational goals and desired outcomes; what challenges and issues those schools had encountered during the development of Mandarin Chinese programs; and what needs those schools had and how the needs were met. This study attempted to give a voice to the six schools in this study so their experience with the development of Chinese language education and the partnership with the CI could be heard.

Most previous research focused on the development and expansion of Chinese language and CIs. Examples included an economic analysis of Confucius Institutes (Ning, 2006); Chinese language, culture and diplomacy policies (Dai, 2008; Kato, 2010); Chinese language teacher training and teacher certification (Gong, 2008; X. Li, 2009; Jiao, 2010); Confucius Institutes and China’s soft power (Wang, 2008; H. Li, 2009; Y. Li, 2009; Hao, 2010); Confucius Institute case studies (Bai, 2009; Du, 2009; Zhou, 2009; Chang, 2010); comparative studies of other language promotion agencies (Sun, 2008; Wen, 2009; Zhang, 2010); and Confucius Institute and Chinese heritage language schools (Liu, 2010). Table 8 lists some examples of completed research studies on, or related to, CIs.

Table 8. Examples of research studies on Confucius Institutes and Mandarin Chinese education

Date	Author	Title	Degree	Institution
2006	Ning, Jiming	International promotion of Chinese language: Analysis of economics of Confucius Institute and recommendations	Doctorate	Shandong U.
2008	Dai, Rong	Confucius Institute and Chinese language and culture diplomacy	Master	Fudan U.
2008	Gong, Zhaoxuan	The Confucius college overseas Chinese language teachers training research	Master	Shandong U.
2008	Sun, Pengcheng	Comparative Study on Confucius Institute and Overseas Language Promotion Institutes	Master	Shandong U
2008	Wang, Jin	An analysis of the relationship about the cultural soft power and the improvement of the international influence of China	Master	Jilin U.
2009	Bai, Lindan	A Confucius Institute's Observation of Chinese Teaching in Korea's Language Institutes	Master	BLCU*
2009	Du, Qingyun	Confucius Institute and Chinese cultural diplomacy from the recipient's view: The case of Southeast Asia	Master	Fudan U.
2009a	Li, Hangyu	The Concept of "Harmonious World" and Building China's soft power building	Master	SISU**
2009b	Li, Xiang	On teacher certification for teaching Chinese language as a foreign language	Master	Southwest U.
2009c	Li, Yao	The impact of Confucius Institute on China's soft power	Master	BLCU*
2009	Wen, Lipeng	British diplomatic culture and its application to China	Master	CFAU***
2009	Wu, Wei-li	Chinese Language Schools' Language Policy for Non-Mandarin-Speaking Students	Doctorate	Columbia U.
2009	Zhou, Zheng	Analysis of the cross-cultural and communication model of the Confucius Institutes in the United States	Master	SNU****
2010	Chang, Dong	The Predicament and Probability in Cross-Cultural Communication: A Case Study of the Development of Confucius Institutes in the World	Master	ECNU*****
2010	Hao, Junfeng	An Effective Way to the Construction of China's Soft Power: as an Example of Confucius Institute	Master	HNU*****
2010	Jiao, Yanan	Studies on Training and Cultivation of Confucius Institutes Teachers in Perspective of Communication	Master	Shandong U.
2010	Kato, Yuri	China's Foreign Language and Culture Policy: The Function of Confucius Institutes as Soft Power	Master	Fudan U.
2010	Liu, Na	The Role of Confucius Institutes in Chinese Heritage Language-Community Language (HL-CL) Schools: Stakeholders' Views	Doctorate	Arizona State U.
2010	Zhang, Xiangrong	Comparative Study on Confucius Institute and Goethe Institute	Master	Fudan U.

*BLCU = Beijing Language and Culture University

**SISU = Shanghai International Studies University

***CFAU = China Foreign Affairs University

****SNU = Shanghai Normal University

*****HNU = Hebei Normal University

Of those studies mentioned above, Na Liu's (2010) study was the only one that discussed the role of a CI in a school setting in the U.S., though focusing on how Chinese language education developed in Chinese Heritage Language-Community Language (HL-CL) schools. This research focused on the development of Chinese language education in U.S. secondary schools (five public and one private) through partnership with a Confucius Institute. Liu (2010) found that "Confucius Institute (CI) performs an important and encouraging role in local Chinese schools" (p. iii). She suggested that Chinese HL-CL schools should seek "external cooperation and support, such as collaboration with Confucius Institutes, or even public schools and university Chinese programs" (p. iv). Liu believed that "such collaborative efforts and support will benefit not only heritage language communities but the nation as a whole" (p. 286). As noted earlier, my study found that the partnership between the schools and the CI was complementary and cooperative, not collaborative, in nature. The Chinese Heritage Language-Community Language (HL-CL) schools in Liu's study had Chinese native speakers as teachers with years of experience of teaching the Chinese language, while the schools in my study were scarce in resources such as experienced Chinese language teachers, quality Chinese curricula and adequate textbooks for U.S. school students. Moreover, most (perhaps all in some cases) students of Chinese language schools were usually Chinese descents who grew up in a bilingual or multilingual environment, while the schools in my study had mostly non-Chinese language background students. Though the two types of schools might have similar challenges and issues in the course of developing Mandarin Chinese education, some major differences exist due to different school systems and student's cultural background.

2.4.2 Confucius Classroom (孔子课堂)

“Confucius Classroom” (CC) was first launched around 2008. The application process is based on an agreement between China’s Hanban/CIH and interested schools. Among those established CCs, some originated from schools that had well-developed Chinese language programs, while others started as CCs. In the U.S., many CCs are under the umbrella of CIs and some are in collaboration with schools in China. Hanban/CIH is also willing to help foreign schools find Chinese partners. Each CC received a seed grant in the amount of \$10,000 directly from Hanban/CIH, along with 1,000 textbooks. One CC supervisor of another school, which is not one of the six schools in this study, informed me that the CC in her school had received funding from Hanban/CIH for two years and the school year 2011-2012 would be their third year receiving funding from Hanban/CIH. She did not know if Hanban/CIH would continuously fund the CC after the third year and if all CCs would receive three-year funding from Hanban/CIH. Between 2008 and 2011, about 300 CCs were established in the U.S. (Confucius Classroom, 2011).

Perhaps the largest Confucius Classroom network in the U.S. is the one under the Partnership for Global Learning with the New York-based Asia Society. According to Asia Society, 100 schools and districts with exemplary Chinese language programs were selected to be part of the network through a competitive process, with the purpose of building them into effective and sustainable Chinese language programs for American students. In addition, the Partnership for Global Learning focuses on increasing the number of American schools offering

rigorous international studies curriculum.⁴³ Unlike CIs, many CCs are school based, focusing more on the teaching-learning of Chinese language and culture at the school level.

According to Article 4 of the Agreement, the scope of activities of Confucius Classrooms should include:

- (1) Teach Mandarin Chinese and sponsor cultural activities and Chinese competitions;
- (2) Train Chinese teachers for local elementary and secondary schools;
- (3) Organize primary and middle school students to participate in summer and/or winter camps in China;
- (4) Compile Mandarin Chinese teaching materials.⁴⁴

As noted earlier, three of the six schools just became CCs in 2011. When asked what the schools would do differently after the status change, the administrators of the three schools informed me that they had not met with the CI administrator and discussed about any future plan. They also told me that they did not know if the new titles would bring any change or challenges to the schools and if the new status would change their relationships with the CI in any way. They were very pleased to receive grant money from Hanban/CIH.

Since this research was to investigate how the six secondary schools developed Mandarin Chinese education through partnership with the CI, it is beyond the scope of this study to discuss Hanban/CIH's marketing plans and strategies, though it would be interesting to find why Hanban/CIH allocated funding directly to CCs and schools, rather than going through its CIs.

2.4.3 Major models of Confucius Institute

Ning (2006) might be the first scholar who has thoroughly studied the operation models of CIs. According to Ning (2006), there were three models of CIs abroad: (1) CIs that received funding

⁴³ <http://asiasociety.org/education/chinese-language-initiatives/asia-society-confucius-classrooms-network>

⁴⁴ http://english.Hanban.org/node_7879.htm

directly from Hanban/CIH (总部直接投资); 2) CIs that partnered with Hanban/CIH and interested parties (总部与申办方合作); and (3) CIs that were permitted to operate as authorized franchises by Hanban/CIH (总部授权特许经营). The second model was considered the most popular one and constituted the largest group among CIs. Ning (2006) defined “interested parties” as those organizations (mainly higher education institutions both in China and abroad), that “have the intention to establish a Confucius Institute; abide by the principals of Confucius Institutes, and as a legal entity that meets the requirements for a language promotion agency” (p. 105).

According to Ning (2006), the second model, “partnering with Hanban/CIH and interested parties (总部与申办方合作),” was further divided into three types of partnerships (Ning, 2006). The first type referred to cooperation between Hanban/CIH and organizations or institutions (总部与国内申办方合作) in China. The second type was a partnership formed by Hanban/CIH, a Chinese partner and a partner in a host country outside China (总部与国内外申办方合作). The third type was a partnership between Hanban/CIH and organizations or institutions outside China (总部与国外申办方合作). Ning (2006) found that most CI partnerships outside China fell into the second category, such as the partnership in this study. Figure 12 illustrates the three models of Confucius Institutes and the three types of partnership between Hanban/CIH and its partners, domestic and abroad.

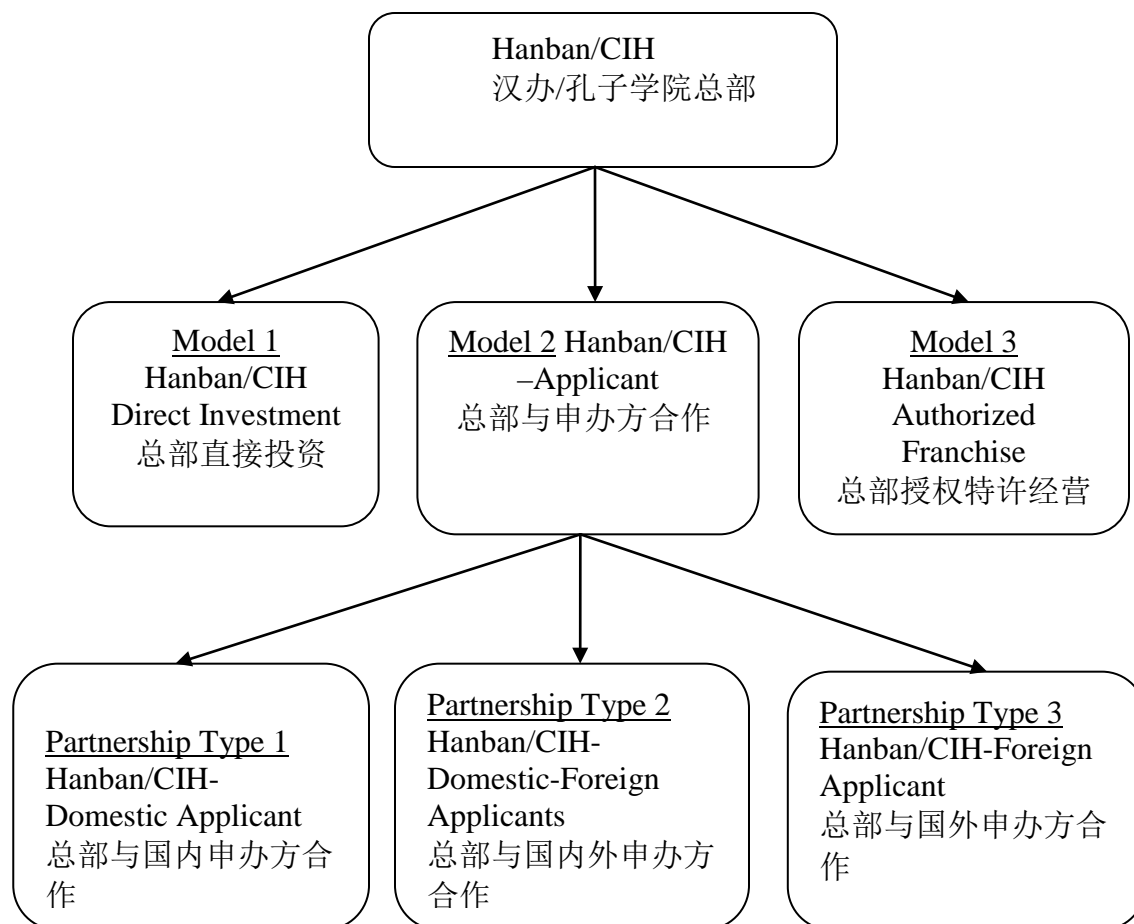


Figure 12. Models of Confucius Institutes overseas⁴⁵

⁴⁵ Created based on information from Ning (2006, p. 106)

This study focused on the second model--- Hanban/CIH partnered with interested parties (总部与申办方合作) and the second type of partnership between Hanban/CIH, a Chinese partner, and a partner in a host country outside China (总部与国内外申办方合作). In this case, the partnership was between Hanban/CIH, a Chinese university, and University X.

Upon examining and analyzing three operation models of CIs within the framework provided by Hanban/CIH from an economic perspective, Ning (2006) concluded that the second model, Hanban/CIH partnered with interested parties (总部与申办方合作), was the most feasible model meeting the needs of CIs (p. 186). The second type of partnership was the most common one abroad, namely, the partnership between Hanban/CIH, a Chinese partner and a partner in a host country outside China (总部与国内外申办方合作). One such example was the Chicago model.

2.4.3.1 The Chicago model

The Chicago model has been praised by Hanban/CIH as “the best” among U.S. CI partnerships with public schools offering Mandarin Chinese instruction. With the support of the Mayor’s Office, the Chicago public school system (CPS) of nearly 700 schools first introduced Chinese language learning into its world languages and international studies programs in 1999, several years before the establishment of the Confucius Institute in Chicago (CIC). Initially, only three schools taught Chinese to a few hundred students. By the end of 2010, “25 elementary and 17 high schools provide Chinese language lessons” and “some 12,000 public school students in Chicago are now learning Chinese” (Li, 2011).

Established in 2006 and housed at Walter Payton College Preparatory (Public) High School, CIC was “the only Chinese culture center in the world based in a high school” (Li,

2011). The CIC partnership is a cooperation of the City of Chicago, Hanban/CIH and East China Normal University in Shanghai, China. Since 2006, Hanban/CIH has invested over \$800,000 in funds to the teaching of Chinese language and over \$800,000 in materials to CPSs (Li, 2011).

The Chicago model has been considered an example of how U.S. public schools used available resources to develop Chinese language education. In addition to utilizing the aid from Hanban/CIH, CPS' Chinese language programs also received grants from the U.S. Department of Defense from 2008 to 2010 for sending the best students to attend the four-week summer Chinese language session at the University of Chicago, which was operated under the department's STARTALK program. Moreover, for four years since 2007, the U.S. Department of State enabled CPS to send 20 juniors to Shanghai for a six-week intensive summer language program at East China Normal University. It was also reported that the teaching of Chinese had become so successful in the CPS system that it served as a model to introduce Arabic and Russian language programs (Li, 2011). It will be beneficial to many CIs and their schools if there is a research study on the Chicago model, particularly introducing in what ways CIC has worked with its schools and responded to those schools' needs; how the partnership has helped develop Mandarin Chinese education in those schools; and what long-term effects the partnership has brought to Chinese language programs, schools and local communities.

2.4.4 Some characteristics of Confucius Institute

In addition to being non-profit, Ning (2006) pointed out that CIs generally had the following characteristics: (1) particularity of educational products and services; (2) diversification of organizational functions; (3) trans-nationality; and (4) monopoly of Chinese language education. In regard to CI's particularity of educational products and services, Ning (2006) asserted that the

services provided by CIs were educational in nature. Unlike other educational services, CI's services were "immaterial," "quasi- public" and "less competitive" (p. 94). Ning argued that, like other language promotion agencies, CIs had political, economic, cultural and social functions. For example, according to Ning, through promoting Chinese language and culture, CIs had assisted in increasing China's image and reputation in the world (political function). The rapid growth of China's economy undoubtedly benefitted from language promotion, and vice versa (economic function). More and more countries were interested in learning about Chinese culture (cultural function). By December 2010, 322 CIs had been established in 96 countries (transitional). Ning (2006) also pointed out: supported by the Chinese government, CIs had the potential to monopolize Chinese language education worldwide, particularly in the areas of Chinese language education resources and language proficiency testing and qualification. Ning (2006) predicted that CIs might fail if they would do so, because few successful non-profit organizations had a monopoly on their functions.

In addition to the characteristics above, Ning (2006) also compared CIs to other language promotion agencies and came up with a list of "characteristics in Chinese style." For example, he called CIs a "[Chinese] government action" (p. 97), which was due to the education property system in China. In his view, "educational institutions have been the means utilized by the government to administer social affairs in China" (p. 97). Unlike other language promotion agencies, Hanban/CIH encouraged "partnerships" between Chinese universities and higher education institutions outside China, so CIs were able to utilize the shared resources of both sides. Ning (2006) asserted that CI's administration model was "unique" and different from other language promotion agencies. He suggested that CIs should develop to meet "our [China's] requirements" (p. 100). His view was supported by many Chinese scholars. For

example, Professor Yinghui Wu (2008) of Central University of Nationalities of China proposed an economic model in his study on the sustainability of CIs. Wu suggested that CIs worldwide should become part of a super, transnational educational enterprise, which offers degree and non-degree Chinese language programs. According to Wu's proposal, the enterprise's headquarters is in China. Each year, interested students of CIs can apply, pay tuition and fees and study at the headquarters. Wu's proposal addressed what CIs could do to become self-sufficient. It would be beneficial to stakeholders such as schools if the proposal had also discussed about what CIs could do to meet the needs of their partner schools. For many CIs like the one in this study, their sustainability rests upon partner schools' success with the development of Mandarin Chinese programs.

2.4.5 The Confucius Institute at University X

Established in 2007, the CI at University X was a partnership involving Hanban/CIH, a Chinese university, and over 50 participating schools, school districts and colleges, public or private (see Figure 5). From an organizational perspective, the partnerships between the CI and schools were informal and loose at all levels. As educational organizations, participating schools, universities and the CI are considered "loosely coupled systems."

Affiliated with University X, the CI is considered a sponsored project for fulfilling the purpose of community outreach. The relationship between University X and its partner university in China was bound by a Memorandum of Understanding (MOU), which required a renewal every three years and must be signed by chief officers (e.g. a university chancellor or president) of both institutions. It is worth mentioning that exchange activities between University X and the Chinese university began prior to the establishment of the CI. The

partnership between the CI and a local school or school district was guided a written agreement resulting from negotiations by the two parties. Some schools or school districts had also developed partnerships with other schools or school districts in a similar manner.

In general, responsibilities between the CI and its partner schools were divided based on before and after Chinese guest teachers arrive at schools. That is, the CI was responsible for anything before Chinese guest teachers arrive at schools, such as teacher selection and recruitment, visa process, airport pick-up and a two-week new teacher orientation and training. Once Chinese guest teachers arrived at schools, schools were required to be responsible for all logistics from renting apartments, purchasing medical insurance and grocery shopping to paperwork for getting emergency teacher permits and social security cards, transportation, job training and other needs of Chinese guest teachers. The data collected showed that schools' concerns were related to responsibilities that were not specified in the agreements, such as whether the CI would help schools develop Mandarin Chinese curricula and what the CI could do to improve training for Chinese guest teachers.

2.5 CLARIFICATION OF SOME KEY CONCEPTS

Though the relationship between schools and the CI has been termed “collaboration” and “partnership,” few studies have attempted to define the relationship from a theoretical perspective. Similar terms include “network,” “coordination” and “cooperation.” Previous studies indicated that terms such as “partnership” and “network,” “coordination,” “cooperation” and “collaboration” had been used interchangeably, creating a great deal of confusion and misunderstanding of the real meanings of those terms. As Clark (1986) pointed out, “one of the

complications of investigating this subject [i.e. the definitions of the terms] is that different terms are used to describe similar activities and, on the other hand, different meanings are attached to the same term” (p. 4). Therefore, he suggested that one should “define those [terminologies] before attempting to discuss school-university relationships” (p. 33). The section below was created for this purpose.

Clark (1986) observed that “authors speak of partnerships, collaborations, consortiums, networks, clusters, interorganizational agreements (IOAs), collectives, and cooperatives, frequently without definition and often without distinguishing their chosen descriptor from other possible terms” (p. 4). Scholars (e.g. Clark, 1988; Sirotnik & Goodlad 1988) asserted that different terms represent different types of relationships because they were “formal or informal connections between individuals, groups and/or organizations” (Sirotnik & Goodlad, 1988, p. vii), or the terms would “denote linking endeavors ranging from mostly symbolic, ‘on-paper’ agreements... to mutually collaborative agreements between *equal* partners working together to meet self-interests” (Sirotnik & Goodlad, 1988, pp. vii-viii). In the section below, I first reviewed what experts said about “network” and “partnership,” and the structure of a relationship. Then, I looked at the three forms (or strategies) of “working together”: “coordination,” “cooperation” and “collaboration.” The purpose of this review was to understand whether the relationship between the schools and the CI was a partnership, a network or both, and whether the partners coordinated, cooperated or collaborated.

2.5.1 Network and partnership

Clark (1986) warned us that “of the various terms used, network represents the most complex concept and has the greatest record of scholarly investigation” (p. 4). Schon (1977) argued that

social networks were “regular and persistent...but they are not governed by formal rules. They lie outside the boundaries of formal contact, formal regulation, and formal organization” (p. 3). In Schon’s view, social networks were informal in nature. Smith (1977) sided with Schon and defined a network as “an interrelated set of members separated in space so that direct face-to-face interactions tend to be sporadic or episodic rather than regular or frequent. ...a network tends to be more diffuse, less hierarchical, and less goal centered than a formal organization” (p. 4). Parker (1977) defined a network as consisting of “independent innovators and problem solvers who link together voluntarily as equals seeking assistance not provided by established systems” (p. 25). Sarason et al. (1977) suggested the following three “distinctive attributes” of networks:

- 1) Every unit in a network does not interact with every other unit in a network;
- 2) The units in a single network do not have a clear boundary from the rest of the world; and
- 3) The only common characteristic of units in a network is their relationship (direct or indirect) to the ego [the center of the network] (p. 128).

While scholars failed to agree upon “the features constituting a network,” Clark (1988) suggested defining “what a network is not” (p. 37). According to Clark, a network “is not a deliberately designed, collaborative arrangement between different institutions working together to advance self-interests and solve common problems” (p. 37) and it was “antiestablishment” (p. 41). Moreover, Clark argued that “network” was used “to describe relations between similar individuals, groups, or organizations” (p. 41).

Unlike “network,” “*partnership* ... may describe relations between dissimilar entities—but not always,” according to Clark (1988, p. 41). Meanwhile, Clark stated that “collaboration, cooperation and the like” were embedded in partnerships “but have quite different meanings for various conceptual, political and operational reasons” (p. 37). He

reminded us that we should not go by the title and assume that “a partnership is a partnership” (1988, p. 41). He insisted that the meaning of the term should be determined by “its operating concepts and practices” (1988, p. 41).

Clark (1988) also suggested using Goodlad’s (1985) description of the three basic characteristics for partnerships below as “a basis for discussion” of school-university partnerships, since “there is little agreement on the meaning of ‘partnerships’” (p. 41):

- (1) The partners need to have a degree of dissimilarity;
- (2) The goal should be mutual satisfaction of self-interests;
- (3) Each party must be selfless enough to assure the satisfaction of these self-interests.

Clark (1988) argued that what Goodlad described above might not be realistic, because “there are few... examples of symbiotic relationships as proposed by Goodlad” (1988, p. 41). He (1988, p. 41) wrote:

When networks become formalized, the line between a network and an organization becomes very blurred; therefore, those members forming networks need to beware of overly specifying governance, unless they seek the benefits of a formal organization instead of those attributable to a social network.

Goodlad (1988) noted that “a school-university partnership represents a planned effort to establish a formal, mutually beneficial, interinstitutional relationship characterized by sufficient commitment to the effective fulfillment of overlapping functions to warrant the inevitable loss of some present control and authority on the part of the institution currently claiming dominant interest” (pp. 25-26). He described that the function of a partnership “is to be used as a device for bringing together institutions that need each other for the solution of tough problems” (1988, p. 26). Like Goodlad, Beckhard (1975) believed that “collaboration” occurs because of “real dissatisfaction with the status quo, a high enough level of dissatisfaction to mobilize energy toward some change” (p. 424). I would argue that partnerships might not always be “formal”

and are not always formed to solve “tough problems.” For example, the SUPs in this study were formed to help schools develop Mandarin Chinese education, which was more of an innovation than a “tough problem.”

Goodlad (1988) emphasized the importance of “equity” in partnerships, stating that the intent of a SUP is “to create a process and an accompanying structure through which each *equal* party to a collaborative agreement will seek to draw on the complementary strengths of the other *equal* parties in advancing its self-interests. Each partnership is a means to this end and not an end in itself” (p. 26).

Briody and Trotter II (2008) believed that “all partnership definitions include cooperation, collaboration, and synergy” (p. 7). They further described that, in a very broad sense, partnerships consisted of “dynamic and structural components and outcomes” (p. 7). They defined “partnerships” as “collaborative arrangements in which participants entered into relationships (the dynamic component), combined their resources, time, and expertise through the various roles they played (the structural component), and worked toward the creation of new knowledge, products and services (outcomes)” (p. 7).

Chavkin (1998) warned us that the term “partnership” meant different things to different people; “synonyms include words such as coalition, collaboration, cooperation, alliance, association, affiliation, merger, and connection” (p. 84). Franklin & Streeter (1995) developed a five-part continuum: informal relations, coordination, partnership, collaboration and integration, illustrating different levels of commitment to a relationship. Chavkin (1998) observed that, within the continuum, “participants move from little or no change in the basic philosophy of the system to systemic change in how all the participants operate” (p. 84). She suggested that researchers of educational partnerships “need to go further than just finding out if ... partnerships

are helping education” and “need to know how, when, and which parts of the partnership are improving education” (p. 83).

Moreover, partnership experts had different views on the essence of an SUP. For example, Goodlad (1988; 1994) pointed out that “complementarity is the essence of school-university partnership” (p. 11). In his view, organizations partnered with one another because of “complementarity,” and the “distinctive differences” led to working together through “fully shared commitment and effort” toward a common goal. However, Edwards et al. (2009) argued that “collaboration is the essence of a school-university partnership” (p. 10).

What experts said about “network” and “partnership” above suggested that: 1) “working together” might not always mean partnership; and 2) the term “partnership” could also mean “network,” especially when it became “more diffuse, less hierarchical, and less goal centered than a formal organization” (Smith, 1977, p. 4), though “network” also had the tendency and possibility of becoming “formal.”

A rough picture of the relationship between the schools and the CI emerged: a partnership with network components. The schools and the CI were organizations with “a degree of dissimilarity.” They were interrelated, goal-centered and mutually beneficial. They entered the relationship voluntarily (“the dynamic component”); each partner had its own expertise (“the structural component”); and they worked and developed Mandarin Chinese programs to meet students’ language needs (“outcomes”). However, the relationship was also considered “informal,” “independent” and “less hierarchical and less goal centered.” Moreover, it was not uncommon that one partner school had little interaction with another partner school. There was no clear boundary between a partner school that did not have the title of Confucius Classroom and the rest of the world. In addition to an application-approval process, the main factor that

determined the fate of a school to be a partner school was the school's finances. Due to financial constraints, two of the six schools in this study were unable to "hire" Chinese guest teachers. As a result, they lost their status as partner schools with the CI.

2.5.2 Cooperation, coordination and collaboration

Previous studies on partnership revealed that terms such as "cooperation," "coordination" and "collaboration" had been used interchangeably. Researchers advised us that different terms meant different things to different people (Chavkin, 1998). According to Hoyt (1978), cooperation referred to "two or more parties, each with separate and autonomous programs, agree to work together in making all programs more successful" (p. 8); and collaboration "implies the parties involved share responsibility and authority for basic policy decision making" (p. 9). It was not uncommon for many partnerships to have "separate and autonomous programs," "agree to work together" and "share responsibility and authority for basic policy decision making."

Kloth and Applegate (2004) viewed "coordination," "cooperation" and "collaboration" as part of "a working together continuum" and believed that the "continuum" developed "from wholly self-focused to wholly other-focused" (p. 2). They asserted that organizations of the same sector, or in the same sector, worked together when they saw the value in coordinating efforts. In such a case, "the coordination relationship allows each to work together on common interests while maintaining their boundaries and ability to pursue distinct interests" (p. 2). They defined "cooperation" as "work[ing] together to meet a need in marketplace by recognizing their distinct strengths" and through "contracts with individual organizations" (p. 3). The authors further explained, "With cooperation, each organization is able to maintain distinct boundaries and

interests. However, they do work together with a very specific shared outcome that each has an important part in achieving [it]" (p. 3). As for "collaboration," Kloth and Applegate (2004) found that "some businesses or agencies ... have a shared goal that is best achieved by opening their organizational boundaries enough to share what might otherwise be considered proprietary information," such as "share financials, change internal policies and practices to create alignment and synergy" (pp. 3-4).

According to Kloth and Applegate (2004), the key was that those organizations "are willing to open their boundaries to achieve a compelling common purpose" (p. 3) and "choose to share control and accountability for their future with others over whom they have no direct influence" (p. 4). In their view, "cooperation," "coordination" and "collaboration" were different strategies that organizations and agencies adopted to work together for different outcomes. One major difference between "cooperation," "coordination" and "collaboration" was reflected by how much the boundaries are open and how much control is shared between, or among, the partners. Kloth and Applegate (2004) summarized the difference as follows: in "coordination," each [organization] "work[s] together on common interests while maintaining their boundaries and ability to pursue distinct interests" (p. 2); in "cooperation," organizations may work together to "create a constituent specific plan," but they may not share any information related to their "internal capacity building" (p. 3); in "collaboration," partners "have a shared goal" and open "their organizational boundaries enough to share...information" (p. 3).

Kloth and Applegate (2004) further explained that in addition to "cooperation," "coordination" and "collaboration," the "working together continuum" also consisted of other components such as "independent," "integration" and "full circle." According to the researchers, "none of these approaches is inherently better than any of the others. The key is to choose which

approach is likely to be [the] most effective in the context of the work of the partners” (p. 4).

Based on the definition by Kloth and Applegate (2004), the partnership between the CI, the Chinese university and China’s Hanban was “collaboration” because they “have a shared goal that is best achieved by opening their organizational boundaries enough to share what might otherwise be considered proprietary information,” such as “share financials, change internal policies and practices to create alignment and synergy” (pp. 3-4). However, that definition might not be accurate for the partnership between the schools and the CI, though they had “a shared goal.” In other words, University X might not be able to “share financials, change internal policies and practices” with the schools, and vice versa.

Edwards et al. (2009) believed that “in the context of a school-university partnership, collaboration is taken to imply something that is distinctive..., and more substantial than, cooperation” (p. 10). In other words, “partnership” does not always mean “collaboration.” It could mean “cooperation.” Other researchers also expressed a similar view. For example, O’Hair and Odell (1994) stated that “cooperative” and “collaborative” partnerships differed. They noted that, in a cooperative partnership, “separate authorities are maintained while working toward a common goal” and in a “collaborative” partnership, “shared authority is enjoyed” (p. xiii).

The partnership between the schools and the CI was not just one, but multilateral. Thus, it is very likely that partners work together in various forms, e.g. “cooperation,” “coordination” or “collaboration,” taking different strategies to achieve different outcomes. It is also possible that, during the course of development, “working together” transformed from one form to another within the continuum, depending on which part of the partnership or which partner the study referred to. By the time this study was conducted, it was more accurate to say that the

partnership between the schools and the CI was a cooperative one, because the schools and the CI remained “separate authorities” while “working toward a common goal” (O’Hair & Odell, 1994, p. xiii). It is unlikely that those partners would share authority anytime soon.

2.6 SUMMARY

Foreign language education in the U.S. had undergone “substantial cyclical change” (Moore, 1992) and “frequent ups and downs” (Schultz, 2001, p. 3). Regardless of the efforts made to improve foreign language education by the government or the private sector, similar issues and problems remained, such as lacking student motivation, a shortage of qualified teachers and scarce quality textbooks. Unfortunately, the six schools and the CI experienced a similar fate in the development of Chinese language education in U.S. schools.

In addition to the efforts made by the federal government, private foundations (such as the Carnegie Foundation and the Dodge Foundation) joined forces promoting Chinese language in U.S. public high schools in early years. It was not until recent years that China’s Hanban/CIH launched a movement to promote Chinese language and culture on a much larger scale. Different from the strategies adopted by the Carnegie Foundation and the Dodge Foundation, Hanban/CIH first established CIs with reputable colleges and universities in the U.S. Then, through the influence of those colleges and universities, CIs soon developed partnerships with local schools and colleges, both public and private.

Traditionally, SUPs were created to improve teacher preparation, classroom teaching and student learning, as well as for school renewal. Several partnership models and nine characteristics were identified to reflect the experiences of the SUPs formed within the U.S.

territory and cultural system. In comparison, the school partnership with the CI in this study had some fundamental differences. For example, the partnership in this study was international and multilateral, involving not only U.S. schools and a university, but also China's Hanban/CIH and a Chinese university. The partnership was created for the purpose of promoting Mandarin Chinese language instruction mainly in U.S. schools, a challenge that many schools never had prior to the development. As one high school principal put it, "If you want to know what a real challenge is, try building a Chinese curriculum without knowing the language." (Notes taken during a school visit, June 1st, 2011).

Although most school students in the U.S. studied commonly taught languages (such as Spanish, French and German), the enrollment in less commonly taught languages showed a steady increase in the past decade, particularly in Mandarin Chinese programs. However, we know very little about how U.S. schools developed Chinese language programs and in what ways the partnership with the CI helped develop and improve Mandarin Chinese education. This study was conducted to fill the gap and provide a basis for further studies related to meeting U.S. schools' needs in the development of quality Mandarin Chinese education.

Finally, partnership experts pointed out that terms such as "partnership" and "network" as well as "coordination," "cooperation" and "collaboration" had been used interchangeably in previous studies, though different terms meant different things to different people. They suggested that one should clearly define the "relationship of working together" before studying it. The complex, diverse and unique characteristics of the relationship between the six schools and the CI in this study confirmed that (1) the relationship was a partnership with some network components; (2) "cooperation," "coordination" and "collaboration" were employed in the partnership as different strategies to achieve different outcomes; and (3) the partnership was a

cooperative one, because the partners remained “separate authorities” while “working toward a common goal” (O’Hair & Odell, 1994, p. xiii). It was not a collaborative partnership because those partners may not be able to (or want to) share authority anytime soon.

3.0 CHAPTER THREE: METHODOLOGY

This study was designed to explore how six U.S. secondary schools (five public and one private) developed Mandarin Chinese instruction through partnership with the CI at University X, and to determine if there was a relationship between the development of Mandarin Chinese education and the partnership. The study was guided by the four research questions below:

- (1) What motivated six U.S. schools to start Mandarin Chinese education?
- (2) Why did the six schools develop Mandarin Chinese education through partnership with the Confucius Institute at University X?
- (3) In what ways did the partnership help the six schools achieve their educational goals and desired outcomes?
- (4) How did the six schools describe the value of the partnership?

For this study, “desired outcomes” were defined as meeting students’ language needs in learning Mandarin Chinese as well as increasing students’ motivation and proficiency with the language.

Though a large number of studies have been conducted on the teaching of Mandarin Chinese as a foreign language and the development and sustainability of CI, little research has been done on a topic similar to this study which is to explain in what ways the partnership met the schools’ needs and helped them develop Mandarin Chinese education.

3.1 RESEARCH APPROACH AND DESIGN

This study adopted the method of qualitative field research, because “field research is especially appropriate to the study of those attitudes and behaviors best understood within their natural setting” (Babbie, 2007, p. 287). Other scholars such as Lofland and Lofland (2006) also pointed out that “field research” would be appropriate to discuss people and events in various social settings such as “relationships,” “groups” and “organizations.”

The study was descriptive in nature, because it described what was happening, how something was happening and why something was happening (Lauer, 2006). To be specific, the study described how and why the six U.S. secondary schools developed Mandarin Chinese education through partnership with the CI at University X.

Mauch and Birch (1998) suggested utilizing the exploratory method for “investigation into new or relatively unknown territory for the purpose of searching out or much more closely scrutinizing objects or phenomena, mostly to lead to a better understanding of them” (p. 123). The study was also exploratory, seeking in what ways the partnership helped the six schools achieve their educational goals and desired outcomes. Furthermore, since this topic was new in the field, the exploratory method appeared to be appropriate for the study.

Field interviews were conducted to solicit the opinions of participants. The step-by-step procedures and the criteria for selecting participants were established to ensure that the study was carried out in concert with the research design “to obtain objective, reliable, and valid information” (Mauch & Birch, 1998, p. 113).

3.2 POPULATION AND “STUDY POPULATION”

3.2.1 Population

Babbie (2007) discussed the concepts of “element,” “population” and “study population.” He referred to elements in survey research to “people or certain types of people” (p. 190). He differentiated the concept of “population” from that of “study population” by defining the former as “the theoretically specified aggregation of study elements” and the latter as “that aggregation of elements from which a sample is actually selected” (p. 190). That is, “population” refers to those who are targeted in a research study and “study population” means those who meet the selection criteria and are chosen for the study, because “researchers are seldom in a position to guarantee that every element meeting the theoretical definitions laid down actually has a chance of being selected in the sample” (Babbie, 2007, p. 190).

The population for this study was all school and school district administrators, foreign language teachers and Chinese guest teachers who came from 57 schools and colleges offering Mandarin Chinese through partnership with the CI at University X. I chose this population because those people were the most knowledgeable of the development of Mandarin Chinese education and the partnership in their schools. Six schools (five public, one private) were chosen within the Standard Metropolitan Statistical Area (SMSA) where the university is. Because the number of schools offering Mandarin Chinese within the SMSA for at least three years was very small, I was unable to provide any specific information about those schools due to the possibility of violation of respondents’ confidentiality. Those schools were willing to participate and provided me with names of their teachers so I could interview them. Participants were informed

and assured that their responses and school information would be kept confidential. Pseudonyms were used to protect the identity of those who participated in the interviews.

3.2.2 “Study population”

The research study was to solicit the opinions of those who were finally selected based on the selection criteria and formed the “study population” (N = 22). I chose this population because they were the ones who had knowledge of, and experience with, the research topic. They were there every day and watched Mandarin Chinese programs grow.

The “study population” consisted of eight school administrators, one school district administrator, eight Chinese guest teachers and five regular school teachers. “School administrators” referred to school principals, assistant principals and curriculum leaders while “school district administrator” meant superintendent. In general, a school administrator was a contact point between a school and the CI. In one school district, the contact point was a superintendent. “Chinese guest teachers” were those who were recruited to U.S. schools by the CI. Those teachers were graduate students trained by the Chinese university to teach Mandarin Chinese as a foreign language. They were required to pass the selection processes performed by the Chinese university, the CI and China’s Hanban/CIH. “Regular school teachers” referred to those who were employed by the six schools.

Selecting Chinese guest teachers for this study was a real challenge, because most Chinese guest teachers only teach one year in U.S. schools. Thus, only those who completed their term were qualified for this study. The original plan was to recruit those who returned to teach for a second year. I soon found that criterion unrealistic, because three of the six schools did not have any Chinese guest teacher stay for a second term. Since many Chinese guest

teachers who completed their teaching had returned to China, I travelled to China and interviewed some of those teachers in the summer of 2010.

3.3 INSTRUMENTATION

Research experts (e.g. Gay, 1987) advised us that a researcher should develop his or her own instrument. Four sets of interview protocols (see Appendixes A, B, C, D and E) were carefully crafted for this study. The first one (see Appendix A) was for collecting data from school administrators (which referred to principals, assistant principals and curriculum leaders). To differentiate the opinions of administrators at the school level and at the school district level, the second interview protocol (see Appendix B) was created for interviewing a superintendent. The third interview protocol (see Appendix C) was designed for interviewing Chinese guest teachers. Since their native language is Mandarin Chinese, the interview questions were written in both Chinese and English and the interviews were conducted in Mandarin Chinese. The fourth interview protocol was divided into 4a and 4b (see Appendixes D & E). The former was utilized to interview teachers of Chinese whose native language was Chinese and the latter was for teachers who taught course subjects other than Chinese.

The interview protocols were designed to answer the following four research questions:

- (1) What motivated six U.S. schools to start Mandarin Chinese education?
- (2) Why did the six schools develop Mandarin Chinese education through partnership with the CI?
- (3) In what ways did the partnership help the six schools achieve their educational goals and desired outcomes?

(4) How did the six schools describe the value of the partnership?

A Research Question Matrix (see Appendix F) was created to illustrate the corresponding relationship between interview questions of each protocol and each of the four research questions.

The interview questions were semi-structured. Each interview protocol consisted of three sections. In the first section, a participant was asked to submit some general information, such as gender, position title and education background. The second section consisted of questions on the development of Mandarin Chinese education. The third section asked about their view of the partnership with the CI. As indicated in consent letters, each interview would last about one hour. With participants' permission, all interviews were recorded utilizing a SONY MP3 IC Recorder. Information and data collected were copied to NVivo 8 for coding and analysis.

A pilot test of the interview protocol for Chinese guest teachers was conducted to check its workability in the summer of 2010 when I visited China and interviewed several former Chinese guest teachers. Due to limited populations of schools and people, I was unable to test each interview protocol before conducting formal interviews.

A few challenges occurred during the test. For some challenges, I was able to incorporate a change to address the issue, while others I could not. For example, some questions seemed explicit in English, but there were no corresponding words in Chinese that expressed the same meaning without sounding offensive to the Chinese culture. One question asked: What factors hindered the Confucius Institute partnership? The Chinese translation for "hinder" (阻碍 or 妨碍) would sound very strong and negative, and it could also imply purposely harming the partnership. To avoid misunderstanding, I used the word "affect" (影响), which sounded

mutual, but not quite the same as “hinder.” Unfortunately, I was unable to find the right word in Chinese for the English term.

During the pilot-test, I also found that some Chinese guest teachers were unable to answer questions regarding the school system; and few could talk much about the partnership between their schools and the CI. For example, they had difficulty describing how U.S. schools operated and what school administrators and school teachers thought of them and the Chinese language programs. One year was not a long time, especially when they had to struggle with their English and try to learn how to manage U.S. school classrooms at the same time.

3.4 DATA COLLECTION

Gay and Airasian (2003) noted that “observation and interviewing are important qualitative data collection approaches” (p. 129). In this study, qualitative data were collected from documentation and open-ended interviews with 22 participants (N = 22) in two phases: summer 2010 and fall 2011. The first phase of study was conducted in China, while the second phase was performed in the U.S. Efforts were also made to seek evidence from various sources available.

3.4.1 Documentation

Information on the development of Mandarin Chinese education in those schools was available on the CI’s website. Since the programs were still in their initial development stage, there was not much documentation (e.g. reports or presentations) about how those six schools developed

their Chinese programs. The available information included a standard agreement between schools and the CI, new teacher orientation and workshop agenda, the statistics of student enrollment and the number of classes each year, and reports that the CI submitted to Hanban/CIH each year.

Other information was collected through specific library features and networks, such as school websites, E-Z Borrow and Interlibrary Loan, as well as ERIC and CNKI (a database of Chinese doctoral dissertation network)⁴⁶

3.4.2 Face-to-face interview

As noted earlier, open-ended interviews were conducted with 22 participants (N = 22) in two phases. In the first phase of data collection in the summer of 2010, six Chinese guest teachers were interviewed in China (see Appendix C) upon their completion of one year of teaching in U.S. schools. Prior to that, I pilot-tested an interview protocol with five Chinese guest teachers to check its workability in the summer of 2010, as mentioned earlier. In the second phase of data collection in the fall of 2011, in-depth, semi-structured interviews were conducted with eight school administrators (see Appendix A), one school district administrator (see Appendix B), two Chinese guest teachers (see Appendix C), three regular teachers (non-Chinese, see Appendix D) and two regular teachers (Chinese, see Appendix E). Interviews were conducted in Mandarin Chinese or English, depending on a respondent's native language.

Participants were interviewed in public settings in a safe environment, e.g. a school office or a community library. They were asked questions based on their knowledge of, and experience

⁴⁶ Source: <http://acad.cnki.net/Kns55/brief/result.aspx?dbPrefix=CDFD>

with, the Chinese language programs and the partnership with the CI. For example, the questions for school administrators and superintendents focused on the Chinese program development and the partnership between school/school district and the CI; Chinese guest teachers were asked about their teaching experience in U.S. high schools and the challenges and issues they had encountered in teaching; the regular school teachers were asked about their observations of the Chinese programs and the partnership. With the participants' permission, all interviews were recorded. Though researchers have debated about recording interviews (Rubin & Rubin, 2005), overall, I believed that few respondents were affected by the device.

The interviews for this study were "topical interviews." According to Rubin and Rubin (2005), "topical interviews explore what, when, how, why, or with what consequence something happened" and "in topical-research interviewing, researchers play a[n]...active role" (p. 11). Because of that reason, I turned down the request when a participant asked if a phone interview could be conducted rather than having a face-to-face one. I believed that the information collected would be more accurate if I could do a face-to-face interview, because additional information could be collected through a respondent's voice and body language. In addition, a face-to-face interview would allow me to establish a better relationship with respondents.

3.5 DATA ANALYSIS

The purpose of the data analysis in this study was to organize the data so themes and possible relationships could be identified between the responses and the four research questions; between the development of Mandarin Chinese education and the partnership; and between the schools' needs and the responses to those needs.

Researchers held different views in regard to when data analysis should begin. Miles and Huberman (1994) suggested that data analysis should begin “while data collection is going on,” because “they help organize data for later, deeper analyses” (p. 50). Another reason was to enable investigators to develop understanding during data collection. Miles and Huberman (1994) believed that data analysis in the early stages of a study would provide “the possibility of collecting new data to fill in gaps, or to test new hypotheses that emerge during analysis” (p. 50). My experience showed that it depends on a couple of factors. For a couple of cases, I started data analysis “while data collection is going on.” As a result, I found myself attempting to revise interview questions, which almost led to a problem of inconsistency and affected the outcomes. In my case, a better understanding of the data and a consistent data analysis occurred when I started data analysis after I transcribed and translated all of the interviews. As Weiss (1994) described, “...only after interviewing has ended that the investigator can give full attention to analysis and writing” (p. 151).

The data analysis in this study followed the two phases proposed by Rubin and Rubin (2005). The first phase “entails classifying, comparing, weighing and combining material from the interviews to extract the meaning and implication, to reveal patterns, or to stitch together descriptions of events into a coherent narrative” (Rubin & Rubin, 2005, p. 201). The second phase is about how to “figure out what ...coded data mean” by “building toward narratives and description” (Rubin & Rubin, p. 224) and “building toward theory” (Rubin & Rubin, p. 230). Figure 13 illustrates the two phases of data analysis by Rubin and Rubin (2005).

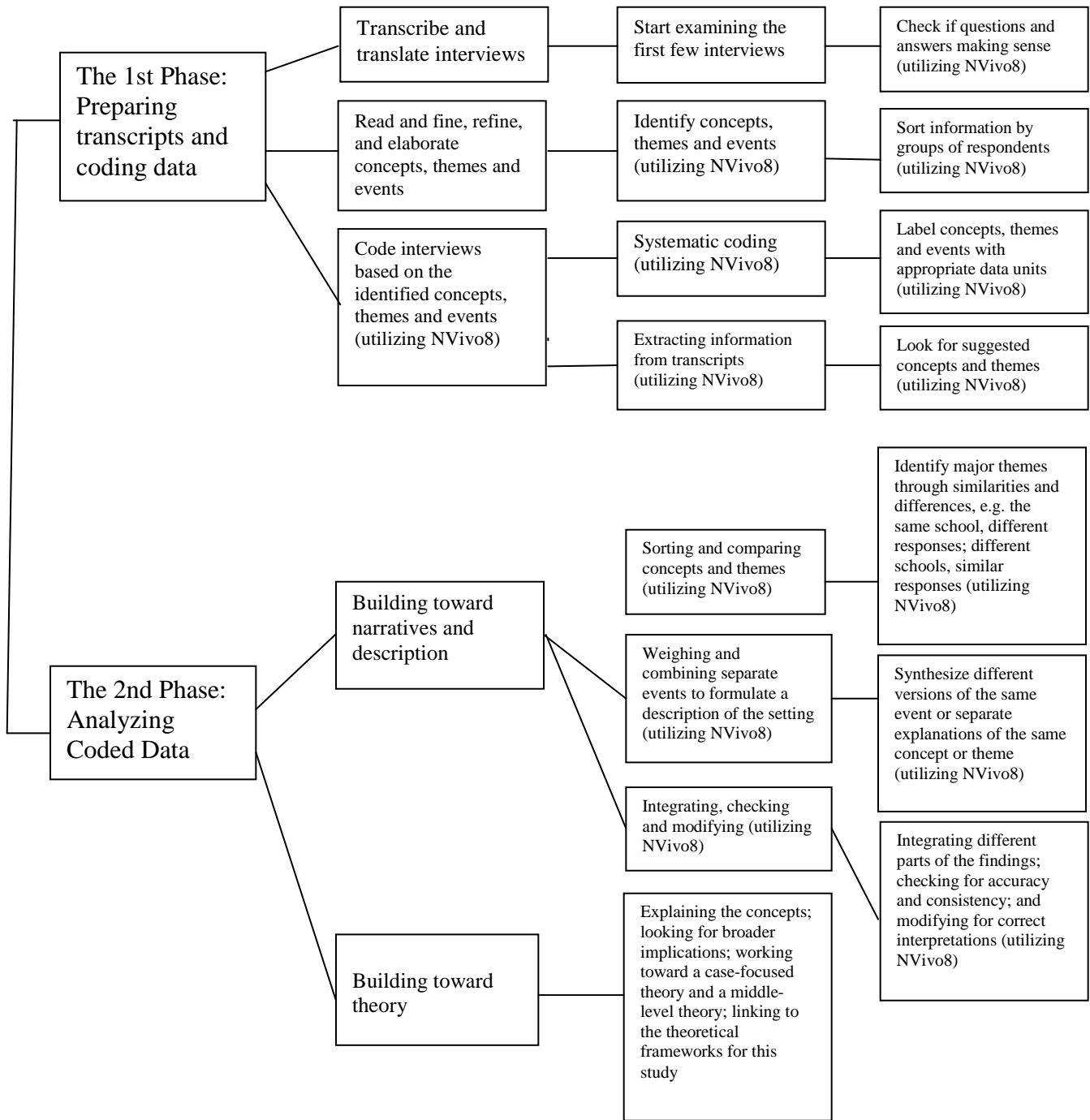


Figure 13. The two phases of data analysis⁴⁷

⁴⁷ Based on information from Rubin & Rubin (2005)

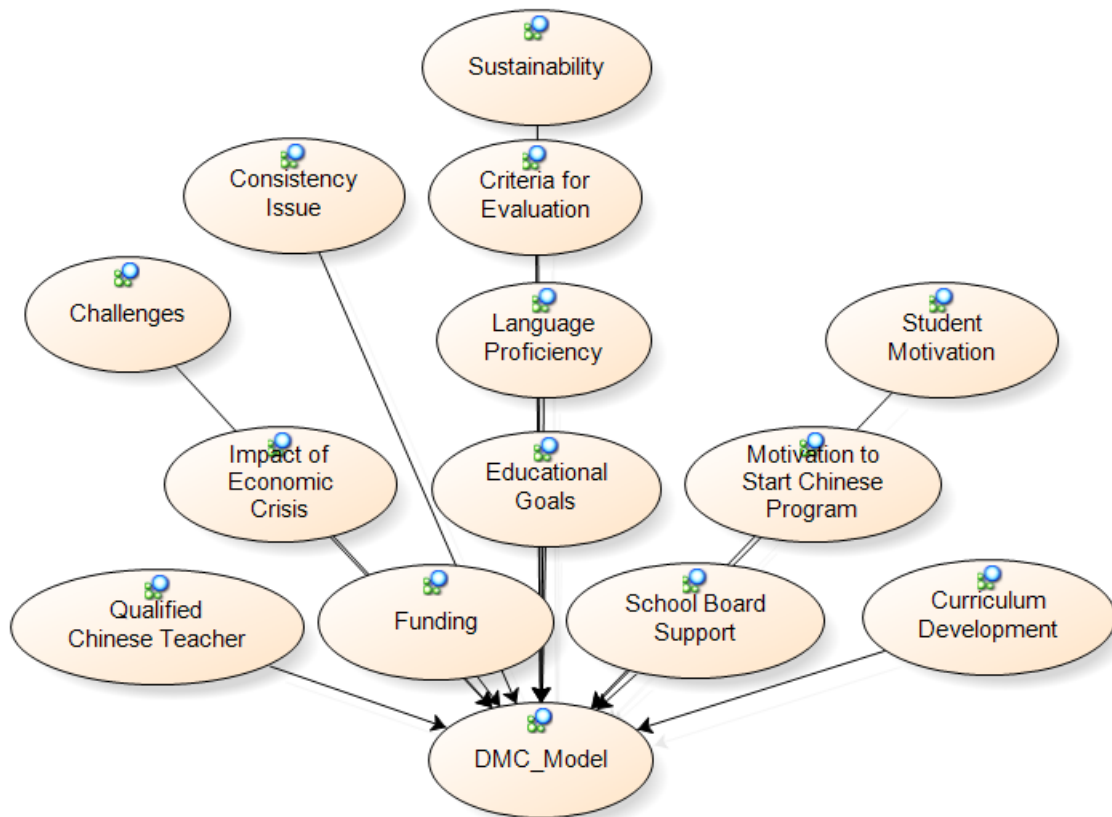


Figure 14. Sorting, ranking, comparing and combining the data

DMC = Development of Mandarin Chinese

By utilizing NVivo8, I was able to sort, rank, compare and combine the data more efficiently.

Similar to Rubin and Rubin’s approach was the “four major phases” proposed by Weidman and Jacob (2011), which includes noticing, collecting, thinking (Seidel, 1998) and writing. Weidman and Jacob suggested utilizing “the qualitative technique of inductive data analysis (i.e., identifying categories, patterns of response, and the drawing of connections between units of data)” to analyze data. Though both approaches outlined detailed steps in the

proof of data analysis, the “four major phases” provided more systematic guidelines for researchers to follow.

During the interviews, I found serious knowledge and experience gaps among participants. For example, some respondents knew little about Mandarin Chinese programs, while others were not familiar with the CI and the partnership. Due to this reason, I had to group the interviews and analyze them accordingly.

3.6 SUMMARY

This qualitative research study was designed to explore how six U.S. schools developed their Mandarin Chinese education through partnership with the CI and to define the relationship between the development of Mandarin Chinese and the partnership. This chapter described the research methodology employed and presented the design of the study. The selection of the “study population,” the study’s instrumentation, data collection and analysis were also described. Findings of the study are presented in the following chapter.

4.0 CHAPTER FOUR: PRESENTATION OF FINDINGS

This chapter reports the analysis of the data collected from qualitative field interviews of 22 participants from six U.S. secondary schools (five public and 1 private), located within the SMSA, where the university is located. The interview respondents included nine school and school district administrators, five regular school teachers⁴⁸ and eight Chinese guest teachers. Because the number of schools offering Mandarin Chinese within the SMSA for at least three years was very small, I was unable to provide any specific information about those schools due to the possibility of violation of respondents' confidentiality.

During the interviews, the school/school district administrators were asked to describe their educational goals, desired outcomes, expectations and needs for the development of Mandarin Chinese education and their partnership experience with the CI at University X. In addition, I asked them to describe in what ways they thought the partnership helped their schools achieve the educational goals, what benefits were gained and what long-term effects the partnership had on the Chinese programs, the schools and local communities. Five regular school teachers were interviewed. They were either certified teachers of foreign languages (including Mandarin Chinese) or were knowledgeable of the development of Mandarin Chinese education in their schools. The regular teachers were asked about their observations of the

⁴⁸ I contacted six regular teachers and all of them confirmed that they were willing to participate in my study. However, only five were available for interview.

development of Mandarin Chinese in their schools and the partnership between their schools and the CI at University X. Eight Chinese guest teachers who taught in those six schools were also interviewed. They were asked to share their teaching experience in U.S. schools and their observations of the partnership between their schools and the CI, as well as the challenges and issues they encountered while teaching in those schools.

Rubin and Rubin (2005) suggested that data analysis begin with identifying concepts and themes and find in what ways they respond to research questions and theories. The preliminary findings of this study were presented through concepts and themes identified from the data collected from the face-to-face interviews. Some examples of concepts included need and response, qualified Chinese language teachers, a Mandarin Chinese curriculum, funding, expertise, communication and leadership. Those concepts connected the themes within and between the development of Mandarin Chinese education and the partnership with the CI. For example, in this chapter, the term “need” was defined as what the six schools needed to develop their Mandarin Chinese programs, including resources and expectations. The term “response” was defined as any action, reply and reaction that answered the schools’ “needs,” including means of providing aid and support from either the partnership or other sources outside of the partnership. Other concepts will be defined in each section of the findings below.

The coded data suggested the following themes:

- (1) The need and response in the development of Mandarin Chinese education;
- (2) The need and response in the partnership between schools and the CI;
- (3) The relationship between the development of Mandarin Chinese education and the partnership with the CI.

In some sections, a great deal of raw data was presented so readers would have a better understanding of the concepts and themes from the respondents' perspectives.

4.1 FINDING 1: THE NEED AND RESPONSE IN THE DEVELOPMENT OF MANDARIN CHINESE EDUCATION

School/school district administrators were first asked what motivated their schools to offer Mandarin Chinese education. Despite each school starting its Mandarin Chinese program in its own unique ways, they all agreed that the rapid growth of China's economy and their vision of preparing "global citizens" for the competitive economic market worldwide were the main driving forces for developing Mandarin Chinese education. Moreover, they believed that their schools were responsible for providing quality Chinese language education and meeting students' language needs.

The coded data indicated that some examples of the needs of the six schools focused mostly on resources such as (1) qualified Chinese language teachers; (2) a Mandarin Chinese curriculum; and (3) funding. The respondents defined them as the most critical resources in the development of Mandarin Chinese education in their schools.

4.1.1 Qualified Chinese language teachers

The respondents all agreed that, if funding was available, what they needed the most was "a qualified Chinese language teacher." When they were asked to define "qualified," they used terms such as "a native speaker," "a native speaker who can teach Chinese," "certified,"

“experienced,” “well-trained” and “is able to get along with students.” Below are some examples of the responses:

And to define “qualified,” I would say “certified.” “Qualified” means “certified” (Interview with Respondent 2, October 13th, 2011).

Well, one thing is that we have to have a teacher that is experienced, you know, that is able to teach well, and identified by students as a good teacher (Interview with Respondent 3, October 11th, 2011).

I think there is also just the human resource as well: who is going to teach it and finding the right teacher to match the rights of the school. It’s not just a matter of finding someone who knows Mandarin; you have to find someone who can teach Mandarin, and also fits your school’s culture as well. So, there are lots of layers to that. We had made a commitment that we were not going to expand our Mandarin program until we found a teacher. So, we decided first it was so critical, based on our experiences, the importance of finding a qualified teacher. That’s going to make a program successful. If you do not have a qualified teacher, you would not have a successful program. ...for us, it’s all about the teacher. You have a great teacher; you have a very strong program (Interview with Respondent 9, October 19th, 2011).

So, it was almost like...rather than saying: we’re going to start and let’s find a teacher, it was almost like we have this great teacher. We interviewed her early, I want to say very early to hire her. We didn’t interview anybody else. And we knew we were going to hire her. The school board gave the commitment to hiring her six months before (Interview with Respondent 7, October 19th, 2011).

Though most of the schools in this study were pleased with their Chinese guest teachers’ performances, some schools considered Chinese guest teachers “interns” and questioned their readiness for teaching U.S. classes, indicating that the schools defined “qualified” differently.

For instance, one respondent commented:

... the interns [are] coming here, some had the teaching responsibility right away, unfortunately. Unless they could come a year before, which is not...it’s too expensive. It would be great to somehow get them that type of experience. ... for our interns from the Confucius, they not only had to learn about our structure, all the other cultural things, just the expectations of what our students are like here. (Interview with Respondent 7, October 26, 2011)

At one point, all six of the schools had Chinese guest teachers through the CI. By the time the interviews were conducted, four of the six schools still had Chinese guest teachers,

while the other two schools no longer had them due to the economic crisis and drastic budget cuts. School/school district administrators spoke highly of their Chinese guest teachers:

Wow, they [Chinese guest teachers] were very good, both of them. They were very fluent in English language and also in Mandarin Chinese. And I was impressed, because I watched them teach. They taught very well. And, I thought, they were very nice people. They made connections with students, you know, personal connection, which is what teachers have to do. (Interview with Respondent 3, October 11th, 2011).

We've had phenomenal teachers. Individually, they all have different strengths. They've all had different strengths. It's been amazing how quickly they picked up the American culture, language in a short time period. They meshed extremely well with staff. They really become a part of our [school] family pretty quickly. So, I think that's been their strengths (Interview with Respondent 2, October 13th, 2011).

Well, their strengths are many. First of all, they are very excited to be here. They want to know about the American education system. They listen to their students. And they also have a lot to teach. They are very enthusiastic. They provide lessons in Chinese culture well as in Chinese language. They want to do more than they may actually be able to do. In some cases, they have got to know families of certain students so they've shared... on that level parents are very important when it comes to secondary level education. In some cases these teachers have worked well when they've had parents' support. Also, these guest teachers are interested in learning English and went off to have the opportunity to work with me and to share more at adult level some cultural information and some language information. I'm impressed with their professionalism. I think they are very professional in most cases. [They're] quite what we need. (Interview with Respondent 18, October 12th, 2011).

They are enthusiastic. They learn quickly. What they can, with language issues, I'm amazed that they can jump into the technology. They jump into the technology very quickly. And they can do it. You know that impresses me. Their Chinese is good. I think they are creative. They know their culture (Interview with Respondent 19, October 13th, 2011).

I would speak of [our current teacher's] ability. She is dedicated. She is focused. She creates outstanding lesson plans. She creates incredible games. She spends time creating different strategies teaching students. Students have great respect for her. She is a member of the team. She is very approachable. She wants to make sure that students do well. She is the one who is always signed up and say: Yes, I'll help. I think she is really somebody who is dedicated and focused making sure that we have an outstanding Mandarin program (Interview with Respondent 9, October 19th, 2011).

Despite the high remarks about Chinese guest teachers, some concerns were also expressed by some respondents:

And the [Chinese] instructors here are not familiar with how you teach from curriculum, and how you follow curriculum. There is a concern now, as well as in the past few years, the [Chinese] instructors aren't following a curriculum. So, how do they account for what they are teaching? That's a valid question and a valid concern (Interview with Respondent 1, September 20th, 2011).

I think the first thing is you have to have good teachers. In the beginning of the year, they struggled with several different things. Number one, they didn't speak very much English when they first got here. So, I think they struggle with that, because our students were used to foreign language teachers who still speak a lot of English with them, especially in their early Level I and Level II classes. And when our kids went into classes with those two [teachers], they were struggled with English, and our kids hadn't exposed to any Chinese. So, that was one issue. I think the second issue was the cultural differences, the educational component that their [Chinese guest teachers] expectations were different from what our students' expectations were in the class (Interview with Respondent 4, October 11th, 2011).

Some respondents made comparisons between Chinese guest teachers and the Chinese teachers they hired, though their intention was not to diminish the contributions of Chinese guest teachers in any way. For example, one respondent noted the following:

Quite frankly, you know, [our regular Chinese teacher] is so good at what she does and there is not comparison; there is not slight on the guest teacher. [Our full-time teacher] is very interactive, very in control of that and has had experience in that. But we were sort of forced splitting that and have that guest teacher to have their own classroom, which wasn't the greatest, because again, their [Chinese guest teachers] expertise wasn't necessarily in the management of that class; because again, they didn't have really much experience with it in that setting. And I think that's where [Our regular Chinese teacher] was really excelled in her teaching in the last several years and being able to manage that, managed by not standing over kids managing, but by creating lessons that are interactive to the point where students don't get interruptive. The other advantage...you know, we were able to work with [our regular Chinese teacher]. The guest teacher was here for one year and then goes back [to China]. And that's difficult, because [our regular Chinese teacher] will be able to build on those experiences over years and years. (Interview with Respondent 6, October 26th, 2011)

Some respondents also expressed their concerns about not knowing much about the Chinese guest teachers before they arrived at their schools, wishing that the schools could be included in the Chinese guest teacher selection process. On the one hand, it showed the lack of

communication between the schools and the CI; on the other hand, it indicated that in some cases, the schools were not included in the decision-making process in the partnership.

We do not know who those teachers are until August of the year. We have no idea. (Interview with Respondent 1, September 20th, 2011).

We have no say in who they [the CI] sent, you know. So, whoever we get, we get. We don't have much choice in the selection. (Interview with Respondent 5, October 18th, 2011).

Somehow, I would like to, maybe rather than just saying: this is your intern, to maybe go and have some interview and have some interaction to get the right fit for the person that is assigned to us. And this person is going to be teaching and being responsible, but yet they do not like children, or they are not very effective or they can't be left alone. So, maybe the CI, the interns, get a little bit background from the school districts of what their needs are and what they are going to use for. We take student teachers all the time. But I know most of the people who take student teachers actually want to have a little background and a little interaction. We have a very fine music department here. They just don't take anybody, because they are going to give up time in front of their groups. It has to be somebody who is competent, because that group is going to be put on the stage and give a performance (Interview with Respondent 7, October 19th, 2011).

In addition to the readiness of Chinese guest teachers, the lack of consistency and continuity was another major disadvantage of the partnership. That issue was reflected through comments on a school's dependency on its regular Chinese teacher, as well as some concerns about the "turnover" of Chinese guest teachers each year. Some examples of these concerns are as follows:

[Our regular Chinese teacher] is the biggest resource...the single, biggest resource we can rely on for our [Chinese] program. (Interview with Respondent 6, October 26th, 2011)

I think the only issue [of having a Chinese guest teacher] was not having that consistency year to year. And having a different person year to year is a challenge. I think we had great people, but it's just one of those things, the support system for them is challenging. I could never be serving in that role, because I never had the opportunity taking Mandarin Chinese. So, I wouldn't be able to communicate effectively enough to bridge that gap. [Our regular Chinese teacher] has a lot of experiences and things that allow her to do that. But again, with her having full-time teaching schedule, and also has to coach up the guest teacher, so to speak, it was a challenge. It is challenging. And that's difficult, because [our regular Chinese teacher] will be able to build on those experiences over years and years. (Interview with Respondent 6, October 26th, 2011).

And I think one of the things to me concerning is that you may have a really good teacher here for a year, two years, or even three years. But if they are going to leave, then, you almost have to start your program all over again. Where my French teacher, she has been here for seven or eight years, and we expect she is going to stay here for 30 years. The two Spanish teachers who just retired, the one who was here for 30 years, the other one was here as a Spanish teacher for 25 [years]. So, that consistency really helps solidify any academic program that you offer. I think especially [for] foreign languages. And, you know, that constant turnover changes heart for students. That change over time makes it difficult (Interview with Respondent 4, October 11th, 2011).

One of the challenges we had is each year we had a new teacher. They [students] are in a disadvantage... They were unable to build a relationship with the teacher even they had it for four years. Every year we had a new teacher until this year. So, I think that's one of the issues that make it a little bit challenging for retaining kids in the program (Interview with Respondent 5, October 18th, 2011).

Since no representatives of Hanban/CIH and the CI were interviewed for this study, it was not clear whether those organizations were also concerned about the lack of consistency at the school level and what they planned to do to improve it. As some respondents pointed out, the lack of consistency and the “turnover” of Chinese guest teachers each year had affected student learning and the quality of Chinese language programs. A deeper implication was that those issues would also affect the sustainability of Chinese programs. Though Hanban/CIH had been encouraging schools to hire their own Chinese teachers, there was no evidence of what the CI had done to work with the schools to overcome those issues while they used Chinese guest teachers.

In summary, most schools felt that their basic needs for having “qualified” Chinese language teachers were met, though the term “qualified” was defined differently. It was not clear whether those schools responded with satisfaction because they received “free”⁴⁹ Chinese guest teachers, textbooks and teaching materials from Hanban/CIH through its CI. Those

⁴⁹ It was called “free” Chinese teacher because a school did not pay a salary but only costs such as rent and medical insurance. Chinese guest teachers received stipends from China’s Hanban/CIH when they taught in the U.S.

resources meant a lot to those schools, especially at the time when many schools were experiencing economic crises and drastic budget cuts. They said that their schools would not be able to start Mandarin Chinese education without those recourses from Hanban/CIH. However, some respondents felt that their needs were not met due to the constant “turnover” and the lack of U.S. pedagogical training among Chinese guest teachers. Those issues had affected the consistency and continuity of Chinese language programs and student motivation and retention. According to the data, if school funding allows, most of those schools would prefer hiring their own Chinese teachers over Chinese guest teachers through the CI, which is in line with Hanban/CIH’s vision. However, the schools had not been informed of what Hanban/CIH and the CI would do to help them increase the level of readiness of Chinese guest teachers and the consistency and continuity of the Chinese programs.

4.1.2 Mandarin Chinese curricula

All respondents interviewed recognized the importance of having a Mandarin Chinese curriculum and considered it another crucial need of their schools in the development of a successful Chinese language program. They defined a well-developed Mandarin Chinese curriculum as a curriculum that was incorporated with the U.S. national and state foreign language standards and was effective in the teaching of American students. At the time when this study was conducted, three schools relied on their Chinese guest teachers to develop a curriculum; two schools had their own teachers in charge of the curriculum development and one school lost their Chinese program due to sharp budget cuts.

The respondents held different views on who should be responsible for developing a Chinese curriculum. When asked how their schools found expertise to develop a Mandarin

Chinese curriculum, some felt that the CI should be responsible for providing a curriculum, because schools did not know the language and had no expertise in that area. Since the CI was affiliated with University X, those respondents felt that the CI should be able to help them with curriculum development through utilizing resources within University X, e.g. the Department of Learning and Instruction. Some respondents described their views as follows:

We don't get any assistance from the Confucius Institute. So, we had to do it internally. The [Chinese] instructors have done it. We've taught the instructors how to do lesson plans, how to write their lessons for the week. We kind of pull that all together. We build a curriculum from the back end to the front end. And we also pull curriculum from other states so we have a Mandarin curriculum. We have no resources. We are totally dependent on [Chinese] instructors. And we are dependent on them to follow the guidelines we've given them. And we get no feedback from the Confucius Institute as far as the curriculum goes. (Interview with Respondent 1, September 20th, 2011)

[Our school] didn't develop the curriculum. Again, we have to rely on the curriculum through the Confucius Institute. I really don't have much to say other than asking for: we need to really see the curriculum so it's consistent every year, and the kids are able to transition from one level to the next level. We didn't really get the document [the Chinese curriculum] until this summer. We try to do a program that goes from one level one class one year different from one level one class the next year. We need to have something concrete and that's the process for students. I think we are still in those early phases of working with the curriculum. In the first few years there wasn't a curriculum. (Interview with Respondent 5, October 18th, 2011)

With the curriculum we really look to the Confucius Institute. We are writing curriculum in all areas. So, curriculum development is tough with different teachers every year. [Our own Chinese teacher] is the one who has been leading the [Chinese guest] teachers. Taking what we see from the Confucius Institute, looking at the AP curriculum, and looking at other examples from across the country, and we make a curriculum based on that. But we could use some more support in the curriculum development area of Chinese. (Interview with Respondent 2, October 13th, 2011)

The same respondent above also felt that "the Confucius Institute could do a little better, not a little better but a little bit more in the curriculum development" (Interview with Respondent 2, October 13th, 2011).

It was not uncommon that in many U.S. schools, individual teachers were responsible for developing a curriculum. Thus, some school administrators believed that Chinese guest teachers

were responsible for building a curriculum, because they knew the language and what students needed. However, due to their language barrier and the lack of experience with developing a curriculum for a U.S. school, few Chinese guest teachers were able to accomplish the task. Hence, who was responsible for curriculum development had become an issue between some schools and the CI. Some school administrators thought that Chinese guest teachers were trained to teach in U.S. schools, while others questioned those teachers' readiness for teaching in U.S. schools, as mentioned earlier. In some cases, it was an issue of lack of communication because the schools were not informed of what pedagogical training those Chinese guest teachers had prior to their arrival at the schools and whether they came with a Chinese curriculum that met the schools' needs. Some respondents expressed their views as follows:

... the expertise really comes from the teachers. Unfortunately, I don't have expertise in all disciplines. I really rely on [teachers'] expertise. My understanding was that the teachers who came to us from the Confucius Institute have been trained and they have the understanding of what they are expected to teach at a certain level. I always thought maybe it was a faulty assumption that there was a curriculum that the teachers coming to the school with, like this is a charge and I know what I'm teaching. The way they instruct might be different, but there was always a sense that students were expected to have this knowledge by this time and covering this type of information. It never, never crossed my mind to request a curriculum from somewhere else. (Interview with Respondent 9, October 26th, 2011).

Again, this wasn't something that we really had a whole lot of guidance on. I guess I expected that the [Chinese guest teacher] had a curriculum that was established. We are going to follow along to make sure...The impression I got was that they received a curriculum that outlined everything they needed to do. It was pretty systematic. So, especially that first year, they followed that step by step. I think, in the second year, [the Chinese guest teacher] did make quite a bit adaptation to it, because she knew what the kids would like. She had a better idea what to expect. My thought on this is that the teachers in the classroom are the one who should be developing curriculum. I'll show you...This is an example of our French I or Level I class curriculum. If we had a Chinese course, I would expect the Chinese teacher would come up with something similar to this. Those are the kind of conversations I would expect that if you had the same teacher teaching the Chinese class year after year, you know, they would initially work with the Confucius Institute, develop a curriculum that everybody is comfortable with. But if the person stays in this school for 2, 3, 4, maybe five years, my expectation would be that

they don't necessarily need the Confucius Institute to make a decision on what our kids need (Interview with Respondent 4, October 11th, 2011).

Two of the three schools that had their own Chinese teacher for a few years entrusted their "resident teachers" (versus "interns") to lead the curriculum development. One school just hired a Chinese language teacher in the fall of 2011. Thus, it was expected that the regular teacher would assume the responsibility for keeping the consistency and continuity and for developing the curriculum for the program. One respondent told me during the interview:

[Our own teacher] is one stop shop, you know. She is the one who developed our curriculum. She is the one we lean on. We have to put our trust in our resident expert. She is our resident expert. And again, we also have our side board [a neighboring school] and the experiences they've had, and the Confucius Institute being able to relate to that. That's where we found it [expertise] (Interview with Respondent 6, October 26th, 2011).

Sometimes the data collected from the same school lacked consistency. For example, one respondent told me that his school had a Mandarin Chinese curriculum from the CI, but then his colleague told me later that the school did not have a Chinese curriculum, and the Chinese guest teachers had been following "lesson plans," not a curriculum. When I asked how long it would take the Mandarin Chinese program to catch up with other foreign language programs in that school, the respondent answered: "Ten years. Five to ten years" from now.

In summary, all of the six schools recognized the importance and urgency of having a Mandarin Chinese curriculum incorporated with the national and state standards and guidelines for the teaching of foreign languages. While some schools felt that the CI should be responsible for developing a Chinese curriculum, others believed that Chinese language teachers were responsible for the task. Two related issues that affected the curriculum and the programs were the high "turnover" of Chinese guest teachers and the lack of consistency and continuity in the programs. As most of the Chinese guest teachers taught in U.S. schools only for a year, the schools that relied on their Chinese guest teachers to build a curriculum often found interruption

and inconsistency. However, the two schools that had their own Chinese teachers for a few years seemed less concerned about the issues. The data indicated that all of the six schools were still working on building Mandarin Chinese curricula.

4.1.3 Funding

Most school/school district administrators interviewed agreed that their schools and school districts had been affected by the economic crisis and budget cuts, though it was more severe in some than others. Three of the six schools (two public, one private) reported that their Chinese programs were not affected much yet and that they were fortunate to have sufficient funding for the following couple of years. Those three schools were approved by Hanban/CIH to be designated Confucius Classrooms in 2011. With the title came a \$10,000 seed grant for each Confucius Classroom. Figure 15 illustrates the resources (e.g. money, Chinese guest teachers) distributed (or not distributed) to schools by Hanban/CIH, Chinese university and the CI.

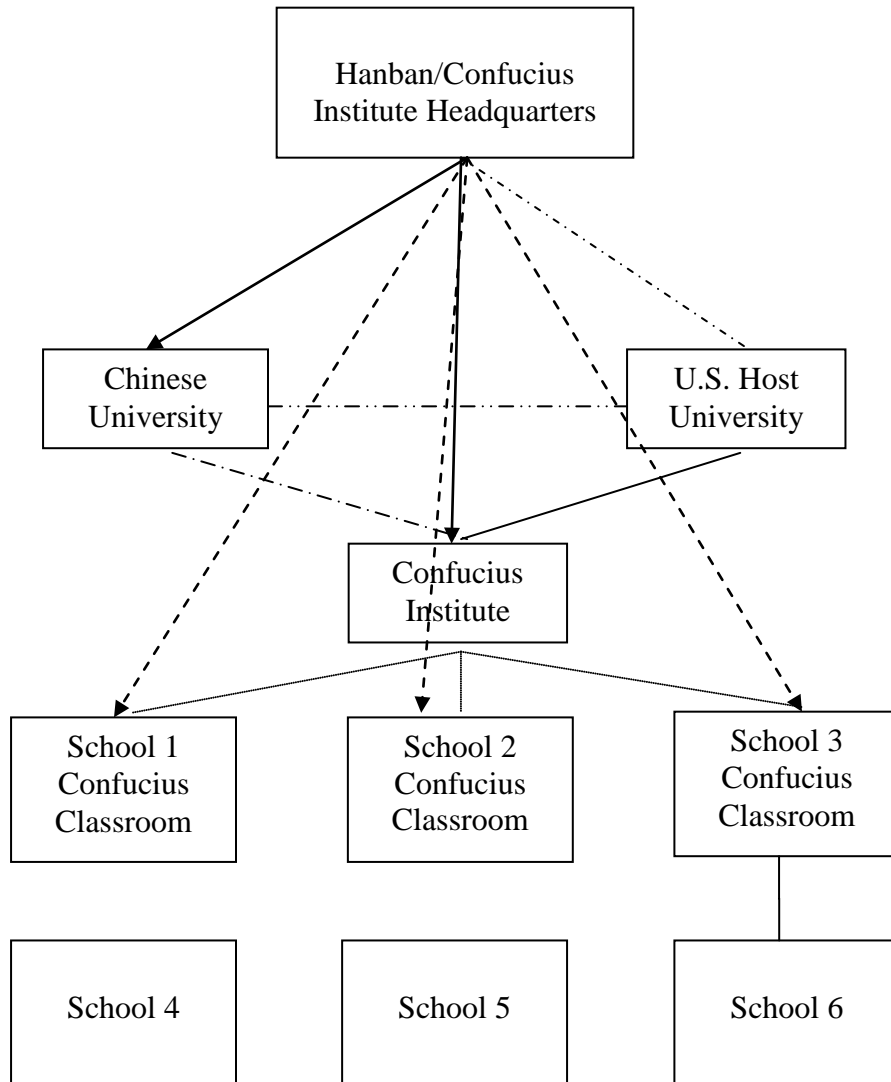


Figure 15. Resource distribution to schools by Hanban/CIH and the Chinese university through the Confucius Institute

- > = Funding from Hanban/CIH /CIH to Chinese University and the CI
- = Memorandum of Understanding (MOU)
- - - - -> = Hanban/CIH 's funding to U.S. schools that were designated to be Confucius Classrooms
- = Chinese guest teachers from the Chinese university to the CI
- = Chinese guest teachers recruited by the CI to U.S. schools

As indicated in Figure 15 above, at the time when this study was conducted, School 4 and School 5 no longer had Chinese guest teachers from China through the CI. Schools 1, 2, and 3 that were designated “Confucius Classrooms” are located in affluent areas, while the school that had lost all of its Chinese language programs was described as “very poor” because “there is no socioeconomic base” (Interview with Respondent 3, October 11th, 2011). Although Hanban/CIH and the CI were not responsible for any school’s financial stability, the fact that schools in affluent areas were more able to keep their Chinese programs and received rewards (money and free textbooks) from Hanban/CIH would surely trigger some questions on potential disparity and inequality regarding resource distributions among schools in the same region. If Hanban/CIH could contribute similar aid to “poor” schools that were committed to developing Mandarin Chinese programs, like the one described above, it would definitely help narrow the gaps of resource disparity and inequality among schools and make its reward system more meaningful.

The most difficult conversation I had in the entire study was about the impact of the economic crisis on school funding. One respondent pointed out that, as the newest foreign language added to many schools’ curricula, Mandarin Chinese was usually the first foreign language program to go when schools had budget cuts. As one respondent described below:

The biggest impact is that school districts are eliminating elective programs and elective courses. Mandarin falls under the category of being elective. So, with the budget cuts going, electives are the first thing they cut. And one of the school districts has eliminated Mandarin this year. They have been a participant for three years. Because they eliminated quite a few of their electives, they not only eliminated Mandarin, they have eliminated some of other foreign languages that started taught at school. So, that’s a concern...I don’t think the budget situation is getting better over the next few years. I think it’s getting worse. So, I think Mandarin plus some other foreign languages plus other classes are going to be targets for coming, not because they want to cut it, but because they have no choice. (Interview with Respondent 1, September 20th, 2011)

Schools 5 and 6 (See Figure 15) still had their Chinese programs. However, due to financial constraints, they had to watch their budgets and stop expanding their Chinese programs.

For example, School 5 used to have an exploratory class in the middle school so students could explore all foreign language classes (including Mandarin Chinese) before they decided which foreign language program they wanted to sign up for when they got to high school. The school administrators believed that the cancellation of the exploratory program was detrimental, because students were not given an opportunity to explore before they made a decision. Moreover, the same school was unable to “hire” a Chinese guest teacher due to tight budgets. The administrator of School 6 reported that they desired to hire a full-time Chinese language teacher, but they were unable to do so due to a financial reason. Another administrator told me that, due to an economic crisis, his school had to give up the plan for beginning Chinese culture exploratory classes in the 5th grade.

During the interviews, one school administrator informed me: “Our individual building budget was reduced probably by 20 to 30%. I think across the state is probably about 20-30% reduction in money” (Interview with Respondent 6, October 26th, 2011). He also told me:

We were trying to figure out ways to save as much money as we could, because of the budget crisis. We have to make a lot [of budget cuts]. Not having an exploratory in the middle school is the one that hurts us the most to me. The other thing is that we talked about trips and experiences, you know, field trips getting students to be able to experience those types of things. Obviously, that has been cut back because of the economic situation (Interview with Respondent 6, October 26th, 2011).

One school district administrator informed me that his district had experienced the most severe budget cuts in its history. As a result, that school district lost all of their Chinese programs and was unable to “hire” a Chinese guest teacher through the CI. In addition to the Chinese programs, that school district also lost staff, principals and teachers, as well as other programs.

According to Respondent 3, his school district used to have two partnerships and three Chinese language programs. Four years prior to this study, the school district established their

first partnership with a high school in China. Each year, a delegation of students, teachers and school administrators from that school district visited the high school in China in the fall, and a delegation from the Chinese high school visited them in the spring. In the same year when they established the first partnership, the school district started a partnership with the CI and began offering Chinese language instruction. In the second year of the partnership, Chinese language classes were offered at all school levels in the district. Meanwhile, they also launched an online program through a local university, which allowed their students to take an online course together with students in China and earning U.S. university and high school credits. According to the school district's strategic plan, the Chinese language programs were to motivate students to learn the language in a classroom setting. The partnership with the high school in China was to provide students with opportunities utilizing and practicing their language skills in a real world situation and enhancing their understanding of the Chinese culture. The online learning with Chinese students was to engage students of different cultures so that they could learn together. When the economic crisis hit, the school district had to cut 1.2 million dollars from their budgets to meet the state's mandate. The third Chinese language program was offered through Skype, so students could continue learning Chinese after their Chinese guest teacher returned to China. As a result, they lost all of their Chinese programs in the fourth year, including the online program. The exchange program with the high school in China was funded by a grant from a private foundation. Since that grant required an application each year, it was not clear if the school district would be able to receive another grant in the following year. The respondent described the situation with emotion:

We had to cut 1.2 million dollars of state aid this year. The economy is just horrible around America. You know, there have been drastic cuts. The state had a 4 billion dollar deficit in the beginning of last year. They cut one billion dollars in education. To us, that was translated to a loss of 1.2 million dollars, a huge cut in our finances. So, when we

lost that money, the result is we don't have any money to fund this [Chinese] program, and the other programs, too. (Interview with Respondent 3, October 11th, 2011).

In summary, funding was crucial to all of the six schools in the development of Mandarin Chinese education, though some schools were in a better financial situation than others. In addition to each school's own financial health, location could also be a factor that affected a school's resource supply. For example, it was evident that the three schools located in the affluent areas were in a better financial situation. Being located close to the CI and University X could mean receiving more resources. Two schools were located in the less affluent areas and further away from the CI and University X. The school district that got hit the most by the economic crisis was in an area that "[has] a very poor tax base" (Interview with Respondent 3, October 11, 2011) and "[does] not have socioeconomic groups" (Interview with Respondent 4, October 11, 2011). They lost their Chinese guest teachers in the end of year two and lost their Chinese program with the CI and the online Chinese program with a local university in the third year. One interesting observation was that the resources (e.g. grants) from Hanban/CIH through its CI did not reach the school that needed it the most, even though the school had linked Chinese language education to their school goals and accomplished a great deal within two years.

I was touched by the vision and enthusiasm of the educators in that school district. They were deeply committed to their vision of producing global citizens and meeting their students' language needs. Unfortunately, they suffered from the most severe economic impact and lost their Chinese language programs. I would never forget how passionate respondent 3 was when he told me the following:

It [the Chinese program] was very successful, you know, the time we did it. You know, it is totally ridiculous. It makes me upset as an educator, because the leadership of the state... If they don't have enough foresight to understand [and] they cut education like this, [it] is going to have a negative impact on America. The investment should be in our children and our country to continue to promote programs like this and other programs in

our schools to help our children to be able to be competitive in the world economy. To cut money from public education is just devastating. It's going to result in the decline of America in the end for doing this. This is just one program. This is a good program. But there were other programs, too. That was devastating (Interview with Respondent 3, October 11th, 2011).

4.2 FINDING 2: THE NEED AND RESPONSE IN THE PARTNERSHIP BETWEEN TH SCHOOLS AND THE CONFUCIUS INSTITUTE

What were those schools' needs for the development of the partnership with the CI and what were the responses in regard to the partnership? This section focused on what the six schools expected from the partnership and the CI. I found that the need and response could be interpreted from the following aspects: (1) expertise; (2) communication; and (3) leadership.

4.2.1 Expertise

The term "expertise" was defined as the knowledge and experience the schools needed to develop Mandarin Chinese curricula and to work with Chinese guest teachers and the CI in the partnership. All of the six schools recognized the challenge of establishing a Mandarin Chinese program and the lack of the expertise in finding qualified Chinese teachers, developing a Chinese curriculum, and developing an international partnership with the CI at University X. The list continued on. The schools needed the expertise that they did not have. Thus, they relied heavily on the CI. One respondent informed me that her school tried to find a qualified Chinese teacher for a year, but failed. So, they turned to the CI for help.

Each year, the CI recruited Chinese guest teachers from a Chinese university, where those teachers received their academic training. Prior to their arrival in the U.S., Chinese guest teachers went through short-term training in China, which was sponsored by Hanban/CIH, but administered by a university in Beijing. Once those teachers arrived in the U.S., the CI offered them a two-week orientation (including one-week training on U.S. culture and pedagogy) held on the campus of University X. Besides recruiting Chinese guest teachers, the CI also assisted Hanban/CIH with distributing textbooks and teaching materials to its partner schools.

In addition to the need for finding qualified Chinese teachers, some schools also expected the CI to help them develop a Mandarin Chinese curriculum and provide further training for Chinese guest teachers. One respondent explained why the CI should develop a curriculum for its partner schools. In his view, the curriculum developed by the CI could be used as a road map for all of the schools in the partnership, so there would be consistency across the programs in partner schools.

We need curriculum. When we started this program, my understanding was that the CI was going to develop a curriculum. It never happened... And they [the CI] should also give us all a road map of what the CI is expecting, not only the [Chinese] instructors to achieve, but the students to achieve. And I think that should be uniformed across all the [school] districts the [Confucius] Institute is providing instructors to. As little communication as we have, I don't know any program that has a curriculum designed by the CI they are working from. I don't think it does. And it'll be nice if we're all doing the same thing. (Interview with Respondent 1, September 20th, 2011)

In general, responsibilities were shared between the schools and the CI. For example, the CI was responsible for preparing paperwork for visa applications, picking up Chinese guest teachers at the airport and conducted a two-week orientation workshop and training. Once the teachers arrived at a school, it would be the school's responsibility to help those teachers get settled in and get them familiar with the school system, including paying rent for apartments, purchasing medical insurance, getting emergency teacher permits and social security cards, as

noted earlier. However, it was not made clear to the schools that the CI would not be responsible for the development of a Chinese language curriculum. That is one of the areas that the CI and the schools would need further clarification in terms of shared responsibilities.

According to Respondent 1, it was crucial for the schools to have a curriculum from the CI because of the following reasons:

The [Chinese] instructors here are not familiar with how you teach from curriculum, and how you follow curriculum. They don't know. There is a concern now, as well as in the past few years, the [Chinese] instructors aren't following a curriculum. So, how do they account for what they are teaching. That's a valid question and a valid concern. Just like any other subject, you have to have a map of where you are going, as far as your teaching goes. There is a way of how to put something together. But it is just not provided to us. And that's become a major issue now

However, Respondent 2 provided a very different view from Respondent 1. Respondent 2 recalled:

With the curriculum we really look to the CI. The CI has really helped us develop the curriculum. It needs further development, but they give us guidelines. Originally, the curriculum kind of came from a lot of textbook and unit plans. (Interview with Respondent 2, October 13th, 2011)

The disparity of the two different reports indicated the lack of communication between the CI and some of the schools, as well as the inconsistency in the partnership. However, Respondent 2 suggested later in the interview that he hoped "the CI could do a little bit more in the curriculum development" (Interview with Respondent 2, October 13th, 2011).

Some respondents held the view that Chinese guest teachers were the source of expertise that their schools could rely on. For example, Respondent 4 said during the interview:

I think, well, I guess...my thought on this is that the teachers in the classroom, they are the one who should be developing curriculum. They are the ones who should...some of the discussions I had in the past couple of years with the teachers in this building are that curriculum is not something you set and then just leave it and move on. It's something you should always look at. I'll show you...This is an example of our French I or Level I class curriculum. If we had a Chinese course, I would expect the Chinese teacher would come up with something similar to this. What are the main concepts we want our kids to

know at the end of the school year. And how are you going to know, what skills are you going to require kids to know for each of those concepts? (Interview with Respondent 4, October 11th, 2011).

Respondent 4's view was echoed by Respondent 9, who stated:

...the expertise [of developing a Chinese curriculum] really comes from the teachers. My understanding was that the [Chinese] teachers who came to us from the CI have been trained and they have the understanding of what they are expected to teach at a certain level. Our school is very wired in some way. Teachers create their own curriculum. We have a curriculum map. We have a map of the curriculum so she has put information in, such as learning objectives, essential questions, the skills, the content covered. (Interview with Respondent 9, October 19th, 2011)

However, those schools did not specify what criteria they had established to evaluate the Chinese curricula and make sure the curricula reflected the state and national standards (e.g. the ACTFL standards) for the teaching of foreign languages in U.S. schools. One observation I had during the interviews was that the Chinese language programs were viewed as competition, rather than an addition to the schools' curriculum innovation. For example, one respondent told me that the Chinese language teachers and teachers of other foreign languages did not observe each other's classes; and they did not meet and share their teaching experience on a regular basis. I was surprised to hear that, though I was aware of the competition among foreign language programs in schools. Western language programs, such as Spanish and French, had a long history in U.S. schools. Theoretically speaking, Chinese language teachers could have learned a lot from teachers of those programs, especially in the aspects of curriculum development, teaching methods and classroom management. During the interviews, I did not sense that teachers of Western languages were cooperating and working closely with Chinese language teachers in some schools.

Another need that some respondents talked about referred to further training for Chinese guest teachers, which they hoped the CI and University X could help with. For example, when respondents were asked what Chinese guest teachers should improve, they replied:

I think in the assessment. For... it has been one week since he had seen a lot of teachers how they do the assessment, understanding oral proficiency, standards, understanding some of our assessment philosophies as far as formal one, some of the assessment. They will get a lot of that in the induction program as well as the professional development program. For one week it has been developing assessments. (Interview with Respondent 2, October 13th, 2011)

They [Chinese guest teachers] need improvement in preparation before they come on how to teach in American school. I know the CI does some of that. I mean I know they are doing that, but I don't know that's enough. And, maybe, I don't know if they talk about proficiency. I don't know if they talk about how to teach a foreign language. You know, I don't know how you get on that. It's the issue of getting them settled. It would probably help if the CI did a little more with that [teacher training] throughout the year. (Interview with Respondent 19, October 13th, 2011)

I think just the experience of teaching and developing a report with the class. And again, some of the strategies they [Chinese guest teachers] need to use, or could use to help them manage the classroom. Since the cultures are so different, the teaching is different; and how you have to teach is different. (Interview with Respondent 6, October 26th, 2011)

The first year, the intern [Chinese guest teacher] was just with [our teacher] in the classes. The second year, the intern had to be separate in the class...That's got a little bit challenging. Looking back, we couldn't have done it in another way. (Interview with Respondent 7, October 26th, 2011)

It was clear that some respondents believed that Chinese guest teachers should have more preparation before entering American classrooms. In addition, they felt that Chinese guest teachers were "interns," rather than "experienced" teachers.

When I asked what kind of training a Chinese guest teacher would need when she or he just arrived at the school, Respondent 6 said:

I think that classroom management piece, and again, just the interaction, some experiences before they are in front of 25 students. And again, one thing I would suggest is even to have a different resource other than the teacher here because it put a lot of strains on [our teacher] to have help do that. She did it, because she knew she had to and

it would make her life easier in a long run. It's one of those things there needs to be a support network. I almost feel bad for some of those [Chinese guest] teachers, because they came over, they were put in a little bad situation, because they weren't expecting to be so different as it was. They may have got a bad experience in the first week or so, because they are like: why aren't the students listening to me? I think those are the things could certainly help. (Interview with Respondent 6, October 26th, 2011)

4.2.2 Communication

In addition to the expertise that the schools expected to get from the CI and University X, another need that those schools expected to have from the partnership was communication. Several examples mentioned earlier pointed directly toward the lack of communication. Some respondents reported that their communication with the CI was on a case-by-case basis, while others said they heard little from the CI. For example, when asked about his school's communication with the CI, Respondent 2 said:

The primary communication occurs through [a CI person] and I. And that's pretty much it. ... sometimes between [CI person], the [Chinese guest] teacher and I. That's pretty much the communication channel. (Interview with Respondent 2, October 13th, 2011)

Later in the interview, Respondent 2 suggested that the CI should encourage communication among partner schools, implying there was little communication among partner schools. The respondent commented:

I think the CI could do a little better, not a little better but a little bit more in the curriculum development, maybe brining the schools together. That's something I would like to see more in schools offering Chinese, providing opportunities for those principals, or teachers, or curriculum leaders to get together and talk about how and what these schools had done and been successful in Chinese. We really haven't had that. We had one meeting in the years I have been involved with the CI. So, I'd like to see more meetings like that. (Interview with Respondent 2, October 13th, 2011).

Respondent 3 confirmed that his communication with the CI was also on a case-by-case basis, though he “didn’t talk to them a lot.” (Interview with Respondent 3, October 11th, 2011)

Respondent 9 shared with me that the communication between her school and the CI was also conducted on a case-by-case basis.

INTERVIEWER: Please describe the communication channel between your school and the CI.

RESPONDENT9: If there is anything to do with the CI, we contact [the contact point at the CI]. She is our conduit at the university. If there is something we need, paperwork, submitting applications, deadlines, she is the person who usually gives us announcement and information about the CI. She is our point person. I don’t have any of the same with Hanban. I would connect directly with [the contact point at the CI].

INTERVIEWER: How frequently that communication takes place?

RESPONDENT9: It’s interesting. This year I have not been communicated as much with [the contact point at the CI]. I have not...I would say year one with [a Chinese guest teacher], it was frequent. Year two was less frequent. It was just last year. It wasn’t every month. It was frequent enough. Several times a semester, definitely.

INTERVIEWER: So, is it correct to say that communication takes place on a case-by-case basis?

RESPONDENT9: Absolutely. I will agree with that, case-by-case bases are usually we connect. (Interview with Respondent 9, October 19th, 2011)

Respondent 1 had a very different experience. He described:

We’re lacking any kind of information coming out of the CI. I think in the years this program has existed, we had one meeting with all of the participants over at the university, where everybody was able to get together and exchange. I think we had one meeting within the years. There is no communication between myself and the other participants. I don’t even know what the other participants are [now].

And we don’t talk amongst ourselves. So, that’s kind of a hanging issue. It will be nice if we could talk. We don’t get to talk to each other. And again, the CI needs to bring everybody together, to share. We don’t get to talk to each other. I don’t know who the other school districts are. I know about [schools] because I actually helped them out in the past with logistics. And outside that I couldn’t tell you. I have no idea what the other participants are. (Interview with Respondent 1, September 20th, 2011)

Respondent 18 expressed his concerns about some issues between his school and the CI, which he believed was due to “poor communication” between the two. The themes described by

Respondent 18 included:

I think the greater issues and challenges have been to smoothly work with the university and the CI in optimizing those resources as I’ve mentioned earlier. And I think those are the crucial issues that need to be addressed to make this a really first rate program that could just really shine. In the five years I have worked here, I really got a sense that in some ways the program is pretty mediocre. I describe that to poor communications really coming from the university or the CI. That may be on the behalf of the schools that sent the teachers, too. As I said earlier, I just don’t see the forum set up to address to get us all together to say where things are working well, where things can work better. I don’t see any paperwork asking for an evaluation. So, personally, from my point of view, that’s the big challenge and the big issue. (Interview with Respondent 18, October 12th, 2011)

Respondent 18 agreed with the suggestions proposed by Respondent 1 and Respondent 2 about the importance of establishing a communication network among the partner schools. He was concerned that, due to the lack of communication, resources were not shared and maximized between the schools and the CI. He explained:

I really feel that resources needed to be assessed very broadly and I think that’s really been...In my understanding that hasn’t been done thoroughly. There are great resources out there. But identifying them, how are they developed, how can they be better developed, what kind of feedback we get from the schools to develop this better, I feel that as a resource the CI itself should be reaching out more to [our school] and may be the other schools as well. One of the things I don’t understand what they haven’t been done is to bring all of the directors of these schools together once or twice a year and have them conducted a seminar or forum: how are things going; what can we do better; what can we share about what works; how can we optimize the teaching of Mandarin Chinese across all of these high schools. (Interview with Respondent 18, October 12th, 2011)

Respondent 18 emphasized his view by describing the relationship between his school and the CI as follows:

RESPONDENT18: I really don’t think it’s effective. It could have been far stronger and more effective. And it should be.

INTERVIEWER: For example?

RESPONDENT18: Well, maybe the things I said, you know. My fear is that if the CI in this area isn't reaching out more to bring together all the resources, all the descending schools and the participants, the program may wither. I don't know if it would fail, but enthusiasm I sense is waning a bit now. Again, as I said earlier, there is no real way to measure what we've been doing very clearly, get enough feedback from these schools, organize social events for the teachers, bring the best ideas out there. I'm repeating myself, but...I don't think the relationship is particularly very good. Well, I didn't see them (CI representatives) last year. I attended two events. They were good, but there were only two. What we really need is an event, a meeting where we talk about what's working, what's not working. I've never seen an event like that. I'm waiting. (Interview with Respondent 18, October 12th, 2011)

Respondent 19 felt that the lack of communication between her school and the CI could lead to the lack of consistency and continuity in the Chinese program. She commented:

There is a lack of communication on what the CI...like it will be helpful if the CI would tell me, because I'm the only thing here every year. It would be helpful if the CI would tell me what those goals are. (Interview with Respondent 19, October 13th, 2011).

There was clear discrepancy in communication between the schools and the CI. The lack of communication also suggested that other issues such as inconsistency and the lack of transparency might exist in the process and the partnership.

4.2.3 Leadership

Leadership, or topics related to leadership, was mentioned during the interviews. However, in some cases it was not clear which leadership a respondent was referring to, the leadership in the development of Mandarin Chinese education or the leadership in the partnership with the CI. I did not inform the respondents that I divided the leadership into those two categories, because I wanted to hear how they defined leadership and what their views were.

Most of the conversations focused on the leadership in the development of Mandarin Chinese education. Some respondents looked up to the CI for directives, while others believed

that a school should take the lead in the initiative. Respondent 18 expressed his view on leadership below:

INTERVIEWER: In your opinion, which organization should be the leader to organize this [activity] for [Chinese guest] teachers?

RESPONDENT18: There is a lot of responsibility that it's at every level. But it really seems to me that has to be the Confucius Institute. It has to be...they have to be the central organizing agent. And I think if they were doing more, they would get great participation from each of the high schools and middle schools where these teachers are. And I know all of those, many of those teachers who are working in the classrooms with the Mandarin teachers, they would attend, administrators would attend, even students would attend. Sometimes parents if invited would gladly attend. But no one school can organize that. They are the branches, you know. The trunk has to do that kind of organization. So, yes, I feel that's where the Confucius Institute really needs to set something up to do.

INTERVIEWER: From an organizational perspective, what do you think lacking between the school and the Confucius Institute?

RESPONDENT18: Leadership. What more is there? That's the most important thing. Why isn't there? I think there was the first year, there may have been a forum or some sort where all of the schools were invited to get together and share. But I haven't seen that continue. If you ask me, that's failure of leadership. That's what we need. That's a great idea. Let's get back to it.

INTERVIEWER: What kind of help or guidance will your school need from the Confucius Institute if you want to do this kind of assessment or evaluation of the Chinese program?

RESPONDENT18: Well, it seems to me that the Confucius Institute has to spearhead that, has to set up some forums, have some university-level people spearheading some of these studies, using some of the resources from the high schools, to participate in the evaluations of the programs in their schools.I have seen how things have brought about change. Things that stagnate too long end up fading away. There must be regular evaluation and re-evaluation. It's never an ending process. You're always working to improve, change, grow, but it's all based on data. It's not just someone's feelings about things. It has to be done in a formal, scientific way.

...I think we need some direction from somewhere, because this program isn't quite like our other programs in that, you know, these [Chinese guest] teachers aren't directly our employees. There's been some latitude given to bringing this program into the schools because we can't go out and hire a Mandarin teacher. There aren't just enough of them, so they come from the Confucius Institute. I don't think our school can do all those things without greater efforts at the higher level to try to bring this about. I think we'll work hard to do it, but we need to be on the same page with other schools that are doing this

and know this is the process happening in the state... because there are many things driven by the state. For each one to do this on its own is...that's an old model. We are not working into that model anymore. (Interview with Respondent 18, October 12th, 2011)

Respondent 9 held a different view and felt that a school should be the leader in the development of Mandarin Chinese education. She also emphasized the role of the school in the Chinese program development. When asked if a school should lead the development of Chinese education, rather than waiting for the Confucius Institute, Respondent 9 insisted that a school should be the leader, not the CI. She explained:

I think in order to have a successful Mandarin program, the school definitely needs to be the leader. The school cannot wait for the Confucius Institute to get their directive. It is your school, so the school has to have the leadership and the commitment and a vision of what they want to do with their language program. And you have to have a vision of what the Mandarin program is going to be, because you have to shape it; you have to deliver it. You are here. The Confucius Institute is not here. It's not their school. They are supporting the school and definitely contributing to the program, but ultimately the school is accountable for delivering that educational experience to students. And you have to be able to follow through on that. You have to know what the needs of the school are. The Confucius Institute does not work here. So, they don't know what the needs of the school are. You as an employee, you as the leader, you need to know what the school's needs are. (Interview with Respondent 9, October 19th, 2011)

During the interviews, I found that the six schools' academic and financial strengths varied. For example, some schools that were located in affluent areas were financially stable and academic oriented. Those schools had sufficient funding for their Chinese programs and were able to find expertise to develop their Chinese curricula. However, some schools that were financially challenged and less academic-oriented would need expertise and support from the CI and University X to help them develop Chinese curricula. Otherwise, they would not be able to sustain their Chinese programs. Thus, the argument of respondent 9 above might apply to some schools, but not others. Further study on disparity among partner schools is recommended.

Respondent 6 noted that the CI had been “a beacon” or “a light house” to his school and provided the school with guidance when needed. That approach reinforced the notion made earlier, that is, the needs of the schools varied. Whether the CI was willing and capable of meeting the various needs of its partner schools remained a question. Respondent 6 illustrated his view as follows:

I think they’ve assisted us and guided us as a light house and let us use the resources. It’s like we are sailing, and we use that light house as a point of reference. And again, sometimes that light house is essential to us because they’re giving us key information and guest teachers to help us move our program. Those are the benefits that really allow us to develop the program. (Interview with Respondent 6, October 26th, 2011)

In summary, expertise, communication and leadership were crucial to the partnership between the schools and the CI. Some schools relied on the CI for expertise and leadership, while others suggested using the CI when needed. The center of the question was not about which view was right, but about how the CI met the needs of its partner schools, regardless of the schools’ financial status and academic or vocational orientations. The data collected showed that some schools’ needs were not met and it was not clear to those schools what the CI would, or would not, do to assist them. For example, the CI helped those schools recruit Chinese guest teachers, but did not help them develop Mandarin Chinese curricula, which was what the schools needed the most next to their need for Chinese teachers. Communication took place on a case-by-case basis, while the schools expected to have communication on a regular basis. Several respondents suggested that a communication network should be established so partner schools could share their experiences and maximize resources. Different views were expressed about leadership in the development of Mandarin Chinese education. Some suggested that the CI should provide leadership; some believed that a school should take the lead; and some felt that the CI should only act like “a beacon” or “a light house” to the schools. Leadership for the

partnership was either not mentioned, or the respondents thought what they said about leadership referred to both the development of Mandarin Chinese education and the partnership. In addition to communication and leadership, another crucial factor for a successful partnership is trust, which was not mentioned much during the interviews. The reason could be because the CI was affiliated with University X, which was well known in the country. Thus, the schools had no reason to question its legitimacy. Only those schools that had gone through the partnership with the CI had learned that University X played a minor role in the partnership.

4.3 FINDING 3: THE RELATIONSHIP BETWEEN THE DEVELOPMENT OF MANDARIN CHINESE EDUCATION AND THE PARTNERSHIP

Despite the challenges and issues, the data collected indicated that the development of Mandarin Chinese education and the partnership benefitted and complemented each other in some ways.

During the interviews, the respondents were asked to describe:

- Some common goals that the schools and the CI shared;
- The outcomes that the schools desired to achieve through the partnership;
- In what ways the partnership helped the schools achieve educational goals;
- The benefits that the schools gained from the partnership.

The themes of the relationship between the development of Mandarin Chinese education and the partnership emerged when the respondents described their experiences with the following concepts: (1) common goals; (2) educational objectives and the partnership; and (3) benefits gained.

4.3.1 Common goals

The respondents were asked to identify some common goals that their schools and the CI shared. The term “common goal” was defined as a goal that both the schools and the CI attempted to achieve through the partnership. The respondents said that the CI did not tell them what its goals were, but they came up with their own interpretation and assumed that the common goal would be to promote Mandarin Chinese language and culture in U.S. schools. Below are some examples of the responses.

I think it's to expand our Chinese program. (Interview with Respondent 2, October 13th, 2011)

We tried to teach our children Mandarin Chinese and tried to promote the other ideas I've talked about, the other ideas about culture acceptance of another culture, learning about another culture, educating our children about China, about the fact that China has become a world power. (Interview with Respondent 3, October 11th, 2011)

The common goal, I think, is the goal of educating students in our country the Mandarin Chinese. That's the number one goal we [the school and the CI] both share. We want our students to have more and more experiences allowing them to learn the language and the culture and be a benefit for them down the line. I think that's something that we definitely share. Basically, I would imagine that the Confucius Institute has their own needs and wants in mission out of the whole process. I'm sure everybody is in for different reasons. There has to be some benefits for them, even as simple as the benefit for them is knowing that more and more students will be coming out and learning Mandarin Chinese. I think those maybe the things a little different because our motivation for it and their motivation for it are different. It doesn't mean either right or wrong, just mean it's different. (Interview with Respondent 6, October 26th, 2011)

I think it's providing opportunities for our students to learn another language, Chinese language, Mandarin. I think it did broaden our understanding and appreciate for the Chinese culture. But I think the thing we really shared is providing a strong academic program of a world language, and also sharing appreciation for the culture. (Interview with Respondent 9, October 19^h, 2011)

Some respondents pointed out that they were not informed of what the CI tried to achieve, but they knew what their schools attempted to achieve.

We didn't get any feedback from the Confucius Institute. So, our goal here in reality right now is just to maintain the program, because we don't know what the Confucius Institute's goals are. There is very little communication at that level, as to what Confucius Institute wants to do now or two years from now or five years from now. We don't know. (Interview with Respondent 1, September 20th, 2011)

I don't know a whole lot about the Confucius Institute. I know they were providing our teachers for us. I think our goal would be to hire a permanent person if we could do that. (Interview with Respondent 4, October 11th, 2011)

I think, perhaps, it's promoting Chinese language and expanding its influence. They [the school] didn't tell me what it [the goal] was. (Interview with Respondent 20, October 10th, 2011)

Though the respondents were certain about the overarching goal between the schools and the CI, it was evident that little communication regarding the goal took place between the schools and the CI, as well as among the administrators and teachers. That explained the various gaps that existed between the respondent groups and why some respondents were not familiar with the development of Chinese language programs, while others knew little about the CI and the partnership.

4.3.2 Educational objectives and the partnership

The respondents were asked to describe in what ways they thought the partnership with the CI helped the schools achieve their educational objectives. The term "educational objectives" was defined as some specific goals that the schools attempted to achieve through providing quality education and the partnership. For example, increasing the level of language opportunities so students would be able to gain proficiency in Mandarin Chinese as they moved toward

graduation, as well as preparing students to become competent and competitive for their future careers, were examples of some specific goals.

When asked what their schools attempted to achieve through the partnership and in what ways the partnership had helped the schools to achieve their educational objectives, the respondents commented:

It provides some diversity to our educational programs. When we can offer Chinese courses, whether it's a Chinese language course or we offer a Chinese culture class two years ago, you know, that just offered an educational opportunity for our kids. That's one of the goals we have for all of our students. (Interview with Respondent 4, October 11th, 2011)

We had someone last year take an AP test and do well. They were non-native Chinese speakers. I think it's evident that our program, curriculum, what we are doing with kids are working. So, this partnership made that all possible. (Interview with Respondent 2, October 13th, 2011)

I think as the school has developed a vision of having more global study focus, and emphasis on global citizenship, the Confucius Institute has helped us develop that commitment by adding another language. When you have only Western languages offered in your school, you are sending out a message: those are the languages most important; those are the only languages to learn; those are the languages that really shape your vision. And when you open up the language offerings to another region of the world, that is not a Western language, that is not a Romance language, you are making a statement that there are other languages and cultures which are value to study, and have their own place in our curriculum. And I think that's a school that is dedicated to diversity, dedicated to a global vision and the world around you and be able to be a contributing member to our society. (Interview with Respondent 9, October 19th, 2011)

We have developed more classes and more students. We hope more schools would join us. (Interview with Respondent 20, October 10th, 2011)

Well, it helped us because we have a strategic plan that tells us different things we try to achieve, a five-year plan. A part of that was the China Initiative. So, by having the Confucius Institute teachers here, it helped us achieve that strategic plan goal to be able to have a partnership with China; [to] have our children exposed to the learning of Mandarin Chinese; and [to] be able to learn about another culture. So, that was really helpful. I can only think of the fact that in our strategic plan we talked about how we want to be able to have a partnership, you know, to have the opportunity for our kids to learn the Chinese language. (Interview with Respondent 3, October 21th, 2011)

It is worth mentioning that, during the interviews, Respondent 3 and his colleague talked a lot about the partnership they had with the high school in China. More partnership activities took place between the school and the Chinese high school, than between the school and the CI. During the interviews, the respondents referred to the partnership with the Chinese high school often, particularly in regards to how their students got to practice their Chinese language and experience the Chinese culture while visiting the Chinese high school in China. They also mentioned how much their students benefitted when representatives of the Chinese high school came and visited the school in the U.S. That school also got its neighboring schools involved in hosting some of the Chinese visitors, which left a tremendous impact on the neighboring schools, as the respondents of those schools described to me.

However, some drawbacks of the partnership were mentioned during the interviews, which might have hindered the schools to achieve their educational objectives. For example, Respondent 18 described as follows:

It can do a lot to contribute to the sustainability of the program, but the partnership isn't being utilized as partnership so much as...it's stagnating, if you ask me. It's not growing. It's not providing feedback. It's not asking questions and providing feedback. Just kind of in a static role: let's do the same thing like we did last year again with new teachers, like these are some changeable parts. And we just repeat this; maybe even do less, because now we are better at this. I think we need to do more to make it get better. Really do more. That's what we do with any other program in America, or it fails to survive. If more isn't done, the program won't survive. (Interview with Respondent 18, October 12th, 2011)

4.3.3 Benefits gained

The respondents were asked to describe in what ways the partnership with the CI benefitted their schools and the development of Mandarin Chinese programs. All of the respondents agreed that Chinese guest teachers were a major benefit to their schools, because the schools were not

required to pay those teachers' salaries on the one hand, and those teachers had the knowledge and expertise of the Chinese language and culture on the other hand. Other benefits were the free textbooks and teaching materials from Hanban/CIH, through its Confucius Institute. Without those resources, the partner schools would not be able to start their Chinese language programs. Another benefit was the impact Chinese guest teachers brought to the schools when they "opened [their] eyes to a new culture." The respondents shared with me their views below:

If it were not for the partnership, I'm not sure if we would offer Mandarin Chinese. The benefit is that we were able to offer students a critical language. (Interview with Respondent 2, October 13th, 2011)

I would say that the Confucius Classroom is a huge benefit. I would say outstanding teachers; ways to approach teaching a foreign language differently. There is some good teaching over there. I think that's another one. I think also just being a community outreach..., which is really beneficial for people to look at [our school] and look for some of the things we offer. But just the quality of the educational experience for our students is great. People look at our school, because we offer Mandarin. That's huge; that's profound. There are people who come to our admission events because we offer Mandarin and offer a quality Mandarin program, not just like something that is cookie cutter. It's quality education. It has the standards. It feels right for us. (Interview with Respondent 9, October 19th, 2011)

I think the benefits are very clear. We are able to start this program from scratch. Three years later, now [we] have Chinese III, have a full class of it. I think that's a big benefit. (Interview with Respondent 6, October 26th, 2011)

Well, I tell you one benefit. It's that the [Chinese guest] teachers...have had our eyes opened to a new culture. Seeing these [Chinese guest] teachers in our school, and seeing how much they are like us has broken down big barriers at the professional level. Students certainly have gained. But I think one of the chief gains is that at the professional level we see, hey, these people are a lot like us. We may have ideological differences, cultural differences, but we don't have many personal differences. We like the same things. We laugh about the same things. We cry about the same things. We like expanding our cultural horizons with the Chinese teachers in our schools. (Interview with Respondent 18, October 12th, 2011)

The benefits described by the respondents actually referred to what Chinese guest teachers had done for the schools, because they were the ones who worked with the schools daily and assisted the schools in developing the Chinese language programs. One respondent felt that

Chinese guest teachers and the CI were two different entities, because Chinese guest teachers came from a Chinese university and they were sponsored by Hanban/CIH. Moreover, he felt that there was no partnership between his school and the CI, but rather “a working relationship.” As a result, he felt his school did not gain any benefit from the CI.

Again, there is no partnership. So, I think anything we gained has been outside. The CI has nothing to do with that. Right now, we are not getting any benefit. There is nothing being done. So, I have to wonder what benefit we are getting from this agreement. I won't even call it a partnership. It was a working relationship. But right now we are not getting any benefit from it, to be honest. (Interview with Respondent 1, September, 20th, 2011)

Whether Chinese guest teachers were a part of the CI was debatable. What the respondent meant was that Chinese guest teachers had made great contributions to teaching Chinese language and culture and working with students in his school, while the school was unable to get any assistance from the CI with the development of Chinese curricula. Therefore, it was difficult for the schools to say they had benefitted much from the partnership and the CI.

In summary, the respondents agreed that the schools and the CI shared a common goal, i.e. to promote Mandarin Chinese language learning in schools. Other than that, few respondents said they knew what other goals the CI had, which indicated the lack of communication between the schools and the CI. It was evident that the relationship between the development of Mandarin Chinese education and the partnership with the CI was complementary and cooperative in nature, because the schools would not be able to establish Mandarin Chinese programs without the aid and support provided by Hanban/CIH through its CI. All six of the schools started their Mandarin Chinese programs through the partnership with the CI, though some programs lasted longer than others. Most schools believed that the partnership had helped them achieve some of their educational goals. For example, in some schools, the number of

classes and students increased. However, in other schools, the number dropped severely as the class level went up. For example, according to the CI's 2010 annual report, between January and December 2010, a total of 1,400⁵⁰ students enrolled in the Chinese language programs offered in the CI's partner schools and colleges, with 1,230 students in Level 1 classes, 107 students in Level 2, but only 63 students in Levels 3 and 4 classes (advanced level). That phenomenon had led to questions about what caused the dramatic drops in student numbers as class levels went up and who in the partnership should be held responsible for that undesirable outcome.

⁵⁰ The Confucius Institute claimed that the total student enrollment in 2010 was 2,915, but with 1,230 students in Level 1 classes, 107 students in Level 2, and 63 students in Level 3 and Level 4 combined. The correct total number should be 1,400, which was used in this study.

5.0 CHAPTER FIVE: CONCLUSIONS AND RECOMMENDATIONS

This study was designed to find in what ways the partnership with the CI helped the development of Mandarin Chinese education in the six U.S. secondary schools and to define the relationship between the development of Mandarin Chinese education and the partnership from the schools' perspective. This study addressed the following questions:

- (1) What motivated six U.S. schools to start Mandarin Chinese education?
- (2) Why did the six schools develop Mandarin Chinese education through partnership with the Confucius Institute?
- (3) In what ways did the partnership help the six schools achieve their educational goals and desired outcomes?
- (4) How did the six schools describe the value of the partnership?

The population for this study included all school/school district administrators, regular teachers and Chinese guest teachers of 57 schools offering Mandarin Chinese through partnership with the CI between 2007 and 2010. Six secondary schools (five public and one private) were selected for this study, a little over 10% of 57 schools⁵¹ in the partnership in 2010. The “study population” consisted of 22 participants, including nine school and school district administrators, five regular teachers and eight Chinese guest teachers (N = 22).

⁵¹ The Confucius Institute reported that a total of 57 schools and colleges participated in the partnership in 2010.

The design of this study was qualitative. Data were collected through qualitative field interviews and related documentation. Four sets of interview protocols (see Appendixes A, B, C, D and E) were developed for each category of the participants, namely, school administrators, school district administrators, regular teachers and Chinese guest teachers. The interviews were semi-structured, allowing the respondents to share their views on particular topics in detail and in depth. The interview questions were open-ended and grouped into two major topics, focusing on the development of Mandarin Chinese education and the partnership between each individual school and the CI.

However, this study was constrained by several limitations, including:

- (1) Only a certain number of schools offering Chinese language programs through partnership with the CI are located within the SMSA where the university is located. Thus, only a small number of schools were available for this study. While the results may be generalizable to some schools offering Mandarin Chinese through partnership with the same Confucius Institute or a different one, the findings of this study may not be applicable to all schools.
- (2) Due to the fact that very few people in each of the six schools knew much about the development of Mandarin Chinese programs and/or the partnership with the Confucius Institute, a very small number of content experts could be found for the study. Thus, the results may lack representation.
- (3) The respondents defined “partnership,” “Confucius Institute” and “success” differently. The responses related to those concepts may lack consistency.

- (4) Due to certain circumstances, the study was unable to include students, parents and community citizens, whose input could be beneficial and crucial to the outcomes of the study.
- (5) There were obvious gaps between participant groups regarding their knowledge of the research topic. For example, one group of respondents could answer questions about the Chinese programs in their schools, but not about the partnership. Another group knew about the partnership, but was not familiar with the Chinese programs. Therefore, in some cases, half of the interview questions were left unanswered. In that case, no replacement could be found from the same school.
- (6) My personal knowledge of, and experience with, the CI and those six schools might affect my judgment in the analysis, though the knowledge and experience also benefitted me since I could fully comprehend the information and issues presented by the respondents.

Mauch and Birch (1998) pointed out that limitations would no longer be problems once they were “specified” and “clearly and openly laid out for all to examine” (p. 105). I would also add that some limitations could be looked at dialectically, such as my personal knowledge of, and experience with, the Confucius Institute and those six schools. As Mauch and Birch (1998) explained: “Every study has its limitation” (p. 105). What makes them unproblematic is to maintain honesty and openness about them.

5.1 SUMMARY OF THE FINDINGS

The schools were motivated to start Mandarin Chinese education by the rapid growth of China's economy and their responsibilities of meeting students' language needs and producing competent and competitive global citizens. The data collected indicated that it was a bottom-up initiative across the board. That is, school administrators and faculty approached their school boards, proposing to add Mandarin Chinese to their world language instruction. The administrators interviewed recalled that their schools and school districts received full support from the school boards, but with one condition: the programs must be cost effective.

All six schools started their Chinese language programs through the partnership with the CI. The administrators interviewed identified that "qualified Chinese teachers," "a Mandarin Chinese curriculum" and "funding" were some of the most critical needs for the schools to start a Chinese program. The administrators confirmed that some of their schools' needs were met because they received "free" Chinese guest teachers and textbooks from the CI, which was viewed as the main reason that those schools started their Chinese programs through the partnership with the CI. The administrators commented that they were satisfied with the partnership, because, with those critical resources, the schools were able to start Mandarin Chinese programs from scratch.

The administrators were divided when they were asked about the development of a Chinese curriculum. Some said that the CI helped their schools develop a Chinese curriculum, while others said the opposite, saying that they had little assistance from the CI. It turned out that it was Chinese guest teachers who helped the schools develop a curriculum, not the CI. The lack of clear definitions was found throughout the interviews. To some respondents, Chinese guest teachers were the CI, while others believed that Chinese guest teachers were from the

Chinese university and they were sponsored by China's Hanban/CIH. Therefore, the CI should not be credited for the excellent work the Chinese teachers did. Some administrators said that they were very satisfied with the partnership, but the examples they gave were about how excellent the Chinese guest teachers were, rather than what the CI had done to work with the schools and meet their needs.

In addition to recruiting Chinese guest teachers for schools, some schools expected the CI to meet their needs by helping them develop a Mandarin Chinese curriculum. While some administrators said that the CI helped them develop a Mandarin Chinese curriculum, others noted that their schools did not receive any assistance from the CI with curriculum development. However, both groups agreed that the CI should be responsible for developing a curriculum for all of the partner schools, so there would be consistency in the teaching of Mandarin Chinese and Level 1 Chinese across the board in all of the partner schools.

Some administrators described their communication with the CI as "on a case-by-case basis" and they were satisfied with it, while others reported that they hardly heard from the CI after Chinese guest teachers arrived at the school. Communication resumed a year later when Chinese guest teachers were ready to return to China.

The agreements signed by the schools and the CI outlined responsibilities for each party. However, clarification was needed as the relationship between the schools and the CI developed further. In some cases, it was not clear to the schools who were supposed to do what in the partnership. For example, the schools knew that the CI was responsible for recruiting Chinese guest teachers for them, but they were not sure who (the CI, the Chinese university or China's Hanban/CIH) should be responsible for checking with the schools for feedback and improving

teacher training so Chinese guest teachers would arrive at school with adequate knowledge and skills to teach American students.

A relationship was found between the development of Mandarin Chinese education and the partnership with the CI. The relationship was formed when (1) the schools and the CI shared a common goal, i.e. developing Chinese language programs; (2) some of the schools' needs were met through the partnership, e.g. receiving "free" Chinese language teachers and textbooks; and (3) the schools achieved their educational goals through the partnership, e.g. starting a Mandarin Chinese program and meeting students' language needs.

The relationship could be illustrated by the following formula: R (Relationship) = DMC (Development of Mandarin Chinese) + P (Partnership). Any change in DMC and/or P would directly affect the strength of R . For example, while some respondents were satisfied with the partnership on all accounts, others felt that the CI failed to meet their schools' needs by providing little assistance with their curriculum development and not communicating with them on a regular basis. The lack of "consistency" and "continuity" was identified as a major concern for schools across the board. Some schools felt that the high "turnover" of Chinese guest teachers not only affected student learning, but the quality and sustainability of the Chinese language programs as a whole.

Despite the concerns and gaps, most administrators interviewed saw the value of the partnership through the benefits the schools had gained so far, such as being able to start a Mandarin Chinese program from scratch and employing Chinese language teachers through the CI with a smaller investment than had they hired their own.

5.2 DISCUSSION AND CONCLUSION

As described in the previous section, the data collected answered the research questions of this study. However, they also generated some questions and issues, which will be discussed in the following aspects: (1) the partnership; (2) “loosely coupled systems”; (3) consistency and continuity; (4) accountability and shared responsibilities; and (5) long-term effects.

5.2.1 The partnership

One of the theoretical lenses utilized to examine the partnership in this study was the partnership theory. Partnership experts such as Briody and Trotter II (2008), Chavkin (1998), Edwards et al. (2009), Furlong et al. (2000), Goodlad (1988), Kloth and Applegate (2004), and Nelson (2008) defined “partnership” in various ways. Chavkin (1998) pointed out that the term “partnership” means different things to different people. For example, Goodlad (1988) asserted that “complementarity is the essence of school-university partnership” (p. 11). In his view, schools and universities partner with one another because of “complementarity”; and the “distinctive differences” of the two entities lead to working together through “fully shared commitment and effort” toward a common goal (p. 11). However, Edwards et al. (2009) argued that “collaboration is the essence of school-university partnership” (p. 10), because it is evident that there is “a discernible shift over time from a complementary model toward a more collaborative model of partnership” (p. 24). Furlong et al. (2000) described two “ideal-typical models of partnership” in their study: “complementarity partnership” and “collaborative partnership” (pp. 77-82). According to the researchers, the former model refers to a partnership in which “the school and university are seen as having separate and complementary responsibilities but there is

no systematic attempt to bring these two dimensions into dialogue” (Furlong et al., 2000, p. 78). In other words, it focuses on “a division of labour” rather than “integration” (Furlong et al., p. 78). The latter model required the partners to “work and plan together on a regular basis” (Furlong et al., 2000, p. 80).

Briody and Trotter II (2008) asserted that “all partnership definitions include cooperation, collaboration, and synergy” (p. 7). They stated that in a very broad sense, partnerships consisted of “dynamic and structural components and outcomes” (p. 7). They defined “partnership” as “collaborative arrangements in which participants entered into relationships (the dynamic component), combined their resources, time, and expertise through the various roles they played (the structural component), and worked toward the creation of new knowledge, products and services (outcomes)” (p. 7).

I agreed with Briody and Trotter II’s view on “dynamic and structural components and outcomes.” However, I questioned their assumption that all partnerships would be “collaborative arrangements,” especially when “collaborative” was defined as “shar[ing] decision making in governance, planning, delivery, and evaluation of programs” (Schaffer et al., 1983, p. 3) and “work[ing] and plan[ning] together on a regular basis” (Furlong et al., 2000, p. 80). The partnership in this study was clearly not an example of “collaborative arrangements,” but similar to the “complementary” and “cooperative” model, because the schools and the CI (university) had “a division of labour,” but not “integration.” Moreover, according to the interview data, there was little evidence that the CI had “work[ed] and plann[ed] together on a regular basis” with the schools.

Unlike the many SUPs taking place in the U.S. school system, the partnership in this study was complex and unique with an international context. The partnership involved multiple

partners in China and the U.S., including China's Hanban/CIH, a Chinese university and a U.S. host university, the CI and 57 U.S. schools and colleges. What this research study has addressed is just part of a larger partnership network. One of the challenges for this study was how to achieve the objective of the research without jeopardizing the readers' vision of the larger partnership network. For example, when a school said that the partnership failed to meet its needs, does that mean the partnership with the CI failed them or did the entire partnership network let them down?

SUP experts asserted that communication was the key to a successful partnership. Goodlad (1988) suggested "an ongoing effort to document, analyze, and communicate successes and failures" (p. 28). Williams (1988) pointed out that "a continual problem is the lack of communication" in the SUP he studied. He described it by saying, "Even after the two years, many people in the schools and university know very little about the BYU-PSP and what they can do with it to help improve the schools" (p. 143). I had a similar feeling as I conducted the interviews. For example, the relationship between different players in the partnership seemed beyond the comprehension of many respondents. Furthermore, not many respondents were able to explain the relationship between the CI and University X. For example, some saw CI as part of University X and wondered why the School of Education at University X could not help train Chinese guest teachers so they could assume their teaching responsibilities in American schools. They also wondered why the CI, as part of University X, could not get certain resources from University X and help them develop a Chinese language curriculum.

How much did the schools know about their Chinese guest teachers? Some respondents said that they knew very little about the Chinese guest teachers assigned to them prior to their arrival, such as what pedagogical training those teachers had prior to arriving at their schools;

how much knowledge those teachers had about the U.S. school system; how knowledgeable they were of the methodology for teaching a foreign language in a U.S. classroom; and if they had any experience with teaching U.S. schools students and classroom management. Some administrators felt that Chinese guest teachers should have more pedagogical training before they entered any U.S. school classroom. They suggested that the CI should communicate with its partner schools, understand their needs and make sure Chinese guest teachers had received adequate training before teaching in U.S. schools, particularly in the areas such as the U.S. school system, teaching methodology, classroom management as well as assessment.

How much did the respondents know about their Chinese language programs, the partnership with the CI, information on China's Hanban/CIH and the Chinese university, as well as the relationship between University X and the CI? There were obvious gaps between the respondent groups in terms of what they knew and what they did not know. For example, some respondents were familiar with the Chinese programs, but knew little about the partnership with the CI. Some had basic knowledge of the Chinese programs and the partnership, but were not aware of the creation and progress of the curriculum development. Few knew much about China's Hanban/CIH and the Chinese university and the relationship between those two entities and the U.S. university and the CI. Few Chinese guest teachers interviewed knew much about the relationship between their schools and the CI. I was surprised by how much those teachers knew about Hanban/CIH and how little about the CI.

It was not clear who was responsible for communicating with them, collecting their feedback and reporting it to the teacher providers or China's Hanban/CIH each year. It was also unclear as to which party should take the feedback and use it to improve teacher training so new teachers would be well prepared when they arrived at U.S. schools. Despite the fact that

Hanban/CIH and the CI offered some short-term training for Chinese guest teachers prior to their arrival at schools, most of the schools in this study felt that those teachers could use more training, but it was not clear who should be responsible for implementing it. The schools could do some, but as Chinese guest teachers changed each year, it had become time consuming and burdensome for the schools when they had to perform similar training each year.

One of the observations I had during the interviews was that it was very vague among the respondents in regard to who was responsible for what. For example, in the partnership there were issues unidentified, responsibilities unclaimed and questions unanswered. As I was listening to the responses regarding to challenges, confusions, issues, problems and questions, I felt there was a “No Man’s Land” or a grey area within the partnership, where issues and questions were accumulating. Those issues, responsibilities and questions were either related to the development of Mandarin Chinese education in U.S. schools and/or the partnership between the schools and the CI. Some of them might be related to the relationship between other partners, e.g. between the CI and the Chinese university, between the Chinese university and Hanban/CIH, or between University X and the Chinese university, as illustrated in Figure 16 below.

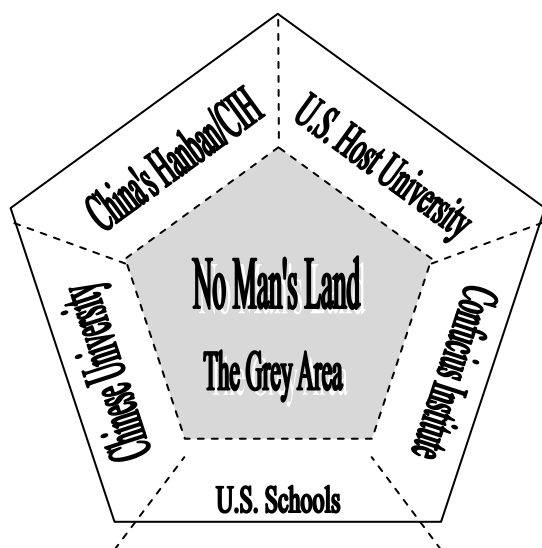


Figure 16. No man’s land/the grey area in the partnership

Though the respondents did not term “No Man’s Land/The Grey Area,” the data collected showed the lack of transparency in terms of sharing responsibilities and meeting the schools’ needs. As noted earlier, some schools needed assistance with the curriculum development, but it was not clear to them how they would be able to obtain that expertise and whether the CI, Hanban/CIH, or the Chinese university would help them. In my view, the partnership may not become successful unless the grey area (see Figure 16) becomes clear and transparent to all of the partners involved, especially the schools.

“Leadership” was mentioned during the interviews, but it often referred to the leadership in the development of Mandarin Chinese curricula. The respondents seldom talked about leadership in the partnership. The data clearly showed that the schools’ focus was more on the development of Mandarin Chinese education, rather than the partnership. The sustainability of the CI (and many others) will be continuously challenged because more and more schools are

hiring their own Chinese language teachers and they have found that the CI has constraints and limitations to meet their needs.

Some respondents felt that the CI should and could do more to meet their schools' needs, particularly in the areas of curriculum development and communication. Several respondents wished that the Confucius Institute had established a forum or a network among the partner schools, so they could exchange information and share their experience with one another. Sirotnik (1988) stated that "at the heart of collaborative inquiry is the willingness and ability of people to engage in competent discourse and communication" (p. 177). Goodlad (1988) proposed a set of minimum essentials for a network of SUPs. One of them was "a communications network among partnerships" (p. 29). The data collected indicated that the schools were not included in the communications network of China's Hanban, the Chinese university and the CI; nor were they included in communications with the CI on a regular basis. Without "develop[ing] a common agenda" and "engag[ing] one another in serious dialogue" (Goodlad & Sirotnik, 1988, p. 217), what the schools had with the CI was just "a work relationship," not a partnership.

Edwards et al. (2009) pointed out that there were four "distinctive and interrelated concepts" in the research on school-university partnerships, i.e. "collaboration, complementarity, equivalence and community" (p. 10). "Complementarity" and "collaboration" were discussed earlier in this section.

According to Edwards et al. (2009), there were a "relationship of complementarity" and a "relationship of equivalence." The former referred to "responsibilities... distributed between the partners;" the latter meant that "the partners shared responsibilities in all areas" (p. 12). Edwards et al. (2009, p. 13) wrote:

There is a clear suggestion here that schools are deficient in expertise and experience and until this deficiency has been rectified they cannot expect to have equal status with HEIs [Higher Education Institutions] in school-university partnerships. However, there is also the suggestion that a partnership of equals is a desirable goal that, given time, is achievable.

Upon analyzing the interview responses, it was evident that the partnership between the schools and the CI had yet to achieve “equal status.” In addition to not being part of the communication network, some respondents were concerned that the schools were not included in the selection of Chinese guest teachers and they had to accept the guest teachers assigned to them by the CI. They suggested that the schools should be given the opportunity to interview Chinese guest teachers before accepting them, which challenged the Chinese teacher selection process performed by China’s Hanban/CIH, the CI and the Chinese university. I viewed that as an initial discussion on “hav[ing] equal status” in the partnership.

Edwards et al. (2009) argued that “collaborative partnership is considered to be superior to complementary partnership because collaborative partnership requires personnel from schools and universities to engage mutually in negotiating the meaning of a shared agenda in which neither party’s meaning is privileged” (p. 13). While I question that “collaborative partnership” is always “superior to complementary partnership,” I believe it is necessary to explore (1) whether a “complementary partnership” must develop into a “collaborative partnership” to be sustainable; and (2) whether a “complementary partnership” can be sustainable by continuously doing what it does. The outcomes of that study may help us understand the partnership between the schools and the CI.

Based on the data collected, the partnership in this study was not, and might not become, a “collaborative” one due to constraints and limitations. The CI was mainly funded by China’s Hanban/CIH, not University X. Unlike many other SUPs reviewed earlier, the involvement of

University X in this partnership was very limited and it had played a minor role in the partnership. In addition, there were particular units within the university that were responsible for the CI's activities, rather than the whole institution. Those units' decision might affect the CI's commitment to the partnership and the schools. For example, the CI was affiliated with a university center. Thus, the center's decisions and policies might affect the CI's activities. Another factor that affected the partnership was the unrealistic expectations by Hanban/CIH for their American institutional partners, including schools. If the CI decides to discontinue its mission someday, it may not affect University X much, but it could be detrimental to China's Hanban/CIH and the Chinese university. U.S. schools that rely heavily on CI's teacher recruitment may suffer from a temporary interruption. If few U.S. schools use the CI's teacher recruitment service, the CI will have to close its office or develop a new mission. In other words, the CI's sustainability rests upon the needs of schools, but the sustainability of Mandarin Chinese programs may not depend on the CI. Some schools' experience in this study informed us that more and more schools (three out of six) hired their own Chinese teachers to maintain the consistency and continuation of the programs. As described by some respondents, those teachers would stay, bring consistency and continuity to the programs and continuously build quality curricula for the schools. In addition, those teachers were trained in the U.S. They understood the U.S. culture and the school system. Moreover, they could effectively communicate with American students. Unfortunately, most of the Chinese guest teachers are unable to meet those requirements.

It is worth mentioning that the data collected confirmed some foreign language experts' concerns regarding "language opportunities" vs. "language proficiency." Based on the 2008 national survey by CAL, Rhodes and Pufahl (2009) found that "the overall picture of foreign

language instruction in 2008 was no better---and in some areas worse---than in 1997” (p. 7). One of the most “disturbing concerns” was that “many schools offer foreign language instruction but do not expect proficiency” (Pufahl, 2010). The CI reported that in 2010 a total of 1,400⁵² students were enrolled in Mandarin Chinese programs in 57 schools, with 1,230 students in Level 1 classes, 107 students in Level 2 and 63 students in Level 3 and Level 4 combined. The statistics showed a severe decrease as the class levels went up, suggesting the lack of language proficiency. Such a phenomenon also suggests some issues and problems in increasing students’ motivation, retention and language proficiency, as well as the necessity of Hanban/CIH, the Chinese university, the CI and University X.

Liu’s (2010) study revealed that the partnership between a local Chinese school and the CI in her study “had positive influence” (p. 270) on the school, which was described by the school principal as “it injected fresh vigor” to the school (Liu, p. 271). According to Liu, the CI in her study had provided the school with “funding,” Chinese teacher training opportunities and “some sponsorship,” such as “free classrooms” at a university and “the Chinese Knowledge and Culture Contest,” including the costs for all of the rewards (p. 271). It was evident that the CI in Liu’s study played an active role in the partnership with a partner school, which was not something I found from most of the schools in my study. Though I knew that the CI in my study used to give some small grants (e.g. \$500.00) to some local schools or nonprofit organizations to promote Chinese culture events, the money actually came from the CI’s budget, which was fully funded by Hanban/CIH, not the university.

⁵² The Confucius Institute claimed that the total student enrollment in 2010 was 2,915, with 1,230 students in Level 1 classes, 107 students in Level 2, and 63 students in Level 3 and Level 4 combined. The correct total number should be 1,400, which was used in this study.

Prior to this study, I did not know how schools developed Chinese language instruction; what their needs were; and what their concerns were. Though I was not extremely surprised at most of the findings, I was shocked to hear that Chinese language programs could lose overnight, regardless of how well those programs had performed before. It was also a surprise to find that the partnership with the CI was operated in a “no money, no talk” mode. When a school was unable to “hire” a Chinese guest teacher and pay the CI an administration fee, there was little going on between the school and the CI. One suggestion I would like to make is that, while rewarding CCs with some incentives, it would be a sensible thing for Hanban/CIH to consider funding some poor schools at the same time, especially those schools that used to have successful Chinese language programs and partnerships with schools in China but then lost them due to financial crisis and budget cuts.

Practically and pragmatically, there were incentives for University X and the CI to participate in the partnership, though University X played a minor role in the partnership. One explanation is that through the CI, University X was able to accomplish its outreach mission. Many (maybe all) U.S. higher education institutions have linked their mission to providing community service and their sustainability to community support. University X is no exception. In addition, as noted earlier, University X had MOUs with several Chinese higher education institutions, including the Chinese university in this study. Supporting the CI and Hanban/CIH would definitely benefit the university at home and abroad. Moreover, the CI received funding from Hanban/CIH each year, which contributed a small income to the university center.

There had been a great demand for experienced Chinese language teachers worldwide. According to Zhang and Liu (2008), in 2004 when first CIs were established, Hanban was able to provide only 69 Chinese language teachers. Three years later, about 2,500 Chinese language

teachers were dispatched to the CIs worldwide. By having “free” Chinese guest teachers, the schools in this study were able to offer Chinese language programs at a minimum cost. However, when the Chinese guest teachers returned to China after completion of one or two years of service, many of them either did not, or were unable, to pursue the same career path, this, in my view, is a tremendous waste of human capital. It would be a great benefit to many schools if those Chinese guest teachers could be invited back, either to the same schools or different ones.

The Chinese university in this study is one of the ten research bases in China, approved and funded by Hanban/CIH for producing adequate materials and services to assist CIs with promoting Chinese language and culture worldwide. One of the respondents informed me that Hanban/CIH invested about three million dollars in the Chinese university to produce materials and services to assist CIs with promoting Chinese language and culture overseas. The local Chinese government also promised to contribute about one million dollars to the Chinese university for the same research project. The CI received funding from Hanban/CIH each year. The schools were in the partnership, but they were not in Hanban/CIH’s financial plan, except for those Confucius Classrooms that received some seed grants.

5.2.2 “Loosely coupled systems”

Weick (1976) noted that “researchers need to be clear in their own thinking about whether the phenomenon they are studying is described by two words or three” (p. 5), namely, “loose coupling” or “loosely coupled systems.” This section will focus on the latter, exploring how the partnership functioned as a network of “loosely coupled systems” (hereafter termed LCS or LCSs) and what held the partnership together. In this section, the partnership with the CI will be

examined as a network of seven LCSs (the CI and six schools), as illustrated in Figure 17. Since the partnership in this study is part of a larger partnership that includes Hanban/CIH and the Chinese university, Figure 17 illustrates the entire partnership.

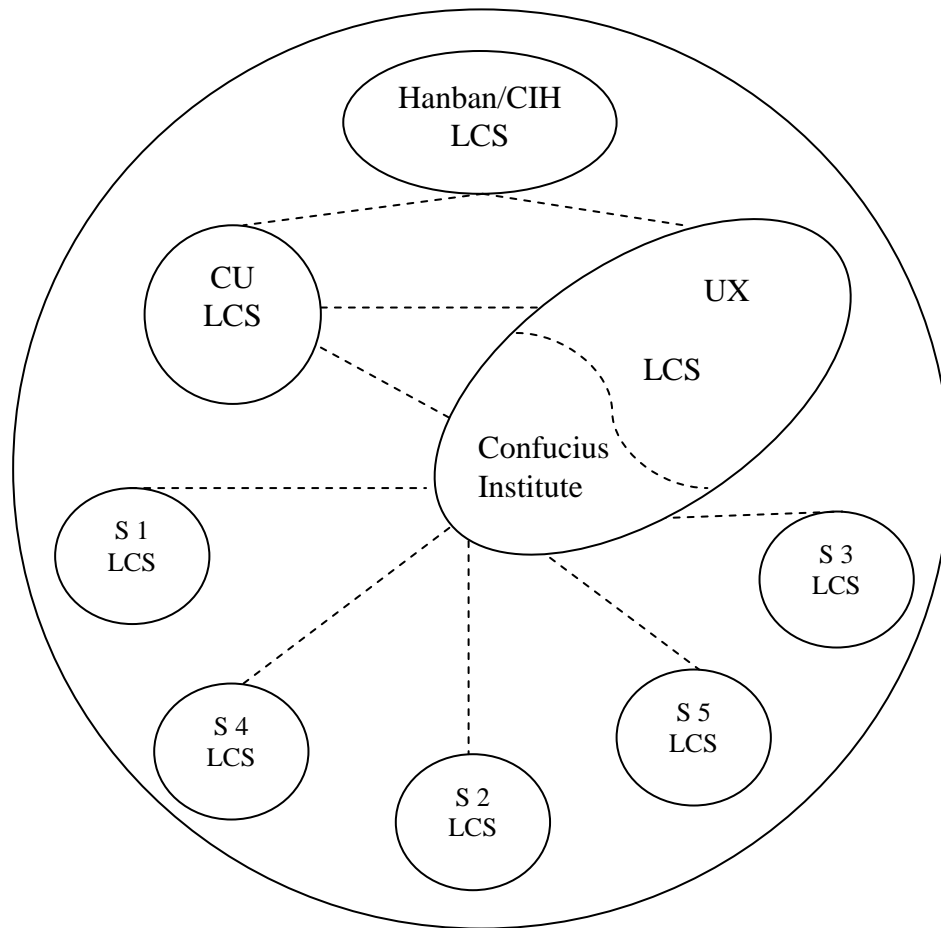


Figure 17. The school-university partnership as a “loosely coupled system”⁵³

LCS = Loosely Coupled System
 CU = Chinese university
 UX = University X
 S = School
 ----- = Loose coupling

⁵³ This is just an illustration. It does not represent the number of schools in this study.

It was noted earlier that the theoretical design of this approach was based on the perspectives of Borthwick (2001), Murphy and Hallinger (1984), Orton and Weick (1990) and Weick (1976, 1982 & 2001).

Borthwick (2001) asserted that a partnership was an organization and, therefore, a partnership could be studied as an organization. On the one hand, I agree with Borthwick when she said some successful partnerships had demonstrated “organized” characteristics (such as leadership and “equal status”). They were clearly identified among partners and the process was transparent and monitored. Responsibilities were clearly defined and shared and communication took place on a regular basis among partners. On the other hand, I saw that many of the above mentioned were either vague or did not exist in this partnership. One of the approaches, and perhaps the most direct way to identify whether an organization is “organized,” is to look at its “culture” and “subculture.” Hatch (1997) developed a continuum for describing a culture’s state of integration-differentiation in an organization, which consisted of “numerous small cultures (i.e. the subcultures) all existing within the same organization” (p.226). Figure 18 illustrates Hatch’s continuum of cultures in an organization.

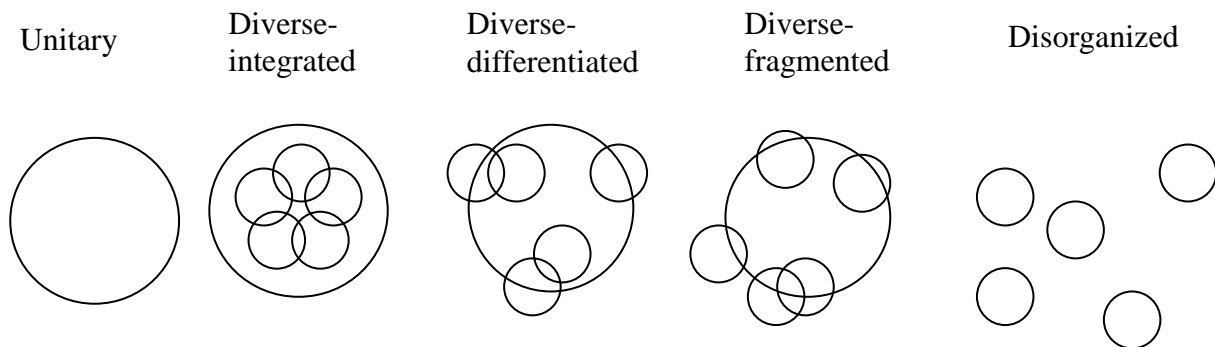


Figure 18. A continuum for describing a culture's state of integration-differentiation

SOURCE: Hatch (FIGURE 7.6, 1997, p. 226)

The data collected indicated that some partner schools contacted the CI from time to time (though not on a regular basis), while others were distant from the partnership. It was not clear what and where the main culture was in this partnership. Therefore, the cultures could be described as “diverse-fragmented” in some cases, but “disorganized” in others, because each school had a one-on-one relationship with the CI and communication between the two partners was not regular. Thus, I argue that not every partnership can be studied as an organization, and it is especially so in this case. Additional claims that support such an argument include: (1) the leadership was not identified and did not show a clear presence in the partnership; (2) the process was not monitored; (3) communication between the schools and the CI took place on a case-by-case basis in some schools, but almost not at all in others while little communication happened among the partner schools; and (4) only some basic, logistical responsibilities were divided, but not those high-level professional responsibilities, such as sharing decision-making, developing a Chinese curriculum for all partner schools and improving teacher training to meet schools’

needs. My argument above leads to the next question: If a partnership is not an organization, can it still be studied as an organization? I believe in that case, studying a partnership as an organization may not be very meaningful, because the reason for studying a partnership as an organization is not to expect the partnership to be like an organization, but to understand it. If little relationship can be established between a partnership and an organization, I suggest finding an appropriate approach, perspective or theory to study it, or build a new theory. I believe that some partnerships can be studied as organizations, such as “collaborative” partnerships and those partnerships that have reached a mature stage of development.

Another question I would ask is how, and for what reason, should I study this partnership. Undoubtedly, this partnership is the first of its kind taking place in the U.S. school system and in U.S. educational history. It is worth the time to study it, understand it and find what it is so schools and universities in this country will have the knowledge to deal with it. However, the partnership does not appear to be the schools’ primary focus in the development of Mandarin Chinese education, because schools do not have to develop their Chinese programs through partnership with a CI. Further study is recommended to continue a discussion on this line of topics.

Murphy and Hallinger (1984), Orton and Weick (1990) and Weick (1976, 1982 & 2001) studied educational organizations (e.g. schools and school districts) as LCSs. Weick (1976) observed that “loosely coupled systems” often had some negative “manifests” such as (1) situations where several means can produce the same result; (2) lack of coordination; (3) absence of regulations; and (4) highly-connected networks with very slow feedback times (p. 5). Despite those “negative” characteristics, Weick believed that they might actually work toward the organization’s favor by presenting some positive features such as “persistence,” providing “a

sensitive sensing mechanism,” good for “localized adaptation,” less affected by “a breakdown” in the system; “more room...for self-determination by actors” and “relatively inexpensive to run” (pp. 6-8).

As noted earlier, it was hypothetical that an SUP could be studied as an LCS because it was formed by educational organizations like schools and universities, which had been defined by organizational experts as LCSs. This line of reasoning generated the following questions, showing the linkage of the two theoretical lenses utilized in this study: (1) How realistic could it be that two types of “loosely coupled systems” (school and university) worked together in the most casual organizational form, but expected to achieve the most satisfactory outcomes? (2) If both school and university are “loosely coupled systems,” what are some of the “coupled elements” that hold the partnership together? (3) Do the two types of partners have more common goals or different objectives? (4) Will a partnership of two types of “loosely coupled systems” (e.g. a school and a university) lead to more complexity, flexibility and uncertainty than a single “loosely coupled system”?

To answer the first question, the data collected showed that the two types of “loosely coupled systems” (school and university) worked together and attempted to achieve some expected outcomes, though the schools were proven to be the front runners of cooperation, while the university appeared to be a weak link. It was evident that the partnership showed some “negative” characteristics such as “lack of coordination,” “absence of regulation” and “diffuse leadership.” However, the partnership enjoyed some advantages, such as the autonomy of “more self-determination” by the partners; the flexibility to adapt to the environment in its own pace; surviving damage of the entire system when a sub-system broke down; and “inexpensive to run.” The six schools had been in this partnership for two to five years. The data indicated that not all

of them had achieved the most satisfactory outcomes. It requires further research to determine what worked and what did not work and why. As noted earlier, LCS did not always mean less effective than “Tightly Coupled System” (TCS).

The second question asked what “coupled elements” held the partnership, i.e. a network of seven LCSs, together. Weick (1982) asserted that a “loosely coupled system” was held together by “the issues on which people agree” (p. 675). When the respondents were asked what held the “partnership” together, they said “good teachers” (Interview with Respondent 2, October 13, 2011); “dedication” and “commitment” (Interview with Respondent 9, October 19, 2011); “the success of our [Mandarin Chinese] program” (Interview with Respondent 6, October 26, 2011); and “knowing the roles of both parties” and “[effective] communication” (Interview with Respondent 3, October 11, 2011). I found the challenge was how to define “loosely coupled systems’ together” in a partnership setting. Togetherness is important within an organization. It may not have similar importance to a partnership of LCSs, especially like the one in this study. For example, does University X really care about School A or B dropping out of the partnership? Or, will School A no longer be able to offer Mandarin Chinese if it drops out of the partnership with CI? Not necessarily.

Weick (1982) believed that “one reason loosely coupled systems remain systems is that their occupants have had similar socialization; e.g., they all think like educators” (p. 675). That might not be the case for a partnership in which “occupants” did not have “similar socialization” or similar “professional socialization.” Unlike a school or an organization, the partnership in this study consisted of several schools. The vision and mission of those partner schools were influenced by domestic and international institutions and organizations, such as China’s Hanban/CIH, the Chinese university, the U.S. host university and even a U.S. state department of

education. On an even larger scale and scope, the partnership might also be influenced, directly or indirectly, by the governments of China and the U.S. Therefore, there might be other factors that facilitate or hinder the partnership as a system. Further discussion on this topic is beyond the scope of this study.

To address the third question, there was accumulating evidence that the partnership was “glued” by a common goal the schools and the CI shared, i.e. developing Mandarin Chinese programs in schools. Perhaps, that was the only benefit that both the schools and the CI gained from the partnership. The increasing number of students and programs measured how well the schools had achieved their educational goals and desired outcomes, while the same information enabled the CI to spread publicity for University X as providing an outreach service for the community and to collect funding from China’s Hanban/CIH. As long as the schools and the CI are linked by that common goal, the partnership remains. However, there may be three possible reasons that a school may not be able to maintain the partnership. One, the school experiences budget cuts and is unable to participate, like the one school mentioned earlier. Two, the school decides to hire its own Chinese teacher, rather than going through the CI. Three of the six schools in this study had hired their own Chinese teachers, though two of them also “hired” Chinese guest teachers through the CI. There are schools (not in this study) offering Mandarin Chinese without partnering with a CI. Three, some schools may use the partnership as a backup system and use it only when they need it.

The fourth question asked if a partnership of two types of “loosely coupled systems” (e.g. a school and a university) would lead to more complexity, flexibility and uncertainty than a single “loosely coupled system.” I observed that the complexity and uncertainty increased, but the flexibility decreased as the number of LCSs increased in the partnership. The data collected

showed that it was more challenging for the CI to coordinate with six (or 57) schools than one, and vice versa; and the schools had more uncertainties due to the lack of communication and inconsistency in information sharing among the partners. As mentioned earlier, every school operated differently and their needs varied; and different types of uncertainties were expressed in the interviews. Being in a partnership, the flexibility of a school as a LCS decreased because partner schools were asked to meet certain expectations by the CI and China's Hanban/CIH. One respondent recalled that from time to time, her school was asked to fill out paperwork by the CI and it usually came as a last minute request. In another case, Chinese guest teachers were sometimes asked to participate in some activities by the CI, but it was later reported that they volunteered to do so. Partner schools were obligated to provide transportation for Chinese guest teachers, regardless of the schools' availability.

Murphy and Hallinger's (1984) study was considered relevant to this study because they addressed the "conceptualizations of loosely coupled schools" (p. 7) and explained "how school districts can move from loose coupling toward the achievement of desired outcomes" (p. 8). The researchers pointed out that "The basic tenet of loose coupling is that the lack of tight organizational connections substantially reduces the capacity of one organizational level or component (e.g., the superintendent) to influence the activity of other organizational levels or components (e.g., principals)" (p. 7). The researchers concluded that "the difference in perspectives presented by the loosely coupled organizational literature and the effectiveness literature is not a difference between what must be and what should be, but between what is and what can be" (1984, p. 10).

Though this study was not about the relationship between a school district and a school or to assess the effectiveness of a partnership as an LCS, it attempted to find how several "loosely

coupled systems” with “a multitude of vaguely stated and contradictory goals” (Murphy & Hallinger, 1984, p. 8) could work together to achieve “desired outcomes,” as mentioned earlier. Murphy and Hallinger (1984) also pointed out that “effectiveness can be obtained when student achievement is selected and clearly defined as the school's goal” (p. 8), as well as through “principals” (p. 7), “teachers” (p. 8), and “technology” (p. 10). The data collected in this study showed that the outcomes of Mandarin Chinese programs relied heavily on the schools’ educational goals, the support of school and school district administrators, and the effectiveness of Chinese guest teachers and Chinese language teachers hired by the schools. Developing quality Mandarin Chinese programs was defined as one of the educational goals of the schools, but there might be other factors that could “significantly influence educational outcomes” (p. 10). For example, as Figure 15 illustrates, the couplings between the schools and the CI could possibly be affected by the couplings between the CI and University X, the Chinese university and even China’s Hanban/CIH. Part of the complexity of the couplings is that there are particular units within each university that are responsible for the CI’s activities, rather than the whole institution. Because American school and higher education systems tend to be quite decentralized, this may lead to unrealistic expectations by Hanban/CHI for their American institutional partners, including schools. For example, one respondent informed me that, without an advanced notice, it could be difficult for a public school to provide transportation for Chinese guest teachers on a weekend. Schools in China would not have any problem to meet that request. A further study is needed to examine in what ways the couplings within the schools, and between the schools and the CI, are affected by the different systems and expectations of Hanban/CIH, the Chinese university and University X.

Weick (1976) pointed out that an educational organization was held together by “coupled elements,” but affected by the strength of coupling, which “both appear and disappear overtime...within the individual, group, and/or organization” (p. 5). He further explained that an educational organization such as a school consisted of two systems, i.e. “the principal-vice-principal-superintendent” and “the teacher-classroom-pupil-parent-curriculum.” According to Weick, some examples of the “couple elements” in a “loosely coupled system” included “administrators and teachers” and “teachers-materials, voters-schoolboard, administrators-classroom, process-outcome, teacher-teacher, parent-teacher, and teacher-pupil” (1976, p. 4).

Weick (1976, p. 5) wrote:

A researcher can study "loose coupling" in educational organizations or "loosely coupled systems." The shorter phrase, "loose coupling," simply connotes things, "anythings," that may be tied together either weakly or infrequently or slowly or with minimal interdependence. Whether those things that are loosely coupled exist in a system is of minor importance.

It was mentioned earlier that studies on educational organizations (e.g. schools, as “loosely coupled systems”) usually focused on an individual school or between a school and a school district. Different from those studies, the partnership in this study was about a network of several individual schools and a university affiliation, the CI. Figure 19 was created to help understand the partnership as a network of “loosely coupled systems.”

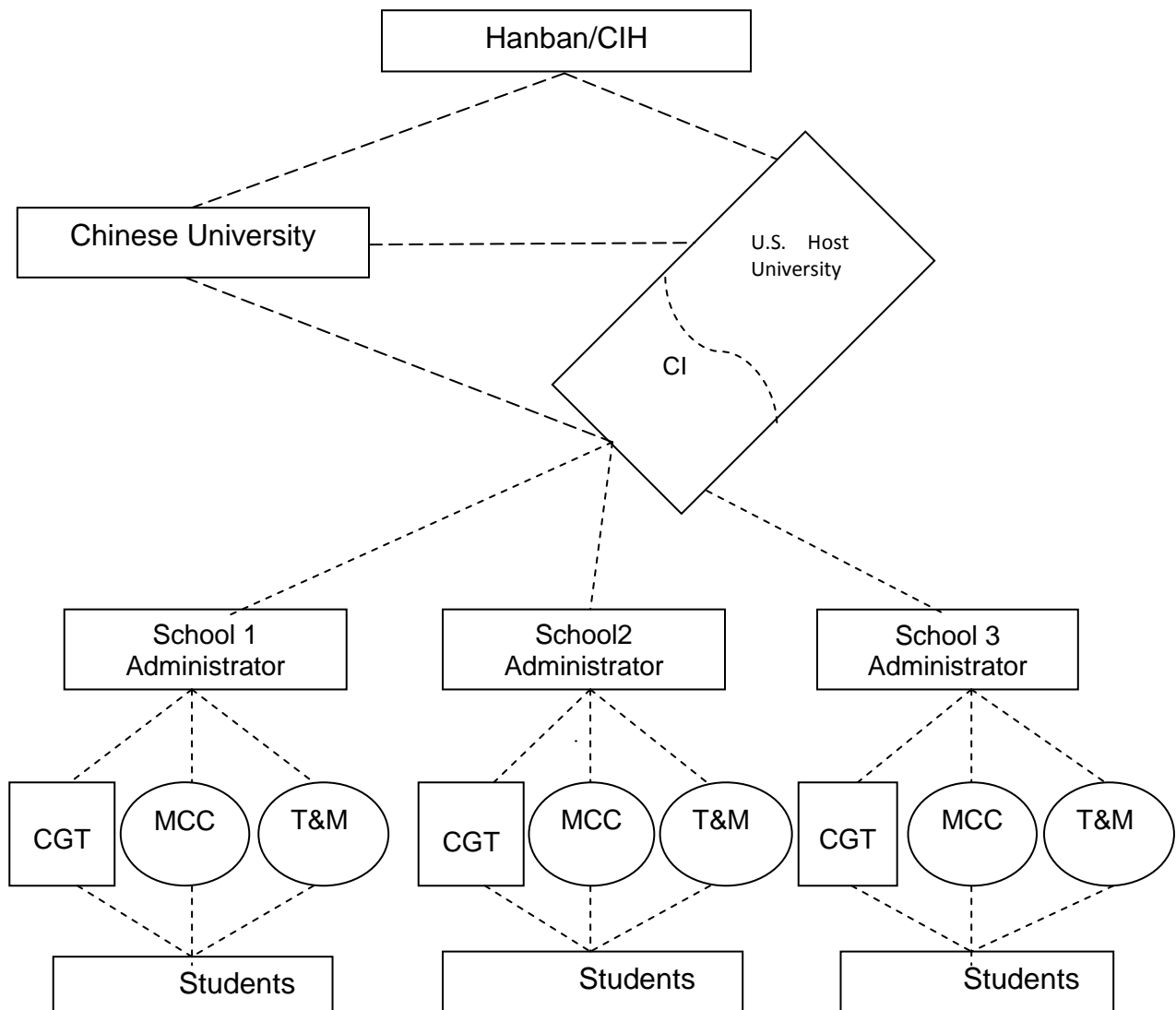


Figure 19. “Coupled elements” in a network of “loosely coupled systems”

- CIH = Confucius Institute Headquarters
- CGT = Chinese Guest Teachers
- MCC = Mandarin Chinese Curriculum
- T&M = Textbook & Materials
- = Loose coupling
- - - - - = Possible “loose coupling” (not covered and discussed in this study)

Based on the illustration in Figure 19, examples of “coupled elements” could be identified and categorized as follows:

- (1) Between institutions:
 - (a) A school/Confucius Classroom and the Confucius Institute
 - (b) A school/Confucius Classroom and China’s Hanban/CIH
 - (c) A school and the Chinese university that provided Chinese guest teachers
- (2) Between persons:
 - (a) School administrator and Chinese guest teacher
 - (b) Chinese guest teacher and regular teacher
 - (c) Chinese guest teacher and coordinating teacher
 - (d) Chinese guest teacher and student
- (3) Between person and Mandarin Chinese curriculum
 - (a) School administrator and Mandarin Chinese curriculum
 - (b) Chinese guest teacher and Mandarin Chinese curriculum
 - (c) Student and Mandarin Chinese curriculum
 - (d) Student and teaching materials

Due to limited space, Figure 19 was unable to include “coupled elements” such as student-parent, teacher-parent, administrator-parent, principal-classroom, parent-Mandarin Chinese curriculum and parent-textbook and material, school administrator-regular teacher, Chinese guest teacher-regular teacher, as well as administrator-classroom. As Weick (1976) explained, each “coupled element” reflected a dialectic relationship. For example, in the “coupled element” of teacher-teacher, a school’s expectation for Chinese guest teachers could be tightly or loosely coupled with the expectations for regular teachers in the same school. When a Chinese guest teacher was asked if her school evaluated her work as they did a regular teacher’s work, she said “No.” Then, she said she did not think the school was doing her a favor. Actually, she wanted the school to evaluate her against the school’s standard so she would know where she stood.

In Figure 19 above, examples were created to illustrate the “coupled elements” within an LCS and between LCSs. In addition, the complexity of the partnership illustrated as a network

of LCSs in Figure 19 may also indicate that some concepts, perspectives and theories employed in previous studies on SUPs and LCSs could possibly fall short of the needs of this study.

Weick (1982) stated that, in a “loosely coupled system,” “even though people don’t communicate much with each other, they can still coordinate their actions because each person can anticipate accurately what the other is thinking and doing” (p. 675). What Weick described might be true when the “loosely coupled system” referred to the same school or organization. When the schools became partners with the CI, and Chinese guest teachers entered those schools, the environments changed. Terms such as “people” and “teachers” might no longer mean the same in those schools. At the same time, school administrators, staff and teachers were challenged by something that they had little knowledge of and no expertise to tackle. Therefore, communication on a regular basis became crucial and necessary. Not “communicat[ing] much with each other” could not be afforded.

One of the tricky questions is why we should study an educational partnership (e.g. the partnership in this study), as an LCS. If using the analogy of a guided tour vs. a self-guided tour, the partnership in this study is similar to a guided tour, where there are certain rules for participants, though participation is voluntary; and schools can join as they wish. Both types of tours are acceptable to schools; and each has its own advantages and disadvantages. In my view, the significance of studying the partnership as an LCS is to find ways to maximize the available resources, so partner schools and their students can benefit from them. During the interviews, several administrators expressed their desires for establishing a network among partner schools, so they could exchange and share information and experience. That was one of the schools’ needs that had yet to be met by the partnership.

Weick (2001) discussed “sensemaking” as an organizational dimension of global change. He predicted that making sense of global change was challenging because it would be more difficult to comprehend “loosely coupled systems” in a global context. To add to Weick’s list, it will be even more challenging to comprehend a partnership consisting of two “loosely coupled systems” (e.g. a school and a university) or a partnership as a network of “loosely coupled systems” (e.g. three or more schools and a university, see Figure 17) in a global context and then analyze the network of partnerships as one “loosely coupled system.”

5.2.3 Consistency and continuity

This section was created because the lack of consistency and continuity was one of the main concerns among the schools that “hired” Chinese guest teachers through the CI. Though respondents did not define “consistency” and “continuity,” it was my understanding that what they meant was to keep similar teaching styles and instructions, so students did not have to experience constant changes in their learning process, such as changes of Chinese teachers, teaching methodologies and styles, textbooks, class instructions and requirements, and assessment criteria and methods.

The data from the interviews revealed that most Chinese guest teachers taught in the six schools for one year and then went back to China. Within that year, the schools trained them in various aspects, from the U.S. school system and commonly used teaching methodologies to classroom management and assessment. By the time those teachers learned all of the skills and become familiar with everything, it was time for them to go home. One of the Chinese guest teachers I interviewed confirmed: “It took us [Chinese guest teachers] a long time to learn how to

do assessment in U.S. schools. It took us a year to understand it. Then, it was time for us to go home” (Interview with Respondent 11, June 27, 2010).

As a result, students of those partner schools had new Chinese guest teachers each year. When their Chinese guest teachers left, students had to start all over again: getting to know their new teachers, learning about their teaching styles, getting used to their accents, and sometimes changing textbooks before finishing the previous ones. Several respondents pointed out that the lack of consistency and continuity challenged their programs, students and schools. For example, one respondent commented that “constant turnover changes heart for students. That change over time makes it difficult” (Interview with Respondent 4, October 11, 2011). Another respondent said: “One of the challenges we had is each year we had a new [Chinese guest] teacher. They [students] were unable to build a relationship with the teacher even they had him or her for four years. So, I think that’s one of the issues that makes it a little bit challenging for retaining kids in the program” (Interview with Respondent 5, October 18, 2011).

The schools that had hired their own Chinese language teachers were able to make a comparison of Chinese guest teachers to their own teachers. Being able to have consistency and continuity for their students and programs was one of the main reasons that those schools considered hiring their own Chinese teachers. For example, one respondent commented:

I think the only issue was not having that consistency year to year. And having a different person year to year is a challenge. One of the biggest concerns is that, since the person [the Chinese guest teacher] just came over, our teacher would have to get her or him up to speed on where we are and on where we can go. Certainly, it’s something that has brought a lot of benefits to us, but it was one of those things challenging. And that’s difficult, because our teacher will be able to build on those experiences over years and years. (Interview with Respondent 6, October 26, 2011)

Despite those disadvantages, most schools still considered “hiring” Chinese guest teachers through the CI. One respondent explained to me: For \$5,000 plus living expenses, I

could hire a Chinese guest teacher through the Confucius Institute. If I hire our own teacher, the expenditure would be beyond \$60,000. So, financially, it's better to hire from the Confucius Institute. But, hiring our own teachers, we have a lot of advantages, it's just more money. (Interview with Respondent 3, October 20, 2011).

As schools and school districts nationwide were experiencing sharp budget cuts, many schools had to put their budget before program consistency and continuity. I was amazed to hear the money saving plan used by some (maybe many) schools and school districts: The first choice was to hire their own teacher, full-time or part-time. A second option was to get a Chinese guest teacher through the CI (though some schools had both their own teacher and a Chinese guest teacher). A third option was to find an online course for their students. A fourth option was to buy computer instructional discs for students to study on their own. One respondent told me that he knew several schools utilizing those methods.

Some respondents felt that the lack of consistency and continuity had affected student learning and the quality of Chinese language programs in some of the six schools, but no one suggested how that issue should be solved. As Chinese language programs develop further, the partners (e.g. schools and school districts, the CI and Hanban/CIH), would be obligated to work together and come up with some feasible solutions. Although Hanban/CIH had made great efforts improving teacher training and textbooks, so far they had failed to beat the diverse U.S. school system. At the same time, Mandarin Chinese was considered one of the most difficult languages in the world and few methods of teaching Mandarin Chinese as a foreign language had been recognized as being effective in U.S. classrooms. All of this indicates that the couplings within the schools and the partnership could be affected by many other factors that are beyond the scope of the partnership.

5.2.4 Accountability and shared responsibilities

Goodlad (1988) referred “accountability” to “a system of shared responsibilities” (p. 25). Schlechty and Whitford (1988) pointed out that “the major problem that makes change and improvement exceedingly difficult in...education is the diffuse nature of program responsibility and accountability” (p. 194). Though accountability is no longer a buzz word in school educational reforms, it still remains a burning issue and at the center of debate among educators. Perhaps, the main reason is that accountability is often linked to “shared responsibilities.”

The purpose of discussing accountability in this study was twofold. One, it is to address the importance of clarification of responsibilities among partners. Two, it attempts to understand how partners in a multilateral, international partnership should handle sticky subjects such as unclaimed responsibilities in a grey area. For example, the schools have been receiving “free” Chinese guest teachers from Hanban/CIH through the CI. Will the schools be brave enough to tell Hanban/CIH and the CI that they need to improve teacher training because some Chinese guest teachers need more training to meet the schools’ requirements for teaching? Or, will the schools tell Hanban/CIH that the CI did not respond to their requests for help to develop a Chinese curriculum? In this partnership, when responsibilities are left unclaimed, schools and students are the ones to bear the cost.

The responses from the interviews demonstrated that the Chinese language programs in the six schools were still in the early stage of development. One of the vague areas was the distribution of labor---shared responsibilities. As partnership experts pointed out, accountability was closely link to responsibilities. Though each partner school had signed an agreement with the CI, in which some responsibilities were listed, sometimes questions were raised and then left unanswered. For example, one respondent believed that the CI should be held responsible for

developing a Mandarin Chinese curriculum for all of the partner schools, which also implied that the CI should be held responsible, if not in whole, for the quality of the Chinese language programs in those schools. Another respondent argued that ultimately a school should be held accountable for the delivery of educational experience to students. A third opinion suggested that everyone involved should be held accountable for the quality of Chinese language programs. Obviously, some details need to be refined among the partners, including the schools, the CI, University X, Hanban/CIH and the Chinese university.

In a school setting, accountability is often linked to student achievement and teacher performance. School administrators and teachers are usually held accountable for student achievement. In this complex partnership, it was not clear who should be held responsible for what. Being part of the partnership, schools' dynamics changed and responsibilities increased. In a couple of incidents, parents complained to schools about certain content of some teaching materials that were distributed to the schools by Hanban/CIH. The schools apologized to the parents. An underlying issue is whether schools in this partnership should be the only ones that are held accountable for the teaching and learning outcomes, even though Chinese guest teachers were selected by the Chinese university, recruited by the CI and approved by Hanban/CIH? The purpose of this line of questioning is not to find someone to blame, but to clear up some potential issues and get all partners involved in working together on establishing some transparent processes and procedures so all partners will be on the same page.

There were cases when valuable information was not provided to schools due to some restrictions of University X and the CI, or schools were not sure about who could provide them with the expertise they needed and what they could do to solve their uncertainties. For example, Hanban/CIH invited school administrators, teachers and students to participate in various types

of seminars, summer camps and visits to Chinese schools each year. Those were great opportunities for administrators, teachers and students to experience the Chinese culture. Unfortunately, the schools were not informed of the opportunities, because the university's attorney said it would violate the university's regulations if the CI performed the registration for those events and activities. What made the case more complicated was that Hanban/CIH insisted that the CI must be in charge of the registration. That was an example of how the coupling between the schools and the CI was affected by certain units of University X and China/Hanban. Figure 20 below illustrates some examples of possible uncertainties among partner schools and how it was not clear who should be responsible for what in the partnership.


<i>Improve teacher training to meet U.S. schools' needs</i>	?	Hanban/CIH
<i>Assist U.S. schools with developing Mandarin Chinese curricula</i>		
School 	?	Chinese University
<i>Collect feedback from U.S. schools</i>		
<i>Develop effective assessment tools for Mandarin Chinese programs</i>		
<i>Provide professional counseling for Chinese guest teachers</i>	?	University X
<i>Maintain Consistency and continuity for Mandarin Chinese programs</i>		
<i>Additional information for schools and students, e.g. summer camp in China</i>	?	The Confucius Institute

Figure 20. Who is accountable and responsible for what?

Another aspect regarding responsibilities in a partnership like the one in this study is the myth of “shared responsibilities.” Each year, Hanban/CIH paid the CI to carry out some responsibilities such as recruiting Chinese guest teachers, organizing a two-week new teacher orientation workshop and a couple of other activities, such as the celebration of Chinese’s New Year and a teacher seminar. Those responsibilities were covered by the “contract” between Hanban/CIH and the CI through the CI’s budget. However, there were also some other responsibilities that were not specified in writing, but they were crucial to the schools, such as developing a curriculum for all partner schools, communicating with partner schools about their

needs and checking the progress of Chinese programs on a regular basis, and including schools in the partnership decision making process. It was not clear to the schools what the CI would do and what it would not do. Some schools wondered why they could not get help from the CI. Though several reputable institutions and organizations like Hanban/CIH, the Chinese university and University X were involved in the partnership, they had little authority over the CI or in telling them what to do. Practically, none of those organizations and institutions could be held accountable for the CI's actions, except for legal matters. Meanwhile, the CI operation was not evaluated by any outside independent agency for quality. If schools and school districts expect to have a long-term, successful partnership with the CI and sustainable and quality Chinese programs through the partnership, those loopholes must be closed.

5.2.5 Some long-term effects

Despite some concerns and uncertainties, the respondents felt that the schools' efforts of developing Mandarin Chinese programs had brought some long-term effects to the programs, schools and communities, mainly focused on satisfying students' interests and serving communities with their educational needs. For example, the entire community could benefit from the opportunity provided by the school. Some schools offered adult classes in the community. Students were given the opportunities to master Chinese language, demonstrate a level of proficiency and competence, and gain a large world vision of a life-long learner. The schools were able to better prepare their students for their future careers in the global market. One respondent told to me how pleased he was when he saw his community was very accepting and friendly while hosting a group of students from China. "That was a big benefit to our

community. It forced our community to grow. And that's what we [the school] are here to do.” (Interview with Respondent 6, October 26, 2011).

While some respondents were very excited about the progress their Chinese programs had made, others expressed their concerns, feeling that their Chinese programs moved too slow and might become “stagnant.” For example, one respondent said sadly, “I fear, as I mentioned earlier, that the long-term effect is there won't be a long-term effect. It's just going to stumble along or move into something else. I don't know what, but it's been good for these five years. But it could be better; it could have been better (Interview with Respondent 18, October 12, 2011).

To conclude, all six schools successfully launched their Mandarin Chinese programs, though one school lost its Chinese language programs due to severe budget cuts. Their efforts could be characterized as a school-driven, bottom-up initiative fully supported by their school boards and the community. China's Hanban/CIH met the schools half way by providing them with “free” Chinese guest teachers and textbooks through its CI at University X. Without those resources and the support of Hanban/CIH, the Chinese university, the CI and the six schools might not be able to start the Chinese language programs from scratch. The respondents of all six schools spoke highly of the Chinese guest teachers, praising them as “enthusiastic,” “excellent,” “hardworking” and “outstanding,” though the word “qualified” was not mentioned by many. All six schools were determined to develop Mandarin Chinese education and set that as one of their school goals. One school district included “China Initiative” in its five-year strategic plan. Those examples confirmed the schools' commitment to the development of Chinese instruction. Some concerns and issues were addressed in regard to the lack of communication in the partnership and the lack of consistency and continuity, mainly due to the

constant “turnover” of Chinese guest teachers and the lack of training on teaching in U.S. schools. The division of responsibilities between the schools and the CI did not seem transparent. Overall, most of the schools were satisfied with their partnership with the CI, though Chinese guest teachers were the main reason that the schools enjoyed the partnership.

This study filled in several gaps by presenting how six U.S. schools (five public and one private) developed Mandarin Chinese education through partnership with the CI and, in their own words, what they said about their experiences, their challenges and the issues they encountered. The research examined the partnership utilizing two theoretical lenses: the partnership theory and the “loosely coupled system” theory and explained “how, when, and which parts of the partnership are [or not] improving education” (Chavkin, 1998, p. 83). Supported by the data collected from 22 qualitative field interviews, the study defined that the partnership in this study was “cooperative” and “complementary,” rather than “collaborative” in nature.

Another contribution of the study was the exploration of the possibility of studying the partnership as an LCS or a network of LCSs. This research found that part of the complexity of the couplings in the partnership as an LCS or a network of LCSs was that there were particular units within each LCS that might be responsible for the outcomes of the partnership, rather than the whole LCS. In addition, due to the lack of understanding of the decentralized American school system, Hanban/CHI and the Chinese university (international partners) might have unrealistic expectations for their American institutional partners, including schools. A further study is suggested to examine in what ways the couplings within the schools and between the schools and the CI are affected by the impact of Hanban/CIH, the Chinese university and University X.

Finally, Murphy and Hallinger described a loose coupling research process as “what is,” and the school effectiveness research as “what can be” (p. 10). The data for this study explained “what is,” but was unable to describe “what it can be,” because assessing effectiveness or success of the partnership was beyond the scope of this study.

5.3 RECOMMENDATIONS FOR FURTHER RESEARCH

With the resources provided by Hanban/CIH through its CI at University X, and the invaluable contributions from Chinese guest teachers of the Chinese university, the six schools successfully launched their Mandarin Chinese programs and met their students’ language needs, except for one school that lost their program at the time this study was conducted. It is my sincere hope that the findings and conclusions of this study can provide some insight into the development of Mandarin Chinese instruction in those schools and their partnership with the CI. As noted earlier, the results of this study may not be representative. However, some of the perspectives may be helpful to schools and colleges, public and private, that wish to develop Chinese education on their own or through partnership with a CI.

The following recommendations are offered for further research on topics related to the development of Mandarin Chinese education in U.S. schools through partnership with a CI.

- Continue this study by adding feedback from students, parents and community members regarding student learning, especially over time, and the development of Mandarin Chinese programs as well as the partnership with the CI, focusing on how schools’ needs were met; what has been done to increase students’ language

proficiency; and in what ways the partnership helped develop and improve Mandarin Chinese education.

- Continue this study and interview representatives of Hanban/CIH, the Chinese university, University X and the CI and explore the procedures, processes and strategic plans of those institutions and organizations for the development of Mandarin Chinese education at the school level and the partnership. In doing so, further study would help to indicate what they have done to work with schools and improve Chinese language teacher training, textbooks, communication and consistency to meet the needs of U.S. schools and school districts. In addition, find what they have done to make the procedures and processes transparent as well as establishing an “equal status” in the partnership.
- Conduct a follow-up study with the same schools in three years with a similar focus on comparing changes and development.
- Study other CIs and explore how those CIs work with schools developing Mandarin Chinese instruction.
- Conduct research on how public and private schools develop Mandarin Chinese education and make a comparison in regards to resources, curriculum development, increasing language proficiency, student motivation, teaching methodology, and assessment and evaluation criteria, standards and tools.
- Research and find what mechanism and criteria China’s Hanban/CIH utilizes to evaluate its CIs, focusing on process transparency, continuous improvement and schools’ involvement in the partnership.

- Continue research on the school-CI partnership, utilizing the “loose coupling” and “loosely coupled systems” theories to explore in what ways the coupling is affected by different units within the partnership and how it affects the partnership.
- Build a theory that is suitable for the study of an SUP as a “loosely coupled system.” The review of literature informed us that no partnership theory was established based on an international partnership like the one in this study. Previous studies on LCSs were usually based on U.S. educational institutions such as schools, school districts and universities. Therefore, further research is needed to study “loosely coupled systems” in an international context, like the international SUP in this study.
- Conduct a study focusing on topics such as further training for Chinese guest teachers; communication between partner schools and a CI and among partner schools; Chinese curriculum development; consistency and continuity; program sustainability; program evaluation and criteria; language proficiency; process transparency; accountability and responsibility, etc.
- Research different strategies that enable schools to increase student motivation and retention in Chinese language programs.
- Research and find Hanban/CIH’s plans and strategies for supporting and improving the development of Mandarin Chinese education at the school level.

Since 2007, Hanban/CIH, the Chinese university and the CI had been working with their partner schools toward the common goal of developing Mandarin Chinese programs. It was evident that the partnership had provided school students with learning opportunities. However, more efforts are expected to be made in increasing students’ language proficiency. The CI’s

2008 annual report showed that around 1,000 students were enrolled in introductory Chinese classes, but two years later (2010) only 63 students continued studying Chinese in Levels III and IV classes combined. I did not expect to see the enrollment rates for Levels III and IV classes were so low. If meeting students' learning need is defined as providing students with learning opportunities and increasing student language proficiency, the data showed evidence that the former was under development, but the latter showed obvious deficiency. Should the schools be held responsible for that problem? Or, all partners should be held accountable? Many questions remain unanswered concerning both the development of Mandarin Chinese education and the partnership between the schools and the CI.

This study was a first step to explore how six U.S. secondary schools developed Mandarin Chinese instruction through partnership with a Confucius Institute. The study provided a complimentary view on the partnership between those schools and the CI. Hopefully, this study will open a line of discussion and research that can help find answers to questions on how to develop and improve Mandarin Chinese education in U.S. schools, which ultimately meets students' language needs and their future career goals. That is what will provide the greatest value to all stakeholders involved.

APPENDIX A

INTERVIEW PROTOCOL 1

(For School Administrator)

ABOUT THE DEVELOPMENT OF MANDARIN CHINESE EDUCATION

1. What motivated your school to develop Mandarin Chinese education?
 - a. What criteria did your school use to choose Mandarin Chinese over other “world languages”?
2. How supportive is your school board toward the development of Mandarin Chinese education in your school?
3. What are your school’s educational goals and desired outcomes for developing Mandarin Chinese education?
 - a. What are some short-term goals?
 - b. What are some long-term goals?
4. What resources are critical to the development of Mandarin Chinese education in your school?
5. How did you find qualified teachers of Chinese?
 - a. What criteria do you use to define “qualified”?
6. From where did you find expertise developing a Mandarin Chinese curriculum?
7. What resources are still lacking in the development of Mandarin Chinese education in your school?
8. Has the Mandarin Chinese program in your school been affected by the economic crisis? If yes, in what ways?

9. What are some challenges and issues that you have encountered in the development of Mandarin Chinese education?
10. What are some reasons that students in your school are interested in learning Mandarin Chinese?
 - a. What other reasons could you name?
 - b. What grades are those students in?
11. What criteria does your school use to evaluate the quality of the Mandarin Chinese program?
12. What does your school plan to do to help students achieve greater proficiency in Mandarin Chinese?
13. What are the strengths of China's guest teachers?
14. In what area(s) do China's guest teachers need improvement?
15. What feedback have you obtained from students, parents, school administrators and teachers about the Mandarin Chinese program?
 - a. How did you obtain this feedback?

ABOUT THE PARTNERSHIP

16. How did your school start a partnership with the CI?
17. What are some common goals that your school and the CI share?
 - a. What goals are different?
18. Describe in what ways your school and the CI are committed to the partnership.
19. Describe what outcome(s) your school desires to achieve through the partnership.
20. How do you define a successful school-university partnership?
 - a. What criteria do you use to develop the definition?
21. How are the responsibilities of the partnership divided among your school and the CI?
22. What have your school done to host China's guest teachers?

23. How do you describe the relationship between your school and the CI?
24. Describe the communication channel between your school and the CI.
25. What are some key factors that hold the partnership together?
26. In what ways has the partnership helped achieve the educational goals of your school?
 - a. What specific educational goal(s) has been achieved through the partnership?
27. In what ways has the partnership succeeded or failed to meet the needs of your school?
28. What worked and what did not work for the partnership between your school and the CI and why?
29. What benefits has your school gained from the partnership?
30. What are some long-term effects this partnership has on (a) the Mandarin Chinese program; (b) the school(s); (c) the community?
31. What do you expect to see happening to the partnership with the CI in the next few years?
 - a. In what ways can the partnership contribute to the sustainable development of your Mandarin Chinese program?
32. Overall, how would you evaluate your experience working with the CI?
 - a. What would you share with colleagues in other schools in regard to developing Mandarin Chinese education through partnership with the CI?
33. What else would you like to share not already covered in this interview?

APPENDIX B

INTERVIEW PROTOCOL 2

(For School District Administrator)

ABOUT THE DEVELOPMENT OF MANDARIN CHINESE EDUCATION

1. What motivated your school district to develop Mandarin Chinese education?
 - a. What criteria did your school district use to choose Mandarin Chinese over other “world languages”?
2. How supportive is your school board toward the development of Mandarin Chinese education in your school district?
3. What are your school district’s educational goals and desired outcomes for developing Mandarin Chinese education?
 - a. What are some short-term goals?
 - b. What are some long-term goals?
4. What resources are critical to the development of Mandarin Chinese education in your school district?
5. How did you find qualified teachers of Chinese?
 - a. What criteria do you use to define “qualified”?
6. From where did you find expertise developing a Mandarin Chinese curriculum?
7. What resources are still lacking in the development of Mandarin Chinese education in your school district?
8. Has the Mandarin Chinese program in your school district been affected by the economic crisis? If yes, in what ways?
9. What are some challenges and issues that you have encountered in the development of Mandarin Chinese education?

10. What are some reasons that students in your school district are interested in learning Mandarin Chinese?
 - a. What other reasons could you name?
 - b. What grades are those students in?
11. What criteria does your school district use to evaluate the quality of the Mandarin Chinese program?
12. What does your school plan to do to help students achieve greater proficiency in Mandarin Chinese?
13. What are the strengths of China's guest teachers?
14. In what area(s) do China's guest teachers need improvement?
15. What feedback have you obtained from students, parents, school administrators and teachers about the Mandarin Chinese program?
 - a. How did you obtain this feedback?

ABOUT THE PARTNERSHIP

16. How did your school district start a partnership with the CI?
17. What are some common goals that your school district and the CI share?
 - a. What goals are different?
18. Describe in what ways your school district and the CI are committed to the partnership.
19. Describe what outcome(s) your school district desires to achieve through the partnership.
20. How do you define a successful school-university partnership?
 - a. What criteria do you use to develop the definition?
21. How are the responsibilities of the partnership divided among your school district and the CI?
22. What have your school district done to host China's guest teachers?
23. How do you describe the relationship between your school district and the CI?
24. Describe the communication channel between your school district and the CI.

25. What are some key factors that hold the partnership together?
26. In what ways has the partnership helped achieve the educational goals of your school?
 - a. What specific educational goal(s) has been achieved through the partnership?
27. In what ways has the partnership succeeded or failed to meet the needs of your school district?
28. What worked and what did not work for the partnership between your school district and the CI and why?
29. What benefits has your school district gained from the partnership?
30. What are some long-term effects this partnership has on (a) the Mandarin Chinese program; (b) your school district; (c) the community?
31. What do you expect to see happening to the partnership with the CI in the next few years?
 - a. In what ways can the partnership contribute to the sustainable development of your Mandarin Chinese program?
32. Overall, how would you evaluate your experience working with the CI?
 - a. What would you share with colleagues in other schools and school districts in regard to developing Mandarin Chinese education through partnership with the CI?
33. What else would you like to share not already covered in this interview?

APPENDIX C

INTERVIEW PROTOCOL 3

(For Chinese Guest/Voluntary Teacher)

1. 孔子学院国际合作的主要任务是什么？
What is the mission of the CI partnerships?
2. 孔子学院国际合作自成立以来取得了哪些成就？
What have the CI partnerships achieved since establishment?
3. 孔子学院国际合作的特点是什么？
What are the characteristics of the CI partnerships?
4. 促进孔子学院国际合作的因素有哪些？
What factors facilitate the CI partnerships?
5. 影响孔子学院国际合作的因素有哪些？
What factors hinder the CI partnerships?
6. 孔子学院国际合作目前面临哪些主要问题和挑战？
What major challenges and issues have CIs been facing?
7. 孔子学院国际合作未来的发展目标是什么？
What are the future goals of the CI partnerships?
8. 您所任教的学校在孔子学院合作中的主要职责是什么？
What are the roles and responsibilities of your school in the CI partnerships?
9. 汉语教学对您所任教的学校及当地社区产生了哪些影响？
What impact do the Chinese language programs have on your school and the local community?

10. 您在汉语教学工作中遇到了哪些挑战或问题?
What challenges or problems have you come across at work?
11. 学生对汉语教学的反馈意见有哪些?
What feedback have you heard from students about the Chinese language program in your school?
12. 您所任教的学校是通过哪些途径保证汉语教学质量的?
What mechanism does your school use to assure the quality of its Chinese language programs?
13. 在您所任教的学校, 汉语教学的有效性是怎样评定的?
How is the effectiveness of the Chinese language programs evaluated at your school?
14. 在您所任教的学校, 评估汉语教学的标准是什么?
What are the criteria used to evaluate the Chinese language programs at your school?
15. 您认为汉语教学应怎样发展才能达到持久和稳定?
What should the Chinese language programs in your school do to achieve sustainability?
16. 您还有什么要补充的吗?
What else would you like to share not already covered in this interview?

APPENDIX D

INTERVIEW PROTOCOL 4a

(For Regular School Teacher)

ABOUT THE DEVELOPMENT OF MANDARIN CHINESE EDUCATION

1. What motivated your school to develop Mandarin Chinese education?
 - a. What criteria did your school use to choose Mandarin Chinese over other “world languages”?
2. What are your school’s educational goals and desired outcomes for developing Mandarin Chinese education?
 - a. What are some short-term goals?
 - b. What are some long-term goals?
3. What resources are critical to the development of Mandarin Chinese education in your school?
4. What resources are still lacking in the development of Mandarin Chinese education in your school?
5. Has the Mandarin Chinese program in your school been affected by the economic crisis? If yes, in what ways?
6. What are some challenges and issues that your school have encountered in the development of Mandarin Chinese education?
7. What are some reasons that students in your school are interested in learning Mandarin Chinese?
 - a. What other reasons could you name?
 - b. What grades are those students in?
8. What criteria does your school use to evaluate the quality of the Mandarin Chinese program?

9. What does your school plan to do to help students achieve greater proficiency in Mandarin Chinese?
10. What are the strengths of China's guest teachers?
11. In what area(s) do China's guest teachers need improvement?
12. What feedback have you heard from students, parents, school administrators and teachers about the Mandarin Chinese program?

ABOUT THE PARTNERSHIP

13. How did your school start a partnership with the CI?
14. What are some common goals that your school and the CI share?
 - a. What goals are different?
15. Describe what outcome(s) your school desires to achieve through the partnership.
16. What have your school done to host China's guest teachers?
17. How do you describe the relationship between your school and the CI?
18. In what ways has the partnership helped achieve the educational goals of your school?
 - a. What specific educational goal(s) has been achieved through the partnership?
19. In what ways has the partnership succeeded or failed to meet the needs of your school?
20. What worked and what did not work for the partnership between your school and the CI and why?
21. What benefits has your school gained from the partnership?
22. What are some long-term effects this partnership has on (a) the Mandarin Chinese program; (b) the school(s); (c) the community?
23. What do you expect to see happening to the partnership with the CI in the next few years?
 - a. In what ways can the partnership contribute to the sustainable development of your Mandarin Chinese program?
24. What else would you like to share not already covered in this interview?

APPENDIX E

INTERVIEW PROTOCOL 4b

(For Regular School Teacher [Chinese Language])

关于发展汉语课程 ABOUT THE DEVELOPMENT OF MANDARIN CHINESE EDUCATION

1. 促使贵校选择发展汉语课程的动机是什么？ What motivated your school to develop Mandarin Chinese education?
 - a. 贵校选择汉语优先于其它语种的标准有哪些？ What criteria did your school use to choose Mandarin Chinese over other “world languages”?
2. 贵校开展汉语教学的目标有哪些？ What are your school’s educational goals and desired outcomes for developing Mandarin Chinese education?
 - a. 近期目标？ What are some short-term goals?
 - b. 长期目标？ What are some long-term goals?
3. 贵校在开发汉语教学上有哪些优势？ From where did your school find expertise to develop a Mandarin Chinese curriculum?
4. 贵校的汉语教学需要哪些重要资源？ What resources are critical to the development of Mandarin Chinese education in your school?
5. 贵校的汉语教学还缺少哪些资源？ What resources are still lacking in the development of Mandarin Chinese education in your school?
6. 贵校的汉语教学是否受到了经济危机的影响？ 如果有，在哪些方面？ Has the Mandarin Chinese program in your school been affected by the economic crisis? If yes, in what ways?
7. 贵校学生对汉语感兴趣的原因有哪些？ What are some reasons that students in your school are interested in learning Mandarin Chinese?
 - a. 还有哪些别的原因？ What other reasons could you name?

- b. 他们是哪些年级的学生？ What grades are those students in?
8. 贵校评估汉语教学的标准有哪些？ What criteria does your school use to evaluate the quality of the Mandarin Chinese program?
9. 除了考试以外，贵校还采用什么方法评估学生掌握的汉语知识？ In addition to tests, what other procedures does your school use to evaluate students' language proficiency in Mandarin Chinese?
10. 您计划怎样帮助学生更进一步提高他们的汉语水平？ What does your school plan to do to help students achieve greater proficiency in Mandarin Chinese?
11. 您在汉语教学上遇到了哪些问题和挑战？ What are some challenges and issues that you have encountered in the teaching of Mandarin Chinese?
12. 中国来的汉语教师有哪些优势？ What are the strengths of China's guest teachers?
13. 中国来的汉语教师在哪方面需要改进？ In what area(s) do China's guest teachers need to improve?
14. 学生，家长，学校管理人员及教师对汉语课程的反馈有哪些？ What feedback have you obtained from students, parents, school administrators and teachers about the Mandarin Chinese program?
- a. 您是通过什么方式获得这些反馈的？ How did you obtain this feedback?

关于学校-孔子学院的合作 ABOUT THE PARTNERSHIP

15. 贵校是怎样开始与孔子学院合作的？ How did your school start a partnership with the CI?
16. 贵校与孔子学院的共同目标有哪些？ What are some common goals that your school and the CI share?
- a. 有哪些不同目标？ What goals are different?
17. 请描述贵校希望通过与孔子学院合作取得什么样的结果。 Describe what outcome(s) your school desires to achieve through the partnership.
18. 贵校在哪些方面为中国来的汉语教师提供了帮助？ What have your school done to host China's guest teachers?
19. 请描述贵校与孔子学院的合作关系。 Describe the relationship between your school and the CI?

20. 贵校与孔子学院的合作在哪些方面是成功的，哪些方面还需要改进？为什么？
What worked and what did not work for the partnership between your school and the CI and why?
21. 孔子学院与贵校的合作怎样帮助贵校达到了教育目标？ In what ways has the partnership helped achieve the educational goals of your school?
- a. 达到了哪些具体的教育目标？ What specific educational goal(s) has been achieved through the partnership?
22. 贵校与孔子学院的合作给汉语课程，学校和当地社区带来了哪些长期的影响？
What are some long-term effects this partnership has on (a) the Mandarin Chinese program; (b) the school(s); (c) the community?
23. 您希望贵校与孔子学院的合作在今后的几年当中有一个什么样的发展？ What do you expect to see happening to the partnership with the CI in the next few years?
- a. 贵校与孔子学院的合作在哪些方面能有效促进贵校的汉语课程的持久发展？ In what ways can the partnership contribute to the sustainable development of your Mandarin Chinese program?
24. 您还有什么要补充的吗？ What else would you like to share not already covered in this interview?

APPENDIX F

Research Question Matrix

The relationship between study research questions, interview questions, and data sources

INTERVIEW QUESTIONS	DATA RESOURCES				RESEARCH QUESTIONS*			
	SP	SU	TCN	RT	1	2	3	4
<i>A. Motivation and criteria</i>								
What motivated your school/school district to develop Mandarin Chinese education? (Probe: a. What criteria did your school/school district use to choose Mandarin Chinese over other “world languages”?)	√	√		√	X			
<i>B. Students’ language needs</i>								
What are some reasons that students are interested in learning Mandarin Chinese? (Probe: a. What other reasons could you name?)	√	√		√	X			
<i>C. Support of school board</i>								
In your opinion, how supportive is your school board toward the development of Mandarin Chinese education in your school/school district?	√	√			X			
<i>D. Shared vision and goals and desired outcome</i>								
How did your school/school district start a partnership with the CI?	√	√		√		X		

SP = School Principal SU = Superintendent
 TCN = Teacher of Chinese RT = Regular Teacher

RESEARCH QUESTIONS	DATA RESOURCES				RESEARCH QUESTIONS*			
	SP	SU	TCN	RT	1	2	3	4
What are some goals that your school/school district has for the development of Mandarin Chinese education? (Probe: a. What are short-term goals? b. What are long-term goals?)	√	√		√		X		
What are some common goals that your school/school district and the CI share?	√	√		√		X		
Describe in what ways your school/school district and the CI have demonstrated strong commitment toward the partnership.	√	√		√		X		
Describe the desired outcome(s) that your school/school district plans to achieve through the partnership.	√	√		√		X		
In your opinion, what works and what does not work for the partnership between your school/school district and the CI and why?	√	√		√		X		
How do you define a successful school-university partnership? (Probe: a. What criteria do you use to develop the definition?)	√	√		√		X		
<i>E. About resources</i>								
What resources does your school/school district have to support the Mandarin Chinese program? (Probe: a. How much money has been invested in the Mandarin Chinese program? b. How much manpower has been invested in the Mandarin Chinese program?)	√	√		√		X		
How did your school /school district find qualified teachers of Chinese? (a. What criteria do you use to define “qualified”?)	√	√		√		X		
From where did your school /school district find expertise to develop a Mandarin Chinese curriculum?	√	√		√		X		
What resources are critical to the developing of Mandarin Chinese education in your school/school district?	√	√		√		X		
What resources are still lacking in the developing of Mandarin Chinese education in your school/school district?	√	√		√		X		

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RESEARCH QUESTIONS	DATA RESOURCES				RESEARCH QUESTIONS*			
	SP	SU	TCN	RT	1	2	3	4
How has the Mandarin Chinese program in your school /school district been affected by the economic crisis? If so, in what ways?	√	√		√		X		
<i>F. About responsibilities</i>								
How are the responsibilities of the partnership divided among your school, school district and the CI?	√	√				X		
In what ways has the partnership affected your school's/school district's administration?	√	√				X		
What has your school/school district done to host China's guest teachers?	√	√		√		X		
What are some challenges and issues that you have encountered in the development of Mandarin Chinese education in your school/school district?	√	√		√		X		
<i>G. The relationship between school/school district and the CI</i>								
How do you describe the relationship between your school/school district and the CI? (Probe: a. Describe the structure of the partnership between your school/school district and the CI; b. Describe the characteristics of the partnership; c. Describe the leadership of the partnership.)	√	√		√		X		
Describe the communication channel between your school/school district and the CI.	√	√		√		X		
What is the mission of the CI partnerships? 孔子学院国际合作的主要任务是什么?			√			X		
What have the CI partnerships achieved since establishment? 孔子学院国际合作自成立以来取得了哪些成就?			√			X		
What are the characteristics of the CI partnerships? 孔子学院国际合作的特点是什么?			√			X		
What factors facilitated the CI partnerships? 促进孔子学院国际合作的因素有哪些?			√			X		

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RESEARCH QUESTIONS	DATA RESOURCES				RESEARCH QUESTIONS*			
	SP	SU	TCN	RT	1	2	3	4
What factors hindered the CI partnerships? 影响孔子学院国际合作的因素有哪些?			√			X		
What major challenges and issues have CIs been facing? 孔子学院国际合作目前面临哪些主要问题和挑战?			√			X		
What are the future goals of the CI partnerships? 孔子学院国际合作未来的发展目标是什么?			√			X		
What are the roles and responsibilities of your school in the CI partnerships? 您所任教的学校在孔子学院合作中的主要职责是什么?			√			X		
What impact do the Chinese language programs have on your school and the local community? 汉语教学对您所任教的学校及当地社区产生了哪些影响?			√			X		
What challenges or problems have you come across at work? 您在汉语教学工作中遇到了哪些挑战或问题?			√			X		
What feedback have you heard from students about the Chinese language program in your school? 学生对汉语教学的反馈意见有哪些?			√			X		
What mechanism does your school use to assure the quality of its Chinese language programs? 您所任教的学校是通过哪些途径保证汉语教学质量的?			√			X		
How is the effectiveness of the Chinese language programs evaluated at your school? 在您所任教的学校, 汉语教学的有效性是怎样评定的?			√			X		

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RESEARCH QUESTIONS	DATA RESOURCES				RESEARCH QUESTIONS*			
	SP	SU	TCN	RT	1	2	3	4
What are the criteria used to evaluate the Chinese language programs at your school? 在您所任教的学校，评估汉语教学的标准是什么？			√			X		
<i>H. Meeting school's educational goals</i>								
In what ways has the partnership helped achieve the educational goals of your school/school district? (Probe: a. What specific educational goal(s) has been achieved through the partnership?)	√	√		√			X	
<i>I. Meeting students' language needs</i>								
In addition to tests, what other procedures does your school use to evaluate students' language proficiency in Mandarin Chinese?	√	√		√			X	
What criteria does your school/school district use to evaluate the quality of the Mandarin Chinese program?	√	√		√			X	
In your opinion, how proficient have students become in Mandarin Chinese? (Probe: a. What are your plans for helping students achieve greater proficiency?)	√	√		√			X	
<i>J. Feedback</i>								
Do you solicit feedback about the Mandarin Chinese program from students? From parents? From administrators and teachers? If yes, how do you obtain this feedback? What does the student/ parental/administrator and teacher feedback indicate about their feelings toward the program?	√	√		√			X	
<i>a. Benefits</i>								
What benefits has your school/school district gained from the partnership?	√	√		√				X
What other benefits does your school/school district expect to gain from the partnership?	√	√		√				X
What benefits does the CI expect to gain from the partnership?	√	√		√				X

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RESEARCH QUESTIONS	DATA RESOURCES				RESEARCH QUESTIONS*			
	SP	SU	TCN	RT	1	2	3	4
Describe in what ways the partnership <u>does not</u> meet the needs of your school/school district and help achieve your educational goals and desired outcomes.	√	√		√				X
In your opinion, what are some key factors that hold the partnership together?	√	√		√				X
<i>b. Partnership effects</i>								
In your opinion, what long-term effects will this partnership have on (a) the Mandarin Chinese program; (b) the school/school district; (c) the community?	√	√		√				X
<i>c. Suggestions and recommendations</i>								
In what ways can the partnership contribute to the sustainable development of your Mandarin Chinese program in your school/school district? (Probes: a. What do you expect to see happening to the partnership with the CI in the next few years?)	√	√		√				X
What should the Chinese language programs in your school do to achieve sustainability? 您认为汉语教学应怎样发展才能达到持久和稳定?			√				X	
Overall, how would you evaluate your experience working with the CI? (Probe: a. What would you share with colleagues in other schools/school districts in regard to developing Mandarin Chinese education through partnership with the CI?)	√	√						X
What else would you like to share not already covered in this interview?	√	√		√				

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TCN = Teacher of Chinese RT = Regular Teacher

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