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Contents

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Examining a causal effect of Gyeonggi innovation schools in Korea*

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Abstract

This study evaluated the policy impact of the Gyeonggi innovation school movement. Of primary concern was whether or not the effect of the school reform observed from the survey data might be due to selection bias, that is, if the policy effect would be confounded with other covariates. Thus based on the analytical framework of the Rubin causal model, this study estimated causal effects of Gyeonggi innovation schools. From the results of multilevel analysis with matched high schools and weighting individual observations of Gyeonggi Education Panel Study 2012 (GEPS 2012) by propensity scores, this study did not find positive evidence of Gyeonggi innovation schools on academic achievement. However students' school satisfaction was much higher in innovation schools than their counterparts.

Keywords: Gyeonggi innovation schools, selection bias, causal effects, propensity scores, matching

* This paper has been revised and reorganized based on the manuscript, which was presented at the 2nd Gyeonggi Education Panel Study Conference, Suwon, Korea, "*Evaluating the effect of innovation schools in Gyeonggi district with causal inference models*" (Min, Kim, & Jung, 2015).

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Introduction

The Korean education system can be characterized as a nationally centralized system to execute the educational goals and curricula established by the Ministry of Education. It has been changed, however, to build more local-governing structures in which administrators (e.g., superintendents) of district educational agencies implement unique education programs and practices at the regional level. As an example, innovation schools have been a representative reform policy initiated by several Offices of Education, primarily addressing low income family students, school autonomy, and whole-person education rather than students' academic performance. So far, innovation schools with different titles were adopted in six Metropolitan and Provincial Offices of Education, although public debates still exist on whether or not innovation schools can be future school models (Baek & Park, 2014).

The Gyeonggi Province pioneered institutionalizing the innovative school model, which was originally initiated as a school movement to respond to the crisis of closing small schools (Baek, Kim, Lee, & Choi, 2016). The Gyeonggi Province implemented the school reform policy by appointing nine schools in 2009 (Baek & Park, 2014), and there were eventually 541 innovation schools (293 elementary, 183 middle, and 65 high schools) as of November, 2017 (Gyeonggi Provincial Office of Education, 2017).

Since the Gyeonggi Education Panel Study 2012 (GEPS 2012) data was made publically available, a body of data and knowledge has accumulated. Accordingly, the literature included some positive results in various aspects. For example, teachers' participation and job satisfaction in Gyeonggi innovation schools increased with a more autonomous school environment compared to traditional public schools (Cha & Lee, 2014), and positive changes in principals' innovative leadership, school regulations, and teachers' cooperation were found at innovation schools (H.-U., Kim, Choi, & Kwon, 2014). Moreover, innovation high schools more frequently adopted student-oriented teaching strategies (Yang & An, 2014), although teachers experienced more fatigue from a heavier workload that included frequent communication with other teachers, parents, and students (Park, Shin, & Jung, 2014).

More importantly, many studies address the positive impacts of the innovation school policy to students. For instance, students in innovation middle schools appear to have more of a sense of community, human rights, and social competence from student clubs/council activities (W.-J. Kim, 2014; Na, Cha, Kim, & Choi, 2013). There is a significantly positive impact of innovation schools on students' satisfaction and achievement (Jang, Jung, & Won, 2014), and students' classroom attitudes in middle and high schools (Baek & Park, 2014). Active participation in self-governing programs with higher democratic citizenship also occurred in innovation elementary schools (Na et al., 2013), and there was a statistically significant mean difference on self-directed competency between innovative and traditional high schools (Yang & An, 2014).

However, contradictory findings from the GEPS 2012 were also found. Sung, Min, and Kim (2014) insisted there were no statistically significant reform impacts on elementary students' affective domains such as classroom attitude, concentration, test anxiety, or mathematic achievement. In middle schools, there were no effects on students' citizenship (H.-J. Kim, 2014) while W.-J. Kim (2014) affirmed the connection between active participation in self-governing programs and students' community spirit.

It shows that research community has been divided for positive or negative impacts of

the innovation schools (Gyeonggi Provincial Office of Education, 2012). However, we must consider two points that have opposite research results on school innovation. At first, the educational impacts or influences of the innovation schools have been searched retrospectively rather than prospectively. That is, much research on innovation schools were based on observational studies mainly with large-scale survey data, resulting in potential selection bias. Selection bias is related to the initial difference between treatment and control groups on both observables and unobservables (Morgan, 2001), and in turn the estimated policy effects might be confounded with pretreatment differences (Murnane & Willett, 2011; Stuart, 2010). Previous studies show methodological limitations in terms of data analysis such as ignoring the hierarchical structure of data in analyzing the GEPS 2012 (H.-U. Kim, Choi, & Kwon, 2014; Park et al., 2014; Sung, Min, & Kim, 2014; Yang & An, 2014). Also, there are concerns of the lack of efforts for balancing out pretreatment conditions as an effort to remove selection bias in the survey data (Cha & Lee, 2014; H.-J. Kim, 2014; W. Kim, 2014; H.-U. Kim et al., 2014; Park et al., 2014; Sung et al., 2014; Yang & An, 2014). Therefore, although previous studies applied various statistical models, it could be said that more rigorous research designs and analyses could have been employed to draw a causal inference about the impact of innovation schools.

Second, because the school reform policy had various pedagogical and social goals, it was not certain which outcome measures were inherent to innovation schools. As mentioned above, previous studies on Gyeonggi innovation schools focused on somewhat different dimensions depending on school levels (e.g., elementary, middle, or high schools), subjects of analysis (e.g., school administrators, students, or teachers) and domains of performance (e.g., affective or cognitive domains). Above all, a wide range of outcome measures were dealt with for policy evaluation—e.g., students' academic achievement including Korean, English, and Mathematics; student affective domains such as self-efficacy and academic efficacy; students' citizenship and community spirit, and self-directed competency; and teachers' participative decision making, job satisfaction, etc. Thus, although the same data set was used to evaluate the school reform policy, conclusions on the effectiveness of Gyeonggi innovation schools could be drawn differently depending on which aspects the researchers focused on most.

Thus this study revisited the impact of Gyeonggi innovation school policy using the GEPS 2012 data with a special attention to eliminate selection bias. We re-analyzed the GEPS data to assess the effects on Gyeonggi innovation schools by balancing out important covariates based on a causal inference framework to control pretreatment characteristics between innovative schools and their counterparts. A two-stage matching strategy (school and student levels) was employed to draw on more valid comparison groups prior to outcome analyses. We presented more details on statistical issues in the methodology part of this paper.

Another key feature of this study was to include many outcome variables to assess the impact of the Gyeonggi innovation school policy. Thus, this study not only focused on cognitive domains (e.g., students' academic achievement of Korean, English, and Mathematics) but also affective domains (e.g., students' school satisfaction, perception of citizenship, discrimination/harassment at schools, student rights, and mental health) as outcome measures for policy evaluation. These variables, except academic achievement, were mentioned as important outcomes of innovation schools by the Gyeonggi Provincial Office of Education (2012). While some people may disagree with including academic performance as an outcome of innovation schools, we believe that objective test scores is an important factor for students' school selection and quality evaluation of high schools.

Literature review

Goals of the Gyeonggi innovation school policy

The Gyeonggi Province emphasized five goals in innovation schools to reform the bureaucratic public education system—*publicity* as an effort of holding school accountability, *creativity* in educational content, *democracy* for assuring quality life of students, *dynamism* by diverse teaching strategies for achieving excellence for all students based on teachers' collective intelligence, and *globalization* with the objective of human resource development (Gyeonggi Provincial Office of Education, 2012), which is somewhat different from the Seoul innovation school that emphasized five fundamental values—human rights and peace, self-determination and creativity, communication and collaboration, spontaneity and participation, responsibility and publicity (Jo, 2011). Based on these philosophical foundations, Gyeonggi innovation schools were supposed to build a democratic, autonomous, and professional learning community with a systemic self-management and creatively intellectual curriculum (Gyeonggi Provincial Office of Education, 2012).

Particularly, the development of a professional learning community (PLC) as a goal of the Gyeonggi innovation schools was a shift towards a student-centered approach where school stakeholders work collaboratively and focus on a shared mission for effective institutional practices. Although there have been various definitions, Mulford (2007) defined the PLC as "shared norms and values including valuing differences and diversity, a focus on implementation and continuous enhancement of quality learning for all students, deprivatisation of practice, collaboration, and critical reflective dialogue, especially based on performance data" (p. 175). It is a generally accepted research finding that PLC contributes to a positive collaborative culture in schools, which then encourages more student engagement in academic activities.

While traditional PLC models emphasized teachers' shared goals and collective activities, Gyeonggi innovation schools expanded the PLC models by including students' active participation and community cooperation. Another important feature of innovation schools was to improve public education by encouraging voluntary efforts of each school combined with administrative and financial support. That is, the innovation school policy was not to construct new schools or have any fixed form of reform models. So far we have illustrated various experiences with school reform through changes in the national curriculum, student evaluation methods, diversity of school types and student selection procedures. But it has been mentioned that the difficulty or failure of school reform stems from hierarchical and bureaucratic policies that address education for immediate outcomes, while failing to recognize teachers as the main agent to change school culture.

Gyeonggi innovation schools can be understood in four dimensions: normative, technical, structural, and constituent aspects (Cooper, Fusarelli, & Randall, 2004). In normative aspects, innovation schools advocate publicity for a social role, creativity and globalization for educational contents, and democracy for operational rules. Sharing vision and values is important for school members to expand and integrate their goals such as placing learning as the primary mission. In technical aspects of education, small group discussion and cooperative/experimental learning for whole-person education are emphasized to replace traditional classes. The structural aspect is the supportive and shared leadership. That is, sharing duties and responsibilities among school principals, teachers, students, and parents has positive effects on school cultural collaboration and outcomes. Also, small class size, financial support and a lighter teacher workload reinforces the focus on student learning.

The constituent dimension is about expanding the network to build a learning community where teachers can work collectively to resolve school problems and continually improve their expertise.

Overall, innovation schools adopt its own course to build a new school culture as a professional learning community rather than to construct a fixed reform model. Here, school culture encompasses various aspects such as norms and values, ritual and ceremonies, and members' stories so that each innovation school may have various outcomes in terms of learning/student oriented education. Thus, it is important to objectively compare various aspects of innovation schools to evaluate the recent school reform.

Causal inferences on the effects of innovation schools in the Gyeonggi Province

Researchers have tried to reduce bias in observational studies with a focus on the sample coverage error, sampling frame, measurement error, and nonresponse rates in order to improve internal and external validity (Creswell, 2014). Particularly to assure the internal validity, the experimental design has been mentioned as the most rigorous research method to verify the policy effects through comparing treatment groups with control groups that are randomly assigned (Shadish, Cook, & Campbell, 2002). The essential benefit of experimental trials is that random assignment controls over extraneous variables (both observed and unobserved) (Morgan, 2001), while statistical control only adjusts for the observed variables used in analytical procedures (e.g., via blocking variables or controlling for covariates such as pretest measures) (Rosenbaum, 1986). However, the experimental design is not always feasible in teaching-learning practices due to ethical and logistical matters. Thus, a matched sample comparison has been considered as an alternative/promising statistical approach to control observed confounding variables (Rosenbaum & Rubin, 1983; Rubin, 1997).

Following the general guidance of research designs and statistical controls in the survey studies, we re-examined the impacts of innovation schools in the Gyeonggi Province. While many studies analyzed the GEPS 2012 to investigate the effect of innovation schools, statistical methods varied. Group mean comparisons (e.g., *t*-test, ANOVA, and regression models) were popular to find differences between innovation and traditional schools (e.g., W.-J. Kim, 2014; Sung et al., 2014; Yang & An, 2014). These simple mean comparisons, however, do not consider the hierarchical structure of GEPS 2012, which could lead to a biased conclusion because unit of analysis, aggregation problems, and cross-level interactions were not properly dealt with (Bryk & Raudenbush, 1989; Burstein, 1980; Cronbach, 1976; Kang, 1995). Moreover, even with the advanced analytical approaches such as structural equations (e.g., H.-U. Kim et al., 2014; Park et al., 2014) and multilevel analyses (e.g., H. J. Kim, 2014; Na et al., 2013), pretreatment differences between the treatment and control groups resulting in selection bias still matter for estimating causal effects.

Thus, we revisited the GEPS 2012 to examine the causal effect of innovative schools under the potential outcomes framework (Rubin, 1974), which is also referred to as the Rubin causal model (Holland, 1986). Considering that there are two possible outcomes for person i where T (the treatment indicator) has a value of 1 under the treatment condition, and 0 under the control condition (y_{i1}, y_{i0}), the true causal effect of the treatment condition for person i is the difference between the two possible outcomes ($D_i = y_{i1}-y_{i0}$). In real situations, however, one of the potential outcomes is actually missing, named as the 'fundamental problem of causal effect of treatment' by Holland (1986). However, under the potential

outcomes framework, the population average treatment effect (ATE) can be defined as expectation of D_i: $E(D_i) = E(y_{i1}\text{-}y_{i0})$ (Schafer & Kang, 2008). If treatment and control conditions are randomly assigned, then we can reasonably assume that each treatment group and control group represent the target populations: i.e., $E[Y(1)\text{-}Y(0)] = E[Y|T = 1] - E[Y|T = 0]$. But, in observational studies, it is difficult to hold the ignorability assumption, which implies that the treatment assignment is independent of the potential outcomes $((Y_{1i}, Y_{0i}) \perp T_i)$.

Thus an effort was made to hold the independence assumption with observational data by using observed covariates in addition to regression adjustment (Murnane & Willett, 2011). In the context of designing observational studies, matching methods were proposed to balance the distribution of a number of observed covariates in different groups (Stuart, 2010). Among several matching methods, the propensity score approach was widely adopted in estimating a causal effect in social science. The propensity score can be defined as the conditional probability of participating in the treatment group given the covariates (Rosenbaum & Rubin, 1983): $pr(T_i = 1|X_i = x)$, where X_i is a vector of X variables with particular values of x. The propensity scores in observational studies are unknown but are estimated based on observed covariates often by the logistic regression model (Schafer & Kang, 2008). Propensity scores have been widely used to match, stratify, or weigh subjects for reducing group differences in baseline conditions.

Thus, given that treatment assignment (i.e., adopting the innovation school policy) occurred at the school level and students were nested within schools, this study attempted to approximate a cluster randomized control trial such that schools were matched with respect to a set of school characteristics, and then individual students were weighted by characteristics usually accredited to innovation schools, which was captured by estimated propensity scores.

Research methods

This study focused on the three-year panel data (2012-2014) of GEPS 2012. The GEPS was suitable for evaluating the effect of innovation high schools, because the longitudinal panel study was initiated from the fact that empirical evaluation had been rare in the innovation school policy of Gyeoggi Province.

Defining the treatment group and comparison group

The GEPS 2012 data were collected in October 2012 for the first time, and the innovation schools were sampled from the school population that transformed into innovation schools during the period of September 2009 to September 2011 (Sung, Kim, Park, & Min, 2012). The purpose of this sampling strategy was to find schools that had implemented the innovative school policy for at least a year. Following the original design feature of data collection, we defined 12 innovative schools identified in the GEPS 2012 as the treatment group.

Table 1. Number of schools on key school characteristics (2012)

		Number of schools		
		Innovation schools	Regular schools	Total
School type	Public	11	44	55
	Private	1	8	9
Urbanicity	Urban	9	45	54
	Rural	3	7	10
School gender	Male	0	2	2
	Female	0	4	4
	Mixed	12	46	58
Admission policies	Equalized selection: Lottery	1	19	20
	Self-selection	11	33	44
Program type	General	11	38	49
	Vocational	1	14	15
	Total	12	52	64

The high school data included 64 schools with 4,242 first year students in 2012. As provided in Table 1, most innovation schools were classified as public schools, general schools, mixed-gender schools, or schools with autonomy for student selection. In detail, all 12 innovation schools have a mixed gender school system, 11 schools were public, general (non-vocational) schools, and had autonomy for student admission policy. Also, nine out of 12 treatment schools were located in urban areas. It is well acknowledged in the Korean education system that schools having autonomy in selecting students tend to outperform regular schools, and vocational schools showed very different educational environments and contexts with vocation oriented goals. There was also a tendency for academic achievement scores in mixed gender schools to be a bit lower than single-gender schools. Therefore, the unequal distributions of school features between the innovative schools and the regular schools need to be adjusted in evaluating the impact of the innovative school policy.

Table 2. Key student background variables between innovation schools and regular schools (2012 data)

Variable	Treatment group		Comparison group		Total	
	N	%/ Mean (*SD*)	*N*	%/ Mean (*SD*)	*N*	%/ Mean (*SD*)
Student gender (male = 1)	699	48%	3,550	48%	4,242	48%
Parental education level (father)	655	53%	3,400	45%	4,055	46%
Parental education level (mother)	662	68%	3,412	59%	4,074	61%
Living with father	690	84%	3,532	87%	4,222	86%
Living with mother	690	86%	3,532	90%	4,222	89%
Home-ownership	677	59%	3,472	63%	4,149	62%
Monthly family income	668	387.9 (211.5)	3,430	429.2 (222.5)	4,098	422.5 (221.2)
Total *N*	699		3,550		4,249	

Note. Values greater than 1,000 in monthly family income were truncated to 1,000 (unit: 10,000 won); with respect to parental education levels, if the education level was lower than/equal to high school, then it was coded as 1 (otherwise 0); if a student lived with their parents (father and mother respectively), the indicator was coded as 1 (otherwise 0); if a student's household owned a house, it was coded as 1 (otherwise 0).

Regarding student characteristics, family income in innovation schools was lower than the corresponding values of regular schools (388 vs. 429), and the percentage of students whose parents had lower education (i.e., equal to or lower than high school graduation) was higher in innovation schools than in regular schools. Also, the percentage of students living with a father (84% vs. 87%) or living with a mother (86% vs. 90%), and the percentage of students whose parents owned their homes (59% vs. 63%) appeared slightly lower in innovation schools. These descriptive statistics on students' background characteristics of innovation schools and their counterparts showed that students in innovation schools relatively were composed of disadvantaged families. These results addressed that achieving balance on the pretreatment characteristics was crucial for a reliable impact study on school reform policy.

Insufficient information to adjust for selection bias was a major challenge in conducting an impact study with observational data. The GEPS 2012 did not include pretreatment conditions such as student characteristics (e.g., achievement scores in middle school for high school students) or the school-level information prior to initiating the innovation school policy. Given this data limitation, we used a set of variables collected in 2012 as a proxy of pretreatment conditions. We attempted to use variables that showed small changes over time (e.g., school type and school average family income), although this was a clear limitation of the impact study with the GEPS data.

Analysis strategies

Matching on pretreatment characteristics of schools and students

Given the data constraints, it was still critical to build comparable comparison groups in order to make a sound inference in whether the reform policy of the innovation schools had a positive impact on educational outcomes. Thus, as an effort to reduce selection bias, we adopted a two-stage matching strategy to find appropriate comparison groups. Because the treatment assignment occurred at the school level, we matched school-level characteristics first so that the schools showed the same features on school type (vocational vs. general), area size (urban vs. rural), school gender, and school autonomy for student selection (see Table 1). In addition to an exact matching method based on school-level features, we further matched the schools based on logit distance via propensity score (PS) estimation from important continuous measures using the school average household income included in the 2012 data and the percentage of students with free lunch in the 2013 data (see Stuart, 2010, for further details). We used the R *MatchIt* package for school-level matching (Ho, Imai, King, & Stuart, 2007, 2011).

Once a matched school set was constructed, the next step was to adjust for remaining student-level differences within the matched set of treatment and comparison schools. To this end, we estimated the propensity scores of each student with student-level characteristics shown in Table 2 (e.g., parental education levels, family income, and student gender). A single-level logistic regression was used for student-level PS estimation.

Each student was weighted by the estimated PS scores in multilevel analysis for the outcome measures. To estimate the average treatment effect (ATE), the weight should be $1/\hat{p}$ for the treated students, and $1/(1-\hat{p})$ for the comparison students, where $\hat{p}$ is the estimated propensity score. The following inverse-probability weighting estimator ($\hat{\tau}$),

originally provided by Imbens and Wooldridge (2009, p. 35), helped us understand the logic of inverse propensity score weighting approach (Murnane & Willett, 2011, p. 327):

$$\hat{\tau} = \frac{\sum_{i=1}^{N} \frac{T_i Y_i}{\hat{e}(X_i)}}{\sum_{i=1}^{N} \frac{T_i}{\hat{e}(X_i)}} - \frac{\sum_{i=1}^{N} \frac{(1-T_i) Y_i}{1-\hat{e}(X_i)}}{\sum_{i=1}^{N} \frac{(1-T_i)}{1-\hat{e}(X_i)}},$$

where $\hat{e}(X_i)$ is the estimated PS scores given observed covariates (X_i). PS weighting played a similar role as survey sampling weights such that weighting tended to adjust for different possibilities of exposure to the treatment condition in observational studies (Hirano & Imbens, 2001; Lee, Lessler, & Stuart, 2011). However, depending on the parameters of interest, weights could differ. For example, if a researcher aimed to estimate the average treatment effect for the treated (ATT) instead of the ATE, the weight for the treated cases was 1, whereas the weight for the control cases was $\hat{p}/(1-\hat{p})$ (Guo & Fraser, 2010, pp. 161–162). ATT indicated the effectiveness of the treatment for those who were in the treatment group (Hirano & Imbens, 2001; Schafer & Kang, 2008). This approach for ATT made untreated individuals with a larger $\hat{p}$ had a larger weight, which in turn the comparison group became more similar to the treatment group (Lee et al., 2011).

Particularly, weighting with propensity scores is useful in settings where data are sparse, i.e., there are no treatment or control cases within certain strata based on propensity scores, which precludes estimating the average treatment effect for the population of interest (Morgan & Winship, 2007, pp. 98–100). That is, one advantage of weighting strategies based on estimated propensity scores is easy to make the sampled data with treated and comparison cases representative of the population of interest (Guo & Fraser, 2010, p. 161). In sum, the two-stage matching strategies described above (i.e., combination of school-level matching procedures and PS weighting based on student-level features) reduces selection bias on observed variables.

Outcome analysis

The outcome measures for evaluating the impact of the innovation school policy were academic achievement scores in Korean, English, and Mathematics. We also examined if and to what extent non-academic variables (e.g., students' school satisfaction) differed between innovation schools and regular schools. Although non-academic measures were derived from a set of survey questionnaires and so the reliability and validity of such measures might be less desirable, the investigation of those measures was crucial given the fact that the primary goal of the innovation school policy was to enhance a culture of publicity, creativity, democracy, dynamism, and globalization at the institutional level (Gyeonggi Provincial Office of Education, 2012).

The outcome measures were obtained in 2014 from 12th graders in high schools. Two-level multilevel models were built with random intercepts, which helped us to reflect the hierarchical structure that students were nested within schools, and as shown in the following equations, the parameter of interest capturing the effectiveness of the school policy lies at level-2 (r_{01}).

Level-1: $Y_{ij} = \beta_{0j} + \Sigma_{q=1}\beta_{qj}x_{qij} + r_{ij},\ r_{ij}\sim N(0,\ \sigma^2)$
Level-2: $\beta_{0j} = r_{00} + r_{01}TRT_j + \Sigma_{s=2}r_{0s}w_{sj} + u_{0j},\ u_{0j}\sim N(0, \tau_{00})$
$\beta_{qj} = r_{q0},\ q = 1,,,,Q.$

The model included gender and family income variables (student-level), and the average of family income variable (school-level). Furthermore, the individual propensity score was incorporated as weights into multilevel analyses with the matched school sets. The estimated probabilities of being in the innovation schools given the student variables (shown in Table 2) were converted to standardized weights. By standardizing the values of the weights, the sum of the weights for each treatment/comparison group was tantamount to the sample size of each group (J. Kim, Jung, & Seltzer, 2008). We created two different weights described above for estimation of ATE and ATT, respectively. Multilevel analyses for the outcome measures were conducted with SAS 9.3.

Results

Table 3 showed whether the school variables were balanced after constructing a matched school set. As expected, the schools were equivalent for the variables used for exact matching (i.e., a rural area, school gender, school autonomy for student selection, and vocational schools). However, after school-level matching, no improvement was identified on the percentage of students with free lunch and the school average household income. Without exact matching, an alternative strategy would be to employ PS scores at the school-level. There may be compromises depending on which strategy was used, but the vocational innovation schools were better matched to vocational schools that did not adopt the innovative school policy, rather than non-vocational schools. The same logic was applied to other school variables used for exact school matching. We did not use a private school indicator for the exact matching, because once it was included for school matching we were not able to keep all 12 treatment schools. So, we adopted a PS weighting strategy (student-level) to reduce the remaining imbalances after school matching.

Table 3. Matching results before and after matching on school-level features

School variables	Treatment schools (J = 12)	Unmatched comparison schools (J = 52)	Matched comparison schools (J = 12)
	%/ Mean (*SD*)	%/ Mean (*SD*)	%/ Mean (*SD*)
Private school	8%	15%	17%
Rural area	25%	13%	25%
Mixed gender school	100%	88%	100%
Admission policies: Self selection	92%	63%	92%
Vocational school	8%	27%	8%
Percentage of students with free lunch	28%	23%	20%
Sch. avg. of students' family income	390.1 (70.8)	426.6 (83.3)	427.7 (59.8)

As mentioned earlier, we used two different PS weights for different parameters of interest—ATE vs. ATT. The results in Table 4 can be compared to the original data in student descriptive statistics in Table 2. The distributions of student variables after PS weights that were applied with matched schools were very similar in terms of means and standard deviations between the treatment and comparison groups. When the first weight was applied to the ATE estimation targeting the overall population, the distributions appeared similar to the total sample in Table 2, whereas the weighted means and standard deviations from the second weight for the ATT estimation tended to be similar to the values of the treated sample in Table 2.

Table 4. PS weighted mean differences for the key covariates at the student level with matched school sets

Weight methods / Student variables	PS weight 1 for ATE		PS weight 2 for ATT	
	Treated students	Comparison students	Treated students	Comparison students
	%/ Mean (*SD*)	%/ Mean (*SD*)	%/ Mean (*SD*)	%/ Mean (*SD*)
Student gender (male = 1)	47%	49%	45%	46%
Parental educ. level (father)	47%	47%	52%	52%
Parental educ. level (mother)	63%	62%	67%	66%
Living with father	89%	89%	88%	87%
Living with mother	93%	92%	90%	91%
Home-ownership	66%	66%	62%	62%
Monthly family income	423.7 (215.1)	422.3 (200.2)	400.2 (207.0)	401.9 (191.8)
N	555	790	555	790

Note. Standardized PS weights were applied, and the only cases included were those with no missing data in outcome measures; values greater than 1,000 in monthly family income were truncated to 1,000 (unit: 10,000 won); with respect to parental education levels, if the education level was lower than/equal to high school, then it was coded as 1 (otherwise 0); if a student lived with their parents (father and mother respectively), the indicator was coded as 1 (otherwise 0); if a student's household owned a house, it was coded as 1 (otherwise 0).

We used student achievement scores (T scores, mean of 50 and *SD* of 10) in Korean, English, and Mathematics in 2014. Thus the test scores represented academic performance for 12th graders in high school. When a two-level random intercept model was employed to estimate the effect of innovative school policy, there were no statistically significant differences on Korean and Mathematics subjects between the treatment and comparison groups ($\alpha = .05$), while the direction of the estimated coefficients for both the ATE and ATT was negative. However, statistically significant negative treatment effects were found in the English subject. After controlling for other variables in the model, the mean English scores of the treatment group were about four points lower than the mean English scores of the comparison group. We included variables of gender and household income (student-level), and the school average household income (school-level) for outcome modeling.

Table 5. Estimated effects of innovation schools on academic achievement

Korean	ATE				ATT			
Fixed effect	Coef.	*SE*	*t*	$p > \|t\|$	Coef.	*SE*	*t*	$p > \|t\|$
Intercept	36.37	6.19	5.87	<.0001	35.81	6.21	5.77	<.0001
Male student	-2.53	0.45	-5.63	<.0001	-2.50	0.45	-5.54	<.0001
Monthly family income	0.005	0.05	0.10	.917	0.02	0.05	0.42	.675
Treatment indicator	-1.80	1.85	-0.98	.340	-1.80	1.85	-0.97	.343
Sch.-ave. family income	0.04	0.01	2.92	.008	0.04	0.01	2.94	.008
Random effect	Var.	*Z*	*p*		Var.	*Z*	*p*	
School mean intercept	17.54	3.05	.001		17.56	3.05	.001	
Level-1 effect	65.71	25.68	<.0001		66.09	25.68	<.0001	
English	ATE				ATT			
Fixed effect	Coef.	*SE*	*t*	$p > \|t\|$	Coef.	*SE*	*t*	$p > \|t\|$
Intercept	28.04	5.99	4.68	.000	27.68	6.00	4.61	.000
Male student	-3.16	0.42	-7.45	<.0001	-3.14	0.42	-7.49	<.0001
Monthly family income	0.16	0.04	3.55	.000	0.16	0.05	3.60	.000
Treatment indicator	-3.85	1.79	-2.15	.043	-3.77	1.79	-2.11	.047
Sch.-ave. family income	0.06	0.01	4.06	.001	0.06	0.01	4.09	.001
Random effect	Var.	*z*	*p*		Var.	*z*	*p*	
School mean intercept	16.47	3.04	.001		16.52	3.05	.001	
Level-1 effect	58.43	25.68	<.0001		57.03	25.68	<.0001	
Mathematics	ATE				ATT			
Fixed effect	Coef.	*SE*	*t*	$p > \|t\|$	Coef.	*SE*	*t*	$p > \|t\|$
Intercept	35.07	5.74	6.11	<.0001	34.57	5.64	6.12	<.0001
Male student	1.53	0.47	3.22	.001	1.50	0.47	3.17	.002
Monthly family income	0.16	0.05	3.18	.002	0.17	0.05	3.32	.001
Treatment indicator	-3.48	1.71	-2.03	.055	-3.28	1.68	-1.95	.064
Sch.-ave. family income	0.03	0.01	2.43	.024	0.03	0.01	2.51	.020
Random effect	Var.	*z*	*p*		Var.	*z*	*p*	
School mean intercept	14.71	2.98	.001		14.12	2.98	.002	
Level-1 effect	73.39	25.68	<.0001		72.57	25.68	<.0001	

We further investigated the impact of innovation schools based on non-academic measures. The GEPS data provided extensive information on student perceptions, such as satisfaction with school, citizenship, discrimination, student rights, mental health, etc. After conducting various multilevel analyses, we found a statistically significant positive effect of the innovative school on student satisfaction with the school. While result tables were not provided due to page limitations, there were not statistically significant group differences in student rights, students' perception regarding citizenship, mental health, and discrimination/ harassment at school. Table 6 showed that students in innovation schools scored 0.45 points (little less than half standard deviation) higher than students in comparison schools in terms of satisfaction about their school. Because the factor was scaled into *z* scores (mean = 0 and *SD* = 1), 0.45 points seem substantially meaningful.

Table 6. Estimated effects of innovation schools on student satisfaction about school

Student satisfaction	ATE				ATT			
Fixed effect	Coef.	*SE*	*t*	$p > \|t\|$	Coef.	*SE*	*t*	$p > \|t\|$
Intercept	-1.09	0.47	-2.32	.031	-1.15	0.47	-2.42	.025
Male student	-0.03	0.05	-0.59	.554	-0.03	0.05	-0.66	.508
Monthly family income	-0.01	0.01	-2.35	.019	-0.01	0.01	-2.38	.017
Treatment indicator	0.45	0.14	3.20	.004	0.45	0.14	3.18	.005
Sch.-ave. family income	0.003	0.001	2.66	.015	0.003	0.001	2.78	.011
Random effect	Var.	*z*	*p*		Var.	*z*	*p*	
School mean intercept	0.09	2.72	.003		0.09	2.74	.003	
Level-1 effect	0.85	25.60	<.0001		0.87	16.15	<.0001	

Note. One factor was derived from 7 items regarding student satisfaction about their school (Y3H_ST44_1~8) after one variable regarding school meals (Y3H_ST44_6) was excluded.

Discussion and conclusion

The challenges of using observational data to justify causal claims are considerable. The counterfactual model adopted in this study has an advantage of bringing experimental language back into observational data analysis. This study attempted to approximate an experimental study by constructing a similar comparison group with students in innovation high schools based on school information as well as student characteristics. We first incorporated PS matching in combination with exact matching at the school level to construct a comparable school set, and then PS weights based on student-level characteristics involved in outcome analyses to remove remaining selection bias. Matching with PS weights was a useful way for averaging inherently heterogeneous causal effects across different levels of treatments. As a result, we found a positive effect on student satisfaction but there were no impacts (or negative impacts) of innovation school policy on academic achievement in innovation high schools.

To interpret the results of the insignificant effect on cognitive achievement scores, two points need to be taken into consideration. First, differences in the initial characteristics of innovation schools and regular schools appeared substantial and hidden bias might still matter depending on the preexisting conditions of innovation schools. According to Baek and Park (2015), innovation high schools scored about 10 points lower compared to general high schools in academic performance, which represents a substantial difference of about one standardized deviation gap as a whole. However, when some statistical adjustment was implemented as an attempt to adjust for the pretreatment difference (we applied PS weights in multilevel models, and Baek and Park (2015) applied multilevel modeling with covariate adjustments), the gap (i.e., the adjusted mean difference estimates) reduced to around three points across subjects (see Table 5). This signals that the observed mean difference can be largely attributed to pretreatment difference prior to the innovation school policy, and the comparison after statistical adjustment might still contain the initial difference unobserved (i.e., hidden bias). In fact, one critical challenge in this study was insufficient data on pretreatment characteristics such as prior test scores, although this is a data collection issue rather than a methodological issue. Moreover, this study noted that a relatively larger gap was found in English and mathematics than in reading, which is possibly due to private

education on those subjects based on the evidence that about 19% of students in 2014 participated in private education for reading with the percentages much higher in English and Mathematics (43% and 45%, respectively) according to an official report from Statistics Korea (Statistics Korea, 2016). It is true that students in innovation schools came from a less advantaged family based on family income and parent education levels (Baek and Park, 2015). As a result, the evidence was insufficient to conclude that the innovation policy negatively influenced cognitive domain such as student achievement.

Second, the time lag of early innovation schools should be considered (Supovitz & Weinbaum, 2008). Because we used the GEPS 2012 data, the results only addressed the early period in which the innovation school policy was initiated. Thus, each school might have struggled with filling the gap between practice and theory in the early stages. With respect to this problem, we need to conduct a future study focusing on showing the trends before and after the innovation policy was adopted.

With respect to interpreting the results on affective measures, this study only found a statistically positive impact on student satisfaction, and no positive effects on student rights, citizenship, mental health, and discrimination/harassment at school. However, this study noted that the GEPS survey data did not provide sufficient measures closely aligned with the goals of the innovation school policy such as a democratic self-governing school community or student-oriented learning community, which is an area that researchers should pay more attention to for future studies. Given such a limitation, students' satisfaction about school life in innovation schools is still noteworthy, because positive attitudes about their schools can be a foundation for becoming independent and healthy individuals with potential. It is also substantial that the study found that about a half standard deviation is higher in innovation schools than in regular schools.

In this respect, administrators and policy makers need to explore the most successful school cases and identify important factors in sustaining and improving student satisfaction. For example, principals and teachers can interview students who were highly satisfied with their schools. Furthermore, to sustain and improve student satisfaction, school administrators may use a social network framework to identify students with disadvantages (i.e., isolated or bullying victims): After principals and teachers collect friendship and bullying networks and analyze these social network data, principals and teachers can identify those isolated among high school students and focus on them to improve their satisfaction.

Another implication from the study results is related to academic performance in innovation high schools. Even though innovation schools did not emphasize academic achievement, the main concern of students and parents in high school is to improve test scores for the college entrance examination. Therefore, it may be valuable for policymakers and school administrators to make an effort to balance setting educational goals for improvement of academic performance along with the original goals of innovation school movement. To enhance academic performance in innovation schools, it is necessary to specify achievement standards and levels, and design more practical achievement evaluation systems. For example, under criterion-reference assessments, teachers need to adopt more formative assessments combined with corrective feedback to help academic motivation and performance. Furthermore, to improve academic achievement strategically, administrators or principals may target subgroups such as underperforming students or students from disadvantaged families. Along with that, future studies should incorporate these aspects by conducting subgroup analyses on how effective the innovation school movement is by gender, social-economic status, immigration status, and how these variables influence the

impact of innovation school policy.

Finally, the limitations of this study were that, first, it did not address missing data issues, although background characteristics did not change much after removing missing data. Second, this study did not examine student growth or long-term effects, which precluded drawing a conclusion regarding the success of the innovative school policy. We must recognize that much more effort or time might have been needed for successfully cultivating student citizenship or seeing a positive change in non-academic measures such as mental health, especially for high school students.

Linked with the current study, future study topics can be suggested to measure and analyze different outcomes in elementary and middle schools including achievement, because outcome variables cannot be the same at the school level. For example, computational thinking and global citizenship could be good performance variables in elementary and middle schools in the fourth industrial revolution era. Also from the research design perspective, it should be more prevalent for substantive researchers to select and compare only general schools similar to innovative schools at the outset by planning quasi-experimental designs instead of analyzing secondary data.

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Issues and challenges of educators in implementing global citizenship education in South Korea*

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Abstract

This study aims to explore the issues and challenges of implementation of global citizenship education (GCE) in South Korea. Through analyzing in-depth interviews with 19 educators who are in charge or who implement GCE, such as teachers, non-governmental organization (NGO) workers, and international organization (IO) staff, this study presents three major challenges: a partial understanding of GCE, contradictory values between GCE and social norms, and structural constraints regarding the government's top-down approach. Based on findings, this study argues that existing contextual restraints must be reviewed in developing and implementing GCE, because GCE is shaped by these contextual factors. With consideration of these conceptual and structural limitations in Korean society, GCE could truly contribute to actualizing individual and social transformation.

Keywords: global citizenship, global citizenship education, South Korea, global education, citizenship education

* This research is based on some key findings from a larger doctoral dissertation project of the author. This paper was also presented at the 61th Annual Conference of the Comparative and International Education Society (CIES). Based on the feedback from the conference and reviewers, the author has revised this research.

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Introduction

The purpose of my research is to explore issues and challenges that hinder implementation of global citizenship education (herein GCE) in South Korea. As globalization is perceived as a contemporary reality, educators need to reflect various global issues and problems into the education arena (Davies, Evans, & Reid, 2005; Mannion, Biesta, Priestley, & Ross, 2011). In recent years, GCE has received much attention worldwide among educators, policy makers, and organizations. GCE has entered into the international agenda as reflected by the Global Education First Initiative (GEFI), the Post-2015 education agenda, and the Sustainable Development Goals (SDGs). The UN included GCE as one of the three pillars of GEFI in 2012 and later at the World Education Forum (WEF) 2015, the Incheon Declaration proclaimed GCE as an important area within the Post-2015 education agenda. Most recently, the SDGs reaffirmed the commitment to the promotion of GCE as stated in goal 4.7.

Along with these international initiatives, there has been increasing attention to GCE in South Korea, especially after it has joined the GEFI as the 15th Champion Country in 2014. More notably, the WEF 2015 also facilitated more interests and discussions on GCE in South Korea (Korea Civil Society Forum on International Development Cooperation [KoFID], 2015; S. Lee et al., 2015). In this context, GCE has become an emerging issue among Korean educators. Various actors have become involved in GCE in different domains, such as the government, international organizations (IOs), non-governmental organizations (NGOs), and schools. Yet, the research that empirically shows how GCE is conceptualized and implemented in South Korea is scarce. While several studies show how GCE is implemented in practice, the majority of studies focus on analyzing curriculum or specific programs (H. Park & Cho, 2016). On the other hand, there is limited research that explores educators' perceptions and implementation of GCE (H. Park & Cho, 2016). However, in order to facilitate better comprehension of discursive practices, it seems useful to analyze how educators perceive GCE and its implementation in their educational settings.

In this sense, this study aims to explore educators' perceived issues and challenges of implementation of GCE by analyzing interviews with 19 educators in South Korea. In this research, I address three situational factors in South Korea that hinder the promotion of GCE in practice: a partial understanding of GCE, contradictory values in practice, and the government's top-down approach of GCE. Based on my analysis, I argue that current conceptually ambiguous and contextual restraints must be reviewed in developing and implementing GCE in order to challenge hegemonic ideas. This research also proposes practical recommendations to contribute to discursive practices towards the values of social justice.

Conceptual framework of GCE

Within the contemporary phenomenon of globalization, education is required to respond to globalization and prepare learners to engage more effectively and actively in the global community. GCE is perceived as the epitome of such a response (S. Park, 2013). The pervasive discourse of globalization has led educators to incorporate global challenges and issues into the field of education (Pashby, 2011). It is obvious that we are facing global

challenges that require collective awareness and action at the global level. Many global issues, such as poverty, war, environmental problems, sustainable development, and political instability are considered as pressing challenges confronting people in the global community and demanding a shared response. In order to solve global problems and promote sustainable development, importance has been given to education that teaches about various global issues and challenges that call for collective responsibility at the global level. In other words, GCE has emerged as a paradigm shift in the role of education from instilling national identity into people in a defined national territory to promoting a broader sense of belonging to a global community (S. Park, 2013).

Given the importance of GCE, the concept of GCE has been widely discussed. Despite varied definitions and interpretations, scholars and institutions seem to be in agreement about the concept of GCE serving a need to increase the understanding of global issues. One may argue that the main idea of GCE is an attempt to interweave the issues of global concern into existing formal or non-formal education programs. Indeed, Tawil (2013) argues that "global citizenship education is nothing more than an adaptation and enrichment of local and national citizenship education programs, whatever their approach, to the context of the intensified globalization" (p. 6). However, this idea considers GCE to be a simplified or limited concept. GCE is more than an international awareness; rather, its direct concern is empowering individuals to play a positive role in their lives in a globalized context in order to solve various problems regarding social justice.

UNESCO states the purpose of GCE is "to build the knowledge, skills, values and attitudes that learners need to be able to contribute to a more inclusive, just and peaceful world" (UNESCO, 2015, p. 15). Relying on various definitions, UNESCO (2015) identifies three common key conceptual dimensions: cognitive, socio-emotional, and behavioral dimensions as Table 1 shows. The cognitive dimension includes knowledge, understanding, and critical thinking about issues and trends ranging from global to local levels. The socio-emotional dimension embraces non-cognitive attitudes, such as a sense of belonging, sharing values, responsibility, empathy, and respect for differences and diversity. UNESCO sets apart the behavioral dimension from the cognitive and socio-emotional dimensions.

Table 1. Core conceptual dimensions of GCE

Cognitive	To acquire knowledge, understanding and critical thinking about global, regional, national and local issues and the interconnectedness and interdependency of different countries and populations.
Socio-emotional	To have a sense of belonging to a common humanity, sharing values and responsibilities, empathy, solidarity and respect for differences and diversity.
Behavioral	To act effectively and responsibly at local, national and global levels for a more peaceful and sustainable world.

Note. From "Global citizenship education: Topics and learning objectives," by UNESCO, 2015, p. 15.

Similarly, Oxfam GB (2015) also categorizes GCE into three domains: knowledge and understanding; skills; and values and attitudes. Oxfam GB (2015) suggests various elements for GCE, particularly focusing on social justice, for example, knowledge "about social justice and equity" and attitudes of "commitment to social justice and equity" (Oxfam GB, 2015,

p. 8). These three domains show GCE includes not only knowledge, but also attitudes and behavioral aspects. As UNESCO's (2015) and Oxfam GB's (2015) classifications show, GCE emphasizes socio-emotional learning and behavioral changes. Davies (2006) posits that it is active participation that differentiates GCE from global education:

> Citizenship clearly has implications both of rights and responsibilities, of duties and entitlements, concepts which are not necessarily explicit in global education. One can have the emotions and identities without having to do much about them. Citizenship implies a more active role (p. 6).

Accordingly, GCE is not just about international awareness; rather it entails change in one's values and attitudes, and one's involvement in proactive actions.

In line with Oxfam GB, Andreotti (2006) argues that social justice and reducing inequity are the main goals of GCE. Based on this argument, Andreotti (2006) points to the need for critical GCE, as a contrast with soft GCE, where individuals learn critical literacy which helps them analyze their situations and identities in a complex globalized structure. Critical literacy is defined as the ability to "read the word and the world" that entails critical engagement and reflexivity, that is "the analysis and critique of the relationships among perspectives, language, power, social groups and social practices by the learners" (Andreotti, 2006, p. 49). In contrast, soft GCE is grounded in humanitarian and moral obligations (Andreotti, 2006). This falls under the concept of what Cho (2016) calls the humanistic approach of GCE which focuses on moral responsibility to solve problems, such as poverty and helplessness (Andreotti, 2006). However, soft GCE, or the humanistic approach of GCE, is often criticized in that it neglects the structural problems that maintain and reinforce global poverty and inequality. Thus, the critical GCE approach argues that social justice and reducing global (and local) power imbalances is a key concern of GCE (Andreotti, 2006; Cho, 2016; Pashby, 2011). From this perspective, GCE aims for transformation of the hegemonic status quo by promoting individuals to critically analyze their positions, assumptions, and issues ranging from the local to the global context.

Drawing on a review of the literature, in this research I view GCE as a holistic and transformative educational paradigm, or in Andreotti's (2006) term, critical GCE, which empowers individuals to think about one's society and world critically based on universal values, such as respect, human rights, diversity, empathy, and the responsibility to pursue social justice. Through this conceptual framework of GCE, this research explores the primary issues and challenges hindering critical GCE in South Korea.

GCE in South Korea

South Korea has been actively involved in discussions about GCE. Indeed, two current international events, the Global Education First Initiative (GEFI) and the World Education Forum (WEF) 2015, have particularly led South Korea to become deeply involved in GCE issues (KoFID, 2015; S. Lee et al., 2015). After the UN included GCE as one of the three pillars of GEFI in 2012, the Korean government joined the GEFI as the 15th Champion Country in 2014 (S. Lee et al., 2015). Also, as Korea hosted the WEF in Incheon in May 2015, the government put forward GCE as an essential agenda (S. Kim & Kang, 2015). In

this context, the government has tried to promote GCE and expressed its intention publically. For example, at the opening of the World Education Forum (WEF) 2015, former Korean President Park Geun-hye stressed:

> South Korea, as a champion country of the 2015 World Education Forum, will actively contribute to achieving and expanding education goals that will be adopted. In particular, South Korea will continue to spread global citizenship education to raise global citizens living together with understanding differences and respect (G. Park, 2015).

The Korean government has officially tried to promote GCE in its formal education system since the late 2000s. The Ministry of Education (MoE) set out the national curriculum that "outlines and specifically emphasizes the importance of being a global citizen, equipped with relevant competencies such as tolerance, empathy and cultural literacy" (UNESCO, 2015, p. 47). Through the 2007 curricular reform, global citizenship and international understanding of education-related contents have become imbedded in the regular school curriculum in elementary, middle, and high schools (T. J. Lee & Kim, 2010). Later, through the 2009 curriculum reform, notions of global citizenship and the global community were explicitly addressed in several subjects (Mo & Lim, 2014). Although there is no separate subject for GCE, much research shows that the current school curriculum in South Korea includes both explicit and implicit GCE components (Byeon, 2012; Choi & Cho, 2009; J. H. Kim, Cha, Park, & Lee, 2014; D. Lee & Goh, 2015; T. J. Lee & Kim, 2010; Ma, 2006; Mo & Lim, 2014). To be specific, globalization, cultural diversity, global problems, and the responsibilities of global citizens were addressed mainly through several subjects, such as moral education (Byeon, 2012), social studies (Ma, 2006; Mo & Lim, 2014), and geography education (T. J. Lee & Kim, 2010; D. Lee & Goh, 2015). More recently, the MoE includes GCE as one of the policies under the slogan of "promoting Korean education that leads the world" (MoE, 2016, p. 27). According to 2016 Education Policy Plans, the MoE (2016) plans to disseminate GCE throughout all educational levels ranging from primary, secondary to higher education by developing teaching materials and fostering GCE teachers. In this sense, GCE has been employed in schools by teachers either through official curricula or extra activities (S. Lee et al., 2015).

Along with the government's efforts toward GCE, GCE has also been promoted and implemented through IOs. Since GCE was initiated by the UN, UN-associated IOs such as the Asia-Pacific Centre of Education for International Understanding under the auspices of UNESCO (APCEIU), the Korean National Commission for UNESCO (UNESCO Korea), and the Korean National Committee for UNICEF (UNICEF Korea), all in South Korea, have also been actively involved in promoting GCE. Briefly explaining, APCEIU is considered a key player of GCE by undertaking a great deal of programs, such as teacher training and developing educational materials for GCE. UNESCO Korea provides various activities for both teachers and students. One example is UNESCO's Rainbow Youth Global Citizenship project started in 2010 where UNESCO-associated schools are selected to implement GCE. In 2004 UNICEF Korea started GCE titled Nakerna in order to train elementary school teachers in concert with the Seoul Metropolitan Office of Education, but stopped in 2008 (T. J. Lee, Kim, & Kim, 2009).

NGOs also play important roles in expanding GCE. GCE is often presented in schools in association with several NGOs as well as IOs. In particular, since the late 2000s, NGOs

have played key roles in implementing GCE (KoFID, 2015). In 2015, it is estimated that more than 25 NGOs are offering GCE (KoFID, 2015). NGOs offer GCE using mainly five different approaches: visiting schools and operating GCE classes for students; developing education materials; training GCE lecturers (for volunteers); providing teacher trainings; and holding camps. The principal way of implementing GCE by NGOs is offering GCE classes in schools (KoFID, 2015). Here, NGO staff or teachers trained by NGOs give classes to students ranging from elementary to high school. These classes can be either regular or extra-curricular. Depending on the requests of schools or the capacity of NGOs, the class is delivered as a one-time class or multiple sessions. Many NGOs have developed their own education materials for GCE lectures. In addition, to foster more trainers, NGOs often train volunteers or professional lecturers to dispatch to schools. Also, several NGOs provide teacher training targeting school teachers who are willing to apply GCE in their classrooms. Apart from school-based GCE, NGOs hold camps or workshops and support students' extra-curricular clubs related to GCE activities.

Thus far, I have outlined the brief current status of GCE in South Korea. This will provide the contextual foundation for the analysis to follow in this research. Keeping this recent trend in GCE in Korea in mind, I now turn to introduce the research methods of this study.

Research method

In order to gauge the educators' perceived challenges of implementing GCE, for this qualitative research study I employed interviews with education stakeholders. I targeted educators who implement GCE, such as teachers, NGO and IO officers. My viewpoint on the world as well as knowledge is situated within the constructivist paradigm. Mertens (2010) explains the fundamental assumptions of constructivism, adopting Schwandt's (2000) idea, that "knowledge is socially constructed by people active in the research process, and that researchers should attempt to understand the complex world of lived experience from the point of view of those who live it" (p. 16). Further, the constructivist approach stresses that "research is a product of the values of researchers and cannot be independent of them" (Mertens, 2010, p. 16). Consistent with constructivism, I view that knowledge can evolve, be interpreted, and be interactive depending on researchers, and that knowledge is one piece of the accumulated parts of information to understand the truth. While admitting multiple ways to explore complex social phenomena, I uphold knowledge and truth to be mainly socially constructed as constructivists argue. Given this assumption, this research employs qualitative methods to understand complex social phenomenon, namely the implementation of GCE in South Korea which may be also socially situated.

I conducted interviews tailoring my approach to deepen the understanding of educators' perceived issues and challenges in applying critical GCE. The interview method is useful to gather rich and in-depth understanding of participants' thinking and perspectives (Rossman & Rallis, 2012). The participants of my research were educators and education stakeholders involved in the delivery, design, and organizing of GCE in three different groups: teachers, IOs, and NGOs. This study interviewed 19 educators including eight teachers, eight NGO staff, and three IO officers. Table 2 shows brief details of the information for the participants in each group.

Table 2. Brief details of the participants

Category (Number of participants)	Interviewee	Working experiences	Gender
Teachers (8)	Teacher A	5 years	Female
	Teacher B	7 years	Female
	Teacher C	10 years	Male
	Teacher D	6 years	Male
	Teacher E	3 years	Female
	Teacher F	7 years	Male
	Teacher G	15 years	Female
	Teacher H	23 years	Female
NGOs (8)	NGO worker A	9 years	Female
	NGO worker B	15 years	Female
	NGO worker C	8 years	Female
	NGO worker D	4 years	Female
	NGO worker E	2 years	Female
	NGO worker F	5 years	Female
	NGO worker G	N/A	Female
	NGO worker H	1.5 years	Female
IOs (3)	IO staff A	9 years	Female
	IO staff B	20 years	Male
	IO staff C	10 years	Male
Total number: 19			

To identify interview participants, a combination of a purposeful sampling strategy and snowball strategy were employed. More specifically, to comprehend the teachers' voice, I approached a GCE-specialized teachers' club, called Edujam, designated by the Seoul Metropolitan Office of Education. Edujam consists of 10-15 elementary teachers who are interested in GCE and have implemented it in their classrooms. They meet regularly, once a month, to discuss and share their experiences with GCE. I have chosen this group because they have a rich knowledge and experience related to GCE, which allowed me to collect in-depth data for my research. GCE is not mandatory in schools, thus the availability of GCE depends mainly on teachers' autonomy. Consequently, most teachers may not be familiar with or interested in implementing GCE. Thus, this group of teachers provided an appropriate case for my study to examine the application of GCE, since they are already familiar with GCE and are currently trying to implement it in their classrooms. Through Edujam and snowball sampling strategy, eight teachers were identified.

To identify the participants in NGOs and IOs, based on a literature review, I selected a number of NGOs and UN organizations known to be active in engaging in GCE. To identify these participants, I first contacted each organization by e-mail and asked them to provide a list of individuals who are in charge of GCE work and would volunteer to participate in my study, explaining the purpose of the research. Similar to my experience with the teachers, I also used the snowball sampling strategy to increase the number of participants. Namely, I first started conducting interviews with several participants, and then asked them to suggest additional informants in other institutions who were able or willing to participate in my study. Through this process, I was able to interview 19

participants including eight school teachers, eight NGO staff, and three chiefs of the GCE-related teams at three IO institutions.

Each interview procedure was guided according to the interview protocol. The interview protocol mainly included the introduction, body, and closure of the interviews (Rossman & Rallis, 2012). In the introduction, I explained the purpose of the study and asked for informed consent. Then, I asked the interviewees for permission to record the conversations and recorded interviews based on their permission, except one interviewee who expressed discomfort with recording. In the body of the interview, the guiding questions were shared with follow-up questions. During the interviews, I took notes to capture not only key points but also nonverbal cues or facial expressions. Considering that the quality of an interview rests on "the relevancy of questions" and "the skills in asking follow-up questions" (Rossman & Rallis, 2012, p. 182), I carefully listened and interacted with the informants. The guiding questions were sent to participants prior to the interviews via e-mail. The guiding questions included queries such as: 'How do you describe the concept of a global citizen?' 'What do you teach in your GCE classrooms/programs?' 'How do you view the importance/relevance of GCE in Korean educational practice?' 'What are the challenges and issues when you are implementing GCE?' Each interview was designed to be face-to-face and lasted about 60 minutes. Interviews took place between October and December 2015, and all interviews were conducted in Korean.

All of the interviews, except one, were recorded with the participants' permission. All transcription and analytic memos were typed in Korean, and later selectively translated into English according to their relevancy to the study. After organizing the interview data, I carefully read through transcriptions and analytic memos to obtain a general understanding of the information (Creswell, 2009). With a general sense of the information, all the data was then coded drawing on the conceptual framework. The preliminary coding categories consisted of perceptions of GCE, difficulties and contextual issues of implementing GCE. The data was also coded based on the emerging themes from the interviews with participants. To make a code, I used the qualitative software NVIVO to aid in categorizing the data. Utilizing NVIVO was useful in managing a great deal of data. As my coding progressed, I clustered together codes that shared similarities and threaded them into groups. During this iterative process, I identified themes separating evidence and also patterns within and between the categories. I also searched for direct quotes that would capture and elaborate on the findings effectively. Based on the themes and quotes, the findings from the interview data were described with interpretations in relation to the conceptual framework.

Barriers to critical GCE in South Korea

Through an analysis of interviews with educators in South Korea, it became evident there are primary constraints that need attention in order to seek transformative values of GCE in the context of South Korea. In this section, I present three challenges provided by the practitioners themselves for the gap between intention and practice in achieving critical GCE in South Korea. First, I discuss a partial understanding of GCE in practice. Second, this study explores contradictory values between GCE in theory and in practice. Third, I present educators' skeptical perceptions of the government-centered GCE approach. In doing so, I

reveal both the rhetoric and practices around GCE in South Korea as being rooted in conceptual and contextual restraints within a critical rhetoric.

A partial understanding of GCE: Emphasis on affective response

As GCE continues to receive increasing attention in South Korea, the terms GCE or global citizenship are frequently mentioned. However, while the components of global citizenship have been frequently addressed in educational areas, the understanding and perception of global citizenship seems to be limited in practical applications. While GCE entails not only knowledge but also non-cognitive aspects including socio-emotional and behavioural skills that individuals can employ to participate in global issues, educators tend to place a premium on affective responses, such as empathy and respect for diversity, whereas behavioural aspects are only somewhat represented.

Educators tend to believe socio-emotional aspects of GCE including empathy, care for others, and respect are the most crucial aspect of GCE. When teachers were asked about the core values of GCE, they cited respect, care for others, and learning empathy. One teacher stated that GCE is not something grandiose, but something that can be part of any type of class or topic that includes values, such as care for others, empathy (Teacher F). Another example shared by a different teacher told how the values of care for others were incorporated into a science subject using a power of words experiment with two groups of onions. The first group's onions listened to students' negative words, whereas the second group of onions listened to only positive words. Students claimed that the second group of onions would be healthier and live longer. From this experiment, this teacher intended to teach students thoughtful words and behaviours for others. As this example implies, teachers attempted to teach GCE in a broader way by incorporating and highlighting affective aspects.

In this regard, there is a tendency to emphasize the affective response and limited representation of the behavioural domain in South Korea. This is not surprising since the Character Education Law was enacted in July 2015. In this context, several participants perceived that character education and GCE are overlapping to some extent. One NGO member put it:

> GCE is not just about developing countries or others, but character education would be considered within the GCE domain. (NGO worker B)

Another respondent mentioned:

> In South Korea, it seems character education and GCE are going together. Since students are very tired of cramming education and exam-focused competitive education, character education has [also] received great attention. GCE and character education are not the same, but they seem to complement each other. (NGO worker E)

Admittedly, a couple of interviewees pointed out that character education and GCE are different concepts, for example, in that the first one is larger than the other, and vice versa. Although character education is not considered as an interchangeable notion, the perception

that character education and GCE share some commonalities makes affective values, such as respect and empathy, noteworthy for educators in South Korea. Additionally, Andreotti (2006) points out that the limited representation of behaviours which focus on merely donation or sharing are consistent with 'soft' GCE that she argues characterise educators' perceptions about philanthropic education. Many interviewees, particularly NGO staff, mentioned that although they started using the term GCE fairly recently, they began implementing GCE several years ago in the area of sharing. For example, one NGO staff stated:

> Although it has been recently that we have named GCE, we have had sharing education since 2002, which means we started a previous form of GCE 10 years ago. (NGO worker B)

However, another interviewee differentiated between philanthropic education and GCE in that whereas philanthropic education mainly focuses on sharing, GCE considers sharing as just one of the contents and also includes global issues and cases (interview with NGO worker F). In general, however, the educators tended to minimize the potentials of GCE as a transformative curriculum capable of significantly contributing to social justice. On the one hand, recognizing its correlation with existing curricula in South Korea, they indicate sympathy with GCE's overall aims. But on the other hand, they diminish the differences and thus the need for GCE in addition to reducing GCE to saviour/saved (we share with them) binaries that reproduce hegemonic power structures. That is, despite a slightly different emphasis, sharing is considered as important and the most frequently described action. This general perception appears to be related to the fact that most behavioural participants end up sharing their resources including time. Giving donations is also a meaningful and significant way of engagement. However, this overlooks the critical point that students themselves may be contributing to many of these global issues.

In addition, three interviewees raised the lack of reference about political engagement in Korean GCE:

> Actually, it is global citizenship education, not global citizen education. It is about citizenship (or civil rights). I believe GCE is the process to make people become aware of their rights to be involved in decision-making processes at the global level about global problems and issues. But I think the [Korean] government or APCEIU has a different understanding. (NGO worker A)

As the above statement implies, GCE in South Korea appears to ignore the component of citizenship, unlike in the United Kingdom, for example, where citizenship education is regarded as one of the main educational goals within GCE (Mannion et al., 2011). Considering the importance of civic engagement in GCE, it is surprising to note the lack of reference to civic engagement in South Korea. Regarding this point, one interviewee explained that it is unpopular to teach political education, such as voting rights and adolescents' rights, since they are not comfortable discussing political matters as they are considered left-wing issues (IO staff B). However, given that citizenship is one of the core underpinning notions of GCE, it is consistent with transformative social action to suggest a variety of active ways of civic involvement besides donating and volunteering. Indeed, as Morais and Ogden (2011) point out, GCE aims to help students "construct their political

voice by synthesizing global knowledge and experiences in the public domain" and "engage in purposeful local behaviours than advance a global agendas" (p. 4). Ibrahim (2005) also calls attention to the importance of developing political literacy through GCE, where students learn how to become involved in the political decision-making process at different levels. By diminishing action to sharing through donations and so on, students are thus rendered passive with soft actions and affective behavioural changes.

Contradictory values in educational practices

Since GCE is undertaken within specific social and educational contexts, it inevitably reflects broader social and cultural aspects of the country (Alviar-Martin & Baildon, 2016; Andreotti, 2011; Wang & Hoffman, 2016). That is, GCE needs to be experienced in a society by students to internalize the values of GCE (Banks, 2004; H. Kim, 2002). However, several contradictory values in educational and social practices that hinder GCE became evident from the data. Educators identified contradictory educational systems and cultures in South Korea that hamper GCE, such as competitive exam-focused education and authoritarian classroom atmospheres.

Korean education is recognized as competitive and exam-oriented, thus it's often called examination hell (M. Lee, 2003; M. Lee & Larson, 2000). Many educators in this research also pointed out that Korean education is restricted and geared too much toward exams, which contrasts with the values of GCE. For example, one NGO member articulated this problem clearly by criticizing the current competitive educational system:

> I wonder what the Ministry of Education is thinking about GCE... I think in order to bring up children to become global citizens. I believe that the competitive educational system first should be changed fundamentally. But what they are doing now is that they are sticking to the competitive system focused on national entrance examination. And adding GCE on top of this does not make children grow up into global citizens. I think the children are also probably confused. When I talked to the kids deeply about this matter while I am doing GCE, I found that students felt value conflict. (NGO worker A)

As indicated in this commentary, this interviewee explained that students often face value conflicts between what they are taught under GCE and what schools teach. For example, when the NGO where she works organized GCE camps, she was often told by students, 'Why are the messages from the school and from our camp teachers about how to live so different?' More specifically, this NGO worker presented her experience:

> They also ask that, "Up until now, the school and the parents have been telling us that the concept of success in this society is based on the salary and background specifications (spec, in Korean).[1)] In other words, the standard of happiness should be the salary and going to good universities. But why do camp teachers tell us that those things do not define happiness?" The children are clearly going through confusion regarding these values. And we did witness these students got emotionally healed by going through the process of realizing what kind of a person a real global citizen should be and what

> kind of life they could be living. But then, when they go back to their everyday life and to their schools, their value-confusions start again. I have been seeing this for a long time. (NGO worker A)

As this statement shows, although GCE provides students with critical reflection on the society and themselves as advocated by the critical approach of GCE (Andreotti, 2006), what they in fact learn from society including schools and family, is contradicted by the values of GCE. What they learn from society focuses on individual success in terms of social and economic status which is generally believed to be achieved through entering a good university. This contradiction creates value-confusion within students.

This paradox may be intensified by how schooling is taught. One participant posed a question about how an unequal educational system is geared toward a few top students:

> In my opinion, our education system is focusing on the few upper ranks. I doubt that school would realize everyone's potential and try to develop all of them. Isn't this discrimination? When we talk about discrimination [in GCE], we talk about other countries' cases. [But] I think the discrimination issue is the elephant in the room. We should discuss the discrimination that is happening in South Korea. (IO staff C)

This interviewee raised the issue about discrimination existing in the education system because of student rankings. In fact, M. Lee (2003) also argues that many Korean students tend to experience alienation at schools, because class contents are focused on the top one-fourth group of students who are likely to pass the university entrance examinations. The hidden curriculum of invisible discrimination depending on students' ranks defies the ideals of GCE, such as equity or respect, and thus may reinforce students' value-conflicts and social stratification.

Furthermore, the educational culture, especially authoritarian education, is criticized by educators. Authoritarian education undermines the values of GCE. For example, in an authoritarian classroom culture, students are expected to obey teachers' or parents' direction and become docile, not critical individuals capable of questioning what they are told. However, the circumstances of current educational practice conflict with the ideals of GCE which highlights critical literacy. A teacher explains:

> What struck me was the authoritarian classroom mood and students who follow what teachers direct. They are used to doing it. . . I think there is a lack of communication between teachers and students. So I try to communicate with students and encourage them to decide and take responsibility for their decisions. In order to enable GCE, teachers need to change. (Teacher C)

As another example of authoritarian education that disregards the values of GCE, the recently adopted educational policy of history education was brought up by an anonymous interviewee:

> Global citizenship? Well, I don't know. . . . Basically thinking, it is common sense that global citizens should be able to see history in critical and diverse manner. (NGO worker D)

In 2015, President Park's administration issued the requirement for government state-authored history textbooks by criticizing some of the current history textbooks as ideologically biased. With this decision, eight different published history textbooks now in use were supposed to be replaced with a textbook issued by the national government.[2] As these two interviewees imply, the Korean government-authored single textbook seems to contradict the value of respect for diversity which GCE promotes. Another interviewee criticized the government's attitude that implements a contradictory educational policy while it simultaneously promotes GCE:

> Since when has this country participated in GCE so much? It had not. Moreover, the educational policies that they are carrying out currently actually go against the value of GCE. I think that is highly contradictory. (NGO worker A)

In this regard, my analysis shows that the essential values of GCE such as equity, respect for diversity, and critical literacy are overshadowed by contradictory educational practices. Banks (2004) posits that "experiencing democratic living is more significant in helping students to internalize democratic values than reading and hearing about them from teachers" (p. 10). However, social climates that defy the beliefs of GCE create a dilemma wherein individuals confront contradictory ideas between GCE and reality. Therefore, it is vitally important to address the contradictory social and educational contexts to achieve the ideals of GCE. Without consideration of these contradictions in South Korean society, GCE may remain as a well-intentioned but perfunctory initiative.

Government's top-down approach

In accordance with the increasing attention to GCE in South Korea, the Korean government through advertisements or official notices encourages teachers to incorporate GCE in their classroom. One teacher's comment illustrates this situation:

> Since last year, I have started hearing about GCE. I was told to incorporate GCE into creative-experience classes. Since last year, I have received these official reminders frequently [from the Seoul Metropolitan Office of Education]. (Teacher B)

However, educators appear to be skeptical about this government-centered GCE approach. Many interviewees are worried whether GCE is a one-time political event by the current administration or several superintendents of education. A common criticism is that Korean educational policy tends to fluctuate according to the current administration. Considering previously emphasized educational policies that faded away such as multicultural education and development education, educators expressed concern GCE may too disappear like previous policies. For example, one teacher commented:

> Actually, many teachers are quite skeptical about GCE. I mean, it's not something has not existed before. It has. But the Ministry of Education treats this like a new thing by giving scores (to schools), or designating special schools, or giving money. . . like a new issue. . . . So far, there have been many things that appear like events and

> disappear. All of a sudden, the government pushes it [GCE] as a top-down approach. (Teacher C)

As such, teachers tend to perceive these government directives as an additional or a separate task from the curriculum assigned by the government. Thus, although the government provides supplemental resources for GCE, teachers are unlikely to explore them.

Moreover, most teachers paid particular attention to the critical role of the superintendent of education in implementing GCE. When teachers were asked about the sustainability of GCE, they answered it would depend on the superintendent. For example, one teacher mentioned:

> It would last until the current superintendent of education leaves. Korean education is under a superintendent's thumb. In fact, although GCE can last a long time, teachers tend to think like that because they have experienced many cases that turn over and over like character education. (Teacher A)

In this sense, although educators have become increasingly exposed to the concept of GCE, they tend to consider GCE as merely a catchy slogan of several superintendents of education. In other words, some regard GCE to be addressed only by progressive or left-wing superintendents of education.

Furthermore, NGOs are often isolated from the government's systemic support and compete with each other for fundraising. In this context, some NGOs wrap their existing programs with or without even slight modifications to fit GCE, as two of the interviewees stressed:

> Frankly speaking, GCE sounds really cool; however, if you look closely, it may create a lot of side effects. I think we are overlooking these side effects. Most people or organizations see GCE from their own perspectives and consider it as an opportunity to develop their pet projects or strategies. (NGO worker D)

> As NGOs have paid attention to GCE, they have fit their existing activities such as sharing education or development education into the domain of GCE, regardless of their projects' identity with regard to GCE. Anyway these institutes need funding. So, in many cases they go with their convenience. It is competitive. It is important for them to attract more funding. (NGO worker E)

Interviews with several NGO staff confirmed this observation. For example, one NGO worker explained that after the Character Education Promotion Law was enacted in July 2015 in Korea[3)], many current NGOs' curricula began to "dress up in the clothing of character education" (Interview with NGO worker B). Likewise, GCE can be another name of clothing for existing NGOs' programs. As the Korean government's interest in GCE has been increasing, education stakeholders, particularly NGOs, tend to view the notion of GCE as an opportunity to develop their programs and to obtain more funding. This competitive environment misdirects NGOs from focusing on their mission of delivering GCE to soliciting donations in schools when implementing GCE.

This seems to be attributed to the limited financial support. Indeed, most NGOs expressed frustration about the challenges of limited financial or human resources. Although

there is a great demand for GCE from schools and students, NGOs are unable to meet all demand due to their financial and resource restraints. Several NGO staff pointed out that the government's support is merely focused on UN-associated institutes but takes less account of the NGO sector. In fact, while the MoE allocated a budget for promotion of GCE amounting to 2.2 billion won (about 2.2 million USD) in 2016, more than 50 percent of the portion (2 billion won, about 1.2 million USD) was issued only to APCEIU (MoE, 2015a; MoE, 2015b).[4] In this sense, NGOs tend to be isolated politically and financially from the government's support for GCE.

Consequently, despite the support for the values of GCE, educators have skeptical views that are derived from perceptions about the government's top-down, fluctuating, and limited approach. However, educators argue that GCE should be promoted as a bottom-up and consistent approach. For example, teachers suggest the support and space for a teacher learning community where teachers can explore GCE further and share with each other, which will lead to the expansion of teachers' support and a shared understanding of GCE. Furthermore, considering NGOs' active role in promoting GCE, it is necessary to reflect on NGOs' perceptions, struggles, and necessities regarding the government's political and financial support of GCE.

Conclusion: Remaining challenges toward realizing the ideals of GCE

GCE positions itself as a transformative education providing learners with the opportunities and competencies necessary to become active contributors to a more just, inclusive, and equitable world (Oxfam GB, 2015; Reilly & Niens, 2014; UNESCO, 2013). Although GCE itself highlights social justice, sustainable development, and personal fulfillment, it faces challenges that impede attaining the values of critical GCE in practice. Through analyzing the interviews with educators, this study presented major challenges: a partial understanding of GCE, contradictory values between GCE and social norms, and structural constraints regarding the government's approach. First, despite recent heightened interests in GCE, the understanding of GCE remains limited with emphasis on affective response rather than civic engagement. GCE is often understood to be a form of character education focusing on empathy and sharing without sufficient consideration of active civic engagement, the core value of GCE. Second, in spite of efforts toward GCE, contradictory social values in practice such as competitive exam-focused education and authoritarian classroom atmospheres create a dilemma where learners face value-conflicts between GCE and social norms. Lastly, this study shows that educators express skeptical views of GCE due to the government's inconsistent and top-down approach. In conclusion, the findings of this research highlight the conceptual and structural restraints that diminish the values of critical GCE in Korea. Accordingly, I argue that recognition of these existing contextual constraints in practice is important because GCE is shaped by these contextual factors. With consideration of these conceptual and structural limitations in South Korean society, I believe GCE could truly contribute to actualizing individual and social transformation.

Considering the findings, I draw attention to three recommendations that educational policy makers and educators could consider for promoting critical GCE in practice. First, more diverse and active engagement should be considered for GCE by educators and curriculum developers. While the concept of GCE places a high value on the behavioral

dimension, there seems to be little evidence for concern about taking actions as global citizens in implementation. For example, as Morais and Ogden (2011) introduce, students can raise their voice in constructing global agendas or becoming involved in local actions by synthesizing global issues and knowledge. Second, it is especially crucial to take a more holistic approach to GCE by creating educational and social cultures that support the values of GCE such as equity, justice, and respect for diversity, since GCE operates within a social system. GCE can be employed not only through curricula, but also through a supportive learning environment (Education Above All, 2012). For instance, creating a culture of respect within the classroom, providing service activities in schools and communities are all suggested for a GCE-friendly school and classroom climate (Education Above All, 2012). With this approach, students would be able to internalize and experience the values of GCE in social and educational contexts. Third, it is necessary to deepen the values of GCE and the concepts of GCE through public discourse, such as public conferences and the media. As the anlysis of this study represents, the pervasive understanding of what constitutes a global citizen and GCE is limited and preoccupied with humanistic values. Since GCE operates within a social system shaped by its values and norms, the promotion of GCE should be accompanied by reflection on values that counteract the emphasis on social justice in South Korea. Accordingly, it is required to encourage critical reflection on the notion of GCE and contradictory values in South Korea.

As an extension to this study, further research with a larger number of participants such as teachers, NGO workers, and IO staff would be necessary to generalize the findings to the South Korean educational context. Although this research intended to include a variety of groups of educators such as teachers and NGO/IO officers, it is not appropriate to generalize the findings of this research to the whole of the South Korean educational context. Since participants were recruited based on their experience with GCE, this study reflects only educators who are relatively familiar with GCE. In addition, there is a need for analyzing the more recent policies of GCE. As I mentioned earlier, a new policy for GCE was established in 2016. Considering that the World Education Forum (WEF) 2015 provoked great interest and discussions regarding GCE in South Korea (KoFID, 2015; S. Lee et al., 2015), it could prove insightful to examine how the new policies of GCE reflect the values of GCE and are perceived by educators in practice.

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Footnotes

1. "Spec" is a social term in Korea which means competencies and performance of job applicants. This includes "educational background, grades, English score, studying abroad, certificates, experience of winning a contest, internships, volunteer work and perhaps even plastic surgery to give a better impression" (G. Lee, 2014).

2. For more information, see news articles, BBC News (http://www.bbc.com/news/world-asia-34960878) or the New York Times (http://www.nytimes.com/2015/10/13/world/asia/south-korea-to-issue-state-history-textbooks-rejecting-private-publishers.html?_r=0).

3. According to the Character Education Promotion Law, character education became mandatory in all schools in Korea.

4. The rest of the budget was set aside for international cooperation: a) development of country-specific GCE curriculum and teaching materials (about 18%, 4 million won, 0.4 million USD); b) provision for training teachers and government officials of ODA recipient countries to foster GCE experts (about 14%, 3 million won, 0.3 million USD); and c) GCE promotion using information and communications technology (ICT) (about 14%, 3 million won, 0.3 million USD).

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Analysis of policies to develop the teaching force in rural areas of China*

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Abstract

To comprehensively and systematically assess problems and effectiveness of policies aimed at attracting teachers to rural areas in China in depth and clarify the direction of reforms, we analyze policies by using methods such as questionnaires, interviews, systematic analysis, text analysis, and shadow controls. Since the 18th National Congress of the Communist Party (2012), China has gradually developed special policies to attract teachers to rural areas, including policies to increase the number and improve the quality and compensation packages of rural teachers. The key factors that pose challenges to the expansion of the teaching force in rural areas of China include poor remuneration and unreasonable deployment of rural teachers and ineffective enforcement of the teacher exchange policy. Policies were introduced to increase the compensation packages to attract qualified teachers to rural schools, which establish an effective system to ensure adequate supply of resources to facilitate professional developments of rural teachers, and implement the teacher exchange and rotation system to attract more teachers to rural areas. China's policy-makers will make further efforts to increase remuneration of rural teachers and improve the rural teacher deployment mechanism and the teacher exchange mechanism between urban and rural areas.

Keywords: China, rural teachers, policy evaluation, direction of reform, teaching force

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Problem statement and literature review

Poor education in rural areas remains a major challenge in China. Expanding the teaching force is the key to improve education in rural areas (Yang, 2016). The shortage of qualified rural teachers is currently the biggest problem in China's education system, and solving this problem is on the top of China's teaching force development agenda (Pang, 2016). The number of rural students covered by compulsory education makes up 29.3% of the total number of students covered by compulsory education. Without good teachers, rural schools cannot deliver quality education (S. Zhang, 2015). The development of the teaching force in rural areas is at the core of China's efforts to build a moderately prosperous society, which might prevent the intergenerational transmission of poverty and achieve educational modernization. Currently, the number of rural teachers in China is about 3.30 million, accounting for about 30% of the total number of teachers in primary and secondary schools. They are shouldered with the important mission of teaching more than 40 million students in rural areas. Since the 18th National Congress of the Communist Party of China (2012), China has gradually developed special policies to attract teachers to rural areas. However, affected by the rural-urban divide, natural and geographical conditions, historical factors, the departure of elites from the countryside, loss of local culture, and the increase in population mobility in the extensive urbanization process, inter alia, the development of education in China's rural areas is hampered by the lack of attraction to the teaching profession, inadequate supply of teachers, inadequate resource allocations, unreasonable structure, poor quality of the teaching force, and other prominent problems.

In recent years, the development of the teaching force in rural areas is at the forefront of domestic and foreign policy research. Research addressing this issue affects not only the development of education and the teaching force in rural areas, but also the improvement of social equity. Existing studies on policies related to rural teachers mainly focus on three categories of policies: policies to increase the supply of rural teachers, policies to increase teacher remuneration, and policies to improve teacher quality.

With regard to policies to increase the supply of rural teachers, scholars believe that since China adopted the reform and opening up strategy, the focus of these policies has shifted from teachers' instrumental value to their intrinsic value (Fang, 2014). The government formulated and implemented a series of rural teacher education policies in order to train plenty of future teachers who are willing to serve in rural areas in China and teach students with a low socioeconomic status (H. Jiang, 2013). Some policies introduced at the beginning of the new century have played an important role in addressing problems, such as shortage of qualified rural teachers and structural deficit in China (An & Ding, 2014). Scholars have also identified the following four problems in the development of the teaching force in rural areas: (1) structural deficit persists (Liu, Wu, & Shi, 2014) despite the fact that schools are overstaffed (Zhou & Wu, 2014); (2) it's still very difficult for rural schools to attract college graduates (G. M. Wang & Zheng, 2014); (3) rural schools are still struggling with severe loss of teachers every year (Zheng & Wu, 2014); and (4) teachers overemphasize educational attainment, and their overall professional competence and quality is not high (J. Z. Zhang, 2012). How to cultivate high quality teachers for students with low socioeconomic status becomes an issue that needs to be solved urgently (Hollins & Guzman, 2005). Some researchers recommend that college graduates may be presented with the opportunity to work as teaching assistants in remote and poor areas (Labaree,

2010).

With regard to policies to improve rural teachers' remuneration, after China adopted the reform and opening up strategy, the social status and monetary compensation of rural teachers has improved (Z. H. Wu, 2012), but the overall remuneration level of rural teachers remains low (Hanushek, Kain, & Rivkin, 2004), lower than that of similar professions (J. Q. Jiang & Du, 2014). There are relatively large gaps between urban and rural areas in teachers' salaries and social welfare. They can become the obstructions of social development in China (H. Jiang, 2013). The gaps in teachers' salaries between urban and rural areas still exist (Zeng & Yi, 2015), and the policies designed to subsidize rural teachers are less effective than originally predicted (Z. H. Wu, Li, & Zhou, 2012). Taking the working environment, status and other factors into account, the level of wage of rural teachers is still relatively low (Z. H. Wu, 2013). Some scholars suggest that the government should step up policy support for and increase investment in rural schools (Green & Reid, 2004), establish special funds (Dee, Jacob, & Schwartz, 2012), address the regional disparity in teachers' salaries, change designs properly (Zeng & Zhou, 2014), and effectively raise subsidy standards for rural teachers (An, 2014).

In terms of quality improvement policies, policies have experienced four stages, namely, compensation, exploration, popularization, and national training (Chen & Wang, 2013). In 2007, the government implemented the Free Normal Education (Ministry of Education, 2007). Studies found that this policy selects a number of high-quality candidates who are dedicated to rural education, while there are some problems such as the curriculum can not satisfy the cultivation of rural teachers well (H. Jiang, 2013). In 2010, China fully carried out the National Professional Development Programs for Rural Teachers, aiming at enhancing the quality of primary and secondary school teachers in rural areas. Scholars hold that the career development support system only plays a limited role, the traditional training model and curriculum cannot meet their needs (P. Hudson & Hudson, 2008), and a one-off teacher training program not only cannot refer to diversity and equality of education but also has difficulty in changing the educational beliefs of teachers (Dang, 2011; X. Zhao, 2011). Teacher training institutions are hindered by the lack of long-term funding mechanisms (B. S. Wang & Feng, 2015). Teacher exchanges between urban and rural areas are either self-initiated by teachers (Greenberg & McCall, 1973) or arranged by the government (Guarino, Santibanez, & Daley, 2006). Problems in China's teacher exchange policies include low satisfaction (Bao & Xi, 2010) and departure from the original purpose (J. T. Wu, 2014). Scholars suggest that the government should increase financial investment in rural schools to attract more quality teachers through teacher exchanges and rotations (Ye, 2012), offer financial aid (Fulbeck, 2014), and raise the level of remuneration (Ingersoll, 2001).

Our literature review reveals that some scholars have done research on specific issues related to policies to develop rural teaching force and put forward policy recommendations. However, most of the existing studies focus on a specific problem in these polices and fail to look at them in a systematic manner. In terms of methodology, they tend to prefer theoretical analysis over empirical analysis. Therefore, this study aims to comprehensively and systematically assess problems in and effectiveness of policies to develop the teaching force in rural areas in China, and identify the direction of reforms. It deals with the theory and methods of policy analysis, provides a scientific interpretation of current policy issues, and puts forward recommendations to improve the existing policies.

Research design and methodology

Three basic methods are adopted in this study to analyze policies. The first is system analysis. This method is used to inspect policies of rural teaching force development, which is deemed as a dynamic system in the context of the larger state governance system to identify its locations, functions, features, and relationships with other social subsystems. The second is text mining. We use this method to derive unstructured information from text of policies on rural teaching force development and rearrange into structured information for quantitative analysis. The third is shadow control. Experts, managers, and participants are consulted to assess the effect of rural teaching force development policies, problems associated with this issue and solutions.

Methods used to collect information for policy analysis mainly include interviews and questionnaires. Field studies were conducted in 21 counties in 28 provinces nationwide. Two-hundred respondents were interviewed individually, including 120 rural teachers, 40 principals of rural schools, and 40 administrative staff members of government education departments at the county/district level. We held five meetings to interview 169 respondents of three groups: 30 policy-makers from educational, financial, human resources, and social security ministries at the central level; 60 local government officials and policy implementers from local education, institutional organization, finance, human resources, and social security departments; and 79 principals and teachers on the front lines of education. The first group consisted of five director-generals and deputy director-generals and 17 director and deputy directors of relevant divisions and bureaus under the Ministry of Education, five directors from the Ministry of Finance, and three directors from the Ministry of Human Resources and Social Security. The second group include five director-generals and deputy director-generals and 15 directors of education departments, and five directors of finance departments; five deputy directors of institutional organization offices and five deputy directors of human resources and social security departments at the prefecture-level and seven deputy governors of counties; 20 key officials of county/district-level education bureaus. The third group consists of 79 frontline principals and teachers. Three-hundred thousand words of transcripts were produced from semi-structured focus group interviews. Questionnaires are designed to gather information on factual issues, and no validity of concepts or criteria are discussed. We carried out expert evaluations on each question to ensure the validity and reliability of the questionnaires. The survey covered provincial-level administrative regions in eastern, central, and western parts of China. Based on GDP per capita (five groups: upper, upper middle, middle, lower middle, lower), the number of rural teachers, ratios, and other indicators, we distributed 5,800 questionnaires and 5,036 were returned with a return rate of 86.83%.

Interview transcripts were analyzed using text mining approach. Qualitative analysis methods, including open coding, Level 2 coding, and Level 3 coding. Based on the subject matter of this study, a list of words or phrases, from which keywords can be chosen, was generated from the text data through open coding. The final list of keywords was determined by using the Delphi Method. Twenty-one stakeholders, including researchers specializing in policies associated with rural teachers, educational administrators, principals, and teachers on the front lines of education were invited to attend three rounds of discussion, and produced the final list of keywords, which are remuneration of teachers, performance-based pay, social security, rights protection, problems in staffing policies,

workload, working conditions, substitute teachers, professional titles for teaching positions, bureaucratic inefficiency, prefecture-county differences, and social status. Free nodes were created based on keywords and were analyzed and categorized to form tree nodes. Frequency refers to the number of times a node appears; coverage refers to the percentage of text which resides in a node; percentage of a case node refers to the percentage of respondents at the node. A text analysis software (N-Vivo) was used to analyze text data.

Problems associated with the development of the teaching force in rural areas

Poor remuneration

Poor remuneration hinders efforts to improve rural teacher recruitment and retention (L. W. L. Dong, 2016). The Teachers' Law of the People's Republic of China stipulates that the average salary of teachers shall not be lower or higher than that of civil servants and shall be gradually raised. However, in practice, teachers are not very satisfied with their salaries. In urban areas, only 1.36% of principals and teachers hold that the level of teachers' salaries is much higher that of local civil servants; 6.63% believe it is slightly higher; 19.02% believe it is at the same level; 36.93% believe it is slightly lower; 36.07% are of the opinion it is much lower (Figure 1, left). In rural areas, only 0.83% of principals and teachers hold that the level of teachers' salaries is much higher that of local civil servants; 6.94% believe it is slightly higher; 29.17% believe it is at the same level; 28.61% believe it is slightly lower; 34.44% are of the opinion it is much lower (Figure 1, right).

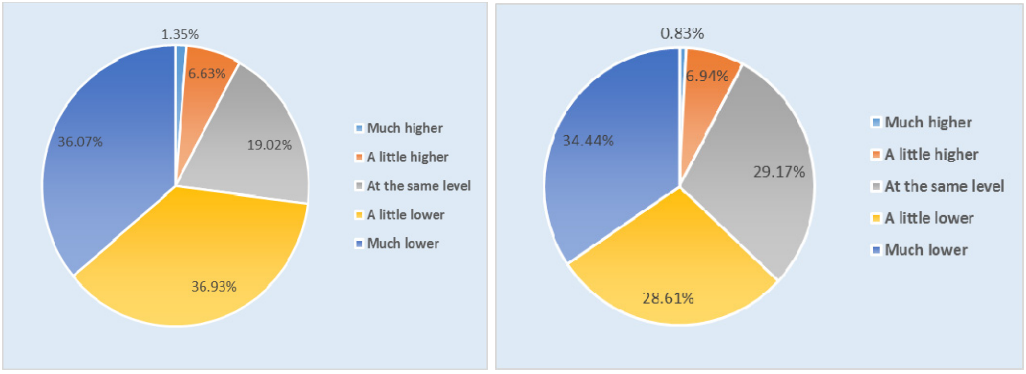

Figure 1. Comparison of the level of teachers' salaries and that of local civil servants in urban (left) and rural (right) areas

Rural teachers' overall remuneration levels remain low (Sun & Ma, 2015). The coverage of rural teacher subsidies needs to be expanded. Some provincial-level administrative divisions have not yet developed rural teachers' grant programs. Full coverage of counties in contiguous poor areas is yet to be achieved. The average subsidy standard of 40.00% of the counties covered by rural teacher grant programs is below RMB 300. Among teachers, 65.82% believe the subsidy standard is too low, while 75.65% are of the opinion that the

current subsidy criteria are not reasonable and cannot accurately reflect the actual workload and the hardships they have undergone. Poor working conditions, heavy workloads, and low subsidy standards make it more difficult for rural schools to attract and retain quality teachers. Another problem of the subsidy management system is ineffectiveness. Some regions have not established a subsidy notification system. Although the difference in base salaries of teachers in primary and secondary schools across China is small, the subsidy level of rural teachers is significantly lower than that of their urban counterparts. This urban-rural gap seriously hinders the development of the teaching force in rural areas, especially remote rural areas. The survey found that the amount of subsidy received by teachers of primary schools in the eastern part of China is about half of that of their urban counterparts. The figures for the central region and western regions stand at 89.64% and 82.17%, respectively. The amount of subsidy received by teachers of secondary schools in the eastern part of China is about 67.54 percent of their urban counterparts. The figures for the central region and western regions stand at 75.33% and 55.89%, respectively.

Ineffective deployment of rural teachers

Shortage of quality teachers and poor quality of education are two common problems in rural schools (L. W. L. Dong, 2016). Moreover, rural schools have great difficulty retaining quality teachers. About half of rural school principals have reported loss of teachers in recent years. High-quality teachers as well as young teachers under the age of 35 account for the majority part of the departing teachers (Fan, 2015). We placed emphasis on the frequency, coverage (%), and percentage of case (%) of themes, such as “serious teacher shortfall”, “slow staffing budget approval process”, “structural imbalance in budgeted teaching posts”, “extra-budgetary recruitment of teachers”, “bureaucratic inefficiency in staffing budget management”, “difficulty in stock adjustment”, to identify specific problems in policies and the urgency in addressing these problems (see Table 1).

Table 1. Major problems in the implementation of teaching force staffing policy and urgency in addressing them

No.	Theme	Frequency	Coverage (%)	Percentage of case node (%)
1	Serious teacher shortfall	270	23.71	56.71
2	Slow staffing budget approval process	216	14.47	45.73
3	Structural imbalance in budgeted teaching posts	150	14.03	36.59
4	Extra-budgetary recruitment of teachers	138	12.16	31.10
5	Anomie in staffing budget management	138	11.12	20.12
6	Difficulty in stock adjustment	120	10.07	23.78

First, a frequency query run on the expression “serious teacher shortfall” revealed that the expression was mentioned 270 times and 57.41% of the respondents reported the

problem, indicating that serious teacher shortfall is a common problem in rural schools. Survey results show that 66.87% of the respondents reported the number of budgeted teaching posts in their schools was "far from enough" or "a little less than enough"; 1.23% believed it was "enough"; 1.90% reported it was "more than enough" or "very sufficient". Second, the slow staffing budget approval process is unable to fulfill the demand arising from student migration in the process of urbanization. It is also unable to adapt to changes that HR demand due to the establishment of new schools, expansion of existing schools, dormitory management, etc. With no new teachers sharing the additional workload, the pressure on original rural teachers greatly increases. The survey found that about 32.35% of local teaching staff budgets were approved before 2005; about 14.71% were revised during 2006-2011; only about 52.94% were revised after 2012; and 50.52% of the respondents reported an "untimely" budget approval. Third, the structural imbalance budgeted for teaching posts remains a serious challenge facing rural schools. Many rural schools still don't have enough teachers to offer a full range of courses. Of the respondents, 37.04% reported the problem. Fourth, many rural schools recruit teachers using extra-budgetary funds. There is a large proportion of low-pay substitute teachers in rural areas, especially in the western region, and it is very difficult for them to become official staff members. Of the respondents, 31.10% reported the problem. Fifth, bureaucratic inefficiency is a severe problem facing teaching staff budget management. For example, some rural schools left officially budgeted posts vacant; school funds are often diverted to other civil service posts. There are also other management problems, including inflexibility and cumbersome procedures. Of the respondents, 20.12% reported problems of this nature. Sixth, no reasonable exit mechanism has been established for teachers working in an officially budgeted post. It is not uncommon for unqualified teachers to occupy a budgeted post for a long term. The inefficiency in administration also provides room for freeloading. Moreover, staffing budgets are directly allocated to schools, making it difficult to co-ordinate them at a regional level. As a result, some schools may have too many officially budgeted posts while other schools are suffering from a shortfall of teachers. Of the respondents, 23.78% reported problems of this nature.

Inefficiency in the implementation of teacher exchange and rotation policies

Compared with urban teachers, rural teachers are badly paid and living in poor conditions (Q. Dong, 2015). During 1996-2014, China has promulgated more than ten policies to balance the number of teachers between urban and rural areas. Among them, three were documents specifically targeting this issue and seven were non-specialized documents (Xue & Li, 2015). However, teachers' willingness to participate in exchange or rotation programs is not strong. About 22.17% of teachers were not decided, 21.39% unwilling, 1.28% very unwilling, 44.32% willing, and 10.84% very willing. The willingness of principals to participate in exchange and rotation programs is slightly higher than teachers. About 9.23% of the principals were undecided, 7.43% unwilling, 0.87% very unwilling, 65.69% willing, and 16.78% very willing (Figure 2).

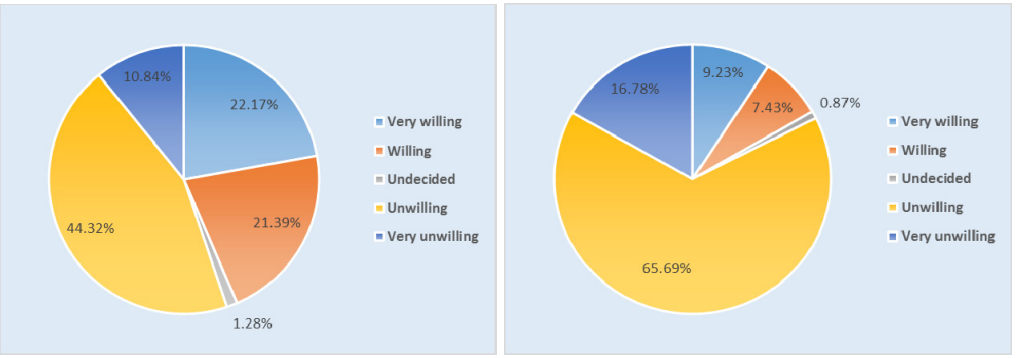

Figure 2. Willingness of teachers (left) and principals (right) to participate in exchange and rotation programs

The level of willingness of principals to send teachers in exchange and rotation programs were as follows. Among them, 19.12% were very willing, 61.37% willing, 10.02% undecided, 8.19% unwilling, and 1.3% very unwilling. Teachers participating in exchange and rotation programs should improve their performance in receiving schools. Of principals and teachers, 22.17% reported teachers that were sent to their schools under exchange and rotation programs played a significant role; 31.09% believed they played a great role; 29.45% reported their role was average; 12.81% believed they only played a small role, while 4.48% of principals reported they brought troubles (Figure 3).

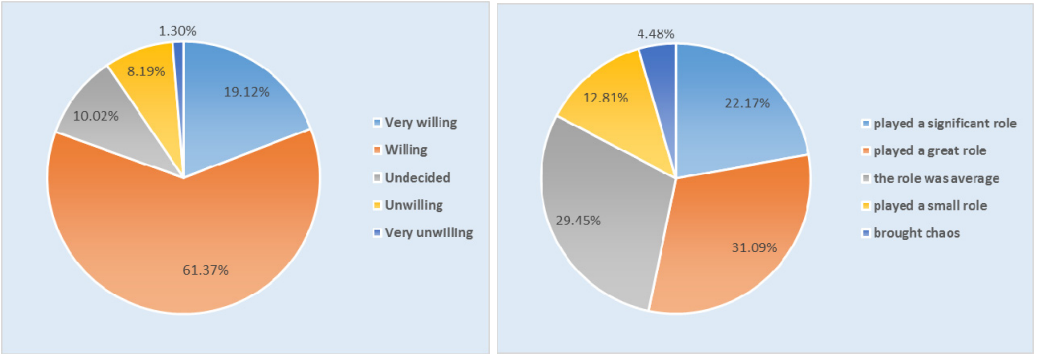

Figure 3. Willingness of sending teachers to participate in exchange and rotation programs, and how teachers perform in receiving schools

In China, several policies specifically stipulate that a teacher in an urban primary or secondary school must have more than one-year experience teaching in a rural school or under-performing schools before they can be given a senior job title. However, these policies are implemented poorly. Of principals, teachers, and administrators, 56.39% reported they knew this specific requirement; 15.83% reported they might adopt a flexible approach to this requirement; 10.09% reported the requirement was not specific; 8.57% reported there was no such requirement; 9.12% reported they never heard of this requirement (Figure 4). Rural schools offer less career development opportunities. Of principals, teachers, and administrators, 35.41% reported the job title criteria were not in favor of teachers in poor, remote areas.

Of rural teachers, 61.42% expressed wishes of transfer to urban areas, 18.24% of which expressed strong wishes. About five teachers per rural school apply for reassignment each year. Under the pilot reform program of the job title assignment system in primary and secondary schools, 806 teachers have been given the title of senior teacher in accordance with the new evaluation criteria, more than 240 out of which are from rural schools at a county or lower administrative level. This program broadens career paths of rural teachers in a certain extent. However, it fails to truly favor teachers from rural primary and secondary schools as these teachers account for nearly 70% of teachers in China's primary and secondary schools.

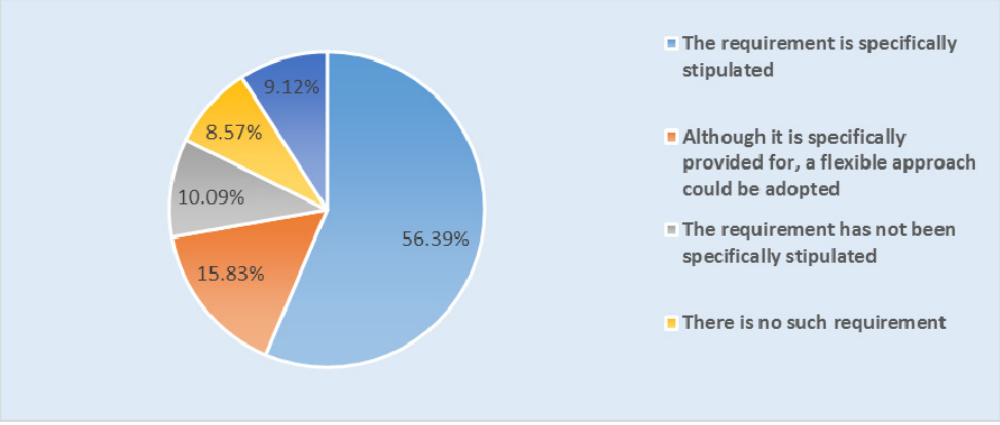

Figure 4. Whether senior job titles require teaching experience in rural or under-performing schools

Effects of existing policies

Improving the remuneration of rural teachers to attract high quality teachers to rural schools

The Notice on Implementing the Subsidy Scheme for Teachers in Contiguous Poor Areas as Required by Central Government was jointly issued by the Ministry of Education and the Ministry of Finance. It stipulates that local governments may at their own discretion offer subsidies to support teachers in rural schools or teaching centers in contiguous poor areas and improve the remuneration level of teachers in rural or remote areas, and the central government should offer funds to support such efforts. Since the policy was introduced in 2013, the central government has allocated RMB 4.392 billion in funding to support such efforts of local governments, and 949,000 rural teachers from 604 counties have benefited from this policy. Twenty-one out of the 22 provincial administrative regions that have contiguous poor areas have offered subsidies to rural teachers. In areas where this policy is implemented, the percentages of rural schools and rural teachers benefiting from this policy are very high and reach 94% and 87%, respectively. The attractiveness of rural areas with higher subsidy standards to teachers has increased. Urban teachers have expressed a willingness to teach in rural schools in such areas.

In order to further improve the compensation package of rural teachers, China is

gearing up the construction of dormitories for rural teachers in remote areas. In 2010, the Ministry of Education and the National Development and Reform Commission (NDRC) jointly issued the Guidelines on the Pilot Dormitory Project for Rural Teachers in Remote Areas, marking that the pilot dormitory project officially got off the ground. In 2011, the NDRC and the Ministry of Education issued the Notice on Budgeting for the Dormitory Construction Plan for Rural Teachers in Remote Areas, providing for budgeting work related to the dormitory project which covered 1,485 counties in the Midwest. In 2012, the NDRC and the Ministry of Education issued the Notice on Circulating the Dormitory Construction Plan for Rural Teachers in Remote Areas, and this plan covered 23 provinces (autonomous regions and municipalities) in the Midwest, Xinjiang Production and Construction Corps[1)] and Heilongjiang Provincial Land Reclamation Bureau. As of 2014, the central government had allocated RMB 14.1 billion in funding to support the construction of 252,000 dormitory rooms and 312,000 teachers had moved in the dormitories. During 2010-2014, the central government allocated RMB 2.59 billion to support the construction of teacher dormitories in five autonomous regions and Qinghai, Sichuan, Gansu, Yunnan, and Tibetan Autonomous Prefectures. In 2014, the central government spent RMB 870 million to construct 11,500 dormitory rooms in five autonomous regions. In 2015, 370,000 dormitory rooms were completed, benefiting 460,000 teachers. These efforts have significantly improved the housing conditions of rural teachers in remote areas and helped retain teachers in rural areas. “We will never forget this day because we finally have a hom e,”said Zheng Miao, a teacher in Mantanghong School which offers nine years of compulsory schooling in Zhangwu County, Liaoning Province on 10 July, 2012 when she moved into the dormitory (Huang, 2015). Tian Weimin, a teacher from Badahe Primary School in Lubuge Township, Luoping County, Qujing City, said moving from old dangerous houses to new teacher dormitories improved rural teachers’ working and living conditions, improved their job satisfaction, and helped retain teachers in rural areas. An official at the Education Bureau of Enshi City, Hubei Province said teacher dormitories solved the housing problem of rural teachers in remote areas so that they could dedicate more of their energy to teach students, thus help propel the compulsory education system towards balanced development.

Establishing an effective system to ensure adequate supply of resources to facilitate professional development of rural teachers

Introducing multiple measures at the same time to effectively increase the supply of quality teachers to rural schools

The first measure is actively promoting the free teacher education policy. During 2010-2015, six Chinese normal universities recruited 52,000 students, 90.8% of which had teaching experience in the Midwest after graduation, and offered free tuition to them. Guided by the policy of the central government, 24 provincial-level administrative regions have introduced free local teacher education programs by offering free tuition or reimbursing tuition to students of normal schools. About 34,000 normal and other college graduates went to rural areas to teach in primary and secondary schools each year, representing an increase of 75% from 2009 (Figure 5). The free teacher education policy has

attracted a number of quality students to study for teaching degrees and supplied qualified teachers to rural schools.

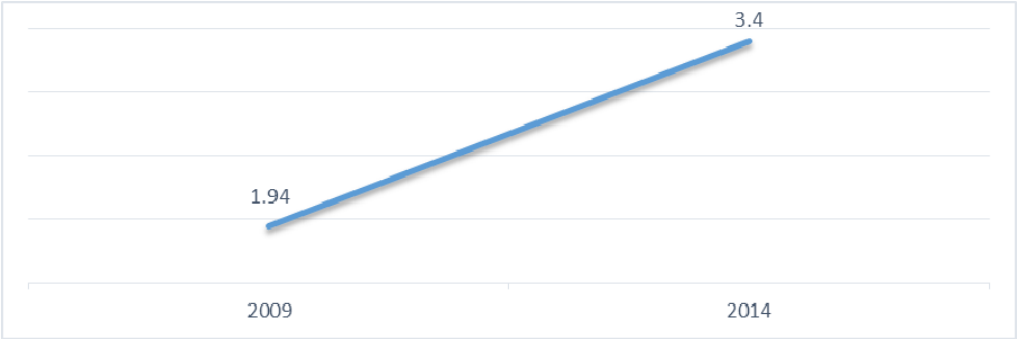

Figure 5. Number of graduates from normal universities and other college graduates teaching in rural schools (10,000 persons)

The second measure is creating special teaching posts. During 2011-2015, the central government invested RMB 22.26 billion in funding to fill 306,700 special teaching posts in over 30,000 rural schools (including primary schools in villages and teaching points) in 1,000 counties of 21 provinces (regions and municipalities) in the Midwest and Xinjiang Production and Construction Corps. During 2011-2015, guided by the entrance exam exemption policy for Master's degree in education programs for teachers in special posts, 43 colleges and universities announced 8,500 enrollment plans targeting teachers selecting to work in rural schools after their service term of the special post has expired (China Institute of Education Policy of Beijing Normal University & Center for Teacher Education Research of Beijing Normal University Key Research Institute of Humanities and Social Sciences at Universities of the Ministry of Education, 2015). The special post program effectively alleviates the shortage and structural imbalance of rural teachers and has become an important measure to supply quality rural teachers. In 2014, the government raised the salary of teachers in special posts from RMB 27,000 to RMB 31,000 per capita in the western region, and from RMB 24,000 to RMB 28,000 per capita in the central region. The percentage of teachers in special posts selecting to work in rural schools for another three consecutive years reached 87%.

The third measure is exempting students who have required teaching experience in rural schools from the entrance exam of Master's degree in education programs. Since 2004, in order to get recommended for the entrance exam exemption for the Master's degree in education, 8,881 college graduates have selected to teach in rural schools (China Institute of Education Policy of Beijing Normal University & Center for Teacher Education Research of Beijing Normal University Key Research Institute of Humanities and Social Sciences at Universities of the Ministry of Education, 2015). It effectively alleviates the shortage and structural imbalance of rural teachers, especially in selected key counties under programs that promote universal nine-year compulsory education and eliminate illiteracy among young and middle-aged people.

Coordinating different policies (staffing budget management policy, job title assignment policy, etc.) to promote rural education

The first policy is standardizing the staff budgeting standards of urban and rural schools. In 2014, the General Office of the Central Institutional Organization Commission, the Ministry of Education, and the Ministry of Finance jointly issued the Notice on Standardizing the Staffing Standards of Urban and Rural Primary and Secondary Schools. It stipulates that staffing budgets of primary and secondary schools shall be determined on an equal basis with their urban counterparts, and staffing budgets of small village schools and teaching points shall be determined depending on the student-teacher ratio and the class-teacher ratio to ensure that all required school subjects, especially physical education, music, art, and science are taught in rural schools, and to effectively solve the shortage and the structural imbalance of rural teachers. So far, primary and secondary schools in Beijing, Shanxi, Inner Mongolia, Liaoning, Jilin, Shanghai, Fujian, Shandong, Qinghai, Xinjiang, and other provincial administrative areas have adopted unified staffing standards which help improve the deployment of rural teachers and promote the integration of urban and rural education.

The second policy is strengthening continuing professional development to improve the quality and competence of rural teachers. Efforts have been made to strengthen continuing professional development of rural teachers and principals, to further improve the overall quality of rural teachers, and to ensure the healthy development of rural education. During 2010-2014, the National Training Program for Teachers of Primary and Secondary Schools trained more than 7.3 million teachers from kindergartens, primary and secondary schools across China, of which over 7.06 million (96.4%) were rural teachers and more than 6.4 million were from rural schools in the Midwest. With regard to continuing professional development of principals of rural schools, 2,000 principals of kindergartens, primary and secondary schools in contiguous poor areas are invited to attend a national-level training program under a supporting project designed for principals in remote and poor rural areas. Among the different principal training methods adopted across the country, the effect of off-the-job training in different counties/prefectures was the best with an average score of 1.54 (1 standing for "very good", 2 for "good", 3 for "so-so", and 4 for "no effect"), followed by replacement training with an average score of 1.58, off-the-job training in the original county/prefecture with an average score of 1.81, training organized in the form of lectures with an average score of 1.86, and remote training with an average score of 2.09 (Figure 6).

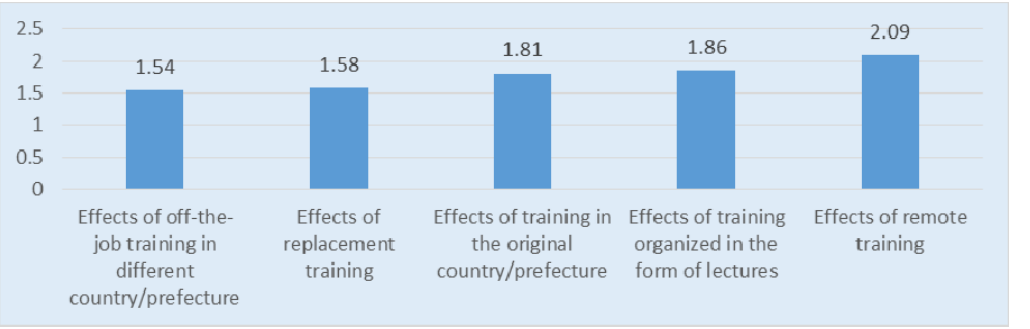

Figure 6. Effects of different teacher training methods

The third policy is introducing criteria for teaching job title assignment in favor of rural teachers. The Opinions on Vigorously Promoting the Development Rural Teaching Force stipulates that a teacher in an urban primary or secondary school must have more than one-year experience teaching in a rural school or under-performing schools before he/she can be assigned to a high-level position or given a senior job title.

Implementing the teacher exchange and rotation system to attract quality teachers to rural areas

Principals should promote the exchange and rotation of teachers. In 2014, the Ministry of Education, the Ministry of Finance, and the Ministry of Human Resources and Social Security issued the Opinions on Promoting County/Prefecture-Level Teacher Exchange and Rotation between Schools Covered by Compulsory Education, comprehensively promoting county/prefecture-level teacher exchange and rotation, and attracting quality principals and teachers to rural or under-performing schools. The Ministry of Education issued the Plan for Construction of Demonstration Areas to Promote the Centralized Rural Teacher Management by County/Prefecture-Level Education Departments and the Notice of the Office of the Ministry of Education on Applying for Construction of the First Batch of Demonstration Areas to Promote the Centralized Rural Teacher Management by County/ Prefecture-Level Education Department. Thirty counties or prefecture-level cities across 20 provinces submitted the application materials and were selected as the first batch of demonstration areas. China is striving to institutionalize principal and teacher exchange and rotation within three to five years to encourage counties and prefectures to balance the deployment of teachers within their respective administrative areas, and in a wider scope where the condition is much more mature.

Another area of concern is encouraging volunteers to participate in the pilot flexible pre-school education supporting program in rural or remote areas in the Midwest. In 2012, the Office of the Ministry of Education and the Office of the Ministry of Finance jointly issued the Notice on Implementing the Pilot Flexible Pre-School Education Supporting Program in Rural or Remote Areas in the Midwest to launch the pilot program in Liaoning, Henan, Hunan, Guizhou, and Shanxi. In 2013, another eight provinces (i.e., Hebei, Inner Mongolia, Fujian, Jiangxi, Guangxi, Yunnan, Gansu, and Qinghai) were included in the program. In 2014, Heilongjiang and Ningxia also joined the program and the number of pilot provinces reached 14 (Guizhou Province exited the pilot program). The central government has created a special fund to construct teaching points in remote rural areas which have no ability to open kindergartens, to recruit college graduates, secondary school graduates with a pre-school education degree, and non-budgeted kindergarten and primary school teachers as volunteers to teach at these teaching points for two years. The central government provides each volunteer with a subsidy of RMB 5,000-15,000 per year and other benefits, including living allowances and social insurance contributions. Within three years, 3,521 teaching points were created and 7,081 volunteers were recruited under the program, and the central government allocated RMB 189.81 million to subsidize these volunteers. The program has recruited a number of high-quality volunteers, expanded educational resources in rural areas, improved pre-school education in some remote areas, and increased the coverage of pre-school education.

Future trends for rural teaching force policies

Rural teachers are the weakest link in the Chinese teaching force and developing the rural teaching force is on the top of China's education agenda. To address the shortage of quality rural teachers, the Chinese government has implemented diversified measures in accordance with the National Long-Term Education Reform and Development Plan (2010-2020) to attract and retain quality teachers in rural areas step by step and constantly improve the overall quality of rural teachers. The 11th meeting of the Central Leading Group for Comprehensively Deepening Reforms (CLGCDR) and the 14th meeting of the Leading Group for National Education Reforms respectively reviewed and approved the Rural Teacher Support Program (2015-2020) (issued by the General Office of the State Council in June 2015). The CLGCDR puts development of rural education on the same strategic level with the goal of preventing the intergenerational transfer of poverty, and is striving to increase the supply of quality teachers to rural areas by introducing eight major initiatives, including initiatives to improve professional morality and expand rural teacher supply channels. It aims to expand sources of quality rural teachers, improve the deployment of rural teachers, improve their teaching competence, protect their rights, and increase the attractiveness of the teaching profession. It is also striving to develop a high-quality hard-working rural teaching force by 2020 to serve the modernization of education. This is China's first policy specifically designed to promote the development of the rural teaching force since the founding of the People's Republic of China. It points out a development direction for rural teachers.

Further improving the compensation of rural teachers

Quantitative analysis of national and provincial policy education programs reveals that improving the status and compensation of teachers is a key goal of policies introduced by China's central and provincial-level governments (Xue, 2014). To recruit and retain more teachers in rural areas, governments need to further improve teachers' compensation packages. Governments at all levels will also continue to increase subsidies offered to teaching posts in remote and poor areas to attract quality teachers (Xue & Li, 2015). According to our survey, 2.8% of principals, teachers, and administrators received a subsidy of RMB 1,000 or more per month; 8.9% received RMB 500-1,000; 15.3% received RMB 300-500; 51.7% received RMB 100-300; and 21.3% received less than RMB 100. Only 0.1% of principals and teachers believe the current subsidy level can achieve the goal of attracting and retaining teachers in rural areas; 52.6% believe it plays a small role; 39.2% hold that it is too low to attract teachers. Of principals and teachers, 5.1% believe a subsidy of below RMB 300 is sufficient to attract and retain teachers in rural area; 15.8% believe RMB 300-500 is sufficient; 55.7% believe RMB 500-1,000 is sufficient; 10.7% believe RMB 1,000-1,500 is sufficient; 12.7% believe RMB 1,500 or above is sufficient. The average amount of subsidy principals and teachers participating in the survey believe can effectively attract and retain teachers in rural areas is RMB 1,053.

This study suggests that teaching posts should be divided into different levels according to geographical environment, economic level, ease of life, culture, and other criteria to lay groundwork for a unified subsidy payment system. Provincial governments (as the main player) and county/prefecture-level governments should work together to raise

the subsidy for rural teachers to about RMB 1,000 per person. The central government should issue honorary certificates to teachers with more than 30 years of teaching experience in rural schools, and provincial and county-level governments should respectively reward teachers with more than 20 and 10 years of teaching experience in rural schools. Governments at all levels should continue to implement relevant policies, set specific standards, and give favors to rural teachers in the selection and review processes of awards. To prevent opportunistic behavior, subsidy and preferential policies for rural teachers should target jobs rather than individuals.

Further improving the deployment mechanism of rural teachers

The central government should introduce more preferential policies for rural areas related to funding, staffing budget, job title assignment, etc. to further improve the allocation of teaching resources. Provincial governments should establish a unified rural teacher supply mechanism under which rural teachers should be budgeted and recruited in a centralized manner. Local governments and teacher education institutions should step up efforts to promote teacher education according to local needs, and adopt diversified methods to supply multi-skilled rural teachers. The scope of the special post program should be expanded with a focus on border areas, old revolutionary bases, poverty-stricken areas and ethnic autonomous areas, and other poor areas in the Midwest. Further efforts should be made to advance the National Training Program for Teachers of Primary and Secondary Schools with a focus on rural teachers and provide professional training to rural teachers, including training with a replacement mechanism, sending teaching resources to the countryside, remote training, short-term intensive training, expert guidance, school-based training, and other effective forms of training. The goal is to ensure all rural teachers should complete 360 hours of training by 2020. Governments at all levels should effectively integrate quality resources of colleges, universities, county-level teacher development centers, and primary and secondary schools, develop a professional development support system for rural teachers, institutionalize continuing professional development of rural teachers, and continue to improve the quality of rural teachers.

Provincial governments should strengthen provincial-level centralized planning, revitalize the stock and optimize the structure of teaching resources, set a proper class-teacher ratio and subject-teacher ratio to meet the needs of urbanization, explore specific flexible staff budgeting measures, and establish a full set of operable rural teacher deployment standards that combine mandatory and flexible criteria. They should develop a fixed quota staffing budget (by taking into account student-teacher ratio, class-teacher ratio, and subject-teacher ratio) and a flexible staffing budget (by taking into account teachers' workload, including teaching, lesson planning, counseling, and administration workload). Provincial governments should deploy rural teachers in a manner in line with the trend of the population migration from rural areas to cities in the urbanization process; improve the management system and the dynamic staff budgeting mechanism to ensure that the county-level educational administrative departments allocate rural teachers within the authorized quota on the basis of the size of class, subjects, sources of students, etc. They should regularly review the number of students of urban and rural schools, and adjust the flexible quota accordingly to form a dynamic adjustment mechanism. They also should strictly implement the teacher recruitment system, establish a teacher exit mechanism, and dismiss freeloaders. County/prefecture-level governments should establish a system to

regularly review rural teacher staff budgets, strictly prohibit misappropriation, diversion interception of budget funds allocated to rural teachers, and punish units and responsible persons for violations of staffing budget policies according to relevant laws and regulations.

A new idea for improving the staff budgeting system of primary and secondary schools is to change the system in a progressive manner to incorporate staff salaries as well as medical, pension, housing, work injury, maternity, children's education, and other social security into the scope of government procurement to ensure all teachers enjoy the same compensation and benefits with staff members in budgeted posts (Li, Xue, & Zhao, 2016). A teacher exit mechanism should be established by grasping the opportunity presented by the public institution human resources system reform and the teacher certification and examination system reform (Xue, Li, & Zhu, 2016). Specific measures should be introduced to manage dormitory management, canteen, security and other logistics personnel, and special funding should be provided to ensure related staff members receive their rightful compensation and benefits.

Further improving the urban-rural teacher exchange mechanism

The central government should organize regular exchange, inter-school competition, and other programs to attract quality principals and teachers to rural schools; diversify the exchange and rotation methods based on the competence level of teachers and the characteristics of subjects they teach. It should link the exchange and rotation program to performance evaluation of principals and teachers and other systems; place sufficient emphasis on evaluation of the effects of the exchange and rotation program, and increase the administrative authorization of receiving schools. County/prefecture-level governments should grasp the opportunities presented by the national plan for construction of demonstration areas to promote the centralized rural teacher management by county/prefecture-level education departments, to promote innovative teacher and principal exchange and rotation programs, to break the bottleneck of the system, and to institutionalize effective programs within their respective administrative scope. They should develop plans to send retired prestigious teachers and senior teachers to rural schools to give lectures and support teaching activities, and the central government should give appropriate support. The review process of the job title assignment should focus on teachers' professional performance and teaching experience, and should not take into account academic achievement related to foreign languages (except for foreign language teachers) and thesis publishing. Preferential policies in favor of rural teachers should be efficiently implemented.

Contributions and limitations of this study

The main contributions of this study are as follows. First, it systematically analyzed policies to develop rural teaching force, took a closer look at specific policies in the context of the entire policy system, and analyzed the weak links in the policy system and problem representation. Second, the scope of the investigation of this study was extensive. It covered 28 Chinese provincial-level administrative regions in the spatial extent and surveyed stakeholders at all levels, from central policy-makers to teachers in the forefront of rural education. This kind of large-scale, multi-level survey can provide a more comprehensive

insight into Chinese policies associated with the development of rural teaching force on the basis of local experiences and perspectives. However, it also has limitations. Because the study was conducted mainly based on cross-sectional data except for a number of indicators for which we compared data of different time nodes, it cannot accurately reflect the overall trends in Chinese policies associated with the development of rural teaching force. To provide a more accurate in-depth picture of the development of the rural teaching force in China, we need to carry out further research and create a specialized database on the basis of panel data in the further study.

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Footnotes

1. Xinjiang Production and Construction Corps is located in the territory of the Xinjiang Uygur Autonomous Region. It is under the dual jurisdiction of the central government, and the government of the Xinjiang Uygur Autonomous Region enjoys the provincial jurisdiction.

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Evolving the university language policy from the lens of the administrators: Language beliefs and practices of university administrators in the Philippines

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Abstract

Evolving a language policy for an institution requires careful formulation involving stakeholders which usually include the administrators, students, staff, and the community. In the Philippines where the top-down approach is the usual practice in developing a policy, the school administrators usually take an active role in the process. The language beliefs and practices of university administrators are determined to identify the language to be used for policy-making. Using Horwitz's Beliefs About Language Learning Inventory (BALLI) and interview protocols as tools, the investigation explored the experiences of the university administrators at home and in the workplace. Findings reveal that among the languages used, English is still the preferred language for the workplace, especially the classrooms. Premium placed on the English language is evident in most of the participants. The use of the English language, however, was limited only to students and teachers; the practices reveal that administrators prefer the first language to English when communicating with the staff. Discussion of findings and implications for language use and language policy are provided.

Keywords: language policy, beliefs, practices, administrators, first language, second language

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Introduction

Language planning is precedent to language policy formulation and implementation. It usually provides the framework that guides the creation of a language policy. Language planning (Rubin & Jernudd as cited by Baldauf, 2005) "was defined as the deliberate, future-oriented systematic-change of language code, use and/or speaking, undertaken by some organization mandated for such purposes—mostly by governments—in some social situation, that is, in a community of speakers" (p. 958). Language planning usually stems from the ideas of a governing body that realizes a definite change in the existing policy or the creation of a policy in absence of one. Furthermore, Maldonado-Valentin (2016) added, "language planning and policies (LPP) are created in order to either homogenize or to validate and promote linguistic diversity in a given socio-cultural context" (p. 4).

The approach to planning can be realized by two approaches as suggested by Baldauf (2005, p. 959): a policy approach—with an emphasis on form: basic language and policy decisions and their implementation; or a cultivation approach—with an emphasis on the functional extension of language development and use. The first policy approach seems easier to work on especially if there are no existing policies, while the second approach is advantageous if the existing policy needs further review or change. The approach, however, should be considered seriously since any policy creation and implementation needs awareness and acceptance from the users of the language. Baldauf's approach to policy planning has been considered as it provides the framework for "small scale and micro-situations" such as the university.

The language policies are existent in many countries in Asia, usually specifying the official language/s of a country. The Association of South East Asian Nations (ASEAN) actually made English as its working language when it created its charter in 2008 (ASEAN, 2008). India has a pluralistic approach to the language policy, considering the abundance of local languages in the country (Ministry of Human Resource Development, 2016). Similarly, Singapore has a multilingual policy, recognizing Mandarin, Malay, Tamil, and English as official languages (Ng, 2011). In contrast, Indonesia is monolingual with Bahasa Indonesia as its official language (Harwati, 2012). Historical, political, and economic conditions usually shape the planning and implementation of the country's language policy. The policy is usually cascaded to educational institutions that carry the task of implementation.

The Philippines, where the study took place, also considers the historical, political, and economic conditions of the country. Historically, the Philippines was colonized by the Americans for decades, and this has impacted strongly on educational reforms and language policy. Politically, most leaders have supported bilingualism as evidenced in the continuing policy of maintaining Pilipino/Filipino and English as media of instruction in schools. Economically, the growing presence of business process outsourcing (BPO) in the country and the continuing flow of overseas workers have strengthened the resolve to maintain English as an official language. Thus, to this day and in accordance to the Constitution of the Philippines, Filipino and English remain as the official languages of the country.

Though the official languages have already been established, their policy guidelines or implementations are not specifically stated in the tertiary or university level. In the National Capital Region (NCR) in the Philippines, only two universities have explicit language

policies (Vizconde, 2011), thus the planning for an institutional language policy is deemed important.

Users of the language to be considered in planning for institutional or university policy usually include administrators, staff, teachers, and students. In some cases, the community is also part of the consultation.

Baldauf (2010, p. 162), citing the studies of Winter and Pauwel identified teachers as great forces in policy planning, suggesting that "education is not a mere external agent of implementation but central to the raising of awareness, with the practices of individual teachers, as role models of language behaviours, constituting a key language planning activity in classrooms." With teachers as front liners of an educational institution, their inputs in language planning are valuable requirements. Their daily interactions with the students provide information that are crucial in the choice of language for implementation and the process that will be in place for realization.

Students, being the clients of the educational institutions, deserve the greatest attention. They are the group which has the most exposure to the change that will take place once the language policy is put in place. Students are the best resources for planning and implementing language policy transformation.

The administrators, however, seemed to have the greatest power among the stakeholders. Normally, the move to change or develop any policy stems from the school administrators' resolution. Although they comprise the smallest number in the school population, administrators are considered as the authority or dominant group that comprises the policymaking body. Tollefson and Tsui (2004, p. 284) argue that medium-of-instruction policies are both ideological and discursive constructs; with policies as ideological constructs, they reflect the interests of groups that dominate the state policymaking apparatus, and thus, they reproduce unequal relationships of power within the larger society. Mansoor (2004, p. 54) further argues that "top-down" language planning situations, "where people with power and authority who make language-related decisions for groups, often with little or no consultation with the ultimate language learners and users, have come under heavy criticism by scholars and researchers like Kaplan (1997) and Luke et. al. (1990), who argue for a 'bottom-up' approach where there is broader participation of the people for whom language is being planned." Johnson and Freeman (2010), likewise, claim that negotiations for the interpretation and implementation of national language policies in the local districts or institutions are still practiced by educators, including administrators and teachers. The administrators, if responsive and collaborative, can truly craft policies that reflect the needs and requirements of its stakeholders.

Given this context where administrators play a great role in language policy formulation, the following questions are raised:

1. What are the beliefs of administrators regarding the language to be used in the university?
2. What are the language practices of the administrators at home and in the workplace?
3. What do administrators perceive to be the language/s to be considered as the official language of the university?

Language beliefs

That people's beliefs are instrumental in influencing their behavior is a truism; people act on the basis of perceptions and their 'definition of the situation' (Davis, 2003, p. 207). Beliefs, though intangible, play a very influential role in people's behavior. Behavior is basically the tangible manifestation of one's beliefs. Whether consciously or unconsciously, one acts according to one's belief (Bargh & Morsella, 2008). Studies on teachers' and students' beliefs regarding language learning abound. In the study of Karabenick and Noda (2004), which took place in a district in Michigan, surveying 729 teachers who were handling schools with immigrants, it was found that teachers believe that the first language of the students does not interfere in learning the target language which is English. They also expressed that "it was possible to be equally proficient in two languages; they expressed ambivalence with respect to the effect of L1 usage in the home on the speed and efficiency with which ELL learners acquired an L2" (p. 62). The results of the study signified a positive attitude towards the first language (L1) and its role in learning the second language (L2). The study stressed, however, that teachers need to be provided with more sessions on language acquisition given their conflicting views that proficiency can be achieved in both languages and the teachers' ambivalence on effect of L1 over L2.

Floris (2013) promotes this belief that the first language ably supports the learning of English and should be allowed in the classroom. Investigating Indonesian teachers and students, the study found that the first language has three main purposes in the classroom: 1) the mother tongue helps explain the difficult concepts, 2) it helps explain the English words that are difficult for students to understand, and 3) it is used to help explain the feedback given by teachers, enabling students to produce better outputs.

Teachers' and students' beliefs about the role and importance of grammar were the subject of Polat's inquiry (2009) in his study on the Georgian English learners, college students from a former republic of the Soviet Union. Results reveal that teachers and students alike believe that grammar plays an important role in learning a foreign language, in this case, English. The majority "believed that the formal study of grammar is essential to the eventual mastery of the language" (p. 244). Interesting, however, in Polat's findings is "the overwhelming majority of both teacher and student participants not only endorsed the significance of the role of grammar in language learning/teaching, but also reported that knowledge of L1 grammar and learning of L2 grammar are prerequisites to language learning/teaching" (p. 245).

Horwitz (1999), who pioneered the Beliefs About Language Learning Inventory (BALLI), discussed learner beliefs in the light of cultural differences. Analyzing various studies (including American learners of French, Spanish, German, and Japanese, and US instructors of French, Korean, Taiwanese, and Turkish heritage), the research did not find conclusive evidences of cultural groups having different language learning beliefs, however "the results point to the possibility that within-group differences, whether related to individual characteristics or differences in instructional practices, likely account for as much variation as the cultural differences" (p. 575). The study points out, too, that participants in the study are engaged with foreign language learning and not second language which may account for some other factors that will affect the language learning.

Using the BALLI, an investigation was conducted among 20 adult Vietnamese English as a Second Language (ESL) learners. Bernat (2004) reported that participants "remain quite

optimistic about their future language learning progress and exhibit relatively high levels of motivation" (p. 48) despite the "negative" beliefs that they hold. All of the respondents, who were adults, hold the belief that children would learn a foreign language much easier compared to adults, while the majority of these learners believe that some people have the special ability for foreign language learning. Interestingly, most of the respondents agree that the "most important part of learning a new language is learning the grammar" (p. 49).

Locally, the study of Cunanan (2013) presented the perceptions of administrators, faculty, and personnel concerning the English and Filipino language use for the determination of the language policy in a university. Results yield that the first language or Filipino is more often used than the second language or English in tasks that involve verbal interactions like: asking favors from colleagues and co-workers, asking favors from superiors, participating in organizational meetings, addressing a crowd to discuss matters affecting the interests of teachers and students, speaking to a crowd during cultural presentations, reprimanding and disciplining students, etc. The use of English has been relegated to a more formal situation like: conducting meetings, seminars, and workshops; and reading scholarly or academic papers in scientific or technical gatherings. In terms of time allotment, quality, and frequency of use, Filipino was preferred at 70.19% over English at 25.96%; the rest made use of the regional language.

Since students were not identified in this study by Cunanan (2013), a previous study by Vizconde (2011) has indicated that students prefer English to Filipino, while teachers prefer Filipino to English. These preferences were found across the four macro skills: listening, speaking, reading, and writing. This preference for English has been documented early in the study of Gonzales (2004) as cited by Chang (2011) where "Filipino students show more favorable attitudes towards English than Filipino as they regard English as the language of power and a tool for upward social and economic movement" (p. 194). The preference of teachers for the first language is borne out of the need to make topics more comprehensible for students.

Bernardo (2008) on the one hand argues that schools who reason that using English as a medium of instruction will produce successful globally competitive graduates seem to base their positions on "untenable, inappropriate or unverified assumptions" (p. 44) since language is just one aspect of success, as high-level technical skills are very important, too. He proposes that Philippine education should look at the English language as a potent resource that will need to be "grounded in a sound and sophisticated understanding of bilingual/multilingual experience of Filipinos, the complex network of competencies that Filipinos learn in school, the relationship between languages used in learning and instruction, and the present constraints of the processes and structures of Philippine education" (p. 44).

Studies on beliefs cover a wide range of focus. Some focus on contexts, others on grammar, some on pedagogy, and others on teacher-student variance. Common among these is the impression that beliefs relate closely with practices.

One strong example how beliefs have impacted on policy is the case of the Alsace in France. Alsace lies in the border of France, and thus has been subjected to border wars between France and Germany, eventually becoming part of France after World War I. In spite of the national policy of French as an official language, this region in France has decided to craft its own policy of maintaining Alsatian as the official language: "Language beliefs towards Alsatian will play a crucial role in the survival of this language variety, as its maintenance is dependent on the actions of the current and future generations of

Alsatians" (Harrison, 2012, p. 372).

Citing Spolsky (2004), Baldauf (2010) underscores the importance of beliefs in language planning and language policy: "These beliefs both derive from and influence practices. They can be a basis for language management or a management policy can be intended to confirm or modify them" (p. 358). In addition, Spolsky (2004) has proposed that to be able to understand how a policy can be crafted, three components have to be considered: "its language practices – the habitual pattern of selecting among the varieties that make up its linguistic repertoire; its language beliefs and ideology – the beliefs about language and language use; and any specific efforts to modify or influence that practice by any kind of language intervention, planning or management" (p. 5).

Given the beliefs and practices as factors in determining the language policy planning and implementation, this study aims to determine the beliefs of the administrators regarding language use and their language preference for the language to be implemented. Their practices at home and at work are also documented in the narratives that they have shared.

Method

Qualitative and quantitative research can often complement each other and can be used for triangulation (Smith & Bowers-Brown, 2010, p. 117). This mixed-method provides depth and clarity to the investigation. Considering this, the study made use of both types of approach with the survey-questionnaires and semi-structured interviews.

The survey-questionnaire has two parts: the first part determines the demographic profile of the administrators; and the second part determines the language beliefs of the administrators. Some questions in the profiling may have more than one answer (e.g., languages spoken: Filipino and English), and respondents may check more than one box. The language beliefs questionnaire is adapted from Elaine Horwitz's Beliefs About Language Learning Inventory (BALLI). It made use of a Likert scale ranging from 1-8 with 1 having the value of "to a lesser extent", and 8 with "to a great extent". The BALLI questionnaire was also translated in Filipino, the official medium of instruction in the Philippines and the first language. Subjected to the validation of three experts in the fields of research and content, the instrument was also subjected to pilot testing (with 39 participants), garnering the Cronbach alpha value of .817, and thereby establishing its reliability.

The most common approach (to eliminate subjectivity in qualitative research) is to claim that although the research participant is an individual with personal, subjective experiences, researchers can overcome their subjectivity to obtain objective knowledge by following special rules or procedures (Packer, 2011, p. 79). In this study, subjectivity is overcome by following the rules on coding: "Coding works on the concrete and particular narratives obtained in an interview to produce abstract generalizations, presented in formal terms" (Packer, 2011, p. 80). In obtaining data for the qualitative approach, participants were invited to an appointed interview where the questions were given before the appointment. Participants or administrators were chosen based on their roles as heads of the offices that concerns teacher, students, staff, and alumni welfare. These offices include the office of the language departments, the human resource office, the alumni office, the student affairs office, the secretary-general (responsible for overseeing all internal and external communications in the university), and department chairpersons for academic units like history, philosophy,

and social sciences.

The individual interviews were recorded and were transcribed later on. Each interview session lasted for about 20 to 40 minutes. The questions raised sought answers concerning the participants' experiences with their first and second languages (L1 and L2); the use of these languages in their personal and professional life; their views concerning language policies; and their recommendations for language policy formulation. Questions for the semi-structured interviews can be found in the Appendix.

Study site

The locus of the study is a comprehensive university in the Philippines, which is ranked four stars by the QS World University Ranking. With approximately 40,000 students, 2,000 teachers, 1,500 support staff, and 100 administrators, the university is a private, sectarian, and multi-disciplinary institution run by a religious congregation.

Participants in the study included 15 school administrators holding key positions in the university, usually in offices that offered services across the different sectors. Table 1 reflects that most are female and single; the majority fall within the age range of 56-60 years.

Table 1. Demographic profile (*n* = 15)

Age		%
26-30 years	1	6.67
31-35 years	1	6.67
36-40 years	2	13.37
41-45 years	1	6.67
46-50 years	2	13.37
51-55 years	2	13.37
56-60 years	5	33.33
61-65 years	0	6.67
Sex		
Male	6	40
Female	9	60
Status		
Single	7	46.67
Married	6	40
Affiliation		
Guidance Services	1	
Library Services	1	
Administrative Offices	12	
Ecclesiastical Faculty	1	
Arts and Letters	3	
Commerce	2	
Education	1	
Science	1	

Table 2 defines the language use of the respondents. Majority makes use of Filipino as a spoken discourse (L1) at home, while using English (L2) as the language for written discourse. Most materials like books, magazines, newspapers, and brochures available in the

house are written in English. In the workplace, respondents usually make use of English and Filipino when speaking with fellow administrators and with faculty members, however, when communicating with students, English (100%) is preferred over Filipino (60%), and surprisingly, Filipino (100%) over English (46.67%) when interacting with the support staff.

With reading materials in the workplace, English-written resources are most favored.

Table 2. Language use (*n* = 15)

Language spoken at home		%	Language written at home		%
Filipino	15	100	Filipino	9	60
English	10	66.67	English	13	86.67
Others	3	33.33	Others	0	
Language spoken in the university			Language written in the university		
With administrators			Filipino	5	33.33
Filipino	12	80	English	15	100
English	14	93.33	Others	0	
Others	0				
With teachers			Language used for reading at home		
Filipino	14	93.33			
English	13	86.67	Magazines		
Others	0		Filipino	2	13.33
With students			English	15	100
Filipino	9	60	Others	0	
English	15	100			
Others	0		Newspapers		
With support staff			Filipino	2	13.33
Filipino	15	100	English	15	100
English	7	46.67	Others	0	
Others	0				
	12	80	Brochures		
	14	93.33	Filipino	5	33.33
	0		English	15	100
			Others	0	

Results

Beliefs

Before the respondents were interviewed, they completed the Beliefs About Language Learning Inventory (BALLI) by Elaine Horwitz. The results of the survey helped in identifying the beliefs of the administrators.

Table 3 presents the top five and the least five language beliefs of the respondents. Based on the respondents' answers, ranked number one is "Some languages are easier to learn than the others" (WM = 7.4) and it is followed by "It's important to repeat and practice a lot" and I want to speak English well" which share the same mean (WM = 7.33). Third in rank is "some people have a special ability for learning other languages" (WM = 70) and the last in ranking is "People in my country feel that it is important to speak in English" (WM = 6.93).

Table 3. Top five and Least five answers on language beliefs

Top 5	Mean	Ranking	Least 5	Mean	Ranking
Some languages are easier to learn than others. (Item 3)	7.4	1	I feel timid speaking English with other people. (Item 21)	2.46	1
It's important to repeat and practice a lot. (Item 18)	7.33	3.5	I would like to learn English so I can get to know the Americans better. (Item 24)	2.73	2
I want to speak English well. (Item 31)	7.33	3.5	People who are good in mathematics or science are not good at learning foreign languages. (Item 11)	3	3
Some people have a special ability for learning other languages. (Item 2)	7	4	It is okay to guess if you don't know a word in English. (Item 14)	3.13	4
People in my country feel that it is important to speak English. (Item 20)	6.93	5	English is a very difficult language. (Item 4)	3.2	5

Most administrators believe that the English language is easier learned than any other foreign language. This may be attributed to the presence of the English language in various media in the Philippines and the recognition of English as a second language. The provision of English as an official language of the Philippines has helped boost its place in the Philippines. Print and broadcast media have also used English for news and advertisements. The premium that the administrators placed on English is evident as they want to speak it well, because people feel it's important to speak. In society and in the workplace, people who can speak English well are looked up to and as observed to be well educated.

Among the beliefs that they least adhere to are "I feel timid speaking English with other people" (WM = 2.46), ranking first. "I would like to learn English so I can get to know the Americans better" (WM = 2.73) ranked second, and "People who are good in mathematics or science are not good at learning foreign languages" (WM = 3.0) was third. Ranking fourth is "It is okay to guess if you don't know a word in English" (WM = 3.13), and lastly, "English is a very difficult language" (WM = 3.2).

Since these administrators have mostly finished their graduate degrees, they have a

better grasp of the English language and they have a wide range of vocabulary in English which is why in the ranking, this answer "I feel timid speaking English with other people" (WM = 2.46) was given the lowest as evidenced in Table 3. They are not extrinsically motivated in learning the language and they look at the acquisition of the English as a way to improve themselves.

Practices: First language or second language?

Most respondents used their first language at home, and they considered English which they learned at home and in school as their second language. Generally, the first language (L1) and second language (L2) are used alternately at home and in school with English used frequently in school. The first language is dominantly used at home. Majority of the respondents speak Filipino or Tagalog at home with some using their native language like Ilongo, Kapampangan, and Bicolano (local languages in the Philippines). All agree that the household members speak the L1, and there are no household rules pertaining to the use of the language.

> "It's Tagalog. It's also because probably you know my husband is not, you know, very fluent also in English so it would be difficult for him if I speak... Me, I'm a teacher so I can speak English all the time, but with my husband I cannot expect, you know, I cannot demand him to speak English so it would be difficult for me to demand my children to speak in English. So it, when they were young the lighter words in English, I cope with my children but when they grew up wala na. So basically it's Tagalog." (Administrator 4)

Another one provided that Filipino is mostly used at home since it is the language that is easier and more comfortable to speak.

> "We are more comfortable in Filipino so we use Filipino at home. Majority of the time we use Filipino, Tagalog." (Administrator 5)

It is evident, too, from the answers that Filipino remained the language at home until the time that the respondents start attending school where they get to be introduced to another language.

> "Of course we began to learn a new language when we start to enter school because ah, beginning in kindergarten. But even before that, informally, our parents taught us, especially my mother." (Administrator 9)

Most influential in the use of the language would be the parents who usually dictate that English be learned since it's a language that seems to be superior.

> "Yes, to a certain extent I tried to control the movies that they watch most of them are also in English. When we also go out and watch movies. Maybe because of my little bit of bias also. I love to watch English movies. I'm not so into Filipino movies."

(Administrator 6)

What is clear, however, among administrators is that their experiences shape the way they view the languages, and thus they try to improve their proficiency in the languages by allowing their family members to experience both the Filipino and the English languages.

> "Based actually on my training in ___, had I not been into the Ph.D. on applied linguistics program, I wouldn't really know that the mastery of the concepts in the second language will be best achieved if I have already mastered the concepts in L1 so yung paradigm shift ko talaga noon and at the time at least I was still in my thirties okay pa yung paradigm shift ko dun nag-iba yung orientation ko but it's not really so when you use the language it's easier for specially kung hindi naman strong yung foundation mo in L1. So that influenced me a lot so hanggang ngayon dala-dala ko un, so with the kind of research that I have been, I am fully convinced that mastery in L1 should be achieved first before I should branch out into learning another second or third or fourth language." (Administrator 13)

The experiences in education have shaped the views of the administrator regarding the language use and how the languages are best learned. It was also evident that the introduction of the second language, normally English, is directly observed in schools. It may be possible, too, that English may not be relevant to the speaker until the time that the situation necessitates it, like the case of the administrator below.

> "Well at first it's awkward especially in high school and elementary because the environment no, it's not really spoken, it's only academic. In college I started here in ___, Ah we also didn't see any practicality because there was no requirement for us to speak in English. We have... Well now I just find it, well most contentious now because of the community, because of the presence of foreigners in our community." (Administrator 3)

Most of the administrators are aware that a language policy has not yet been developed in the university, but most agree that English must be made as the official language of the university in case a policy will be drafted.

The experiences of the administrators have shaped their views concerning the choice of English as the official language. One of the experiences mentioned originated from their graduate programs where they learned about language acquisition theories and how these theories should guide the adoption of a language. Another looked back to not being particular about any language until they were immersed in a community where English is necessary, because there were many other foreign language speakers and they needed one language to communicate.

As declared by most administrators, English is the preferred official language in the university. The following statements indicated the various reasons for their choice.

> "Yes, but it, but it doesn't mean that they can't speak in Filipino; they can still speak in Filipino, but as a matter of policy and as a matter basis or something like that it's English." (Administrator 1)

As observed in the statement found in the previous page, English should be implemented as an official language of the university. It seemed that for the administrator, proficiency is already gained in the first language, Filipino, therefore to gain proficiency in English, there should be a policy in place.

> "I will stick to English, too, because we're going global. Oh and then, what will happen now if these ones don't speak in English and don't understand English? And then now they're going to have to think first, you know, translate it in their minds before they blurt it out, it will take time." (Administrator 2)

For other administrators like Administrator 2 and 3, the major consideration for choosing English as the language for implementation in the policy is globalization. If the university intends to operate in the international scale, its community should be ready to communicate in the language of that scale.

> "Well for me I think one of the major considerations is the demand of globalization, for instance, it is recognized that English is one of the major languages. Ah, English is the closest to us because if our only concern is the global language, there are as of now three or four major languages, English, Spanish, and Chinese. So if you will see I think it's easier to study English rather Chinese or Spanish." (Administrator 3)

For administrators 5 and 7, the need for English stemmed from the need in the workplaces. The entry into the employment required the proficient use of English, and this proficiency should be developed as English remains to be the language of the corporate world.

> "I think it should be English. English should be strengthened talaga. It's 70/30. Seventy for English and 30 for Filipino. We should not forget our language, but we should strengthen English because we need that in our work. We practice students here for their job interviews, and we always use English. It is the requirement of most employees. They should be able to express themselves in English." (Administrator 5)

> "Ah, I don't think they require any language, but for me I speak to them in English kasi I believe that ours is a business school, and in industry and, ah, in the business world, in the corporate world, I think it would be good to really practice ourselves or really speaking the language of the corporate world. And I believe that it is English rather than Filipino." (Administrator 7)

Interestingly, though most agree that English is necessary as an official language, they still see the first language as necessary for day-to-day language for communication, especially for the non-teaching staff.

> "I speak to my staff in Tagalog, because they're more at home with it. Yeah, their comfort zone. Because I don't want them to avoid me because I'm giving instructions in English." (Administrator 2)

Administrators acknowledged that their use of the English language was based on their

communications beyond their staff. Apparently, office efficiency is still observed when the first language is used as mentioned by Administrator 3.

> "Hmm, Well, uh, they're are not really coming to mind, you know, what should be imposed because my purpose in the office is for more efficient communication among the staff. For my staff were more used to Tagalog. But I'm very open to having English, but it's just that we haven't thought about it. Perhaps, it's because of the practicality." (Administrator 3)

In terms of the requirements of the office, other administrators believe that the nature of the office should be considered in the language choice. In the case of the counselling office, for example, it might be easier for the counselee to express his/herself in the language that is less threatening and more comfortable.

> "You know it's also hard in counseling to speak in English because you will not be able to, the students will not be able to really convey their emotions when they speak, but because we have English speaking students we are requested to speak in English." (Administrator 5)

Discussion

Administrators all agree that language plays an important role in their daily tasks. They realize that they dispense more efficiently the tasks of their offices if they are able to get ideas across to the intended recipients, and they see the same results in the comfort of their homes. Apparently, they all find the English language as easier to learn compared to other languages as seen in the survey. It was also stressed in the survey that the English language is practiced more often, and that the administrators see its importance. This can be attributed to their exposure to the language in school and at home. The English language continues to be popular among Filipinos as evidenced in advertisements, newspapers, and the social media. English remains a dominant choice as "to teach English as a way of speeding up national development, to English as a way of understanding other cultures, and to teach English as a tool of international communication in the globalized world" (Chang, 2011, p. 202).

At home, however, the dominance of the first language takes precedence. Since the first language is a comfortable language, it is most often used when the participants communicate with their family members, most especially with the household help. Although some were able to acquire the English language at home and were encouraged by their parents to use it, they still use the first language. The English language was honed usually in school and they continue to believe that when the school became their workplace, it should make use of English as well within the premise.

Although they have mentioned that there was no one who dictated the language to be used at home, it was evident that the elders, particularly the parents, played a big role in determining the language use at home. Parents, directly or indirectly, have influenced the household in the choice of language. For example, an administrator has admitted that his/her preference for English has dictated the choice of television shows or movies that

they watched. Another has expressed her desire to use English at home, but was deterred only by the inability of the household help to speak in English.

They all agree, however, that in an educational institution like their workplace, English should be used as the official language. Most mentioned that English is a global language, thus to be able to be at par with the global standards, they should be able to use English very well. Although a language policy has not been promulgated, the policy has to establish English as the language to be used in official communication and in classroom situations unless the courses require the use of the first language. The view of using English as a medium of communication in the school is shared by the study of Vizconde (2011) and Cunanan (2013). The results of the investigation showed the preference of teachers and students in the use of English in academic-related tasks over the first language.

This decision at home where elders dictate the language is the same view they hold in implementing the language policy in the university. They strongly recommend a language policy that will provide the clear guidelines with the use of English, in particular, as the language for communication. The language policy is to be planned, crafted, and implemented by the highest officer in the university. Again, language use and practice was disregarded and the primacy of what-should-be ideology sets in.

Disregard for the language use and practice may run counter to an effective language policy implementation. Mansoor (2004) supports that the "top-down" implementation when done without consultation will not be successful; language practices, beliefs about language and language use, and modifications or influences on the practice of the end-users must be understood by the policy-making body (Spolsky, 2004).

Interestingly, administrators have realized that talking to non-teaching staff requires the use of the first language. Most agree that requiring the staff to speak in English usually results in either miscommunication or the embarrassment of the staff. According to them, the non-teaching staff would feel uncomfortable in the use of English since this seems to be a more superior language, and they feel inadequate to express themselves in this language. If they speak to their staff in English, the staff tends to shy away or avoid them just as not to speak the English language. Even the numerical data showed the preference of the first language over the English language when speaking to non-academic personnel. This preference is echoed by Cunanan (2013) as he identified that school personnel like librarians, nurses, registrars, cashiers, guidance counselors, and security personnel often make use of the first language. This practice tends to contradict their belief that English should be the official language thus to be spoken by everyone in the institution. Nevertheless, the use of the mother tongue or the first language is still necessary in the workplace not just for students as Floris (2013) supports that the first language may explain difficult concepts.

Is there a way to resolve the concern regarding the language to be used for the university? It cannot be denied that English has remained to be an indispensable language, especially in the academic setting, which is why administrators chose it over the first language. The choice, however, should not rely solely on beliefs, but more so practice or use of the language. The administration's choice using the policy approach (Baldauf, 2005) cannot be fully utilized as there is an existing national policy that stems from the Philippine Constitution. The use of the cultivation approach is more appealing, and that means considering the existing national policy which considers the development of the Filipino and English languages.

Furthermore, the choice for the language to be implemented should not rely solely on

beliefs, but more so on the over-all objectives of the educational program where language, though important, is just one factor to consider as a graduate attribute and as a tool for global competitiveness. As Bernardo (2008) posits, the English language is a potent resource, but it has to be grounded on other factors including the processes and structures of Philippine education.

Conclusion

It was evident that the experiences of the administrators regarding their first language use and English are varied. They have been brought up in an environment where the first language is given importance, yet once they become professionals they find the learning of English to be imperative. This realization has strengthened their resolve to ensure that their children or their students should benefit more once they use the English language well, thus supporting that English becomes the language to be used in the university. Their positive view regarding the English language seemed to shape their belief that English becomes the official language in the university. Tupas (2007, p. 32) maintains that the choice of the national language (the language for implementation in this case) is "more an issue of attitudes, not inability to speak the national language." In this case, the issue of the official language in the university is an issue of the beliefs of the administrators.

Beliefs tend to impact on practices, but it is possible that situating one in authentic environments, practices may bend to accommodate the individuals involved in the communication process. As evidenced in the study, administrators are inclined to the belief that English becomes the official language of the university, thus requiring official transactions in English, but when communicating with non-academic personnel in their respective offices, they do not expect the use of the official language.

It is thereby necessary that administrators consider a policy that does not make English as the exclusive language to be used in the workplace, but also Filipino which remains to be the language used by the personnel. Administrators should recognize that other stakeholders like the personnel prefer to use the first language or local language rather than English. The policy should also provide the rationale for using English as the official language, and coupled with this should be a plan to further improve the skills of everyone, not only students and teachers who will be affected by the policy. Further research on other institutional policies concerning language use would be suggested given that the present report is limited to one university.

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Appendix. Questions raised in the interview:

1. What language/s do you use at home?
2. Is everyone in the house using the same language/s?
3. Who or what dictates the language that will be used at home?
4. How did you learn this language/these languages?
5. What language do you use at work?
6. Is this language required at work? If not, why do you prefer this language?
7. What language do you think should be used in your workplace? Why?
8. Do you know any existing policy about language use in your workplace?
9. Do you think it is important to have a language policy in university? Why?
10. Should there be a language policy, what language do you recommend for use? Why?
11. What should be the bases for the language use in the policy?
12. Who should be responsible for the implementation of the policy?

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The organisational factors influencing women's under-representation in leadership positions in Community Secondary Schools (CSSs) in rural Tanzania*

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Abstract

This paper explores organisational factors that contribute to the under-representation of women in senior leadership positions in the education sector with a particular reference to Community Secondary Schools (CSSs) in rural Tanzania. Interviews and focus group discussions were used to collect data from 182 participants (20 school heads, 160 teachers, one Regional Educational Officer and one District Educational Officer). Findings revealed that there is gender bias, sexual harassment, favouritism, and discrimination in the process of recommending and appointing heads of schools in rural Tanzania. The findings further showed that the education training policies of 2014 do not consider gender equality in appointing heads of schools. Furthermore, in many instances male school heads were reported to sexually harass women staff before they were recommended for leadership. The findings further revealed that women teachers were less supported by their fellow women leaders in recommending them for leadership positions. Thus, the study recommends that a sexual harassment policy should be established by the government to discipline leaders who misuse their office in exercising power. In addition, the study recommends that the educational policy of 2014 should be reviewed to stipulate a gender balance in the appointment of heads of schools.

Keywords: organisational factors, women representation, school leadership, community secondary schools, rural Tanzania

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Introduction

The presence of women in top education leadership positions around the world offers a positive perception on women's ability in leadership. However, the number of women in top leadership positions worldwide is still smaller than that of men though the gender composition in the population is approximately equal (Geiger & Kent, 2017). In patriarchal societies like Tanzania, women are viewed as inferior persons and so they are discriminated in accessing various opportunities, regardless of their experiences and qualifications (Bhalalusesa & Mboya, 2003; Mbepera 2015). Cultural practices, patriarchal socialisation and religious beliefs promote oppression and marginalisation to women by both society and organisations in most parts of the world (Bhalalusesa & Mboya, 2003). However, the levels of oppression and marginalisation vary from country to country (Fagenson, 1990a). Generally, women were made invisible and under-represented in decision-making. Due to this, the Universal Declaration of Human Rights in 1948 was signed for each United Nations' member state to protect individual's equal rights before the law and equal rights to access services (United Nations, 1948). Indeed, Tanzania is a signatory to these declarations. More importantly, the constitution of the United Republic of Tanzania (URT) protects the equality and rights of every person as well (Ministry of Community Development, Women Affairs and Children, 1992). Tanzania has policies and Acts geared at promoting gender equality in leadership. These include the Women Gender Policy of 2002, the Public Service Commission (on all-sector gender equality), and the National Employment Promotion Service Act of 1999. Tanzania also has adopted the Convention on the Elimination of all Forms of Discrimination Against Women (Muro, 2003), and the Beijing Platform for Action 1995 (United Nations, 1995) whose objective is to increase women's participation in decision-making by 30% (Muro, 2003). The government's plan was to have a ratio of 50:50 of men and women parliamentary representation by 2010 that is also in line with the African Union's declaration (Lucas, 2017). However, the plan has not yet been achieved. Despite these declarations, affirmative actions, and global conferences, statistics show that women are still under-represented in key decision-making positions and platforms in many sectors, including leadership in education sector in Tanzania.

Research problem

Tanzania is one of the developing countries in Sub-Saharan Africa with a population of approximately 45 million, of whom 51.3% are women (Ministry of Finance, National Bureau of Statistics, 2013). The country is dominated by a patriarchal system with culture and values varying from one tribe to another. There is indirect and direct discrimination against girls and women seeking access to education and leadership mainly caused by the social, cultural, and structural set-up of society (Bhalalusesa, 2003). This form of discrimination has created a situation where even a few women who are in power still face many challenges that make them refrain from climbing the ladder of leadership confidently. In the education sector in Tanzania, women are still under-represented in school leadership positions. Although studies are scant on women representation in Community Secondary Schools (CSSs) leadership positions, the Ministry of Education and Vocational Training (MoEVT) statistics of 2007 shows a widened gap between men and women in leadership

in Tanzania at national and regional levels. For example, women heads of schools nationally in 2006 comprised 12.7% while men comprised 87.3% (Bandiho, 2009). Furthermore, data from the Tanzanian mainland show that in 2013 about 18.7% of secondary school heads were women (Agency for the Development of Educational Management [ADEM], 2013). In primary schools, women constituted 48.8% of all teachers; nonetheless, only 18% were in school leadership positions in 2010 (Hungi, 2010).

At the regional level, even in areas where the majority of women had more qualifications than men, yet women were still under-represented in leadership. For example, the Iringa Region in 2010 had 59.3% men and 40.7% women teachers (United Republic of Tanzania, Research and Analysis Working Group, 2012). Despite higher education being a prerequisite for leadership in secondary schools in Tanzania, evidence shows that the region had more women teachers with a bachelor's degree (60.4%) than men (39.6%) (District Educational Office, 2011). Male teachers still appear to dominate school leadership positions in those localities where data is available (Omboko & Oyoo, 2011). For example, of the 25 schools in rural Iringa district 16 (64%) were led by men, while only nine (36%) were led by women in 2010 (District Educational Office, 2011). Similarly, in Kagera Region in 2013 only 9.4% of women were heads of schools, while in Manyara region 12% were women, and in Mtwara 15% were women. Surprisingly, in the same year in urban regions like Dar es Salaam women leaders in community secondary schools were 48.7% and men were 51.3% (ADEM, 2013). This is possibly caused by the status of Dar es Salaam as being a major business capital city in Tanzania, where many women for family matters seek for transfer from elsewhere to follow their husbands who might be working in the city. Oluoch (2006) observed that the government has fallen short of taking direct action to increase the number of women leaders in CSSs introduced in each ward in Tanzania.

The Community Secondary Schools (CSSs), established in 2002, comprise 95 percent of all public secondary schools in Tanzania (Ministry of Education and Vocational Training, 2010a). The government is the main provider of education to its people at community level particularly in rural and in the underprivileged areas as private schools has continued increasing in town and semi-urban parts (Machumu, 2011). Therefore, the community secondary schools aimed to improve and increase students' enrolment and academic achievement of the children especially in remote areas, and also improve enrolment to marginalised people at a low cost (Machumu, 2011). Most of these schools are located in remote rural areas (where about 80% of the population live) with poor social services and where teaching, learning, and management roles are conducted in a difficult environment when compared with urban areas. Furthermore, CSSs in rural Tanzania are characterised by high numbers of students, congestion in the classrooms, lack of qualified teachers, electricity, laboratory, teachers' houses and offices, clean and safe water, lack of hostels, and poor transport and internet services (Ministry of Education and Vocational Training, 2010b). Most of these schools are isolated from villagers causing teachers and students to walk long distances to and from schools. The teachers available in secondary schools are unequally distributed; however, shortage in remote rural schools is high (Ministry of Education and Vocational Training, 2010b). Gender disparities vary between rural and urban schools as rural schools have more male teachers than urban schools (Ministry of Education and Vocational Training, 2010b). Because of culture and lack of awareness about gender inequalities, there are gender biases, ignorance, and gender stereotypes against women leaders in rural areas, unlike urban areas where affirmative actions have been taken and the majority of people are educated (Bhalalusesa & Mboya, 2003; Mbepera, 2015).

Women teachers and leaders are more under-represented in CSSs because of the rural environment and culture which shape the rural societies and organisation (Mulkeen, 2006). Mulkeen's (2006) study in five countries in Africa (Mozambique, Lesotho, Malawi, Uganda, and Tanzania) found that poor working conditions were one of the reasons why there are few women teachers and leaders in rural schools. The relevant literature on factors for women's under-representation in educational leadership in rural Tanzanian schools is limited, as the few studies available at present do not adequately address the problem in question. For instance, Bhalalusesa and Mboya's (2003) study based on the merits of women and male participation in educational management in secondary schools observed that both women and men who already were in senior managerial positions displayed high levels of motivation and commitment to their jobs, and worked extremely long hours. Omboko and Oyoo (2011) whose study was based on being a female head teacher in the Tanzanian experience concluded that being a woman head influenced their personal and professional lives. Moreover, Bandiho (2009) studied the status of women with the potential for educational leadership in secondary schools and universities, and concluded that women were under-represented in educational leadership. In brief, there is a gap in the knowledge of organisational factors influencing women's under-representation in senior leadership positions in CSSs in rural Tanzania. Thus, the current study had a socio-academic connection to narrow the knowledge gap and advance the frontiers of knowledge concerning gender and gender balance outcomes in Tanzania.

Objective of the study and research questions

The objective of the study was to identify the organisational factors influencing women's under-representation in leadership in Community Secondary Schools (CSSs) in rural Tanzania. Specifically the study answered the following questions:

1. How do the procedures for appointing heads of schools contribute to women's under-representation in senior leadership positions in CSSs?

2. How do leadership styles used by women hinder potential women teachers to participate in leadership in CSSs?

3. Do the potential women teachers receive support, encouragement, and inspiration from top leadership in climbing in leadership positions in CSSs?

Significance of the study

The results of the current study are expected to inform policy-makers on viable strategies for achieving gender-balanced leadership in CCSs in Tanzania. Through the findings obtained from this study, policies that guide procedures for recommending and appointing heads of schools may be reviewed. The findings may also be used by Ministry of Education and Vocational Training and the government to introduce gender-specific policy and programmes on leadership in secondary schools. The study will also help

women teachers to know why there are so few of them in senior leadership positions. This would enable them to demand for their rights, thus, to help women heads of schools to support and encourage other fellow women teachers. This study is also expected to contribute knowledge to the existing literature on women's under-representation in school senior leadership positions. This will add value to the growth of the body of knowledge on women in educational leadership in Africa and other developing regions.

Portraits from the literature

This section presents empirical studies based on gender biases involved in appointing and promoting teachers to leadership positions, policy challenges regarding the process of appointing heads of secondary schools, and the lack of support and encouragement women would get from top leadership.

Gender bias in appointments and promotion

Studies report that women are under-represented in educational leadership because of sex discrimination in recruitment and promotion (Onsongo, 2004). In Uganda, men dominate top leadership and they discourage women from seeking leadership positions, as they prefer to promote fellow men (Kagoda & Sperandio, 2009). Organisational obstacles to women aspiring to leadership positions have their roots in the fact that most organisations have been created by and for men based on male experiences of leadership (Amondi, 2011). Many organisations still define the competence of a leader in terms of traits that are associated with men such as strength and firmness (Bhalalusesa & Mboya, 2003). Mulkeen, Chapman, DeJaeghere, and Leu (2007) found that there is favouritism based on gender in the appointment of heads of schools at both district and regional levels. Similarly, Gaus (2011) and Onsongo (2004) added that women's under-representation in leadership positions is due to recruitment procedures dictated by corruption, ethnicity, nepotism, and discrimination. In this way, the appointing committees sometime ignore formal rules and make their own informal rules and regulations that are in favour of men (Coleman, 2009). In Tanzania, for instance, the *Public Leadership Code of Ethics* No. 13 Section (d) of 1995 states, "in relation to private interests, public leaders shall not have private interests other than those permitted by the code of conduct that would be affected particularly or significantly by government actions in which they participate" (Ministry of Community Development, Women Affairs and Children, 1995b, p. 4). This means that the selection of staff appointment into leadership positions should be based on their set career development merits and qualifications, not on personal favouritism, interests, and perceptions.

Policy obstacles

Policy is one of the concerns for gender disparities within education systems and leadership (Bhalalusesa & Mboya, 2003). Morley (2006) argues that education policies do not adequately address gender concerns for a balance of women's involvement in leadership

positions. Organisational barriers to women aspiring to senior leadership positions take the form of rules, laws, and practice (Morley, 2006; Onsongo, 2004). Informal rules and regulations give men a better chance to excel than their female counterparts (Amondi, 2011). Kagoda and Sperandio (2009) maintain that organisational factors for a few women in leadership include, among others, discriminatory appointment and promotion practices, and the absence of policies and legislation to ensure the participation of women. This, thus, calls for a serious change to eradicate gender-based discrimination associated with institutional policies and practices. Kamau (2001) revealed that female teachers are under-represented in leadership positions because of the lack of policy and practices that would help to encourage women to aspire for leadership positions. In Tanzania, it is observed that the educational policy of 1995 as reviewed in 2014 also lacks a policy agenda on gender equality in the promotion of women teachers to headship positions in secondary schools (Ministry of Education and Culture, 1995; Ministry of Education and Vocational Training, 2014). The lack of such a policy statement in the Tanzanian education system puts women at a disadvantage for not being able to realise their potential in aspiring to leadership positions in schools because of the perceived patriarchal system.

Lack of support, encouragement, and role-models

Women are under-represented in school leadership positions because they lack support from the family, society, and institutions (Bhalalusesa & Mboya, 2003; Chabaya, Rembe, & Wadesango, 2009). Institutional systems are blamed for denying support to women seeking leadership positions as men tend to undermine women (Bhalalusesa & Mboya, 2003; Mbepera, 2015). It is also reported by Peters (2012) that women leaders lack support from top leadership authority in terms of mentoring, human resources, pecuniary resources and time for implementation. This has left most women in leadership feeling inadequate, unconfident, and most likely frustrated.

Along these lines, Akuamoah-Boateng et al. (2003) also found that not only do female teachers lack support and encouragement from men but also from other female colleagues. The study further reported that women leaders discouraged other women teachers who aspire to become leaders. It appears that women leaders neither support their fellow hardworking women nor like to see their friends flourishing. A similar situation is reported that female leaders would set much higher standards for women subordinates (Akuamoah-Boateng et al., 2003). Women are less supported by women leaders because women in leadership positions fear the career development of their fellow women teachers that will be more successful in their career than them (Luke, 2001). Cubillo and Brown (2003) and Onsongo (2004) state that, due to patriarchy, culture, and religion, females were less encouraged to become involved in leadership. In the same vein, Bhalalusesa and Mboya (2003) observed that women teachers and students both lacked role-models and mentors who could serve as positive role-models for women students to develop their interests and aspirations for leadership positions. For instance, the study by the Ministry of Education and Vocational Training (2012) found that in some districts in Tanzania like Meatu only 28% of teachers were women. About 40% of the 110 surveyed schools in Meatu had no women teachers. This practice has most likely affected women's future careers and professional development.

Theoretical perspective

The perspective that guides the study is organisation structure. This perspective argues that among the factors that shape the behaviour of women at the workplace is the organisational structure (Fagenson, 1990b; Kanter, 1977). In Africa and Tanzania in particular, organisational culture, stereotypes, rules, laws, policies, and ideology hinder women from becoming senior leaders (Morley, 2006). Empirical studies in Africa revealed that men are more favoured in appointments to school leadership (Mbepera, 2015; Mulkeen et al., 2007). Gaus (2011) and Onsongo (2004) added that a few women in leadership positions are contributed by recruitment procedures that favour corruption, favouritism, and discrimination. Organisational culture shapes the behaviour of women and many opportunities are given to men (Fagenson, 1990a). Oakley (2000) points out that these organisations contribute to the under-representation of women in leadership positions due to, among other things, unfairness in recruitment, promotion, and retention.

Women are discriminated at the organisational level based on the work being categorised into disadvantageous and advantageous job positions (Kanter, 1977). The advantageous positions offer power and opportunities and men mostly occupy such positions (Kanter, 1977). Similarly, the majority of men are in top positions. Hence, they support each other in climbing the leadership ladder (Kagoda & Sperandio, 2009). On the contrary, the disadvantageous job positions offer little power and opportunities and are mostly occupied by women (Amondi, 2011; Kanter, 1977). As a result, this negatively affects women's representation in assuming positions in leadership. The dissimilar behaviours and attitudes of men and women are a result of different chances and authority structures in institutions. It is observed that the prevailing gender stereotypes in the environment in which the organisations in question are located are what make organisations act according to these stereotypes (Kanter, 1977).

Research methodology

This study employed qualitative methods to gather in-depth information. Case study design was used in order to construct in-depth knowledge and meaning concerning organisational factors influencing women's underrepresentation in leadership. Different participants construct meaning in different ways from the same phenomenon (Crotty, 1998). An embedded single case study design was used to explore the organisational factors of female under-representation in leadership positions in CSSs in one rural district (Yin, 2003). The sub-units of schools, teachers, heads of schools, parents, members of school boards, the District Education Officer (DEO), and Regional Educational Officer (REO) are embedded within the case study. This type of design was used because it enables a "number of sub-units each of which is explored individually to be drawn together to yield an overall picture" (Rowley, 2002, p. 22). Cross-case analysis was used where sub-unit data was collected and compared to draw overall conclusions (Rowley, 2002).

The study was conducted in 20 CCSs in Kondoa district in Tanzania. It involved 182 respondents: 20 heads (13 men and seven women as there were only those seven women heads in the district), a male REO, a male DEO, and 160 out of 454 teachers (68 women and 92 men). By virtue of their positions and roles in education, the DEO, heads of schools,

and the REO were purposely selected. They were believed to hold pertinent information concerning the problem under investigation. Also, some of these participants were involved in recommending and appointing teachers into leadership roles by virtue of their positions. In addition, women heads of schools were selected and interviewed because of their experiences regarding the challenges and obstacles they face in leadership positions. In fact, both women and male heads of schools recommended teachers to the DEO's office for appointment to leadership positions.

Trustworthiness

In this study, trustworthiness of data was attended by describing accurately the experience of the respondents of the organisational factors of women's under-representation in leadership (Krefting, 1991). Indeed, to achieve trustworthiness of the findings, case study design was used to discover humans' experiences and behaviours in their context (Krefting, 1991). That is, in a case study the trustworthiness of the information obtained is confirmed when different categories of participants from different schools either agreed or disagreed on the issues under discussion (Cohen, Manion, & Morrison, 2007). The findings aimed at broadening understanding of the organisational factors contributing to women's under-representation in senior school leadership positions using a case, rather than to generalising. However, the findings may be transferred to contexts with similar characteristics.

Methods of data collection

Since the case study design has a capacity to accommodate multiple instruments of data collection to get in-depth information (Yin, 2003), interviews and focus group discussions (FGDs) targeting participants' experiences, beliefs, feelings, and behaviour of the women in leadership positions in CSSs were employed (Holloway & Wheeler, 2002). FDGs were used because of its ability to obtain the collective views of respondents and the meanings they give (Gill, Stewart, Treasure, & Chadwick, 2008). Teachers were not grouped based on sex because there were only a few female teachers in some schools selected. Thus, more women were involved in the discussions. The questions asked during discussions were: What are your comments on the appointment process to school leadership? Do you have any suggestions for improving the appointment process? How are heads of schools selected? What criteria are used to select heads of schools? To what extent do heads of schools support and help female teachers to achieve leadership goals? Why are fewer women leaders in secondary schools than men? How do women leaders lead schools? Are you satisfied with women leadership?

Data analysis

The procedure for data analysis articulated by Creswell (2009) was adopted as follows. The first step was organising and preparing the field data. This stage involved transcribing the data, typing field notes, and sorting and arranging the data according to the source of information (Creswell, 2009). The second step was reading through the transcribed data

iteratively to get general information on what the participants said and reflect on overall meaning. The third stage of detailed analysis with coding process was employed. The fourth stage was using the codes to produce a description and the themes for analysis. The fifth stage was about the way description and themes would be presented in the qualitative narrative. Creswell (2009) reports that the best way to present qualitative data is to use the narrative passage to convey the findings drawn from the analysis. At this stage I used narrative text to convey the findings of the analysis, which were the evidence supporting the main description. This was done by analysing and presenting themes that were derived from multiple perspectives (including voices) of the participants.

Research findings

The study findings were presented based on three research questions: How do the procedures for appointing heads of schools contribute to women's under-representation in senior leadership positions in CSSs? How do leadership styles used by women hinder potential women teachers to participate in leadership in CSSs? Do the potential women teachers receive support, encouragement, and inspiration from top leadership in climbing into leadership positions in CSSs? The findings for these questions are presented in the following section.

The procedures for appointing heads of schools

The issues that emerged included gender bias in recommending and appointing heads of schools, sexual harassment, and gender inequality policy in education.

Gender bias in recommending and appointing teachers to leadership

Interviews with heads of schools and Regional Educational Officer (REO) revealed that inappropriate procedures used to recommend and appoint heads of schools were among the causes of women's under-representation in school leadership in rural CSSs in Tanzania. The procedures for appointing heads of schools were reported by heads of schools and REO to comprise three stages. The first stage was for heads of schools to recommend qualified candidates and forward the names to the District Education Officer (DEO); the second stage was for the DEO to select the most qualified teachers and forward the names to the REO office; the third stage was for the appointment committee at the regional level under REO to appoint the most qualified heads of schools. The posts were not advertised; there was no search team and no interviews to obtain the most qualified candidates. The REO added that the committee at the regional level was occupied by only males. The process of appointment appeared to be biased, lacked transparency, and was continuously blamed by staff as being discriminatory. One female head reported:

> There is no fairness in the procedures for recommending and appointing heads of schools. From school level, heads of schools for their own reasons discriminate against women teachers. (Woman head of school-M)

Teachers in the focus group discussions expressed that the procedures for appointment encourage discrimination. In addition, the heads of schools reported that procedures were sometimes not followed, as it bypassed the District Education Officer (DEO), and they were ordered to allow their teachers to lead certain schools without their recommendation. The need for advertisement of the school leadership posts and for applicants to attend for interviews would bring about a sense of fairness as suggested by teachers. Teachers reported further that the procedures were based on ethnicity, favouritism, nepotism, sex, and religion, rather than qualifications. For example, a male teacher commented on this when he said:

> Tribalism and favouritism pose a big challenge to the appointment of heads of schools. Even if I were on the panel, I would appoint a person I know, preferably from my tribe, religion, or sex; you cannot avoid doing that. (Male teacher from school-D)

The Regional Educational Officer (REO) further noted that his office normally received mostly names of male teachers who were recommended for school leadership positions from the DEO offices. The findings with the DEO on the matter show that normally DEOs recommended more male names for appointment to hold school leadership positions because the office received a few female names from heads of schools. The respondents further reported that those who recommend and appoint heads of schools had a negative attitude towards women's ability in leadership. They attributed such bias and discriminatory practices to the African culture, which in their view considered women to be weak and unfit for leadership. They reported that the culture and the Islamic religion, which is dominant in the study district, believed that women ought not to stand in front of men to air out their views. That would be taken as a form of being disrespectful before men.

Sexual harassment when recommending teachers to leadership

Both REO and teachers reported that sexual harassment were among the reasons that contributed to a few women to get into senior leadership positions in CSSs. Teachers revealed that the involvement of women teachers in sexual relationships with male heads of schools was a precondition for women interested in leadership to be recommended and finally appointed into various leadership positions. However, the study findings revealed that some women teachers who denied offering sexual advances to a male boss were less likely to be recommended, despite possessing the required qualifications and merits. One female teacher confirmed:

> My colleague teacher complained that a man head of school demanded sex with her as a condition for recommending her for school leadership, promising that he would talk to DEO to favour her. However, she refused the offer. (Woman teacher from school-F)

Many women heads of schools confirmed to have experienced sexual harassment throughout their career. One woman head of school gave her own experience as she said that:

> One of my former bosses promised to finance my higher studies and promotion. The condition for the offer was, however, to have a sexual relationship with him. Conversely, I refused the offer because I knew that I had all the qualifications required. . . and as the result of that he started hating me so much. (Woman head of school-E)

Teachers added that victims of sexual harassment were not reporting such incidents to the higher authority for action due to the patriarchal system and cultural taboos that banned girls and women victims of sexual harassment not to report such incidents even to their parents or seniors; thus, most of these forms of incidents were left unattended to protect their boss's reputations.

Gender policy and women's under-representation in leadership

The study findings revealed that the educational policy of 1995 reviewed in 2014 and its implementers, the Secondary Education Development Plan (SEDP) I & II are among the reasons for women's under-representation in school leadership positions in CSSs. The participants reported that the policy does not stipulate an advocacy for equal representation between men and women leaders in secondary schools. For instance, the Regional Educational Officer (REO) commented that:

> We don't have a policy which guides us to appoint or select heads of schools based on gender. The policy indicates only individuals who will be involved in appointing and selecting heads of schools and the qualifications required. . . although the government has good gender policies especially in parliament. (REO)

Thus, this finding justifies that no gender-based directive to guide secondary school leaders' appointment was stipulated in the educational policy of 2014 that was being implemented. The absence of a gender equality policy was noted by the heads of schools to have contributed to the presence of a few women leaders in secondary school leadership positions.

Women heads of schools leadership styles

The study findings indicated that women heads of schools more often used the autocratic leadership style because they lack confidence. As a result, this discouraged women teachers to be involved in leadership. Teachers expressed that they were ordered to perform different functions in school without agreements. A woman teacher reported:

> . . . to be honest, women leaders use force. They do not involve teachers and parents in different aspects; they only want to accomplish their goal. (Woman teacher from school-G)

Another woman teacher remarked that:

> Most women heads lack confidence. They use force in exercising their authority . . .

(Woman teacher from school-D)

Teachers reported that they were less involved in decision-making and sometimes women heads ignored other teachers' advice. This frustrated and discouraged other teachers from getting involved in leadership. For example, a male teacher said:

> When teachers want a certain piece of advice or clarification from our head, she accuses them of being after her post. . . she also doesn't involve staff and parents in decision-making; she does not like to be questioned or does she receive criticism when things go wrong. . . and, in most cases our head mistreats those questioning her very badly. (Man teacher from school-B)

Women heads of schools interviewed denied the use of autocratic leadership style. The majority of them reported to use various types of leadership styles, including participatory leadership style. They reported that they encourage their subordinates to take part in decision-making and the communication on key issues was made through meetings, letters, notice boards, and memos.

Lack of encouragement and support

The majority of women heads of schools reported not to get support and encouragement to be involved in leadership, and had seen women being humiliated by their fellow women leaders. A woman head of school in one of the schools studied commented:

> I have seen many women leaders humiliating their fellow women teachers. They accuse them of being disrespectful and unsupportive. So, their only means of controlling them was to humiliate them and undermine their confidence. . . women gossip too much, and always perceive women colleagues as their enemy. (Woman head of school-E)

Teachers reported that women teachers had no support and encouragement from women heads to be involved in leadership. This was because, even for the heads, school leadership was perceived as something too demanding, tedious, and time consuming. It was also said that leadership interferes with other social obligations. One woman teacher reported:

> Our woman head of school discourages us from aspiring for leadership positions as she says that there is no office for us to be leaders, and leadership is a frustrating post for women. (Woman teacher from school-D)

Teachers further added that women leaders were jealous of fellow women teachers who appeared smarter than them. Such women leaders were reported to hate those women teachers and would not support them to take any opportunities, if available. Women heads were reported to be unfriendly to women teachers and denied them opportunities to attain equal status.

Lack of role-models and mentors for women teachers

The lack of role models for women teachers and students to get involved into leadership was also observed to be among the organisational factors for women's under-representation in school leadership. Participants reported that there were a few or no role-model leaders and mentors for women teachers from whom to learn leadership skills as some CSSs in the study district had only one or no women teachers or heads. The respondents reported that there were more women teachers in urban schools than in rural schools, uneven distribution that affected women students more in rural schools. Because of the poor working environment with poor social services (lack of electricity, roads, water, hospitals, lack of teacher offices, houses, and network) in rural areas, the participants reiterated that some women teachers would beg to be posted or transferred to urban schools. This was supported by the District Education Officer (DEO) who reported that:

> A woman teacher from one school was crying in my office for a week begging to be posted to an urban school. (DEO)

It was also reported that the majority of women heads of schools who assumed leadership positions had no role-models and mentors and that they developed confidence into aspiring for leadership through their own efforts and determination. Only one women head of school was reported having been mentored by her father who also was a retired head of school.

Discussion

Gender bias in recommending and appointing heads of schools

Among the organisational factors reported in the current study were gender stereotypes and bias in recommending women for promotion, as women were perceived to be unfit especially in school leadership. School leadership is often correlated with and defined in terms of masculine traits and behaviours (Gaus, 2011; Onsongo, 2004). In male-dominated cultures like Tanzania, women are always inferior because the top privileged posts are occupied by men. Women are under-represented in leadership because of biases in promotion committees dominated by men (Lorber, 2001). For example, in this study, all members of the appointments committee at the regional level were men, and the majority of heads of schools in the district were men (47 out of 54); and these were ones who recommended teachers for leadership positions. Thus, this kind of committee with such composition is likely to be gender discriminatory because those who appoint heads are raised and used in patriarchal cultures. The stereotype concerning the role of men and women as well as cultural values in Tanzanian society could affect institutional practices due to discrimination and favouritism involved during the recommendation and appointment process. The findings revealed that individuals who recommend and appoint heads of schools had a negative perception towards women's ability in leadership, as they feel that women are weak and should just be mere listeners. This is reported as one of the discriminatory practices in Tanzanian cultures (Bhalalusesa & Mboya, 2003). There are

hidden values and beliefs that do not promote women in leadership. In the present study, heads of schools, the Regional Educational Officer (REO) and District Education Officer (DEO) were reported to make their recommendations and appointments based on hidden forms of gender discrimination (societal values, norms, beliefs, attitudes, and stereotypes), which emanate from the society, thus, negatively affecting women's esteem and determination for leadership. Due to the patriarchal system that is a result of culture and religion in the country, the education sector, government, and society still practise discrimination against women (Bhalalusesa & Mboya, 2003).

The practice as shown in the current study promotes teachers into leadership based on *ethnicity, nepotism, sex, and religion,* rather than on academic qualifications, and this seems to have negatively affected women's representation in senior leadership positions (Gaus, 2011). This, thus, confirms the interplay that exists between the cultural values and traditional stereotypes in undervaluing women. In this way, the chances of women becoming leaders in senior positions are continually inhibited, as men who normally dominate appointing committees favour and support themselves (Kagoda & Sperandio, 2009).

Sexual harassment was also reported as among the reasons leading to a fewer women in senior leadership positions in CSSs. In this study, the involvement of women teachers in sexual relationships with male heads of schools was reported as a precondition in recommending women teachers interested in leadership positions. Women teachers who opposed to enter such relationships were not recommended and were denied leadership positions, despite qualifications and merit. Blasé and Blasé (2002) noted that there is a physical or verbal sexual mistreatment of school heads by the staff, which may sometimes put employees off from aspiring for leadership. Mlama (2005) argues that sexual harassment is one of the factors in gender bias and inequality in the education sector. However, sexual harassment is against the Tanzanian law, section 6 of the Code of Ethics and Conduct for Public Service Regulations, which reads, "A Public Servant shall refrain from having sexual relationships at the workplace, likewise he/she will avoid all types of conduct that may constitute sexual harassment that include pressure for sexual activity or sexual favours with a fellow employee" (Ministry of Education and Culture, 1998, p. 5). Despite this law, some of those who are in power in Tanzania still practise sexual harassment. Due to the patriarchal system and culture victims of sexual harassment may not report it hence no action is taken against the offenders.

Lack of specific gender-based appointments policy

The lack of a specific gender-based appointments policy also was found to be among the causes of women's under-representation in senior leadership positions in CSSs. The findings of the present study show that education policies (Ministry of Education and Culture, 1995) in Tanzania are silent on gender equality and the policy implementers as well. The lack of initiative to promote women in school leadership may have contributed to the level of women's under-representation in senior leadership positions in the Tanzanian CSSs. Indeed, the lack of a clear policy to guide women's appointment may have propagated the stereotypical attitude against women. The findings confirm what the literature claims, that women are under-represented in leadership positions due to the lack of policies and legislation that would ensure the participation of women in leadership (Morley, 2006). Similarly, the findings extend the organisational perspective that

organisational rules, laws, policies, and ideology hinder women from rising to senior leadership positions (Fagenson, 1990a). Since the society is dominated by patriarchal and cultural beliefs concerning the image of a leader, the lack of a women-friendly policy on educational leadership in Tanzania will only support, women to continue to be under-represented in top leadership positions, unless the educational policy of 1995 and 2014 are reviewed to accommodate gender aspect in the policy.

Leadership styles used by women heads

The autocratic leadership style used by women heads of CSSs was also noted to be one of the hindrances to women aspiring to participate in leadership. This type of decision-making lacked inclusiveness and participation (Everard, Morris, & Wilson, 2004). While the findings of the present study were consistent with those of Kariuki (2004), Arar and Abu-Rabia-Queder (2011) and Oplatka and Tamir (2009), they differ from those of other researchers such as (Coleman, 2005; Eagly, Makhijani, & Klonsky, 1992; Korchek & Reese, 2002). In other studies, it is reported that the autocratic leadership style is simply a transitory stage in women leadership (Arar & Abu-Rabia-Queder, 2011), as they would start using the directive style in the early stages of their leadership and would later change to the participatory style. The current study makes no comment on this evidence, because it needs a complete cycle of women leadership to reach a conclusion. The differences in findings may be because of cultural variations especially where the study was conducted. The autocratic style used by women leaders in Tanzania could be a result of the prevailing culture, which is dominated by the patriarchal system that causes women to use the predominant leadership style employed by the majority of men in society. In the context of Tanzania, women heads of schools use the autocratic leadership style as a defence mechanism. This may be because they lack confidence and they feel they are not accepted by their subordinates and members of the school community. The use of the autocratic leadership style is an indication of the absence of mutual respect and understanding between heads of schools and the rest of the staff members that could be improved through participatory decision-making and teamwork. The author is of the view that, if women were given support and used the participatory approach in their leadership, the situation could make their work fairly smooth and so reducing the burden of official responsibilities. That is to say, sometimes the work that needs to be done by women leaders themselves could be equally done by other subordinates through power delegation. This eventually would encourage women teachers to be involved in leadership in CSSs. However, the women heads revealed that they would not consider using the autocratic leadership style, but that the choice of leadership style is based on the context and prevailing situation, which is similar to Smith's (2011) findings. Depending on the circumstances, heads of schools should make decisions, as some issues might be urgent or delicate and cannot wait for everybody to come on board. There is no right style of leadership, as the choice of style depends on what would be the best at the present moment.

Lack of encouragement and support from the top leadership

The lack of administrative support and encouragement for women teachers in developing interests and leadership was also found to be one of the causes of women's under-

representation in senior leadership. While other studies in the United Kingdom found that women heads of schools tended to encourage staff development through individual consultations (Coleman, 2000), the findings of the current study and those of Luke (2001) in Hong Kong seem to be different as they indicate that women do not support other women or take the time to help them. This probably is because of a lack of awareness of gender equality and gender stereotype, which may have negative implications in terms of supporting women in leadership. Also, this may suggest differences in the level of the patriarchal system of the countries where studies were conducted. On the other hand, Luke (2001) explains that a few women in the school headship posts are threatened by the progress of young women in the same career. As such, they fail to encourage and help these women to becoming successful in their career. This implies that women heads prevent fellow women from working towards obtaining leadership positions, thereby reducing competition, commonly referred to as the *queen-bee syndrome* (Luke, 2001). Due to the *queen-bee syndrome* the present study observed that women leaders were deeply jealous, dislike their fellow women teachers, and they were not supportive to women teachers as they would not want to see them attaining equal status. This finding was supported by Johnson and Mathur-Helm (2013) who reported that woman leaders are harder on women colleagues, unapproachable and give no time to assist fellow women to be leaders. They further reported that they are worried to be outperformed by fellow women teachers who may come through the same post.

It was also reported in this study that such women heads would discourage fellow women from aspiring to become leaders by arguing that leadership was not a friendly role for women due to many tasks that would deprive them of time to spend with their families. According to Riches (1988, p. 43), this is a "discrimination model whereby one group excludes the other." It is believed that, in order to maintain their positions, some women leaders would gate-keep to prevent other women from ascending the leadership ladder and make themselves seen, admired and recognized as the only leaders (Luke, 2001). This lack of support is also associated with lack of informal and formal social networks, which result in a lack of recognition of professional advancement. Women are given low positions at work and lack support that would enable them to climb the leadership ladder, while men are favoured and supported (Kanter, 1977). Noticeably, this situation encourages the under-representation of women in leadership positions. Thus, the present study evidently asserts that women teachers are already at a disadvantage in terms of becoming school heads due to the prevailing cultural practices and beliefs that lead most women teachers to developing no aspirations in leadership. In this manner, the lack of support, therefore, would continue to keep many women teachers out of the leadership system. Indeed, one would expect schools to encourage women to be involved in leadership, but the lack of such support and encouragement continues to stand as an obstacle for women to participate in CSSs leadership.

Lack of role models and mentors

The finding that women lack role models and mentors to encourage them to climb the leadership ladder has been reported previously (Coleman, 2002; Luke, 2001). Role models and mentors would direct and guide women teachers and children towards acquiring leadership positions in rural community schools. They would help teachers to develop confidence and self-esteem and aspire to become senior leaders. In the context of the present study, where some CSSs in rural areas had neither a women leader nor women teachers, it would appear difficult for women students to have either mentors or role-models. The evidence reported in the present study is consistent with other researchers, who found that women lack a leader of their sex to imitate (Luke, 2001). Based on the findings of the current study, the lack of role models and mentors in rural schools in Tanzania is contributed to by the poor working environment with poor social services, which cause women to decline posts offered.

Therefore, it arguably would mean that if the environment of rural CSSs were attractive or rather conducive enough to motivate more women to take posts both women teachers and students would receive role model leaders and mentors of their sex for whom they would learn leadership skills. According to Hedges (2002), women teachers avoid rural posts for a number of reasons, one of them being the reduced chances of getting married in rural areas. Bennell and Akyeampong (2007) done their study in Sub-Sahara Africa and South Asia noted that married women teachers live with their husbands, who mostly work in towns, and so there are few women teachers in rural schools, which, in turn, would mean that women students lack role-models. This situation presents a challenge to taking serious consideration when council leaders place teachers in schools. There is a need to balance the needs of teachers for both urban and rural schools.

Implication

The findings of this study have revealed that Tanzanian women are underrepresented in leadership because of several organisational factors such as the lack of transparency in the procedures for appointments to leadership posts. It has also revealed the lack of policy on gender equality in educational leadership that would guide the appointment committees. Due to the patriarchal system in Tanzania women leaders use autocratic leadership styles so as can be viewed like male leaders which discourages potential women teachers to be involved in leadership. Few women who have broken the glass ceiling in leadership in Tanzania support, motivate and promote the career development of other women. The organisational factors observed in this study seem to have their roots from the patriarchal system in which people responsible for recommending and appointing leaders in the organisations are moulded. In order to understand women's under-representation in school leadership in rural area, it is vital to understand societal factors and design sensitization mechanisms to patriarchy concerning the importance of gender equality as an initiative that would lead to increase the number of women in leadership positions.

Despite the achievement of the objective of this study, the study had the following limitations. First, the findings of any study can be influenced by personal thoughts and views of the investigator, which could lead to bias. The fact that the researcher is a woman

professional in the field of educational leadership, familiar with the context of the study and knowledgeable and aware of the issues of women in leadership meant that her personal beliefs and feelings possibly were included rather than letting the data speak for itself. However, efforts were taken to represent voices from the ground as a researcher's experiences and knowledge were put aside during data collection and analysis on the assuming that she was new to the subject matter by not interfering the interviewees' speech and this allowed the participants to express their feelings and views. The second limitation was that there was a gender imbalance between the heads of schools and teacher participants in the study district initially planned and this compelled the researcher to conduct the research in two different districts in order to get a fairly reasonable number of female heads of schools and teachers. However, the limited time and financial resources meant that the researcher had to conduct research in one district only. Consequently, fewer female heads (seven) and teachers (68) were involved. This limitation was minimised by involving females in the discussion through focused groups.

Recommendations

Policy recommendation

The Ministry of Education and Vocational Training should review the educational policy of 2014 which is silent on gender equality in appointing leaders in CSSs (Ministry of Education and Vocational Training, 2014). A gender equality policy statement should be developed that would promote the appointment of women teachers into leadership positions with qualifications to achieve gender equality in CSSs. The government should introduce a law that if the head of a school is a male the deputy should be a female and vice versa, provided that such staff have the qualifications and experience required. Furthermore, leadership positions should be advertised for the qualified and interested candidates to apply and interviews should be conducted to obtain the most qualified school leaders. In addition the government should establish a sexual harassment policy which will discipline leaders who misuse their power. Despite having a code of conduct for public servants (Ministry of Education and Culture, 1998) male heads of schools still abuse their offices by sexually harassing female staff.

Recommendation for practice

The government should seek to improve social services in rural schools, such as providing clean water, housing, transport, and electricity. The improvement of infrastructure should also go hand-in-hand with improved teaching and learning resources. These improvements are likely to retain female teachers in CSSs and encourage them to aspire for leadership positions in rural areas. In addition women in leadership should support other women by acting as role models and should pave the way for other women to be involved in leadership.

Recommendations for further research

A study could employ in-depth interviews and group discussion with more female heads of schools and female teachers. Related research could also be done in urban secondary schools to compare the findings with those from rural secondary schools. The study also should be done based on societal and personal factors for women's under-representation in leadership in CSSs. Further study needs to be undertaken by including gender intersectionality theories and other feminist theories that potentially could provide a broader picture of the prevailing cultural differences.

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A study of ways to increase awareness of food ethics within South Korean middle school education

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Abstract

The purpose of the present study lies in examining what kind of topics regarding food ethics are being covered in South Korean middle school technology/home economics textbooks in an effort to help improve adolescents' awareness of food ethics. To achieve the goals of the present study, the characteristics of food ethics in the nation's middle school technology/home economics textbooks were analyzed based on the system of the contents of food ethics presented by Byun (2015). Based on our analysis on what kind of topics were covered in the textbooks for each course, the existing curriculum for middle school technology/home economics course one covered nutrition and health, and course two covered dietary life environment, production, and consumption of environment-friendly food. Our analysis regarding the contents for each topic revealed that the production-centered contents mainly addressed food-safety and circulation; distribution-centered contents focused mainly on food mileage and a small portion on environmental pollution; and consumption-centered contents addressed ethical consumption and sustainable meals. With the results of this study, the curriculum related to food ethics can be further developed leading to help the nation's youth realize that food is not limited solely to health and enjoyment, but also entails both rights and responsibilities within the contents that were covered.

Keywords: food ethics, middle school, education, technology/home economics, South Korea

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Introduction

Consuming food is one of the most important activities of daily living for humans. Food and the act of having meals are affected by society, and the role that food plays in human history is very significant, to the degree that the production of food and the act of eating are considered measures of defining a culture. Because food and the act of having meals vary across cultures, the kinds of food that an individual consumes during his or her growth and the kind of life that he or she leads in relation to food go far beyond individual tastes. They extend to sociocultural changes and public values (J. Kim, 2001). Therefore, living in an era of globalization and open doors, where cultural exchange is easily and actively taking place, such contents regarding food culture can be seen as invaluable knowledge that younger generations must learn (Lee, 2001).

According to Coff (2013), the semiotic approach to food ethics in everyday life is a conceptual framework that can be used to draw attention to certain domains and fields of food ethical behavior that otherwise would tend to remain implicit and unspoken.

Furthermore, as the issue of food safety in regards to food ethics in South Korea became one of the important public agendas, consumer concern for food safety grew to a general public concern. The Korea-U.S. Free Trade Agreement (KORUS FTA) completion allowing import of U.S. beef to Korea has turned into a massive public uproar and a series of demonstrations, revealing widespread concerns on the part of Korean producers and consumers about government food safety regulations and mishandling of the beef trade requirement (R. Kim, 2009).

Amidst the wealth of food today, a sense of crisis is continually growing as problems dealing with food affects individuals at a much broader level in not only health and survival, but also capitalism, environmental pollution, politics, and economics (Jang, 2013). With the emergence of social movements linked to the production, consumption, circulation and distribution of food, such as the local food movement, slow food movement, food justice movement, and zero food mile movement, food ethics has become a big part of people's lives. Together with such changes in social interest, diverse academic disciplines have addressed the problem of food ethics both directly and indirectly, and the need to define the concept of and systemize the contents of food ethics based on time period and situational contents have arisen. Defining food ethics as an ethical consideration of food and something that applies to all food-related professionals including farmers, livestock raisers, fishers, employees of food corporations or restaurants, food-related public workers, and food consumers, S. Kim (2011) proposes that the contents of food ethics should include the principles necessary to resolve all ethical problems originating from food and the moral character required for them. Food ethics deals with the ethical nature of problems directly and indirectly related to food, and therefore must ultimately deal with problems related to the production, circulation, distribution, and consumption of good food (Byun, 2015).

In South Korean middle schools today, students who are undergoing adolescence are currently being educated on acquiring the basic knowledge of nutrition, understanding the relationship between food and health, knowing calorie intake, adopting healthy dietary habits and lifestyle, and being aware of proper production, circulation, distribution, and consumption of food through their technology/home economics class. Also, food culture and style, which are components of food ethics, are significant in terms of the inheritance and development of traditional Korean food and are also areas addressed in South Korea's

middle school curriculum. However, such contents linked to food ethics are inadequate for raising better awareness, which is necessary during adolescence. Because the contents of the nation's middle school curriculum mostly stress food ethics from the perspective of consumers, it is necessary for young students to also recognize ethical characteristics in relation to the production, circulation, distribution, and consumption of food. Furthermore, both teachers and students in the curriculum lack a concrete understanding of the concept of food ethics, necessitating efforts to improve and develop adolescents' awareness of food ethics. In particular, because of economic growth stemming from industrialization and changes in the social structure due to rapid social development in recent years, the nuclearization of the family has been accelerated and opportunities for family members to have meals together at home have declined significantly. In addition, the food service industry has developed and the use of instant food or fast food has increased dramatically leading to not only a decrease in the frequency of consuming traditional Korean food at home, but also in the public's understanding and awareness of traditional Korean food.

South Korean adolescents acquire their knowledge of nutrition mainly through the subject of home economics at school (Ahn, Kang, Ahn, & Ahn, 1998). According to a study by I. Park (2003), education in dietary life had significant effects on both male and female students afterwards and brought about changes in their dietary behavior as a result of this increase in their nutritional knowledge. Judging from such research results, the importance of educating about healthy dietary lifestyle through middle school technology/home economics classes is apparent.

Not only are classroom sessions focused on education of healthy dietary lifestyle important but the adolescents' attitudes toward their dietary lifestyle are also just as important, which will affect their physical and mental development, and form the lifelong basis of their dietary habits. Consequently, it is necessary to shape one's concept of food ethics correctly during this period in life. As for South Korea's current curriculum on dietary life at secondary schools, it is possible to raise the problem that opportunities to study the sociocultural significance of food or to acquire a macroscopic perspective through food itself are inadequate and to point out the limitation that even the conditions for learning about food-related culture are absent (Lee, 2001).

Contemporary research regarding this issue focuses on elementary school curriculums stating that 'food ethics' is covered in practical courses, which is similar to technology/home economics and ethics courses in middle school. However, there is no research studying middle school curriculums in relation to this subject.

Consequently, the present study seeks to analyze the contents on food ethics in the technology/home economics subject, which is the only element of the middle school curriculum that can positively affect the formation of South Korean middle school students' concept of food ethics, thus contributing to the improvement of food ethics education during adolescence.

Theoretical background

Food ethics can be defined as ethical thinking in regards to food, and the study of food ethics is an academic discipline involving a review of and an understanding of ethical standards and principles in relation to food (S. Kim, 2016a). According to Jang (2013), the

study of food ethics education in Korea shows that eating issues are not only related to health and survival beyond individual preferences but also structurally and systematically related to political and economic areas such as capitalism and environmental pollution. In addition, after exploring current food ethics education in elementary schools from a practical perspective through an integrated approach of practice and ethics, Jang (2015) emphasized that food ethics is ultimately linked to eco-intelligence, ethical consumption, and citizenship education. In addition, H. Kim (2015) conducted an ethical study on dietary education of children through contents such as a green dietary lifestyle, slow food, and taste education.

In a previous study on the content of food ethics, M. J. Kim (2016) revealed that it was difficult for farmers to preserve biodiversity and continue sustainable farming due to the development and expansion of genetically-modified (GM) crops produced by transnational corporations, thereby leading to the downfall of small farmers and ultimately threatening food sovereignty (M. J. Kim, 2016). Furthermore, there is a high possibility that although these small farmers are directly or indirectly related to food production, they are likely to experience famine or chronic malnutrition (Cho, 2013).

Studies by M. S. Kim (2014) dealing with animal suffering in the production process have shown that, in Germany, 95% of spawning chickens live in crowded cages, while only 4% are raised in nests filled with straws. M. S. Kim (2014) discusses about the ethical issues that arise from this example, where these chickens are treated as a means of providing eggs to humans without considering the pain and suffering they are experiencing or their rights. Additionally, Jang (2013) warns that if there is not a critical view on the meat market of the large-scale livestock industry, there will not be any awareness of social ethical issues such as the side effects of eating meat and environmental pollution. Currently, in order to solve these problems, Korea has enacted the Animal Protection Act, which is encouraging animal welfare based livestock farming rather than the conventional factory farming (H. Kim, 2015).

Food ethics research related to antibiotics used in food production process has shown that antibiotics causes various environmental diseases such as atopy and is a threat to human health. Also, chemical fertilizers and pesticides used for farming as well as food additives used for food preservation produce genetically modified organisms (GMOs), which are amplifying the controversy over food safety and increasing consumer anxiety (H. Kim, 2015; M. S. Kim, 2016).

According to Byun (2014, 2015) and M. S. Kim (2014), local food is one type of practical movement on food ethics, which refers to the idea of consuming locally produced food in the region, guaranteeing stability to producers as well as giving trust to consumers. An example they provide is the Japanese local food movement known as “GiSanGiSo”, which shows practical ways of food ethics.

The concept of fairness in relation to distribution is important in food ethics. According to S. Kim (2016b), an example of fairness is Fair Trade Coffee, which trades third-world farmer’s coffee beans at a fair price and returns the appropriate income to the farmer, which suggests that humanity must not only coexist with nature but also with the community. In the study of food ethics in terms of consumption, W. Kim (2014) insisted that food sustainability is important to ensure there is enough food as well as food safety, which means it can produce food or it can create a supply system that guarantees food at the community level, showing how consumption, production, and distribution are all related. In addition, the food criterion for consumers in modern society is not only the taste, price,

convenience, and contribution to health, but also animal suffering and ecological sustainability (Byun, 2014; M. S. Kim, 2016). Furthermore, food ethics also includes concepts dealing with health problems such as obesity, anorexia, and binge eating (Byun, 2015).

Research methods

The present study analyzed the contents linked to food ethics from the related topics addressed by South Korean middle school technology/home economics textbooks in order to grasp how food ethics is being taught in the nation's middle school curriculum. The method the study used to achieve this objective was content analysis. Content analysis is the procedure to draw meaningful deduction from text, which means that it is for deep meanings not simple information by systematic and objective steps (Anderson, Rourke, Garrison, & Archer, 2001; Y. Park & Woo, 2012). Also, every documentary including books, magazines, diaries, and recordings can be used for content analysis. They would be analyzed for not only apparent contents but also dormant contents. Because the procedure of content analysis is objective, systematic, and quantitative in methodology, it is used in pedagogy research as well as sociology, political science, and psychology (Riffe, Lacy, & Fico, 2005).

To accomplish the goals of the present study, a total of 24 textbooks were analyzed, which were 12 different books for two different courses: Middle School Technology/Home Economics Course One and different books for Middle School Technology/Home Economics Course Two of the 2009 national curriculum, provided by Korea Authorized and Approved Textbook as the objects. For the analysis in the present study, chapters in textbooks for Middle School Technology/Home Economics One and Two that dealt with food were examined and were analyzed in terms of the goals, main topics, subtopics, and contents.

Technology/Home Economics is a curriculum that enables students to manage their own lives independently and to lead a healthy lifestyle within their community (Ministry of Education, Science and Technology, 2008). It expands to dietary education and the concept of green diets such as production, consumption, ecology, environment and natural resource issues, as well as issues about the quality of a healthy life by promoting positive changes in eating habits and dietary behaviors (Joo, Lee, Yoo, Kim, & Jung, 2015).

The contents analyzed were based on the system of the contents of food ethics presented by Byun, and the system of the contents of food ethics consisted of production-centered, circulation- and distribution-centered, and consumption-centered contents, as shown in Table 1 (Byun, 2015). Byun (2015)'s system of the contents study gives a comprehensive framework of food ethics in terms of production, distribution, and consumption, which makes it appropriate to be used as a framework for our analysis.

More specifically, the contents of 24 home/economics textbooks were reviewed separately by both researchers and the keywords for each unit were categorized based on Byun's (2015) sub-categories in his system of the contents. For example, if there were contents related to local food, such as food mileage, it was categorized into the "local food" sub-category. After the analysis, both researchers checked to see if they both agreed on each of their categorizations, and further sought professional advice from a professor in the Department of Food Management at D University to finalize the categories.

Table 1. System of the contents on food ethics

Production-centered contents	Circulation- and distribution-centered contents	Consumption-centered contents
Cultivation of agricultural products	Global food system	Ethical consumption
Ecological harms of and genetic contamination by genetically modified organisms (GMOs)	Mass circulation systems	Sustainable meals
Sustainable agriculture	Environmental pollution	Food rights and welfare
Production and processing of meat	Fair trade	Local food
Pain suffered by animals	Restriction of the right to access fresh food	Slow food
Problem of feed for cultured fish		Problems of binge eating, bulimia, and anorexia
Use of antibiotics		Obesity and dieting
Discrimination and inequality against farmers and laborers		Food divide
Food safety		Ethicality of gastronomy
Local food		Ethicality of vegetarianism and meat-eating
Food sovereignty		Food culture and styles
		Eating disorders

Research results

Food-related topics in South Korean middle school technology/home economics textbooks

The textbooks analyzed in the present study were for Middle School Technology/Home Economics Course One and Two, which were a total of 24 different books published in 2009 by Jihaksa Publishing Co., Ltd.; Chunjae Textbook Co., Ltd.; Dong-A Publishing Co., Ltd.; SR Book, MiraeN Co., Ltd.; Samyang Media, Kumsung Publishing Co., Ltd.; Kyohaksa, Visang Education, Inc.; Gyomoon Publishing, Wonn; and Chunjae Education, Inc. As for the contents linked to food, textbooks for Middle School Technology/Home Economics Course One addressed the topic of "Adolescents' Dietary Lives" and those for Technology/Home Economics Course Two addressed the topic of "Green Dietary Life and Food Preparation." The food-related contents addressed by each textbook were based on the technical studies (technology/home economics)/informatics curricula announced by the Ministry of Education, Science and Technology (2008). We examined the food-related contents, the learning elements, and the accomplishment standards in the nation's middle school curriculum as shown in Table 2.

Table 2. National curriculum by Ministry of Education for middle school technology/home economics textbooks

Contents	Learning elements	Achievement standards
Understand the importance of nutrition and become aware of problems with dietary life during adolescence to evaluate one's own dietary behavior. Plan balanced meals based on calorie intake standards and type of food, analyze family members' demands, select the meal, and then, evaluate it. Analyze diverse causes that threaten adolescents' health, search for ways to resolve and prevent them, and apply them to real life. Understand the importance of food selection that takes into consideration family health and the environment, search for ways of managing and storing food safely and make use of them in real life. Plan a meal that takes into consideration family members' demands and nutritional balance, prepare it with hygiene and safety in mind and evaluate it.	Adolescents' nutrition, problems with dietary life in adolescence, calorie intake standards, type of food, balanced meal plan, and analysis of family members' demands. Importance of food selection, safe storage and management of food, meal plans, and cooking that takes hygiene and safety into consideration.	With a focus on the importance of nutrition in adolescence, understand the types and functions of nutrients and food sources. In particular, be aware of lifestyles and psychological and social problems that impede health and balanced calorie intake during adolescence, and search for information to create dietary life management plans. Understand food storage and management methods such as being mindful of factors that threaten food safety including food spoilage, food hazards, and food poisoning, and selecting food by referring to the nutrition facts label and expiration date, thus practicing a healthy and safe dietary life.

Based on the Ministry of Education curriculum for middle school technology/home economics textbooks, textbooks for Middle School Technology/Home Economics Course One all addressed topics including health and dietary life, nutrition and health, types and functions of nutrients, calorie intake during adolescence, problems with adolescents' dietary lives, balanced meals, problems with dietary life in adolescence, characteristics of nutrition in adolescence, meal structure plans, and dietary life guidelines for adolescents. Those for Middle School Technology/Home Economics Course Two dealt with topics such as changes in the dietary life environment, a green dietary life, production of environment-friendly food, purchase of environment-friendly food, consumption of environment-friendly food, use of food waste, health benefits of traditional Korean food, food preparation, and having a grateful attitude toward dietary life.

Food ethics in South Korean middle school technology/home economics textbooks

As for production-centered food ethics examined in the present study (see Table 3), it covered the ecological harms of and genetic contamination by GMOs in the cultivation of agricultural products, the capability of sustainable agriculture in cultivating agricultural products, food safety, local food, and food sovereignty. In particular, food safety took up a considerable portion of the contents, addressing food additives, artificial sweeteners, food

colorings, preservatives, environmental hormones, natural foods, GMO labeling systems, food quality certification seals, nutrient reference values, nutritional facts labeling, environmentally-friendly agricultural product certification seals, agricultural product traceability certification seals, degree of international dependence for food, pesticides, and sterilization. However, contents such as the pain suffered by animals in the production and processing of meat, problem of feed for cultured fish in the production and processing of meat, use of processed antibiotics in the production and processing of meat, and discrimination as well as inequality against farmers and laborers were not included.

Table 3. Production-centered food ethics in middle school technology/home economics textbooks

Classification	Food ethics	Contents
Production-centered contents	Ecological harms of and genetic contamination by GMOs in the cultivation of agricultural products	Production of GMO agricultural products
	Sustainable agriculture in the production of agricultural products	Environment-friendly farming methods that reduce the use of chemical pesticides and chemical fertilizers, utilize environment-friendly agricultural products, as well as produce energy- and resource-saving food and pollution-free vegetables
	Pain suffered by animals in the production and processing of meat	(Contents not included in the textbooks)
	Problem of feed for cultured fish in the production and processing of meat	(Contents not included in the textbooks)
	Use of antibiotics in the production and processing of meat	(Contents not included in the textbooks)
	Discrimination and inequality towards farmers and laborers	(Contents not included in the textbooks)
	Food safety	Food additives, artificial sweeteners, food colorings, preservatives, environmental hormones, natural foods, GMO labeling system, food quality certification seal, nutrient reference values, nutrition facts labels, environment-friendly agricultural products certification seal, agricultural product traceability certification seal, degree of international dependence for food, pesticides, and disinfectants
	Local food	Urban farmers, weekend farms, balcony gardens, rooftop gardens, Farm to School in the United States, green tourism in France, carbon emission labeling certification seal
	Food sovereignty	Food related issues globally

Circulation- and distribution-centered contents included contents related to food mileage and environmental pollution (see Table 4); and, as for environmental pollution, the contents covered environmental conservation. In particular, circulation- and distribution- centered contents addressed food mileage contents, such as the distance between areas of production and consumer markets, carbon footprints, and food mileage. As you can see, the term *food*

mileage is used as a general category title to include all related contents, but is also used as a sub-division category title to refer to the specific concept itself. Contents related to topics such as the global food system, mass circulation system, fair trade, and restriction of the right to access fresh food were not addressed.

Table 4. Circulation- and distribution-centered food ethics in middle school technology/home economics textbooks

Circulation- and distribution-centered contents	
Global food system	(Contents not included in the textbooks)
Mass circulation system	(Contents not included in the textbooks)
Food mileage	Distance between areas of production and consumer markets, carbon footprints, and food mileage
Environmental pollution	Environmental conservation
Fair trade	(Contents not included in the textbooks)
Restriction of the right to access fresh food	(Contents not included in the textbooks)

Consumption-centered food ethics addressed contents such as ethical consumption, sustainable meals, new food communities, food rights and welfare, local food, slow food, problems of binge eating, bulimia, and anorexia, obesity and dieting, food culture and styles, and eating disorders (see Table 5). Contents such as food gap, ethicality of gastronomy, and ethicality of vegetarianism and meat-eating were not addressed. The contents that took up the greatest space in middle school technology/home economics textbooks in relation to food ethics were concerning consumption-centered ethics. With respect to ethical consumption, the consumption of environmentally-friendly food was mainly discussed, and sustainable meals dealt with food storage and reducing food waste. In regards to new food communities, the book mentioned about community-supported agriculture in the United States, and for food rights and welfare, food banks were addressed. Consumption-centered local food included contents such as the local production-local consumption movement in Japan, seasonal produce, substitute foods, use of local agricultural products, and direct transactions of agricultural products in farmers' markets. Seasonal produce was included in the category of local food because the significance of local food encompasses not only spatial characteristics, but also temporal characteristics. In addition, in the case of "substitute foods," this keyword was included in local food because it referred to substitute foods in the sense that long distance foods should be replaced with short food supply chain for consumption.

Most of the contents on the problems of binge eating, bulimia, anorexia, obesity, dieting, and other eating disorders were presented in textbooks for Middle School Technology/Home Economics Course One, thus showing that this course focused on food ethics in terms of individual consumption.

Table 5. Consumption-centered food ethics in middle school technology/home economics textbooks

Consumption-centered contents	
Ethical consumption	Consumption of environment-friendly food (organic, pesticide-free, antibiotic-free, outstanding agricultural product certification, geographical indication of agricultural products, low-carbon product certification), use of short food supply chain for agricultural products, learning about the food labeling system (expiration date, names and contents of the ingredients, food additives, nutrition facts labels, and certification **seals** to be checked in selecting food)
Sustainable meals	Lifestyles of Health and Sustainability (LOHAS), recycling of food waste, reducing food waste, environment-conscious food storage, freezing, refrigeration, consideration of disposal rates, refeeding to animals and composting, *ggachibap*, environment-friendly dish washing methods, and minimization of environmental pollution by better ways of disposal
New food communities	Community-supported agriculture in the United States
Food rights and welfare	Food banks
Local food	Local production-local consumption movement in Japan, local food systems, seasonal produce, local food systems in the United Kingdom, substitute foods, using local agricultural products, farmers′ markets for the direct transaction of agricultural products
Slow food	Slow food movement in Italy
Problems of binge eating, bulimia, and anorexia	Overeating, excessive drinking, reducing the consumption of greasy and salty food, being aware of one′s weight and eating right
Obesity and dieting	Over nutrition, unreasonable dieting, intake of processed food, preference for instant food, incorrect dieting, being underweight, problems with skipping breakfast, standard weight calculation methods, exercise therapy, behavior therapy, checking one′s dietary habits, obesity, anemia, calcium deficiency, fast food, fried foods, junk food, increased dining out occasions, high-calorie snacks, habit of preferring popular diets, late-night eating, energy imbalance, and increase in diet-related diseases
Food gap	(Contents not included in the textbooks)
Ethicality of gastronomy	(Contents not included in the textbooks)
Ethicality of vegetarianism and carnivorism	(Contents not included in the textbooks)
Food culture and styles	Changes in Korean dietary life, traditional Korean food, inheritance of Korean traditional dietary culture, traditional Korean holiday dishes, fermented foods, staple foods and side dishes, regional dishes, rites of passage dishes, seasonal rites dishes, *yaksik dong′won* (identical origin of medicine and food), traditional Korean dietary life, customs of *jeolsik* (dishes related to the 24 solar terms of the traditional East Asian lunisolar calendar) and seasonal dishes, excellence of traditional Korean dietary life, Korean table setting and manners, Western table setting and manners, Korean cuisine, table setting worldwide (China, Japan, Thailand, India, France, and Italy), kimchi, diverse types of *jang* (fermented pastes and sauces), *3-cheop bansang* (meals with three side dishes), *5-cheop bansang* (meals with five side dishes), table manners, globalization of Korean cuisine, high value of Korean cuisine as a cultural heritage (harmonious combinations of colors, flavors, and aroma; artistry of implements used in Korean cuisine including tableware, *bapsang* (dining tables), and *bap bojagi* (wrapping cloths used for tableware); with both functionality and refinement), experiencing farming and fishing villages, Korean Food and Culture Experience Museum), *Jeonju Hanok* Living Experience Center, table etiquette education, theory of yin-yang and the *wuxing* (five elements), and condiments
Eating disorders	Anorexia nervosa (anorexia), bulimia nervosa (bulimia), dietary habit evaluation using a self-test chart, depression due to eating disorders, social anxiety disorder due to eating disorders, and dietary behavior disorders

Discussion and recommendations

The purpose of the present study lies in examining food ethics in South Korea's middle school technology/home economics textbooks to improve adolescents' food ethics. To achieve the goals of the present study, the characteristics of food ethics in the nation's middle school technology/home economics textbooks were analyzed based on the system of the contents of food ethics presented by Byun (2015).

First, the production-centered contents dealt with the ecological harms of and genetic contamination by GMOs in the cultivation of agricultural products, sustainable agriculture, food safety, local food, and food sovereignty. The production-centered contents mainly addressed food safety, thus demonstrating the current ethical level of the production of safe food.

According to Sperling (2010), the ethics of food safety is a dynamic area that continues to challenge perceptions of food consumption, health risks, and public responsibility for food borne illness. Ethics will have a great contribution to food safety in all three levels of risk analysis of food: risk assessment, risk management, and risk communication. The exact role that ethics will play in safeguarding food safety will depend on the centrality and effect of the public health law, the satisfactory function of public institutions, public movements and policies, and the extent to which law promotes each of these levels in analyzing food risks. However, the production-centered contents only provide general information without deep analysis of the levels of food safety for middle school students.

The importance of environmentally-friendly farming methods was only mentioned at a very general level in relation to sustainable agriculture. In addition, critical educational contents on topics including organic farming methods and ecological agriculture were not presented at all, thus making it difficult for South Korean middle school students to concretely grasp the idea of sustainable agriculture. Therefore, a more systematic structure for the contents is needed to better educate the middle school students.

Furthermore, the pain suffered by animals in the production and processing of meat, problem of the feed of cultured fish in the production and processing of meat, use of processed antibiotics in the production and processing of meat, and discrimination and inequality against farmers and laborers were not addressed.

Currently, education of food ethics still focuses solely on the producers' safe production of food and consumers' proper consumption of such food, leaving South Koreans with limited awareness of many other critical issues regarding food ethics. There were inadequate contents regarding animal welfare in the textbooks, including horrible living conditions and the pain they suffer, during the food production process as well as the types of feed used to produce meat. As for the contents on food sovereignty, only one textbook addressed the topic as a food problem of the international community very briefly. This shows that even though adolescents are living in the age of globalization, they lack a full understanding and awareness of food sovereignty because of the limited educational contents in the current textbooks. Therefore, there should be detailed contents added for students to broaden their perspectives on the problem of food not only in South Korea but also around the world.

Second, the circulation- and distribution-centered contents focused mainly on food mileage and a small portion on environmental pollution, excluding all other related topics such as fair trade and global food system. Furthermore, critical problems demanding great

attention, such as global warming, that could arise from the circulation and distribution of food was excluded from the contents despite the fact that the topic of environmental pollution was covered.

Third, the consumption-centered contents addressed issues including: ethical consumption; sustainable meals; new food communities; food rights and welfare; local food; slow food; problems of binge eating, bulimia, anorexia, and other eating disorders; obesity and dieting; food culture and styles. There was a heavy amount of content in relation to these topic. However, textbooks are still lacking many critical contents such as the historical background and significance of local food systems, detailed case examples not only locally but abroad, and ethical issues in regards to consumer sovereignty. In terms of consumer sovereignty, distrust arising from producer-consumer relationships "may signify powerlessness, but it may also trigger activism, representing an important and constructive element in the new politics of food. The problem of 'the value-action gap' must be analyzed with this political framing in mind" (Kjaernes, 2012, p.158). Therefore, such critical contents need to be included when educating students about food ethics. For example, the four component model can be applied in order to change practical behavior among students through the curriculum. The four component model by Rest (1983) focuses on the psychological processes or variables that influence the expression of moral behavior. According to Jeon and Hong (2014), the four elements of the four component model that are moral sensitivity, moral judgement, moral motivation, and moral commitment can be the standard model for improving the content and method of moral education within the food ethics curriculum. Also, Learning Together (LT), a type of cooperative learning, was found to generate group goals, compensation, resource, task, and role structuring among each member, and has been proven to have positive effects in educating middle school students (Hwang & Ryu, 2004). Therefore, this type of learning model can also be applied to develop a more systematic and concrete food ethics education program in middle school technology/home economics courses.

Conclusion and future studies

Megicks, Memery, and Angell (2012) said that when buying local foods, consumers are often choosing to do so for reasons that not only relate to the product itself but also their priorities and perceptions of food-related issues, such as support for local businesses and communities and a positive association with the environment and sustainable consumption. Furthermore, the process of buying is fundamentally linked to the act of shopping, which can be regarded as a strong motive for buying local food because of the satisfaction that it may bring from that experience. Consumer food choices are complex; thus designing effective policies to achieve social and environmental outcomes must account for consumer attitudes, changes that may be difficult and costly. Therefore, middle school students need to be educated about factors affecting to consume as ethical food consumers.

Consumption-centered food ethics did not address the food gap, ethicality of gastronomy, and ethicality of vegetarianism and meat-eating. In other words, there were no contents regarding unequal food access, people's responses to food choices involving animal cruelty, and the types of social problems that could arise from the mass consumption of plant-source and animal-source foods. Because food ethics cannot be easily learned in

adulthood, it is necessary to establish the values of food consumed during adolescence.

When food culture and styles, which took up the greatest portion of food ethics, are examined, they tended to be geared towards traditional Korean customs, including traditional Korean holiday dishes, fermented foods, staple foods, side dishes, desserts, regional dishes, rites of passage foods, yaksik dong'won foods, seasonal dishes, and jeolsik. Not only is there a lack of contents regarding other cultures but they only introduce traditional Korean food in an effort to publicize it without providing enough explanations on the origins of the ingredients used or environmental elements of each dish in terms of the inheritance of food culture. Therefore, to elevate South Korean middle school students' awareness of food ethics, the present study analyzed food-related contents in the current curriculum and proposes the following for follow-up studies.

First, while the existing curriculum does deal with contents related to food ethics, efforts are necessary to expand the consumption-centered contents as well as cover a more in depth awareness of food ethics necessary for the production, circulation, and distribution processes.

Second, an increased awareness of the cruel treatment of animals during the food production process is necessary for adolescents, especially when establishing their values on life. These values are influenced heavily by the students' families and the community they live in. So, there also needs to be an awareness of these issues in terms of group efforts.

Third, as for the variety of nutritional problems generated by South Korean adolescents' westernized dietary lives, it is necessary, by highlighting once again the importance of traditional Korean food from a medical perspective, to develop an improved educational curriculum that is appropriate and practical for middle school students, allowing them to take pride in and inherit traditional Korean dietary life, which will ultimately lead to a nutritionally balanced dietary life.

Fourth, the curriculum needs to be more systematic in terms of changing the curriculum from a one year food ethics study to a step-by-step education teaching from the basics to a more detailed and advanced learning in all grade levels.

Finally, food ethics is still a highly unfamiliar concept to South Korean adolescents. It must be emphasized in the curriculum in order for the nation's youth to realize that food is not limited solely to health and enjoyment but also entails both rights and responsibilities within the contents that were covered, including agriculture, fishing industry, livestock industry, circulation, distribution, consumption, food styles related to traditional Korean food, and food ethics concerning food culture.

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Contents