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Under the Equity Discourse: Divergent School Practices for Rural Migrant Children in Chinese Urban Schools

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This paper examines how Chinese urban schools respond to the unprecedentedly large number of rural migrant children under the emerging discourse of educational equity. Drawing upon longitudinal field research in two Beijing public schools, this study finds two contrasting school practices with regards to the migrant children, one emphasizing tailored education ("differentiation") and the other acting school-wide upon the same curriculum and pedagogy ("mainstreaming"). While the two schools both claim to serve the best interest of their migrant intakes and promote educational equity, they have not been able to meet the migrant students' true educational needs. Student-oriented, inclusive education is advocated as an alternative concept of equity for Chinese schools at the end of the paper.

Introduction

With China's rapid modernization and urbanization in the past three decades, a group of "rural migrant children" have emerged in Chinese cities. These rural migrant children largely come from villages to join their parents who work as manual labor in big cities along China's east coast. According to the latest census data, the total estimated number of Chinese migrant children (aged 0-17) had reached 35.81 million, 80% of which (28.77 million) were of rural origin (All-China Women's Federation Report, 2013).

For a long time, these migrant children were not entitled to public social welfare programs in the host cities due to their official household registration (*Hukou* in Chinese) as rural, out-of-state residents. Disadvantaged in socioeconomic status and academic performance, the majority of them were excluded from the urban school system and could only resort to low-quality makeshift schools (*dagong zidi xuexiao*) established by migrant workers or parents in city outskirts (Han, 2004). The growing visibility of rural migrant children and their lack of equal educational opportunities prompted the Chinese government to issue an important policy in 2001, popularly known as the "Two Mainlies" (*liangweizhu*) policy, which stipulated that education of migrant children are the main responsibilities of host cities and of public schools. Under this policy, migrant children who satisfy eligibility conditions[ii] are legally ensured to access urban schools up to Grade 9 and enjoy "equal treatment" as the local children (Ministry of Education, 2010). The "Two Mainlies" policy reflects the determination of the Chinese central government in promoting educational equity and advancing social justice.

In spite of the increasing complexity and stringency of the school enrollment paperwork required by individual cities (such as Beijing, Shanghai, etc.) and schools (such as elite schools) in recent years, migrant students have constituted about 30% of the total student population in urban public schools (Grades 1-9) nationally (Ministry

of Education, 2017). Moreover, as more and more urban middle-class students manage to get into "good" public schools, weak schools with less favorable reputation in Chinese cities tend to have a predominant proportion of migrant students, some as high as 80% (Luo, Zhong & Tsang, 2015). With such an unprecedentedly large number of students from rural family backgrounds, those urban schools sitting at the lower end of the school hierarchy face an unfamiliar student body. How do these urban schools respond? In what ways do they perceive the migrant children as different from local children? To what extent do they differentiate them and accommodate to their special needs in the school curriculum and daily activities? This paper seeks to investigate the divergent school practices towards the migrant children in urban China and what impact these practices may have on this disadvantaged group.

In the following sections, I will first draw upon international scholarship on educational equity and equal treatment as the conceptual framework within which the schooling of Chinese migrant children will be discussed. Data for the study comes from prolonged ethnographic fieldwork in two Beijing public schools. The findings for the study hope to contribute to a better understanding of migrant children's experiences in the Chinese urban school settings and call for a reconsideration of equity in actual school practice for disadvantaged students.

Equity in Theory and School Practice

The concepts of equity and equal opportunity of education have a long tradition as key terms in sociology of education and educational policymaking (Nash, 2004; Coleman, 1966). A review of the literature indicates that educational equity consists of two basic dimensions. The first is fairness, referring to a uniform standard that applies to everyone in a certain education system. The second is inclusion, implying that one's ascriptive traits such as race, gender, class or family background, etc. should not interfere with their potential for academic success. School finance scholars tend to use the terms "horizontal equity" and "vertical equity" to distinguish between the two (Berne & Stiefel, 1999). While horizontal equity embraces uniform distribution of resources and opportunities regardless of people's different initial status or capabilities to use these resources, vertical equity recognizes that some are at a greater disadvantage than others and aims to compensate for these people's initial misfortunes so that everyone is capable of attaining the same level of access to goods and resources. In succinct terms, horizontal equity emphasizes "equal treatment of equals", whereas vertical equity entails "different treatment to different people" (Berne & Stiefel, 1999). The Chinese ancient educator Confucius was famous for two aphorisms that bore similar meanings: Instruction knows no class distinction (youjiaowulei 有教无类); Teach students in accordance with their aptitude (yincaishijiao 因材施教) (Sun & Du, 2008).

However, debates on the meaning and provisions of equity have endured since the 1960s, given scarce resources and unequal starting chances in any given society (Jencks, 1988; Rawls, 1971; Wilson, 1991). Hemelsoet (2012), quoting Dubet (2005), distinguished three dominant conceptions of equality that are relevant to education: meritocratic, distributive, and social equality. Each of these forms of equality refers to a different underlying idea of what is (most) "just" for all, i.e., a particular theory of justice and a notion of what is "good". Meritocratic equality of opportunities offers

equal starting chances for all and allows individuals to compete with their talents and capacities. Within this view, "the only inequalities that can be tolerated are those that result from merit" (Hemelsoet, 2012, p. 525). The introduction of compulsory education, free primary education, open access to higher education and many other initiatives, certainly induce more chances for participation among pupils from different ethnic groups and social classes. The distributive equality deals with the difference principle which states that inequalities can be just as long as they are to the benefit of the least well off (Rawls, 1971). A well-known example is the politics of affirmative action achieved through favorable recruitment of applicants from socio-politically disadvantaged groups. Social equality of opportunities emphasizes equal outcomes rather than equal starting chances and focuses on what schools should warrant for all. Here equal opportunities are weighted on the basis of what the weakest can achieve. A broad common curriculum, or "*minimum in common*" (Hemelsoet, 2012, p. 525), is advocated on its behalf.

Although equity in the abstract sense has been accepted as one of the most desirable principles by educators and policymakers worldwide, it is nonetheless difficult to enact it in school practice and there is no "one-size-fits-all" model to achieve equity for all students. With an increasing number of students from diverse backgrounds, today's schools are facing tremendous challenges in their attempt to provide equal educational opportunity for all. Segregation had been one of the common practices in the past to deal with students of different color on the pretext of "separate but equal". With the 1954 Brown vs. Board Act, the US Supreme Court ruled that separate schools were not equal given the huge disparity in funding and resources between white schools and black schools (Clotfelter, 2004). However, desegregation itself could not guarantee equity as the 1974 *Lau vs. Nichols* demonstrated. Immigrant and language minority students' needs were highlighted when the US Supreme court ruled that just providing the students with the same textbooks, desks and teachers, the so-called mainstreaming or "equal treatment" was not sufficient to ensure equal educational opportunity (McPherson, 2000). Vertical equity of "different treatment to different people" was called for.

Another school practice that has become controversial due to equity concerns is tracking (Oakes, 2005). Due to students' differences in natural intelligence and abilities, tracking and its various modifications have been among the predominant organizing practices of modern schools in many countries, a widely accepted practice that seemed to satisfy the "vertical equity" principle to treat gifted students differently from average/slow students. Unfortunately, tracking is inclined to create internal segregation and ethnocentric social Darwinism. According to Oakes (2005), the disproportionate placement of poor and minority students into low tracks does not reflect their actual learning abilities. Moreover, students initially placed in low-track classes are often taught in watered-down curriculum and lack the motivation to study, eventually leading to stigmatization and school failure. For these reasons, while some educators and policymakers continued to support tracking as appropriate, other scholars denounced it as a contributor to inequality in the school system (Oakes, 2005).

As a response to the above criticisms, inclusive education was advocated by western education scholars and practitioners in recent years (Huang, 2004; Stainback & Stainback, 1996; Porter & Smith, 2011). It was first put forward by UNESCO in 1994 on

the World conference on Special Needs Education: Access and Quality in Spain (UNESCO, 1994). In a narrow sense, inclusive education refers to the placement of students with disabilities in regular classrooms or schools. However, as used by UNESCO (2005), it may incorporate any marginalized groups, such as religious, racial, ethnic, and linguistic minorities, immigrants, girls, the poor, students with disabilities, HIV/AIDS patients, remote populations and more, in the attempt to provide equal educational opportunity for all. Moreover, the concept of inclusion differs from previously held notions of integration or mainstreaming. While the latter two imply that learners with special educational needs should try to catch up and assimilate into the mainstream, inclusion places premium on their social, civil and educational rights to participate in the regular school system along with others (UNESCO, 2005). Proponents argue that inclusive education is good for all students because it builds a caring community where everyone's experiences and abilities are valued (Huang, 2004).

Equity entails multidimensional considerations and complex solutions in school practice. However, it has not been a prominent social value in Chinese schools until the beginning of the 21st century, although there have always been moralities and practices of "helping the weak" (fuzhu ruoxiao 扶助弱小). On the one hand, China's Confucian traditions emphasize a hierarchical social order based on meritocracy. On the other hand, the early attempts of socialist China under the leadership of Mao Zedong (1949-1976) to achieve radical equalitarianism failed, leading to the pursuit of efficiency and excellence during the reform and opening-up era since 1978. It was not until the Hu-Wen administration (2002-2012) and their "people-oriented" (yirenweiben 以人为本) concept that equity became a dominant discourse in Chinese education and society. The western notions of equity, as mentioned above, were imported and have been largely adopted by Chinese education scholars and policymakers, along with certain indigenous values such as harmony, fairness, impartialness etc. (Liu, 2002; Wang, 2006). Yet in terms of school practice, there has not been a consensus about what educational equity involves. It is the local school contexts, school leaders' philosophy as well as the school agendas and strategies that together shape school practitioners' interpretations of equity.

This article explored how equity was viewed and acted upon in two Beijing schools with a large proportion of migrant students. In the following sections, I use two terms: differentiation and assimilation, in the discussion of school practices and educational equity. Differentiation corresponds to the idea of vertical equity and in this study refers specifically to the school's attempts to differentiate migrant students in teaching and learning based on their "migrant" status. Assimilation is presumed on horizontal equity and refers to the school practice of incorporating all students, regardless of their family background or academic preparation, into mainstream (urban) school activities and providing them with an undifferentiated curriculum and pedagogy.

Rural Migrant Children and Their Schooling in Chinese Cities

The emergence of migrant children in Chinese urban cities has drawn increasing attention from scholars across different disciplines, both domestic and outside China. The initial scholarly interest focused on discussions of the *Hukou* system in China and the institutional constraints that deprived migrant children of legal access to urban

public schools (Li, 2004; Chen, 2005). With the establishment of the "Two Mainlies" policy in 2001 and its enforcement in the following years, more migrant children were able to enroll in public schools in urban areas. However, school access continued to be a serious concern due to the local unwillingness to implement the policy, especially in light of the recent population control pressures in big metropolitan cities like Beijing and Shanghai (Yang, 2017).

In addition to school access, increasing studies sought to examine migrant children's schooling experiences and psycho-social adaptations in urban schools (Luo, 2011; Wang & Gao, 2010; Shi, 2017; Lu & Zhou, 2013). Unanimously, these studies revealed the educational difficulties migrant children faced in public schools as well as the social and cultural barriers that prevented them from successfully integrating into the urban society. Due to the disconnect between the rural and urban school systems, including different quality of instruction, textbooks, learning styles and tests, the majority of migrant children possessed insufficient academic foundations and lag behind their urban peers in school performance (Lin et al., 2009; Liu, Holmes & Albright, 2015). At the same time, migrant children with rural origin and low test scores tended to be stigmatized in urban schools and experience loneliness, anxiety and a sense of inferiority (Kwong, 2011; Mu & Jia, 2016). In general, these studies attributed the many challenges faced by migrant children to the lack of financial capital and cultural capital in the migrant families and to the inequitable rural-urban divide in the Chinese society, without paying due attention to the impact of micro-level schooling processes.

In recent years, school type has been found to be an important contributor to migrant children's school failure and social reproduction. Scholars conducted in-depth ethnographies within migrant private schools or engaged in comparative studies between students in these schools and in public schools (Ming, 2014; Li, 2015; Xiong, 2015). These studies highlighted the chaos, tensions and the "counter-school culture" prevalent in migrant schools facing legitimacy issues and with no government support, yet few ventured to examine the divergent school practices and their underlying rationales with regards to the education of migrant children within public schools. This study aims to fill in the gap and explore, with an in-depth comparative lens of two public schools in Beijing, (1) how different public schools in urban China try to accommodate their intake of migrant children and (2) what are the societal, political and cultural factors leading to divergent school practices towards this disadvantaged group of students?

Research Sites and Methods

The study was part of a longitudinal research project (from 2011 till now) on the schooling experiences of migrant children in Beijing public schools, sponsored by the Chinese Ministry of Education. Beijing, the capital of China and the hub of business enterprises in North China, was one of the top three destination cities attracting the rural migrants, the other two being Shanghai and Guangzhou. More than 8 million migrants resided in Beijing in 2015, making up 37.9% of the total population (21.7 million) in Beijing (Zhao & Wei, 2017). In the past decade, the number of Beijing local children has decreased as a result of the one-child policy. At the same time, the number of school-age migrant children (Grades 1-9) increased dramatically, from 227 thousand in 2004 to 473 thousand in 2015 (Zhao & Wei, 2017), constituting more than one-third

of the total student population during the compulsory education period (Grade 1-9).

In the project, the research team, consisting of two university professors (co-principal investigators) and three graduate students, visited many public schools in Beijing and had talks with a number of principals, teachers, migrant children and parents. Having obtained a general picture of migrant children's schooling in Beijing, the research team selected two public schools to do classroom observations and qualitative interviews. The selection of the two schools, Lotus School and Safety School (pseudonyms), was purposeful for the sake of comparison. They were both primary schools offering grades 1-6 with a large migrant student population and therefore regarded as "weak" schools, yet they embraced different goals, visions and strategies in terms of school development and teaching practice with regards to the migrant children.

Lotus School was situated in the Sijiqing Township in the outskirts of Haidian District, Beijing. Sijiqing Township used to be a rural area with the majority of its residents farmers. As part of Beijing's overall urban planning, Sijiqing underwent a series of infrastructure construction in the 1990s. Most of its residents moved to newly built buildings, while the former villages became home to migrant workers and their families due to the low living expenses. Lotus School started to enroll migrant children since 1996. The school principal thus described their student recruitment in 2010:

> "*Our district education commission allocated 160 students to our school. Only 50 came. That was no good. We were asked to open 4 classes, but with so few students, whom shall our teachers teach? In the end, we enrolled 110 migrant students and got the number up to 160*" (Lotus Principal 4-26-2011).

With the flowing out of local children and the influx of migrant children, about 80% of the student population at Lotus School at the time of our study was migrant children coming from 20 provinces and regions all over the country, with the rest being children of the local farmers. Because of the diverse origins of the students, the school principal nicknamed Lotus School as "*Little China*".

Safety School was located in an old alley at Dongcheng District in the center city of Beijing, surrounded by dilapidated buildings, noisy streets and crowded peddlers. As the school teachers informed us, the school was small with limited room for development. Furthermore, the school leaders hadn't been able to grasp the opportunity to make it grow in the school restructuring reforms. Therefore, Safety School had only about 300 students, 92% of whom were children of the peddlers, cleaners, restaurant workers and attendants who migrated "*from all the different parts of China except Tibet and Xinjiang*" (Safety Principal 9-17-2011) and settled down in the neighborhood. The small number of local children in the school came from working-class families residing nearby. As many of the migrant children were born in Beijing and grew up in the neighborhood, they did not look different from the local children except in terms of *Hukou*.

The research team visited the two schools by turn, usually with one professor and one or two graduate students going to one school at a time. As co-principal investigators, we visited the two schools from March 2011 to October 2012, on an every-two-week basis. During the site visits, we usually spent the whole day in the school, doing

classroom observations in the mornings and interviewing the school principals, selected teachers and students in the afternoons. We observed all the classrooms in Grade 6, the final year of primary school in China, across the two schools. During the classroom observations, we paid special attention to teachers' teaching styles and students' in-class participation in order to identify any learning difficulties and how teachers helped them overcome these difficulties. During recess, we would talk casually with the teachers and students, when they were not engaged, to triangulate with what we observed. Each of us wrote our own observation fieldnotes.

At the same time, we conducted formal, in-depth interviews with the principal and three head teachers from each school to get more information about the school curriculum, teaching methods and development strategies etc. We also tried to elicit their attitudes towards the migrant children and their opinions on the rationales behind the school practices. With the help of head teachers, we formally interviewed 4 migrant students and 2 parents from each school to learn about their migration history, children's difficulties in the urban school and expectations for the future etc. The interviews were open-ended in a conversation style, typically lasting from one hour to one hour and a half. The interview data were recorded and later transcribed by the three graduate students. Data for the study came from the collectively produced interview transcripts and my own observation fieldnotes. Please refer to Table 1 for the list of the interviewees.

Table 1: The List of Interviewees

School	Name	Gender	School	Name	Gender
Lotus School	Principal Li	M	Safety School	Principal Meng	F
	Teacher Li	F		Teacher Qin	F
	Teacher Luo	F		Teacher Chen	F
	Teacher Zhu	F		Teacher Pang	F
	Parent Ma	F		Parent Wang	M
	Parent Wang	F		Parent Xu	F
	Student Ma	F		Student Wang	F

	Student Liu	M		Student Xu	M
	Student Han	F		Student Zhang	F
	Student Gao	M		Student Zhao	M

Throughout the field visits, we wrote memos and discussed preliminary findings with the research team to facilitate subsequent data collection and analysis. We applied a "constant comparing and contrasting" method rooted in grounded theory (Glaser & Strauss, 1967; Maxwell, 1996) for thematic analysis of the data. Similar school routines, events, and activities across the two schools were grouped together under one category, while contrasting beliefs, practices and attitudes were highlighted at the same time to permit the drawing of possible conclusions about the differences between the two schools. The tentative conclusions were then triangulated, checked and supported with more evidence from the ongoing participant observations and informal talks.

Discussion

The two schools in the study both advocated "equity" and put migrant students in the same classrooms as local students. However, they preached opposite principles of equity, adopted contrasting educational strategies and created vastly different learning environments for the migrant students. Their conceptions of equity were best illustrated by their divergent attitudes towards "differences".

Lotus School: Targeted Education for Migrant Students

Throughout the fieldwork, the school leaders at Lotus School proudly emphasized their differences from other schools in Beijing: "*Because most of our students are migrant children, we should adjust our school curriculum according to their special characteristics and provide a different kind of education*" (Lotus Principal 4-26-2012). The "special characteristics" of the migrant students, according to the school principal and teachers, included high mobility, weak knowledge foundations, and a strong sense of inferiority attached to their non-local status and disadvantaged family backgrounds. Although local Beijing students constituted about 20% of its student population, Lotus School seemed to position itself as a predominantly "migrant children's school" and paid particular attention to their special needs.

First of all, Lotus School made good use of decoration of its physical environment to make the migrant children feel at home. A huge poster stood on the top of the school building, with a well-known Chinese statement on behalf of migrant children in comparison with urban children: "*You compete with me for what your parents have today, but I will compete with you for who I am tomorrow (ni he wo lai bi fu mu, wo he ni lai bi mingtian.*" On the display board in front of the school building, pictures and calligraphies of the Chinese government officials and celebrities who had visited the school and showed care for the migrant children, as well as pictures of migrant children's life and study in the school, were posted. In addition, Lotus school adopted

"Happiness away from Depression, Confidence away from Diffidence" as its motto and had a school song written entitled, "*I am responsible, I am able and I am happy*", both in the attempt to instill such positive dispositions that were perceived to be lacking among the migrant children. Similarly inspiring words and slogans targeted towards migrant children could be found throughout the campus, from the school walls to each classroom wall. Together, such a configuration of words and pictures aimed to help the migrant students stay strong and persistent in hard work, but at the same time they conveyed a clear message about the non-local identity of the students, exposing and reiterating their inferior social status.

Secondly, Lotus School deliberately adjusted its curriculum and teaching methods to meet migrant students' needs. Although the migrant students were taught from the same textbooks as local students, the teachers at Lotus School commonly expressed their difficulty in teaching the former and reported needing to put more time and efforts into it, compared with teaching the local children. "*We have to start from the very basics so the low-achievers and newcomers do not get frustrated. We have to see to it that they do not lag behind and we encourage them to learn*" (Lotus School Teacher Li 3-14-2012). While other public schools in Beijing were undergoing curriculum reforms in the name of "quality education" and experimenting with innovative teaching methods, Lotus School resorted to traditional teacher-dominated lectures for the most part since the advanced teaching methods often required more student input, as well as parent input. "*We do our best to make them grasp the fundamentals in textbooks. The children cannot understand if you expand knowledge beyond the textbooks. Besides, the parents have no time to help or cannot help at all.*" (Lotus Teacher Luo 4-6-2012) In designing school-based curricula and extracurricular activities, Lotus School also tended to take migrant students' limited family resources into consideration and offered courses that did not require too much material input on the family's part, such as paper-cutting, knitting, calligraphy and recitations, etc. In this way, the curriculum at Lotus School was made more relevant and practical for migrant students to be active participants.

Thirdly, moral and character education occupied an important place at Lotus School to boost migrant students' confidence and encourage them to work hard. A typical example was the school-wide annual project of "Becoming a New Beijinger", in which students expressed their intentions to become a "New Beijinger" through forming good study habits and personal hygiene, learning to be polite, and assimilating into urban lifestyles and values, etc. When teachers motivated the students to learn, they explicitly alluded to their migrant status. "*You must study hard and strive to go to college in the future. Only that way will you stay in the city. Otherwise, you have to go back*" (Lotus School Class Observation 6-12-2012).

While Lotus School claimed to serve the "special needs" of its migrant students, it paid far more attention to developing migrant children's confidence and happiness through extracurricular activities and moral scolding rather than through improving their academic performance. For example, it didn't provide supplementary tutoring to the migrant children who had difficulty to catch up. Nor did it offer additional help or orientation programs for the newcomers who had just transferred to the school from rural schools. Instead, the teachers taught a watered-down curriculum in class and demonstrated low academic expectations towards the migrant children in general. One teacher openly expressed her attitudes,

> "*Our school can't expect them too much…So long as the students understand the basic content materials in the textbooks, that would be more than enough! You can't expect to undertake complex tasks*" (Lotus School Teacher Zhu 3-6–2012).

Therefore, Lotus School's approach towards differentiating the migrant children was not one based on the assumption that migrant children were different but capable learners, but rather on the assumption that they have deficits in learning due to their rural origin and migrant status. Such differentiation with its remedial nature, seemingly in line with "vertical equity", nonetheless diverted from the ideal of "distributive justice" as advocated by Rawls (1971), which aims to redistribute opportunities through different treatment in order to benefit the least well-off.

Because of its positioning as "a school for migrant children", Lotus School attracted great attention in the neighborhood and was deemed successful by the upper-level educational administrators. Donations and visits from public celebrities to the school were frequent. The migrant students at Lotus School were often invited to participate in various art contests and perform in festivals or on TV programs. Obviously, Lotus School had successfully publicized the disadvantages of migrant children and made use of the school image to procure more opportunities and resources for the development of the school. However, the publicity Lotus School won was not always conducive to the benefits of migrant students. Many students expressed strong dislike and even disinclination to participate in the performances and rehearsals. "*We have to rehearse again and again! The afternoon classes are all ruined!*" (Student Ma, 5-11-2012) "*It is like a show, you know. Whenever visitors come, we repeat the same thing. It's all fake*" (Student Han, 5-11-2012). Moreover, the slogans and performances, though intended to be inspiring, worked as clear labels and solidified stereotypes to remind the migrant students of their disadvantaged social status. Frequent and explicit references to their migrant status in daily routines and on TV only intensified this awareness.

In the fieldwork, I found the migrant children at Lotus School frequently used the derogatory "waidiren" (meaning non-locals) label on themselves, which implied second-class citizenship and restricted future schooling opportunities in the city. While being asked which middle school to go to, the migrant children usually pointed to S School nearby as their option. "*Many students in my class would go there. Almost everybody going there is a waidiren. Other schools would have looked down upon us waidiren*" (Lotus School Student Liu 3-6–2012). When a small number of migrant students went to apply for better middle schools with the help of their parents, to our surprise, they were teased and jeered at rather than envied by their classmates. To many migrant students, these efforts were in vain. "*Even if these students could be admitted, they must feel no good there. For one thing, they will fall behind in schoolwork; for another, students going to these schools are all rich kids. They will be looked down upon if they go there*" (Lotus School Student Gao 4-6–2012). Clearly, these migrant students, in trying to shame the few "attempters", had self-selected into the lower track of urban schools and were even diffident to apply for "good" schools. As one parent observed: "*Everything at Lotus is good except for test scores*" (Parent Ma, 5-12-2012). Obviously, the differentiation model that Lotus School adopted is similar to the practice of tracking that has long been criticized for stigmatizing students and producing school failures.

Safety School: Saying No to Differential Treatment

Apparently, Safety School leaders and teachers held different views with regards to what was best education for the migrant students and adopted school practices accordingly. Although they were also clearly aware of the "special characteristics" of the migrant students, they chose to downplay these purposefully and sought to assimilate them in the urban school system. The most prominent words that recurred in our interviews and fieldnotes at Safety School were "equal treatment" and "assimilation".

Unlike Lotus School, the campus of Safety School did not use value-laden slogans or pictures to highlight the disadvantages of the migrant students or demarcate them as a special group in need of help. While Lotus School deliberately created a school image as one that served predominantly migrant children to win publicity, Safety School seemed to position itself as a regular public school. Nowhere could one see anything related to migrant students, even though they made up the majority of the student population. The decorations on the walls and corridors of the school building were mostly Chinese paintings and ancient lyrics. Compared with Lotus School, Safety School was small, quiet and inconspicuous.

In terms of educational goals and school curriculum, Safety School did not create special programs or classes for migrant children. Like the other public schools in Beijing, the teaching activities at Safety School centered around nationally designated textbooks. According to the principal at Safety School,

> "*We run our school wholly under the guidance of Beijing Municipal Education Commission. Our school fulfills every teaching requirement and our facilities are all up to standard. All the courses required by the Commission are offered in our school*" (Safety Principal 9-17-2012).

Student assessments and graduation standards at Safety School were also in accordance with those required by Beijing Municipal Education Commission, even though the migrant students had a low starting point. In the interviews, Safety School teachers justified the strict requirements for student outcomes out of concern for their future schooling options. "*Whether they will enroll in Beijing middle schools or return home, they will take part in examinations and competitions to enter middle school. So the same requirements apply everywhere: academic performance and school behavior*" (Safety School Teacher Qin 9-4-2012). At the same time, they expressed the necessity of equal treatment so as not to damage the self-esteem of the migrant children. "*The migrant students don't like being treated differently. If you consider their special needs, they would believe that you are treating them as outsiders. Some people believe that differential treatment takes their special needs into consideration, but the migrant parents may take it as a discrimination against their children*" (Safety School Teacher Pang 9-27-2012).

In moral education, Safety School used China's past and present and the history of Beijing as educational resources to inculcate patriotism and character building, with little reference to the status of the migrant students themselves. Students' interest in optional classes and extracurricular activities were certainly taken into consideration in designing curriculum for the following year, but in terms of individual aptitude or preference rather than due to group inclination. In daily routines and student

discipline, the teachers at Safety School deliberately avoided mentioning the non-local status of their students. "*It's the same to everybody, no special treatment. Depending on the children's talents, they do what they can do. We won't distinguish who are migrant children and who are not*" (Safety School Teacher Qin 9-4–2012). Thus, unlike Lotus School that tailored their educational programs towards the migrant children, Safety School practiced mainstreaming and acted upon undifferentiated equal treatment. In doing so, it did not advertise itself as a school serving predominantly migrant children, but insisted upon high standards and a rigorous school curriculum as a survival strategy to attract more students, either local or non-local. In fact, Safety School seemed to want to be acknowledged as a "regular" public school in Beijing, as these are often assumed to be of higher quality than schools serving migrant children. *"We can't deteriorate into a migrant children's school. Test scores mean everything. If you don't perform well, the school cannot survive. Many weak schools in Beijing have been closed or taken over these years*" (Safety Principal, 9-17-2012).

Indeed, the migrant students at Safety School were pushed to learn and achieve academic improvement, less burdened by the "colorful" extracurricular activities. At the same time, the practice of mainstreaming helped them avoid constant identity exposure in comparison with their counterparts at Lotus School. The non-local label was inconspicuous. "*They were not that much different from us. We play together. We don't even know who are from outside Beijing*" (Informal talk at Safety School 3-22-2013). To a certain extent, the migrant students at Safety School had a normalized and "pure" school life focused on study.

On the other hand, however, in acting upon the principle of "no differential treatment", Safety School neglected the special educational needs of migrant children as a disadvantaged group. Many migrant children had difficulty catching up in academic study with weak academic foundations from their previous rural schools. A large number of migrant children at Safety School lagged behind and were regarded as "backward" students.

> "*English is the most difficult subject to me. I transferred to Safety School in the second grade. Village schools didn't offer English class until the third grade. I had never learned English, but my classmates had learned for two or more years*" (Safety School Student Wang 10-11-2012).

Under the disguise of equal treatment and fair competition, Safety School did not make any efforts in terms of remedial or compensatory curriculum to help migrant students learn. Instead, it attributed the behavior and study of migrant children to their lack of effort or hard work. The "swim or sink" philosophy of mainstreaming without taking initial disadvantages into consideration placed the migrant students in a marginalized position at Safety School and exacerbated their feelings of being neglected and not belonging in urban schools.

At first sight, the mainstreaming model adopted by Safety School reminds us of Confucius' teaching that instruction knows no class distinction, as well as the ideal of "horizontal equity" and "meritocratic equality" that subjects everyone to a uniform standard. A closer examination based on in-depth fieldwork nonetheless indicates that the rationale behind such a model lies in the eagerness of Safety School to get rid of the reputation as a weak school. Through the mainstreaming/assimilation strategy,

Safety School hopes to survive in the urban school system increasingly driven by test score competition and efficiency. Yet in doing so, it neglects the unequal footing and unbalanced power relations embedded in China's Hukou-based political economy that disadvantaged migrant students are situated in.

Conclusion

While providing equal educational opportunity for disadvantaged children is a global concern, actual practice varies from school to school and depends on the specific school context as well as its available resources and educational philosophy upheld by its leaders. The two case schools in the study adopted quite different ways of educating migrant students and both seemed to be justified by their respective conceptions of educational equity. While Lotus School highlighted the "special needs" of the migrant students in the hope to attract public attention, Safety School acted upon "no differential treatment" in its efforts to survive in the competitive urban school system. However, this study demonstrated that both differentiation (vertical equity) and assimilation (horizontal equity) have positive and negative impacts on the migrant students.

The two case schools in the study were deliberately selected for the purpose of comparison and couldn't represent all schools serving migrant students in Beijing, let alone throughout China. However, in our longitudinal study, we found many Chinese urban schools act upon a preconceived or misconceived discourse of equity, either intentionally or unintentionally. While claiming to serve the best interests of the migrant students, their conceptions of equity and school practices seem to be shaped more by the sociopolitical circumstances they are situated in and the needs of school development than by the true educational needs of migrant students. With the increasing influx of rural migrant children in the cities, it is time for the Chinese urban schools to truly care about them, learn about their hardships and maladjustments in the rural-urban transition, and place a premium on their social, civil and educational rights above everything else. Instead of resorting to superficial confidence-building activities and watered-down curriculum or totally ignoring their disadvantaged circumstances in the mainstreaming classes, urban schools should develop a "student-oriented" conception of equity and reconsider what "equal treatment" in school practice implies for migrant children. Future research on school equity in the Chinese context, both theoretical and empirical, can throw lights in this regard.

While absolute equity is hard to achieve in any given society, a more complex, fluid and dynamic conceptualization of equity, i.e., inclusion, has been put forward as an alternative discourse to simplistic or mechanic views of equity. Inclusion is also compatible with China's socialist ideals as well as its vision of building a harmonious society. However, given its long-rooted Hukou regime and rural-urban dualistic social structure, China has a long way to go before institutional barriers confronting migrant children can be removed. Without the macro-level structural reforms, public schools cannot be expected to adhere to the theory and practice of inclusive education in the truest sense.

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Notes

[1] In China, the out-of-state concept is more complicated. It applies to those residing in the same province but outside the particular city/district. The household registration (Hukou) includes two components: one denotes rural/urban status; the other specifies one's locale of jurisdiction from the provincial level down to the street/neighborhood.

[2] The eligibility conditions vary from city to city, but the basic requirements include: parents' employment proof in the host cities, their temporary residence in the neighborhood, social security record, single-child certificate, and the proof of no caregivers in their place of origin etc.

[3] The co-principal investigators took the lead in the interviews, while the graduate student(s) were assistants, asking questions occasionally.

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Proactive, Reactive, Sustainable? Analyzing South Africa's *Policy and Strategic Framework on HIV and AIDS for Higher Education*

Elizabeth R. Bruce

Introduction

This analysis examines South Africa's *Policy and Strategic Framework on HIV and AIDS for Higher Education*. According to the Foreword by the Minister of Higher Education and Training, it is addressed towards "all" at higher education institutions, including students, university management, and other role players, for implementation and as a "guide" for institutions to develop their own policies (p. 2). Analysis of this policy is important, not only because it is to influence policy-making at individual institutions. This version, in alignment with the *National Strategic Plan on HIV, STIs and TB 2012-2016*, drew from 2008's *Policy Framework on HIV and AIDS for Higher Education* as well as research findings (Higher Education HIV/AIDS Programme [HEAIDS], 2012). It is expected future versions will be arrived at similarly. As such, it is imperative to examine what is, and is not, a part of the policy to subsequently improve the next version so as to further combat HIV.

In 2011, the Republic of South Africa and the South African National AIDS Council (SANAC) released the *National Strategic Plan on HIV, STIs and TB 2012-2016*, giving national sectors strategies to reduce and end effects of HIV and tuberculosis (TB) that occur through infection, transmission, discrimination, and death (Republic of South Africa & South African National AIDS Council [SANAC], 2011). Still in 2016, according to UNAIDS (n.d.), South Africa had approximately 270,000 new HIV infections and approximately 110,000 AIDS-related deaths. Of those infected, individuals between 15 and 24 have been especially vulnerable to exposure and transmission (Republic of South Africa & SANAC, 2011) with females of this age group experiencing infection rates four times that of men (Shisana et al., 2014).

This 15- to 24-year-old age group aligns with many served by higher education. This sector faces challenges and inequalities which reflect the history and present situation of South Africa overall: a legacy of colonialism and apartheid with ongoing inequalities, not limited to race, gender, socioeconomic situations, and geography (Department of Education, 1997; Universities South Africa, 2015). Adding to higher education's challenges, risky behaviors like multiple sex partners, transactional sex, and alcohol and drug use by those at its institutions create an environment conducive to HIV exposure (HEAIDS, 2010). This makes higher education an important ally in the fight against HIV and its policies important to consider.

Published through cooperation among Higher Education South Africa (HESA), the HEAIDS secretariat, universities, and South Africa's Department of Higher Education and Training (DHET), the *Policy and Strategic Framework on HIV and AIDS for Higher Education* dedicates itself to action against HIV and AIDS, citing reasons for the sector's importance

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combatting HIV. Among these are its role in the workforce development pipeline (HEAIDS, 2012). The Preamble describes higher education as a main driver of economic development, with its students representing "the future skills and knowledge base of the economy, academics, and service and administrative staff" (HEAIDS, 2012, p. 10).

With these contributions framing the need for response to challenges arising from the HIV epidemic, this analysis of the *Policy and Strategic Framework on HIV and AIDS for Higher Education* is guided by the Statement of Intent's wording to "respond" and "mitigate" HIV impacts (HEAIDS, 2012, p. 9). Research questions guiding the analysis ask:

1. Does this policy offer guidance on the HIV epidemic that is proactive and reactive so that higher education can help drive economic development for South Africa?
2. Is the guidance sustainable to help drive economic development for South Africa?

Proactive, reactive, and/or sustainable guidance, by definition, directly ties to success. *Proactive* guidance serves to mitigate and stop the spread and effects of HIV. This could include disease research and programmes targeting risky behaviors, for example. *Reactive* guidance responds to disease infection. Examples could include policies for support groups and HIV-infected higher education employees, among others. *Sustainable* guidance is that which can be maintained long-term. As detailed later, to consider sustainability, this analysis examines the *Policy* according to the two categories, "Infrastructure Capacity-Building" and "Sustainable Innovation Confirmation," drawn from work by Johnson, Hays, Center, and Daley (2004). Together, these three criteria have implications for economic development as they relate to response and mitigation of HIV, which affects millions of South Africans, their families, and communities directly and indirectly. Areas impacting HIV and impacted by it are described in the next section.

Literature Review

Examining the way HIV impacts and is impacted by society, healthcare, and workforce development offers context that helps inform what is needed to effectively combat the disease for this sector and for South Africa's economic development broadly-speaking. Considering issues related to HIV infection as they intersect with the higher education sector offers more specific insights. In addition to detailing this context and these specifics, connections made in these three areas in the *Policy and Strategic Framework on HIV and AIDS for Higher Education* itself are outlined.

Society. The HIV epidemic has unfolded against the unique backdrop of South African history. Though democracy and broader support for human rights were adopted in 1994, a legacy of inequality remains across South African society (Coovadia, Jewkes, Barron, Sanders, & McIntyre, 2009). For the higher education setting, inequalities arising from race, financial situations, educational access, health, and opportunity emerge (Department of Higher Education and Training, 2013).

HIV brings additional issues to light. Stigma related to HIV remains an issue (Human Sciences Research Council, 2015), leading to discrimination within families and by community members, job loss, loss of land holdings, school expulsion, health treatment denial, and violence (Joint United Nations Programme on HIV/AIDS, 2007). Despite recent gains, SANAC notes, particularly, the extreme challenge to progress because violence towards women and sexual minorities has been so prevalent (Human Sciences Research Council, 2015). This violence towards women, as well as risk-taking behaviors by men related to sex, stems from patriarchal norms and views of masculinity leading men to exercise power over women (Coovadia et al., 2009). In the midst of such violence, women face difficulties taking control during sexual encounters, putting them at risk for HIV (Maman, Campbell, Sweat, & Gielen, 2000).

The higher education environment itself tends to place students at further risk for HIV infection. Students are often apart from their families for the first time (UNESCO, 2014). This independence is often accompanied by increased exposure to alcohol and drugs, fuelling risk-taking (UNESCO, 2014). Academic pressures in some cases lead students to exchange sex with higher education staff for grades, and financial stress can lead students to pursue work in the sex trade (UNESCO, 2014). On the positive side, higher education is well-positioned to influence students who will lead in the public and private sector for the future (HEAIDS, 2010).

Healthcare. Healthcare is critical to reacting to the effects of HIV, and higher education serves as a provider of such services for both students and employees (HEAIDS, 2010). These services focus on physical treatment, as well as psychological and social ones (HEAIDS, 2010). Besides reacting to the disease, universities also serve proactively, conducting research contributing to patient treatment and disease eradication and linking individuals with HIV research interests so as to strengthen collaboration across institutions.

Workforce development. Just as HIV is detrimental to economic development overall, workforce knowledge and development achieved through higher education can be devastated by HIV. Deaths of employees and students decrease the present and future workforce, knowledge base, experience pool, and returns on investment (United Nations Department of Economic and Social Affairs, 2004; UNESCO, 2014). Productivity and quality of work also suffer with compromised health of employees or their family members (United Nations Department of Economic and Social Affairs, 2004).

Society, healthcare, and workforce development in the *Policy*. The *Policy and Strategic Framework on HIV and AIDS for Higher Education* explicitly presents connections among HIV; society, healthcare, and workforce development as they relate to higher education; and subsequent economic development of South Africa. First, the "strong social and structural underpinnings" of the disease are referenced in connection to development and poverty reduction struggles (HEAIDS, 2012, p. 10). The higher education sector as a pipeline to the labor market is specifically highlighted in overcoming these struggles, with the sector referred to as "one of the fundamental and critical levers for overall development" (HEAIDS, 2012, p. 11). Second, this policy points to the unique positioning

of the sector to address HIV impacts as necessary for its involvement. Higher education action is framed as imperative because its environment is uniquely conducive to HIV transmission, with health declines, absenteeism, and high stress encountered by students, educators, and support staff threatening the sector's ability to fulfill its mission of teaching and learning (HEAIDS, 2012).

More optimistically, its unique situation for grooming "agents of change" in society at large and its mandate to "generat[e] new technologies, practices, and understanding through research" are also stressed (HEAIDS, 2012, p. 12). The attitudes, skills and knowledge pertaining to HIV gained during time at universities have protective possibilities for those with access, and these individuals contribute to economic activities. These attributes also have the potential to serve as foundational building blocks for long-term broad economic development. The economic imperative of HIV policy for the higher education sector is ultimately framed as fulfilling its role in developing "cherished" human resources fundamental to economic development (HEAIDS, 2012, p. 12).

Conceptual Framework

The attention to health in relation to economic development, including through higher education, is laid out in the literature. Higher education is a site of formation and application of human capital resources, enhancements, and innovations (see, for example, reviews of literature on economic growth summarized in Hanushek and Woessmann [2010]). In his work on human capital, T. W. Schultz (1961, 1980) focused on issues affecting individual abilities to gain and, ultimately, utilize human capital, as through economic participation, with particular attention to influences of health. Building from this, Mushkins (1962) explained how effects of health-related programming are two-fold: increasing the size of the workforce as well as improving quality of labor outputs. Hamoudi and Sachs (1999) presented five means by which health impacts economics: costs of treatment and loss of productivity at work, ongoing effects of illness and disease, demographics, impacts on social behaviors and commerce, and the "vicious cycle" of poor health (pp. 7-8).

The attention to health in relation to human capital accumulation leads to consideration of prevention and the sustainability of "prevention innovations," particularly in the arena of health, to target promotion of helpful practices and reduction of unhelpful ones long-term. Johnson et al.'s (2004) work on sustaining these innovations, approaches which may be proactive and/or reactive, led them to develop a sustainability planning model. Johnson et al. (2004) found a strategy's sustainability to be connected to two factors, "Infrastructure Capacity-Building" and "Sustainable Innovation Confirmation" (p. 138). The former focuses on resources in the context of the innovation, including people's abilities, knowledge, and relationships, as well as physical and institutional features, like financing, technology, and administrative guidance (Johnson et al., 2004). The latter focuses on the innovation itself and its continued usefulness to stakeholder needs and their connections to it and each other before, during, and after implementation (Johnson et al., 2004). Sustainable Innovation Confirmation, according to Johnson et al. (2004), includes communications and evaluation. Influenced by Schultz, Mushkin, and Hamoudi and Sach's work factoring health into human capital formation, these two categories

outlined from the prevention literature provide guidance for examining the *Policy and Strategic Framework on HIV and AIDS for Higher Education* to determine whether it proactively and reactively responds to the disease in a sustainable way.

Higher education has been working to address HIV impacts for many years. Critiques published just before the *Policy*'s release provided specifics on gaps and ways in which future investment for HIV could be most beneficial. These critiques, shown in Figure 1 alongside issues related to HIV infection and the higher education population, are explicitly cited as reasons for revision in remarks by the chairperson of the HESA-HEAIDS group (HEAIDS, 2012, p. 5). Most are self-explanatory and can be categorized based on their relationship to society, healthcare, or workforce development. One critique, recommending "critical intellectual engagement," was contributed by Mary Crewe, the Director of the Centre for the Study of AIDS at the University of Pretoria with ten years' experience in integrative HIV/AIDS programming (UNESCO, 2014, p. 79). Her recommendation pertained to the need for higher education to extend its approach beyond only treatment and prevention. She advocated extending approaches to raise student awareness of how "poverty, race, globalization, and class" spread HIV and the addition of programming to encourage students to grapple with issues around sexuality and tolerance (UNESCO, 2014, p. 79).

Paralleling recommendations to broaden awareness of the roles played by poverty, race, globalization, and class, literature and media reports on the South African higher education sector overall indicate systemic gaps related to these. These gaps are relevant not only to discussions for what higher education should offer in terms of health and HIV but also to whether these offerings, should they be introduced as a result of the *Policy*, are even accessible.

For example, university fees are often quite high in South Africa, meaning many individuals are excluded entirely or, if they do attend, they are often burdened with debt (Department of Higher Education and Training, 2013; Falkof, 2016). This burden is obviously felt most greatly by those in poorer households. The highest levels of poverty are found in female-headed households and households headed by black South Africans (The World Bank, 2018). Large families and households that are rural also are likely to face impoverished circumstances long-term (The World Bank, 2018). The country's loan program can add to this burden, covering amounts per student that are too little to cover fees (Council on Higher Education, 2016; Falkof, 2016; "How much students owe," 2015). If students are able to afford attendance, different experiences are frequently offered according to the campus on which they arrive. Some of these differences have been linked to socio-economic contexts of the communities where they are located (Capacity4dev.eu, 2017) and the leadership in place at that particular campus (Tau, 2016; Tshehle, 2016). Once in the classroom, statistics indicate differences in successful completion of coursework. For example, black African students are shown to have an average course success rate of 74% in comparison to an 84% success rate for white students (Universities South Africa, 2015).

Also, many black students, faculty, and staff feel alienated and little sense of belonging at their universities (Universities South Africa, 2015). This is connected to South Africa's history of a segregated higher education system (Universities South Africa, 2015); an ongoing "institutional culture" unwilling to embrace diversity, including through hiring more diverse staffs and addressing sexism, racism, and discrimination head-on (Universities South Africa, 2015, p. 14); and pressures to be more financially efficient to the detriment of being fair (Luckett & Mzobe, 2016). Outsourcing staff positions, many of which are filled by blacks and women, as part of efforts to improve efficiency and competitiveness has increased race and class divisions among workers and feelings of marginalization among those employed at universities (Luckett & Mzobe, 2016).

Because these systemic issues impact who will be reached by the *Policy*, they are listed among the critiques presented in Figure 1. This figure offers a framework for analysis of results presented in the next section.

Figure 1. Overlaps between HIV and higher education: A framework for analysis.

Areas Impacting and Impacted by HIV Infection	**Issues Related to HIV Infection and the Higher Education Population**	**Critiques[a]**

Society	• Stigma and discrimination
	• Violence towards women/ sexual minorities
	• Patriarchal norms
	• Unique to higher education:
	  • Young age group
	  • Alcohol and drugs frequently encountered
	  • Risk of exchanging sex for grades
		• Better promotion of post-exposure prophylaxis following rape
		• Increased prevention involvement by those HIV-positive
		• Increased focus on female students, older students, those in same-sex relationships, and staff with disabilities
		• Address of systemic gaps stemming from race, gender, geography, and socioeconomic situations

Healthcare	• Disease breakthroughs • Mental health treatment • Social support	• More education on mother-to-child transmission possibility • More widespread condom availability on campus • Reconsideration of voluntary counselling and testing offerings based on need • Strengthened sexually transmitted infection education and treatment

		• Institutionally-embedded peer education programs
Workforce Development	• Decreased size of workforce and potential workforce • Productivity and quality of workforce • Workforce healthcare costs/death benefits	• Revised focus on staff, who show highest HIV prevalence • Differentiated innovations for staff/students • Decreased complacency in low-prevalence institutions • Address of systemic gaps stemming from race, gender, geography, and socioeconomic situations

[a] Drawn from Capacity4dev.eu (2017), Council on Higher Education (2016), Department of Higher Education and Training (2013), Falkof (2016), HEAIDS (2010), "How much students owe" (2015), Luckett and Mzobe (2016), Tshehle (2016), and Universities South Africa (2015).

Results of the Policy Analysis

Reflecting guidance by the South African Constitution and the *National Strategic Plan on HIV, STIs and TB 2012-2016*, the *Policy and Strategic Framework on HIV and AIDS for Higher Education* directs actions of the sector, organizing them according to three strategic objectives, listed as follows:

> 1. To ensure the comprehensive and appropriate use of the Higher Education mandate of teaching and learning; research, innovation and knowledge generation; and community engagement to effectively respond to the epidemic drivers of the pandemic.
>
> 2. To promote the health and well-being of the Higher Education community at individual, group and institutional levels though strengthening capacity, systems and structures responding to the epidemic.
>
> 3. To create an enabling environment to ensure a comprehensive and effective response to HIV and AIDS within the Higher Education sector, free of stigma and discrimination. (p. 22)

"Critical Components" related to each of these objectives are presented. In the sections that follow, policy related to these components is overviewed, presented in relation to issues surrounding HIV and the higher education population and the critiques just presented (see Figure 1) as appropriate. Measures advocated are categorized as proactive, reactive, and/or both, to move towards answering the first research question. The *Policy*'s

sections entitled "Roles and Responsibilities" and "Section 3: Monitoring and Evaluation Framework" are similarly examined. Finally, evidence as to whether the policy is sustainable based on attention to Infrastructure Capacity-Building and Sustainable Innovation Confirmation is presented to begin addressing the second research question.

Proactive, reactive, both?

Objective 1. In relation to its Component 1, graduates are framed as future "leaders in society" (p. 24), not just in general but specifically, in facing challenges of HIV personally and professionally. Higher education is framed as uniquely positioned through its role in generating and sharing research and evidence to not only improve progress in this area for the sector but also for communities and the nation as a whole, positioning it to respond both proactively and reactively.

With Component 2 a range of proactive and reactive innovations are presented, and many align with recommendations of earlier critiques, including attention for mother to child transmission, condom availability, counselling and testing, and general health promotion. For Component 3, "peer educators and youth ambassadors," as well as teachers, are designated as valuable to communicating with students, addressing another critique (p. 26). Social and behavioral factors affecting HIV transmission and treatment are among the "combination" (p. 24) of interventions higher education is to offer. Aligning with critiques advocating differentiation among audiences for innovations, there are calls for programming that "customize[s] interventions for different groups" (p. 26), though these are left vague for the most part. Older, working adults, frequently enrolled at open distance learning (ODL) universities, are specifically mentioned. Women regardless of whether they are infected or not are also specifically targeted by Objective 1. "Gender norms and gender-based violence, masculinity issues, transactional sex, [and] issues of sexual consent" (p. 26) are listed as issues for attention by the sector, connecting them to their effects on women. More broadly, unprotected sex, alcohol, and substance abuse are to be addressed, as directed in Components 3 and 4.

Objective 2. Components for this objective are both proactive and reactive in their focus on promoting health and well-being through corporate approaches at institutions. Programs are to be proactive in their protection and maintenance of health as well as reactive to support those already infected by the disease. Staff is given great attention in the components for this objective, addressing criticism they have previously been ignored despite the high HIV prevalence exhibited by this group. Reflecting research found in the HIV literature, Component 1 calls for reactive approaches addressing not just physical but "cognitive, behavioural, spiritual, and psychosocial aspects of wellness" (p. 27) as well. Component 2 focuses on "recommended minimum components" of workplace policy to react to the disease (p. 28), while advocating contextualization. Additionally, institutions are directed to develop specific responses based on particular "impacts of HIV infection and illness" they experience, "programmatic gap areas" that exist, and observed needs for "attitudinal and behaviour changes" (p. 28). Though not directly identifying complacent low-prevalence institutions, this component could certainly speak to this criticism. Needs of individuals living with HIV/AIDS-related illnesses in a "non-discriminatory way" are also put forth for address in Components 1 and 2.

Objective 3. Components of this objective emphasize stigma and discrimination free responses to HIV under a human rights approach. When reacting to the disease, past critiques pointed to the lack of inclusion and involvement by those already HIV-positive, and policy under this objective continues to speak to this group specifically calling for their "greater involvement" (p. 30). Component 2 also calls for training related to HIV that addresses discrimination including for those with disabilities, a group notably ignored according to critics. Communication regarding awareness and activities undertaken are the focus of Component 3. Proactively, Component 4 acknowledges the leadership potential of the higher education sector to actively communicate, engage, and partner with others as well as to obtain appropriate levels of funding (see Component 5). Notably in Objective 3, this leadership position is noted to span from executive to student levels, as well as to trade unions and staff associations. Also proactively, monitoring and evaluation are introduced here to indicate what this might look like and how findings might be used.

Roles and Responsibilities. This section is less about outlining proactive or reactive approaches and more about who carries out the approaches connected to the objectives and monitoring and evaluation, which is described in the next section. The Department of Higher Education and Training (DHET) and Higher Education South Africa (HESA) are designated as the primary drivers of this policy, positioned to offer resource identification, mobilization, and support in line with policy prescriptions. Support is also to be provided through the National Department of Health, supplemented by provincial, district, and municipal health departments. Roles for institutions themselves, including contextualization, implementation, evaluation, and responsiveness to stakeholders, are delineated.

Section 3: Monitoring and Evaluation Framework. Building from Objective 3, this section and the logic model included indicate the *Policy*'s heavy emphasis on monitoring and evaluation to react to what happens and have information to (potentially) shape future responses. The monitoring and evaluation process employed is expected to supply indicators, drive evidence-based decision-making, and promote information exchange. Such monitoring and evaluation build in opportunities to continually reflect on and discern whether proactive and/or reactive approaches are working.

The logic model is constructed according to the three objectives guiding the policy. For example, Objective 1 begins with two goals: "Reduced HIV infections" and "Reduced vulnerability of higher education students and staff to HIV and AIDS" (p. 34). For the most part, each is broken down into one or more results statements with sector and institution-level indicators specified.

Analyzing alignment between the policy text and logic model reveals close matches between objectives and evidence gathering in some areas, with gaps in others. For example, entries for Objective 1 address two of the four components outlined in the policy text. Noticeably absent are indicators related to combatting alcohol and substance abuse (Component 3) and the communication of such strategies (Component 4). Overall, the

logic model for this objective does not include indicators disaggregating data by key groups like women and first-year students. As a result, more detailed information, like data on gender-based violence, is not called to be collected. In contrast, Objective 2 is more comprehensively addressed by indicators in the logic model.

For addressing Objective 3, while aligning with all components, the logic model lacks details to reflect the specificity of the policy text itself in terms of particular stakeholders. Instead they are often referred to broadly as "strategic leadership" or "all participants" (p. 38). This is surprising since involvement of trade unions and staff bodies was called for by critics, is easily measurable, and simultaneously addresses greater involvement of staff historically struggling with high disease prevalence, another concern raised by critics. Stigma and discrimination for Objective 3 is set to be quantified using measurement tools provided by *The People Living with HIV Stigma Index*.

Sustainable?

As explained in the Conceptual Framework, in order to consider sustainability, Johnson et al. (2004) have found attention needs to be paid to "Infrastructure Capacity-Building" and "Sustainable Innovation Confirmation." To review, Infrastructure Capacity-Building is related to contextual factors, including human, physical, and institutional resources. Turning to Sustainable Innovation Confirmation, the focus is on stakeholders and their relationships to each other and the policy itself. Consequently, to answer research question 2, the *Policy* must be revisited with these in mind.

Infrastructure Capacity-Building. For Objective 1, peer educators and youth ambassadors are advocated to augment HIV education. To build up administrative safeguards, minimal workplace guidelines are a part of Objective 2. Two of the objectives also direct that needs of individuals already HIV-infected be addressed, important for improving life expectancy and the quality of their life and work. Training on HIV as it relates to discrimination, including for those with disabilities, and leadership which spans from the executive level to the student level is highlighted in accordance with Objective 3. Throughout the document, contextualization by institutions themselves is stressed which could enable them to develop additional capacity-building and institutional resources to target HIV according to university and even their individual campus needs.

Sustainable Innovation Confirmation. Multiple stakeholder needs are addressed and monitored within Objective 1 of this document: mother to child transmission, condom availability, counselling, testing, peer education and promotion of health as is communication "to encourage positive behaviours and to promote and sustain change" (p. 26). Communication across communities and stakeholders is to be undertaken according to Objective 3. Several student and staff stakeholder groups (older, working adults and women in Objective 1; those already infected in Objective 3) are directly addressed with disabled individuals addressed more indirectly. Presumably support from the National Department of Health and health departments locally will ensure ongoing match to health needs of those in the higher education sector. Evaluation, part of the Sustainable Innovation Confirmation category ascertained by Johnson et al. (2014), is

a large part of this policy's recommendations, found in Objective 3 and in a section entirely dedicated to monitoring and evaluation.

Conclusions

Looking closely at these results and comparing them to the issues and critiques presented in Figure 1, the *Policy and Strategic Framework on HIV and AIDS for Higher Education* does offer proactive and reactive approaches to combatting HIV. Many of these align with issues specific to individuals served by and serving higher education institutions and critiques directly related to HIV exposure, transmission, and prevention. Advocating that monitoring and evaluation be employed has potential to enhance success where there is close alignment between objectives and evidence gathered; however, this is not consistently the case across the logic model presented.

Consequently, in answer to research question 1, higher education is likely in an improved position to impact economic development. First, this improved positioning stems from investments in students, who can carry what they learn into society at large as they graduate. With this policy, this knowledge is set to include messages related to gender norms and issues of sexual consent, especially important for women, who statistics indicate are especially prone to contracting HIV. Messages are also set to address stigma and discrimination, a crucial issue for HIV-infected individuals. As students carry what they are exposed to during university forth to their own families, communities, and workplaces, others are exposed to their knowledge and these approaches. This multiplies benefits so that many are better informed to prevent and deal with HIV and its effects, thereby enhancing human capital stores that can contribute to economic development. Similarly, benefits can be gleaned by entities outside higher education as they learn from the sector's experiences trying out approaches and seeing what works. This allows others to adopt evidence-based approaches themselves, which can also enhance economic development.

Additionally, attention to staff needs regarding HIV and implementing workplace policies around the disease help maintain and maximize the higher education workforce with its knowledge and wealth of experience. Staff contribute not only to students but to society at large through their research and expertise. Healthier staff are more productive and contribute better quality work, further benefitting the South African economy.

Certainty of the policy's potential to make a difference economically comes into greater question, however, when considering research question 2 regarding sustainability. Drawing from the prevention literature and looking at Infrastructure Capacity-Building and Sustainable Innovation Confirmation, both categories are addressed to an extent; however, the burden is placed primarily on the institutions and individuals there. While DHET and HESA are named in "Roles and Responsibilities" for the national level, a lack of specifics on their involvement includes absence of ways they might address systemic gaps seen across higher education, stemming from race, gender, geography, and socioeconomic situations. While government decisions and market forces impact the higher education sector (Universities South Africa, 2015), the higher education system itself has the capability to lead on issues, especially related to teaching, learning, staffing,

and student needs, that can have ripple effects on factors related to HIV exposure, transmission, and prevention. Thus, there is incomplete address of Infrastructure Capacity-Building and Sustainable Innovation Confirmation.

For example, on its website, the National Student Financial Aid Scheme, responsible for providing financial aid to poor and working-class students, lists DHET as among its stakeholders (http://www.nsfas.org.za). This means there is potential for this entity to move to affect change in terms of financing for students. Such actions would take away one obstacle to entering university, thereby increasing the number of students, and particularly the number of less well-off students, exposed to what is laid out in the *Policy*. Such actions could also prevent students already in attendance from entering the sex trade as a way to pay for their education. Measures to affect resource availability so that all campuses start at the same level, and then can contextualize to enhance what they offer, needs to be prioritized by higher education sectoral leadership. Teaching, learning, and staffing are clear mandates over which the sector has influence to help disadvantaged students to succeed and to decrease outsourcing of workers, so both groups might remain in a position to benefit from the *Policy*'s strategies. Specific steps in these areas for DHET and HESA are not included nor defined in the way that, for example, data gathering is across the logic model.

Implications

The results stemming from this policy then are likely to continue as follows: peer educators, called for in the *Policy* to supplement other instruction on HIV, will not represent a variety of backgrounds because large numbers of students remain unable to enroll in university education that is out of reach financially or are forced to drop out because they are ill-equipped for success. The time spent serving as a youth ambassador, called for in the *Policy*, is time that cannot be spent working to pay for school or studying, making such roles luxuries for many and, again, leading to a group lacking in diversity. Contextualization of HIV programming on campuses will remain inadequate because of ongoing, glaring "underfunding in infrastructure, staff and student services" (Universities South Africa, 2015, p. 19) for those universities that were historically black or those campuses, formerly part of historically black universities, made part of a different university in restructuring. Gender issues will continue to be overlooked without more women in place to ensure they remain on the agenda. Many staff members, often the most in need of services for HIV, will remain unreached because of outsourcing, preventing them from benefitting from the *Policy*. And, finally, an education, itself highly preventive to HIV (Department of Basic Education, 2010; HEAIDS, 2012), will continue to be inaccessible and difficult for many. Economic development cannot be maximized until systemic, not just individual and institutional, issues related to HIV are made a part of higher education policy in South Africa.

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Justifications and Impacts of Low-Fee Private Schools in Kenya and Uganda: Understanding Policy Evolutionary Mechanisms through Public Discourse of Bridge International Academies

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Low-fee private schools (LFPS) have grown considerably in the developing world as public free primary education has been unable to cater to the poorest children. Bridge International Academies (BIA), one of the largest chains of LFPS, has positioned itself as a solution to issues of access and quality of primary education. Using newspaper articles from Kenya and Uganda, this paper examines public discourse of BIA through the lens of cultural political economy, or how public discourse can influence variation, selection and retention regarding LFPS. After exploring scholarship to understand the justifications and impacts of LFPS, this paper finds that justifications are present in public discourse while impacts are not. Therefore, public discourse has given voice and promoted the need for improvements, with LFPS as an option, but that discourse (and scholarship) has yet to emphasize LFPS as a real solution, due to inconclusive evidence and ongoing battles with governments.

The privatization of education has become a growing global phenomenon, with a sharp increase in private actors entering education markets over the past two decades. The education sector is gaining large investments from private organizations, providing opportunities for immense profits on a global scale (Komljenovic & Robertson, 2017; Verger, Lubienski & Steiner-Khamsi, 2016). While the global education industry is headquartered in the global north, the untapped and growing education markets of the developing world have led to greater investments in education in the global south (Robertson, Mundy, Verger & Menashy, 2012). The World Bank's policy advocacy for education privatization since the early 2000s has created an environment in which governments, aid agencies and the private sector see education privatization in the developing world as sound economic and education policy and a good investment. The World Bank's philosophical lead has led to an unprecedented growth in education privatization in sub-Saharan Africa and South Asia, leading to more, and larger, investments from a range of actors (Mundy & Menashy, 2014).

One area of education privatization which has received greater attention recently are low-fee private schools (LFPS). The purpose of this paper is to examine how one of the largest and most controversial chains of LFPS in East Africa is represented in public discourse and how their representations in media may help or hinder policy evolutionary mechanisms concerning education privatization. This paper differs from research exploring legal, educational achievement and human rights issues concerning LFPS and is instead grounded in the public discourse of these schools, or how these schools are represented and perceived in an important communication medium.

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LFPS are understood as schools owned by individuals, groups or companies which offer their services to children for a small fee, either paid directly by parents or by a third party, for the purpose of making a profit (Srivastava, 2013; Phillipson, 2008). The fee differs depending on the country and the provider but is vaguely calculated as the price-point deemed affordable for those living in poverty (Riep & Machachek, 2016; Verger, 2012). The realization that the quality of public primary education was subpar and that not all children had access to public schools, even following the push for universal primary education, has led to a rapid increase in private school enrolment (Alcott & Rose, 2016; Rose, 2009; Tooley & Dixon, 2005). This paper specifically examines one chain of LFPS in Kenya and Uganda, two countries where private education has increased drastically since the emergence of free primary education (FPE) policies. The amount of LFPS has risen dramatically in Kenya since the introduction FPE in 2003 and account for a majority of the private education institutions in the country (Nishimura & Yamano, 2013). A similar trend has happened in Uganda, where enrolment in private schools increased following FPE in 1997 (Kisira, 2008; Saphina, 2017). The two neighbouring East African countries are therefore relevant case studies concerning the growth, justification and impact of the LFPS movement. Although there are more LFPS in Kenya, from the available evidence, debates surrounding their legality and morality have taken centre-stage in both countries. While a comparative study of the two countries would be useful for further research, I choose not to focus on comparison but rather on public discourse in the region as LFPS are still a recent phenomenon and because of their precarious legal statuses in both countries.

This paper will use recent academic literature to understand the justifications for LFPS and the impact of these schools on the education system. Following the literature review, I will examine public discourse of Bridge International Academies (BIA), the largest chain of LFPS in the world, and in East Africa, using one prominent newspaper from each country. I conceptualize public discourse as accessible and broad mediums of information and culture which help people understand the world around them. I will analyze public discourse concerning BIA through the lens of cultural political economy (CPE) by examining BIA in discourse through the evolutionary mechanisms of variation, selection and retention. CPE is a useful theory for analyzing how the mobilization of ideas and new strategies, and actors' perceptions of these ideas and strategies, leads to political positions and consensus, and eventually new policies. (Jessop, 2010; Verger, 2016). Using this framework, I explore BIA's justifications and impacts, to understand how private education actors enter, grow and stabilize in low-income countries. I look at mechanisms of variation, selection and retention of BIA through public discourse to understand whether other actors, namely parents, teachers and citizens, are linked to policymakers' vision of the role of private actors. In the CPE context, variation refers to the development of new practices when dominant ones must be revisited due to challenges or dissatisfaction. Selection concerns identification of policy solutions deemed most suitable after examining existing problems. Lastly, retention represents the final step in which policymakers enact reforms after understanding the problems and exploring solutions. These three stages provide a more critical analysis of policy adoption and the roles of strategic actors, and public information, in pushing for reforms linked with privatization (Verger, 2016; Verger, Fontdevila & Zancajo, 2017).

For this paper, I ask the following research questions: a) how is BIA portrayed in the Kenyan and Ugandan news media? b) how does public discourse about BIA represent justifications and impacts of the LFPS movement? c) how does public discourse concerning BIA explain variation, selection and retention ideas? In answering these questions, this paper attempts to demonstrate the role of public discourse in creating an environment for private education actors to capitalize on problems related to access and quality in education and to insert themselves as viable and long-term policy solutions.

Bridge International Academies

BIA was founded by Jay Kimmelman, his wife Shannon May and Phil Frei in 2007. Together, they created a business plan for mass schooling in developing countries based on the "Academy-in-a-Box" model. This model is based on standardized methods, curricula and teaching methods which can be scaled and copied across various contexts while keeping costs low. The entire BIA supply-chain, from finding places to construct schools to lessons plans, is controlled and streamlined primarily by BIA employees in the United States. Teachers and Academy Managers, the sole on-the-ground administrative employees, use computers and/or smartphones to access lessons and scripts prepared by central academic teams (Riep & Machacek, 2016). Using and tapping into market-making devices such as marketing campaigns and standardization, BIA has attempted to create new education markets where their schools can flourish (Riep, 2017; Srivastava, 2016).

The first BIA opened in 2009 in a slum in Nairobi. By 2016, BIA owned and operated over 520 schools throughout Kenya (420), Uganda (63), Liberia (50), Nigeria (4) and India (3) (Riep & Machacek, 2016). Since the company's inception, they have received large amounts of philanthropic funding from prominent global players, including the Clinton Global Initiative, Bill Gates and Mark Zuckerberg and national governments through their aid agencies, including USAID and DFID (Riep, 2017).

LFPS in Kenya and Uganda: Justifications and Impacts

Scholarship concerning the rise of LFPS in East Africa over the past decade has focused primarily on its relation to FPE and the increase in demand for public primary schools. In recent years, academia has focused on urban slums, because the largest growth in LFPS have occurred in these areas (Tooley, Dixon & Stanfield, 2008). This section examines the rise of LFPS by examining recent literature on the justifications for their existence and their impacts on student achievement and school quality. Articles selected for the literature review focused primarily on measuring the successes and failures of LFPS in the region using varied methodologies and criteria for impacts on education outcomes. This attempt to provide a verdict on whether LFPS are helping or hindering education is closely related to how BIA is portrayed and whether the chain's entrance and impact in East Africa demonstrates its influence on policy.

Justifications

The Need for Schools in Urban Slums

A primary justification for the growth of LFPS in both Kenya and Uganda is the lack of public schools to accommodate all children, especially in urban slums. In both countries,

the impact of FPE policies had immediate consequences for access to education in urban areas. Although the elimination of school fees led to rapid national increases in enrolment (Lewin, 2009), it also put great pressure on the public system to expand at an impossible rate. (Nishimura & Ogawa, 2015; Saphina, 2017). The immediate impact of FPE on access to education was not as present in urban slums, where building schools and hiring administrators and teachers became a difficult task for governments.

In Kenya, Tooley, Dixon and Stanfield (2008) explored the rise of LFPS in the Kibera slum of Nairobi by interviewing school owners and managers. First, they claim, after finding nearly 80 LFPS in Nairobi and compiling self-reported data on each school, that the positive impact of FPE in slums was overstated, and that students enrolled in private schools pre-2003 simply transferred to public schools, meaning that there was little to no net gain in enrolment. Second, based on these findings, they argue that new LFPS have grown significantly in slums to meet the needs of the poorest who were left behind. They conclude that there are serious inadequacies concerning school access through state-run education for Kenya's poorest and that LFPS are trying to fill this gap.

Oketch, Mutisya, Ngware, Ezeh and Epari (2010) explored how students transferred and chose schools in urban Kenya and the competitiveness of entering public schools vs private schools. Examining data from the 2007 Education Research Program, they find that more children in urban slums were involuntarily excluded from entering public schools than initially expected. Oketch, Mutisya, Ngware and Ezeh (2010) focused on understanding discrepancies between supply and demand of public schools. Using an excess demand framework, they find that the announcement of FPE created an increased interest in education, especially amongst the poorest Kenyans. However, limited education funding and poor planning has led to an excess demand for education.

In Uganda, there is less research on LFPS and the reasons for their existence and growth. According to Kisira (2008), the private sector has aided in providing increased access to primary education in areas where the Ugandan government has not succeeded. In short, the private sector has had the potential to meet the continuous education access gap. Harma's (2017) analysis demonstrates how the Ugandan government has had very little success in providing appropriate schooling, creating an environment for private schools to flourish and to take more than 80 percent of the market. Overall, the case in Uganda is similar to that of Kenya: the demand for education, especially in urban slums, has been much higher than the public supply, creating an opportunity for LFPS to run schools for the excess demand.

Perception of Education Quality

In addition to filling the quantity gap left by the inadequacies of public schools, the other main justification for LFPS growth is that they will provide a better quality of education (Riep, 2017). Most often, education quality is measured through academic achievement, yet there are other quality indicators that researchers and parents use to examine education quality. Integral to the growth of LFPS in Kenya and Uganda, and throughout the developing world, are parents' perception that public education is of a low quality.

Recent literature on the connection between education quality and growth of LFPS in Kenya has explored parents' dissatisfaction with the quality of public schools. Heyneman and Stern (2014) examined LFPS to understand what has driven their increased demand. Their study included interviews with parents to understand their thoughts on formal schooling. Parents believed there were shortcomings in public schools and wanted other affordable options. To corroborate their opinion, parents cited poor national assessment results, overcrowding in classrooms, teacher absenteeism and unengaged teachers. Other studies have found very similar results concerning parents' perception of public education quality. Nishimura and Yakamano (2013) use a survey of 718 households in rural Kenya to understand what influences parents to send their children to private schools (school choice) and why they change from public to private schools (school transfer). It is important to note that this study does not look exclusively at LFPS. The authors find that pupil-teacher ratio and class size in public schools are two of the strongest determinants of why parents choose private schools. Tooley, Dixon and Stanfield (2008) present their findings on parents in slums' perception of quality differences between private and public schools following focus group discussions with parents from four LFPS in Nairobi. Their findings demonstrate unanimous beliefs that LFPS provide greater quality education than public schools. Similar to the findings of Nishimura and Yakamano (2013), smaller class sizes and lower pupil-teacher ratios, quality indicators which are easy to observe, were a main reason for parents to perceive education quality to be better in private schools.

In Uganda, a similar phenomenon has occurred. According to Kisira (2008), interviews with parents from across the country highlighted the negative perceptions of public schooling after the massive increase of students post-1997. In addition, the decreasing perception of quality, understood as overcrowding and inadequate resources for students, created the higher demand from parents for better quality schools outside of the public sector. Harma (2017) also echoed the perception that LFPS are better than public schools. An interview with a representative from Kampala's private school association found that although public schools may have more qualified teachers, parents have become more result-oriented, and LFPS prioritize improving student achievement. Although the studies mentioned above do not all look exclusively at LFPS, this section has demonstrated that, from available data, parents do believe that public education is sub-par.

Impacts

Increasing Access, but not for the Poorest

Calculating the number of private schools accurately, and finding what percentage constitutes LFPS, is difficult in Kenya due to registration issues. Most LFPS are not registered with the government because only schools that own their land can register with the government (Heyneman & Stern, 2014). Therefore, most scholars who attempt to examine whether LFPS are closing the access gap acknowledge that there are limitations. Using data from 2002, Tooley et al. (2008) identified 76 private primary schools for the poor just in Kibera. Nishimura and Yakamano (2013) use 2008 data from the Central Bureau of Statistics to demonstrate the rising number of private schools, which increased from 1,441 to 5,857 between 2002 and 2005.

Oketch, Mutisya, Ngware and Ezeh's (2010) study explored the growth of LFPS in relation to where poor students chose to attend. Their research finds that more than 40 percent of the poorest students in urban slums, who had trouble accessing public schools, attended a LFPS. In addition, they find that a higher proportion of children living in slums are attending private schools, not public schools. Stern and Heyneman (2013) find in their case study of 23 mostly unregistered LFPS that they target poor students. Additionally, LFPS often provide some sort of subsidy or scholarship (61% of students in their sample received aide) which allows them to attend the school. Stern and Heyneman (2013) conclude that LFPS are meeting a demand for schools, but their ability to attract the poorest students is inconclusive. While it is difficult to measure the impact of LFPS, recent scholarship has proven that LFPS are filling a gap. However, their ability to aide the poorest of the poor through low-cost schooling has largely been inconclusive (see Day Ashley et al., 2014).

In Uganda, LFPS ability to increase access for the poorest children has been more difficult to observe, mainly because of the large market share they control in urban areas. Harma's (2017) findings show that there are approximately 2,282 private schools of all levels in and around Kampala serving upwards of half a million students, which accounts for 84 percent of all school enrolments. While most children attend a private school, the private sectors' ability to provide education to the poorest of the poor is not as well documented. For instance, proprietors of LFPS were asked which two main socioeconomic groups attend their school. While the majority reported they serve the poor, less than 20 percent stated they serve the poorest. (Harma, 2017). This is consistent with most scholarship, which shows that their impact on aiding the poorest of the poor is relatively weak (Day Ashley, 2014).

Offering a Higher "Quality" of Education

A main selling point for LFPS is that they provide a better quality of education, primarily in terms of academic achievement. For research purposes, Kenya and Uganda are good case studies because there is data on academic achievement from national assessments (KCPE in Kenya and PLE in Uganda), the Southern and Eastern Africa Consortium for Monitoring Education Quality (SACMEQ) and Uwezo's citizen-led assessment.

Recent literature on achievement in LFPS compared to public schools has been hotly debated. While some scholarship presents findings that LFPS increase achievement for most students, others demonstrate much smaller gains or no difference. Tooley's (2005) study, using a random stratified sample of schools, tested 3,000 students in Kibera in both LFPS and public schools in English, Kiswahili and mathematics, through an assessment developed by the author. After controlling for background variables, Tooley found that students in LFPS did score significantly higher (Tooley, 2005). In a more recent study, Dixon, Tooley and Schagen (2013) once again conducted their own examination of private and public school students in Kibera. Using multi-level modelling, they found that students in LFPS scored higher in mathematics and Kiswahili, but not in English. While much of Tooley's work demonstrates that LFPS have higher achievement, there has been

a lot of criticism from fellow academics pertaining to Tooley's methodology, testing instruments and analysis (see Watkins, 2004; Day Ashley, 2014).

Other studies have explored quality differences in Kenya. Bold, Kimenyi, Mwabu and Sandefur (2013) use KCPE results to examine the differences in scores between private and public schools. They find that between 2000 and 2005, private schools performed on average 20 percent better than public schools in raw score and conclude that there is an exam performance premium of one standard deviation. It must be noted that their analysis did not differentiate LFPS from regular private schools. Bold et al. (2013) have also been criticized, namely for using KCPE scores that are over a decade old and because most students do not reach Standard 8, the year students take the KCPE exam. A study of 12 LFPS in Kibera by Ohba (2013) also explores KCPE results and transition rates to secondary school. Ohba (2013) finds that eight LFPS had lower KCPE scores than the two government schools selected for comparison, and that graduates of public primary schools were more likely to enter secondary schools.

Examining Kenya, Uganda and Tanzania, Alcott and Rose (2016) study whether LFPS increase learning outcomes for children from the most disadvantaged backgrounds.
This is the most recent study examining student achievement in LFPS, which uses household data and assessment results from Uwezo's 2013 assessment to conduct a regression analysis examining the impact of attending private school on whether a child developed literacy and numeracy skills. They find that private schooling is positively related to increased basic learning outcomes in general for all children in Kenya and Uganda, but that private schooling is unlikely to decrease the already large gap in learning outcomes between rich and poor. Therefore, it is difficult to assess if LFPS are providing better quality education to students from similar socioeconomic backgrounds, or if their student population would perform better regardless of the school they attend.

While public perception of education quality is often linked to pupil-teacher ratios, there is much less empirical research on the topic. In their study, Stern and Heyneman (2013) find that in their sample of private schools in urban slums, pupil-teacher ratio was 15:1, compared to 80:1 in the government school. This evidence corroborates Tooley and Dixon's (2005) findings, in which LFPS in Kibera had a ratio of 21:1 while public schools' pupil-teacher ratio reached 60:1. Ohba's (2013) study also finds that ten of the 12 LFPS had lower pupil-teacher ratios than the two public schools. While there is some evidence of lower pupil-teacher ratios in LFPS in urban slums, there is no research on whether the same phenomenon is present outside of slums. In Uganda, there was no mention of pupil-teacher ratios of LFPS in the literature. However, a Ugandan National Planning Authority (2015) report reveals that pupil-teacher ratio in public schools was 54:1 in 2014, while the ratio was 32:1 in private schools. There is no mention of whether this ratio is similar or different for LFPS.

Methodology

To examine how BIA, the largest chain of LFPS in East Africa, is portrayed in the news media, I constructed an original dataset of articles published online between January 2016 and March 2018. The dataset is limited to articles in this date range because the first BIA

opened in Uganda in February 2015 and due to a lack of media coverage prior to January 2016. I searched for articles in the most read English-language newspaper in Kenya, the *Daily Nation*, and Uganda, *New Vision* (Nyabuga & Booker, 2013; BBC, n.d.). While the *Daily Nation* is a privately-owned newspaper, *New Vision* is a government-owned newspaper. To find relevant articles, I used the search option on both newspapers' websites to input following terms: "Bridge International Academy", "Bridge Schools", "Low-Fee Private School" and "Low-Cost Private School." In total, there were 31 articles in the dataset. Nearly three-fifths (58%) of the articles were in the *Daily Nation*, while the remaining two-fifths (42%) were found in *New Vision*.

Following the collection of articles, I developed a detailed codebook, as well as a questionnaire for background variables and speech acts. Speech acts are the voices of specific actors in each article and are therefore given authority and a platform in public discourse. There are conscious choices made relating to who receives the power to speak and present arguments in news media. Speech acts are thus critical for examining who is given agency and whose ideas are put at the forefront of public discourse. The methodology and codebook I employed is a hybrid of media analysis tools used to examine contentious issues in education and growing global education movements. I use Pizmony-Levy's (2016) methodology for examining speech acts of articles pertaining to contentious education issues, as well as Steiner-Khamsi's (2003) typology for political reactions of international large-scale assessments to explore whether the media scandalizes, glorifies, or is indifferent towards BIA. The dataset also included certain background variables, including year and month, location of article in the newspaper, author affiliation and information about BIA.

I analyze the media, and those given voice in the media, to understand the dominant conversations and debates occurring in the public sphere, and thus how ideas concerning BIA are contextualized and how the public makes sense of BIA's actions. According to Luhmann (2000), media does not only represent shared social realities, but it can produce and influence the public's notion of reality. The presentation, speakers and tone of the media may influence how the public interprets its social reality (see Weaver, 2007). Analyzing the media can help in understanding patterns or interpretation among a given population. In addition, discourse is powerful as it privileges certain ideas and can constrain or develop knowledge (Bacchi, 2000). This is also important concerning policy making as it puts to the forefront certain ideas, facts and truths.

The dataset and methodology are limited in two ways. First, the small sample of newspapers means that certain perceptions and voices may be hindered. This is more relevant to Uganda, as *New Vision* is a government-owned newspaper. Second, since my dataset only includes articles found online, is it difficult to tell whether all of these articles were also published in print editions (Ngoge, 2014).

Results

Descriptive Patterns

I began by examining the descriptive statistics of the dataset. The number of articles referring to BIA, regardless of newspaper, was highest in 2016, with 16 articles. Interestingly, 13 of the articles in the dataset were published between November 2016 and January 2017, three months in which there were conflicts between BIA and governments. In terms of the perception of the articles, eight included positive impression of BIA, 11 were negative, seven articles attempted to present both sides, and five articles were neutral. The reactions towards BIA by newspaper were drastically different, with *New Vision*'s perception much more negative than the *Daily Vision*, as can be observed in Figure 1. Regarding speech acts, BIA and government officials received similar amounts of speech acts, 14 and 13, respectively. Again, speech acts differed significantly between newspapers, with BIA receiving much less speech acts in *New Vision*, which can be seen in Figure 2. Lastly, concerning specific information provided about BIA in the articles, 20 articles included how many BIA schools and/or students were present in the given country, eight articles named BIA funders, seven articles stated that BIA were low-fee and five articles mentioned that BIA was U.S.-based.

Figure 1: Article Tone, Daily Nation and New Vision

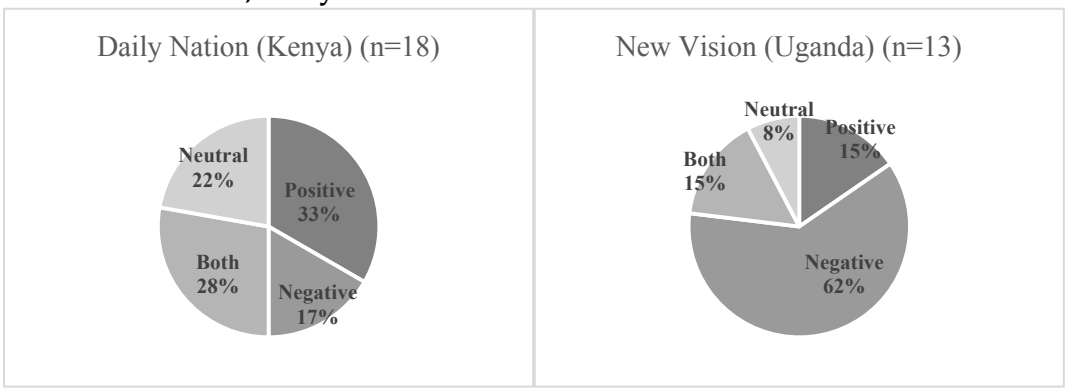
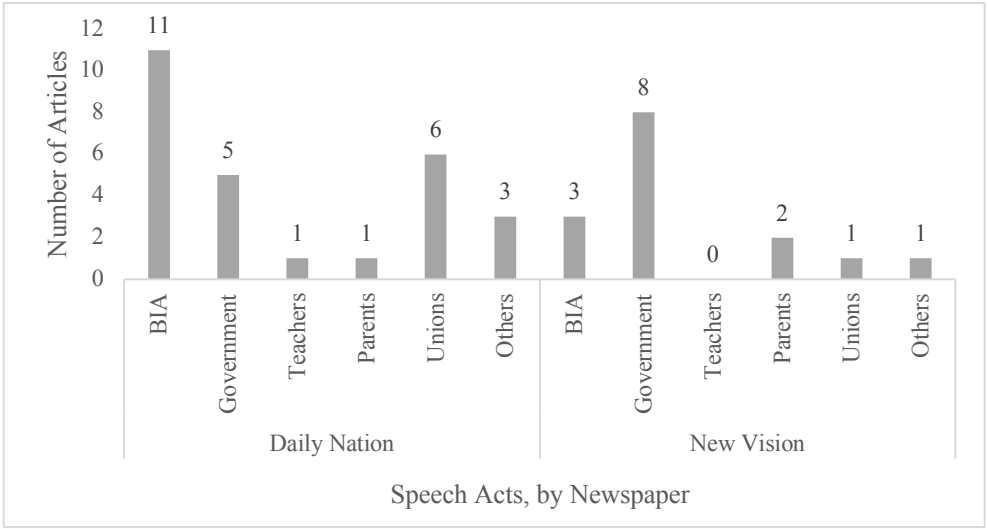


Figure 2: Speech Acts, Daily Nation and New Vision



Public Discourse and Justifications

The justifications for LFPS, namely that they provide school access to children who otherwise may not have the opportunity and that they are perceived as better schools, are quite present in the discourse. Regarding the CPE framework, dissatisfaction with the status quo allows for new actors and ideas to enter discourse and ultimately battle for policy relevance. These justifications are highlighted primarily from BIA speech acts as well as testimonies from parents. In addition, reporting about the number of BIA schools and students was combined with information on the number of out-of-school children and the negative impacts of closing these schools.

Access. The notion that BIA entered Kenya and Uganda to fill the demand gap for access to primary schools was a main theme. There were 12 articles (Kenya 9; Uganda 3) which mentioned that BIA was justified in their endeavours because of their ability to increase access to schools where there was a lack of public schools. In terms of speech acts, BIA and parents were most often quoted concerning the lack of access in public schools. For instance, Shannon May stated that BIA schools "were helping poor children who could not access education due to congestion in public schools" (ID 5), a short introduction to BIA in an article about technology said that the company "manages over 400 schools in Kenya for low-income areas in slums where access to school is limited" (ID 19), and a forum on education in Nairobi led the reporter to state that "urban informal settlement demand for schooling has outstripped supply for lack of public schools in those areas" (ID 15). The discourse promotes the idea that there are not enough government schools in the region.

Public discourse does acknowledge that there is an undersupply of schools for the poorest in the two countries, and BIA positions itself as an opportunity for students to begin or continue their schooling. There are instances in which attempts to close BIA are linked to students being unable to find other schools to attend. An editorial by an unnamed author stated that closing BIA schools will leave students without any alternatives (ID 11), and a teacher (a former BIA employee) wrote that the consequences of governments shutting down BIA schools will impact poor students, who were only able to attend school due to BIA (ID 22). From these perspectives, the attempt to shut down BIA schools due to compliance and legal problems are not questioned, only how shutdowns will negatively impact students. Overall, public discourse does deal with the inadequacies of the public system, and BIA is presented mainly as a provider of education in area which is in desperate need of education providers.

Perceptions of Quality. The negative perception of public education quality is a main justification for the growth of LFPS. Regarding public discourse, there are some mentions of how BIA's quality of education is perceived to be better while demeaning the quality of public schools. Although there are few of these speech acts, one from a teacher and four from parents, they provide important insights on public perceptions of quality. Additionally, there are five instances in which reporters stated that parents backed BIA due to their good schools. In Uganda, a parent responded to BIA reopening in September 2016 after a forced government shutdown, by stating that Bridge "offers children a good

education" (ID 29). In November 2016, when the Ugandan government did order the closure of all BIA schools, three parents were asked their opinion by *New Vision*. All three parents were in favour of keeping BIA open and stated that BIA was offering quality education, with one parent saying that BIA schools "are far better than some government schools" (ID 32). Four other articles mentioned that parents were protesting, or planning to protest, the attempted closure of BIA in both Kenya and Uganda. However, outside of parents' perception, only one article clearly stated that BIA offers education in areas where "quality is largely compromised" (ID 19). Perceptions of the low of quality of public schools, and BIA's ability to provide better education is highlighted in discourse, especially by users. However, concrete reasons for this better perception, including class size, teacher quality and achievement, are not mentioned.

Public Discourse and Impacts

In general, discourse through the media seems to emulate the ambiguity of BIA's impact by largely not engaging with it. Therefore, while BIA does highlight the inadequacies of the current education landscape in the two countries, no proof is provided as to why its model should be integrated into policy. In addition, main actors, including BIA, the government, unions and parents, do not make many claims about the impact of the LFPS in Kenya and Uganda.

Access. BIA's impact on increasing access to education, especially for the poorest children, is seldom stated in the media. Although articles contend that there are not enough public schools, there are no mentions of BIA reducing the number of marginalized or out-of-school children. BIA speech acts do not include any mentions that the schools have helped in closing the gap between demand and supply through education. However, 20 articles (Kenya 13; Uganda 7) provide information on how many schools BIA operates and/or how many students are enrolled. While this provides an idea of the size and expansion of BIA in recent years, it does not explain whether students are from low socioeconomic status. Therefore, public discourse does seem to follow the literature closely: while LFPS have grown and increased enrolment, there is a lack of evidence as to who attends these schools and whether BIA has significantly curbed the number of out-of-school children.

Quality. In terms of discussing BIA's impact on quality of education, public discourse barely focuses on BIA's ability to provide a better education than the public system. Instead, there is a much larger focus on top performers and scholarship opportunities. In abstract terms, BIA attempts to present itself as superior. For instance, BIA speech acts include loose terms such as "Bridge is delivering learning gains" (ID 21) and that Bridge's education is "world-class" (ID 13). However, BIA distances itself from high quality education at times, stating that "our schools are not the worst in Uganda" (ID 32) and that BIA provides "a decent education" (ID 13). In simple terms, BIA speech acts attempt to prove that BIA provides high quality, or at least good, education, but there is little discussion of the real impact on quality indicators. There was only one article from December 2016 which mentioned higher student achievement of BIA schools compared to public schools. The article highlighted the elevated KCPE results of "six candidates with a pass mark of over 400 marks while another 700 candidates scores above 300 marks to steer the group of schools in an unprecedented performance" (ID 16). BIA's head of

communication stated in the article that "this performance has vindicated Bridge Academies of cheating, poor quality education" (ID 16).

The media in Kenya also highlights BIA's ability to help a small number of top performers by providing scholarships to schools in the United States. Four articles in the *Daily Nation* mention students receiving scholarships from BIA and their partners. These stories examined how BIA helps to provide full scholarships to "prestigious secondary schools" (ID 6). The idea that scholarships will help provide quality education to students is also highlighted by BIA staff, who stated that "Bridge Academies will continue to support Kenyan children in attaining the highest levels of education by seeking scholarship opportunities" (ID 6) and that BIA had "secured Sh80 million to ensure their top graduates join top secondary schools" (ID 13). Although the discourse on scholarships does not demonstrate an ability to increase quality for all students, it does show that BIA produces a handful of top students, and that BIA can provide them with greater education opportunities, often outside of Kenya, than public schools.

Government, Unions and the Legality of BIA

While out of the scope of justifications and impacts, but important to understanding the evolutionary policy mechanism of retention, is it critical to examine public discourse related to the legality, and perceived legality, of BIA. I find that governments and teacher unions in both Kenya and Uganda attempt to discredit BIA by putting to the forefront of discourse their subpar standards.

In the dataset, a total of 17 articles (Kenya 5; Uganda 12) explored the substandard practices of BIA. Additionally, six articles (Kenya 1; Uganda 5) stated that BIA's practices are not legal. Lastly, 16 articles (Kenya 7; Uganda 9) mentioned that BIA schools were closed due to their inability to conform to government standards. For instance, articles included statements such as "Bridge schools were ordered closed in August this year for failing to teach the approved syllabus and for employing untrained teachers" (ID 1), that they operated in "conditions … [which are] hazardous and the teachers who are employed in the schools are not qualified" (ID 13) and that their "non-conformity to national curriculum, use of unqualified teachers … and poor infrastructure were putting the lives of the learners in danger" (ID 20). The focus on standards and their negative impact on students is evident in the discourse and is the main argument of governments and unions. Yet, when exploring how these subpar and non-conforming education standards effect students, there is almost no mention of access or quality.

Discussion

Public discourse concerning justifications for BIA and BIA's impact in the education sector are mixed. My findings demonstrate that the two main justifications for the growth of LFPS, the greater demand for education than the public system can supply and the negative perception of the quality of public schools, are present in the discourse. However, the media's interaction with the impacts of LFPS is similar to the literature: there is no information, in this case study of BIA, on LFPS ability to increase access for the poorest, and greater quality is spoken about primarily in abstract terms. Overall, I find that the media does create space for the public to contemplate the downfalls of the public system

and to promulgate the role of LFPS like BIA, and other private alternatives, as possible solutions. However, I also find that the discourse does not demonstrate that LFPS positive impacts on access and quality are so apparent that it is an obvious solution to current education woes.

By exploring the justifications and impacts of LFPS, and more specifically BIA, I find an interesting and useful study to employ CPE and the evolutionary mechanisms of variation, selection and retention in terms of privatization policies (or in this case actors, trends and policies). Regarding validation, the discourse demonstrates that the romanticism of free primary education supported by the government must be revisited since there have been adverse effects. LFPS like BIA are presented, through their own speech acts, and from parents and diverse advocates for accessible quality education, as a viable solution to the education struggles in Kenya and Uganda. While literature dictates that it is private corporations who advocate for services of LFPS (Srivastava, 2010), discourse demonstrates that other actors have also contributed. Therefore, I find that public discourse, particularly in Kenya but also in Uganda, allows for serious debate concerning variation, and the possible role actors like BIA can play to mitigate, and ultimately fix, lack of access to education.

The selection of the most suitable solutions to access and quality issues in East Africa in public discourse is much more nuanced. As demonstrated, the impacts of LFPS are not highlighted, and most actors, including those from opposite sides of the spectrum, have been careful not to conclude the success or failures of BIA specifically. According to Verger (2016), reform advocates try to frame their solution in scientific and evidence-based ways. In public discourse, there is very little evidence-based information about the successes or failures of BIA, which is different from how LFPS enter education markets (Riep, 2017). It is also important to note that discourse and public opinion are also variables which can mediate selection of particular policies. The more informed the public is about reforms, and their ability to tolerate and support aspects of these policies, the more they can influence selection (Boyd, 2007). Therefore, I find that discourse has not supported the idea that LFPS are the answer to issues surrounding access and quality, but that in more abstract terms LFPS are shown as an alternative which does not hinder progress. I hypothesize that the lack of concrete statements on the impact of BIA stems from the fact that BIA may not be entirely confident in their results, or do not have measurable proof of their self-proclaimed successes, while governments and unions may have believed that BIA would fail and that parents would not enrol their children in schools with easily identifiable infrastructure and curriculum problems.

As the final step towards policy reform, policymakers must choose one solution to institutionalize into the regulatory framework. Retention is therefore controlled by decision-makers. Regarding public discourse, it is evident that the government, as well as teacher unions, do not agree that solutions like BIA are appropriate, namely because they do not conform to legal standards. It is worth mentioning that in public discourse there are very few mentions of LFPS impeding access or creating an environment of lower education quality, which seems to be the two main justifications for their existence. Although Verger (2016) argues that other key stakeholders may position themselves

following the implementation of a policy, since LFPS have entered the market without full consent from governments, their voices have been integral in reaching the retention phase. The contention between BIA and the government and teacher unions, including using the courts and forbidding some independent researchers from examining BIA, has meant that retention seems out of grasp. In Uganda, which has developed a legal environment in which public-private partnerships are common (Srivastava, 2016), BIA's entrance into the market has created a rift between the LFPS chain and the public sector. Therefore, I argue that moving towards retention, in which LFPS like BIA are legally allowed to run schools, will not be possible unless LFPS either follow government standards (which may increase fees and make them unaffordable), or prove that they can effectively improve education and energize the public to fight on their behalf.

In sum, by examining the justifications and impacts of BIA in public discourse through the lens of CPE and the policy process of variation, selection and retention, I find that discourse creates a space for exploring variation and new solutions to the access and quality gaps which have not been filled by the governments in both Kenya and Uganda. However, discourse does not show that LFPS results are influential or unimpressive enough to either describe it as a real solution or to brush it aside. In addition, the Kenyan and Ugandan governments' attempt to invalidate BIA, not through exploring its effects on access and quality, but by making it illegitimate, makes it impossible to consider it as a retainable solution.

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Appendix

Newspaper Articles – ID List

ID	Newspaper	Article Title	Month	Year
ID 1	Daily Nation	400 schools likely to be shut over standards	Dec	2016
ID 2	Daily Nation	Bridge International awards scholarships to 5 Mombasa siblings	Jan	2017
ID 3	Daily Nation	British NGOs, unions to stage anti-Bridge Academies demo	May	2017
ID 4	Daily Nation	Changing method to boost learning	Jul	2017
ID 5	Daily Nation	Close Bridge schools, Sossion tells ministry	Jun	2016
ID 6	Daily Nation	Four Bridge pupils win Sh72m scholarship to study in the US	Jan	2017
ID 7	Daily Nation	Governor backs Bridge Academies despite court order	Mar	2017
ID 8	Daily Nation	Kenyan pupils land prestigious US study scholarship	Jan	2016
ID 9	N/A	N/A	N/A	N/A
ID 10	Daily Nation	KNUT to oppose ministry's plan to discontinue holiday studies	Mar	2017
ID 11	Daily Nation	Look further at report on private schools	Dec	2016
ID 12	Daily Nation	Low-cost Bridge schools hire 300 TSC-registered teachers	Sep	2016
ID 13	Daily Nation	Ministry rolls out fresh rules to promote quality education	Jan	2016
ID 14	Daily Nation	Sossion stopped from defaming Bridge Academies	Mar	2017
ID 15	Daily Nation	Row erupts between ministry and Bridge schools	Jul	2017
ID 16	Daily Nation	Slum school shines as it tops KCPE results	Dec	2016
ID 17	Daily Nation	Sossion denies defaming international school	Jun	2017
ID 18	Daily Nation	Sossion under fire from parents over remarks	Dec	2016
ID 19	Daily Nation	Technology key in improving education, says MP	Jun	2017
ID 20	New Vision	Bridge Academies asked to reimburse learners' school fees	Nov	2016
ID 21	New Vision	Stop funding Bridge schools: Teachers petition WB	Apr	2017
ID 22	New Vision	Rethink position to close Bridge schools	Dec	2016
ID 23	New Vision	RDCs ordered to close unlicensed schools	Feb	2018
ID 24	New Vision	Promote dialogue, Muyingo tells institutions	Nov	2016
ID 25	New Vision	More Bridge International Academy branches closed	Nov	2016
ID 26	New Vision	Government to crackdown on unlicensed schools	Jan	2018
ID 27	New Vision	Government stop expansion of Bridge International schools	May	2016
ID 28	New Vision	Enforcement of the Standard Operating Procedures for private schools and school charges in Uganda	Feb	2018
ID 29	New Vision	Bridge Schools re-open amid uncertainty, controversy	Sep	2016
ID 30	New Vision	Bridge schools' parents, pupils storm Parliament	Nov	2016
ID 31	New Vision	Bridge Schools not authorized to operate, says ministry	Feb	2018
ID 32	New Vision	Bridge schools close, over 1000 pupils affected	Nov	2016

Expectations, Distrust and Corruption in Education: Findings on Prevention through Education Improvement

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In this article we present results from research on how education environments may influence the propensity of education participants to engage in corrupt practices. We approached this task with the help of a conceptual framework that draws on rational choice and routine activity theory, and on economic models of human behaviour. The framework guided a collection of evidence through desk research, numerous interviews and focus groups on behalf of authorities and civil society in five countries (Armenia, Kazakhstan, Serbia, Tunisia, Ukraine).

Our findings suggest that circumstances in education influence problematic conduct in two major ways – by opening opportunities for the abuse of regular processes in education, and by providing education participants with incentives to engage in it. This contribution offers some insights concerning the incentives of education participants to participate in corruption and discusses why research on corruption can be a valuable source of guidance for systemic improvement in education.

Introduction

Education matters for the wellbeing of individuals and societies alike, but its significance makes it also vulnerable to corruption – a problem important enough to have been singled out as a reason for the failing of targets in the first decade of the global *Education for All* initiative[1] (World Education Forum, 2000), and also persistent enough to be on the anti-corruption agenda of numerous countries around the world today (Transparency International, 2013, p. xix; OECD, 2018).

This article discusses selected findings from an ongoing exploration of corrupt practices in education and the systemic circumstances which may provide education participants with reasons to engage in them. The work was initiated under the name of INTES (Integrity of Education Systems) in the context of the Anti-Corruption Network for Eastern Europe and Central Asia (ACN) of the Organisation for Economic Cooperation and Development (OECD) and included the development of a conceptual framework of education integrity, as well as the integrity research presented here.[2]

Following an insight from international anti-corruption practice that sector-specific solutions can be more effective than measures that are imposed from the "outside" (Boehm, 2014), the objective was to gather insights into how corruption in education can be addressed from within the sector, through improvements in areas that are within the professional remit of education practitioners and policy makers, such as assessment of student achievement, teacher policies, admission procedures, etc.

The scope of "corrupt conduct" in this research includes both practices for which there is criminal liability as well as softer, sector-specific actions, which are harmful, but may not qualify as corrupt by international standards (OECD, 2018). "Education" and "education system" refer to all education providers in a country, regardless of their

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ownership or sponsorship (UIS/OECD/EUROSTAT, 2002), which are accredited or licensed to grant credentials (certificates, degrees or diplomas) through formal learning and related services. This includes also entities which set the conditions of operation of education providers and monitor their performance, such as line ministries, regional education authorities, education inspectorates, quality assurance/accreditation agencies, testing centers, and similar bodies.

The research presented in this paper was carried out in five countries (Serbia, Tunisia, Armenia, Ukraine, and Kazakhstan) between 2011 and 2018, in which national education authorities and/or civil society organizations volunteered to participate as they were in the process of revisiting education reforms, advocacy campaigns, or national anti-corruption strategies. The work covered school and higher education, as well as pre-school education in Ukraine and Armenia, and followed the principles of OECD peer reviews, as described in (OECD, 2003): a formal request by national counterparts (authorities or civil society); the presence of review criteria derived from national and international sector commitments; clearly defined review/research procedures; and conclusions which are based on a consensus between the peers - members of the respective research teams comprising national and international experts.

Our research focus was on the connections between actions of education participants which qualify as corrupt, and the systemic conditions in which they have their exposure to the education sector as teachers, students, school and university administrators, or external stakeholders. We inquired whether these conditions (education environments) can be drivers of specific forms of corrupt conduct and if yes, how.

Our starting assumption was that manifestations of corruption can be unequivocally linked to specific policy problems in the respective education systems (OECD, 2012), the resolution of which is possible through education improvement. Our findings suggest that the circumstances in which education takes place can indeed influence propensity for problematic conduct, in two major ways – by opening opportunities for the abuse of regular processes in education such as assessment, admission procedures, recruitment, etc. for corrupt purposes, and by providing education participants with incentives to do that.

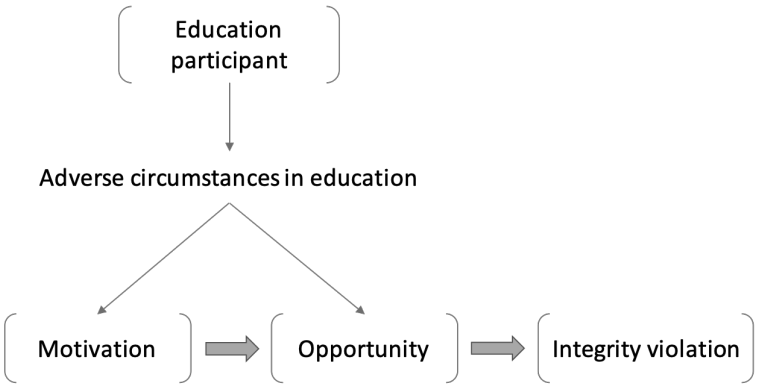
In this article we offer a selection of insights concerning the incentives of participants in education to participate in corruption. The paper starts with an outline of the conceptual framework and methodology which guided the research, and then presents an overview of findings on how education environments may influence the motivation of education participants to engage in illicit or illegal practices.[3] The article concludes with an observation that corruption is not just a problem that calls for punitive responses, but that it also holds critical lessons that can guide systemic improvement.

Conceptual framework

Our research was guided by a conceptual framework which connects corrupt conduct, motivation and opportunity as the three variables of a causal model of corruption in education (INTES model). The model presumes that each integrity violation is linked to policy-related circumstances which motivate and facilitate the violation (Figure 1).

The aim of the research was to describe the three variables and explain how they are connected: how circumstances in education create incentives (motives) and opportunities for education participants to engage in integrity violations. The violations are practices in education which are intentional, system-wide, involve education participants, and deliver undue benefits (OECD, 2018).

Figure 1. Causal model of corrupt conduct in education



Sources: based on OECD, 2018 and Kovacs Cerovic, Milovanovitch, & Jovanovic, 2018

The INTES model draws on several theories. The first is the routine activity theory of Cohen and Felson (Cohen & Felson, 1979), according to which all offences are situational, caused by a combination of circumstances rather than by some inherent features of perpetrators. A crime can be committed by anyone who finds himself in such circumstances. More recent research confirms that professional environments too can play a role in motivating problematic conduct by affecting the commitment of individuals to the values and principles of their organizations (Doty & Kouchaki, 2015). In other words, the integrity of professionals depends not only on their character, but also on their organizational environment.

Our model draws also on elements of rational choice theory. Like the "homo economicus" who is consistent in making choices that are in his best interest (Friedman, 1966; Gruene-Yanoff, 2011), we posit that the "homo educationis" in focus of our research is consistent in going after his best interest as education participant and stakeholder. Given a choice, parents would always prefer to send their children to a good school, students would work towards successful transition to university or employment, teachers would opt for fair pay, education authorities would secure enough funding and presentable reform results, etc.

That said, the reference to rational choice in our model is not a commitment to delivering an accurate reflection of individual decision-making processes. Newer economic theories (*i.e.* behavioral economics) argue that this is more complex task than suggested by rational choice approaches, and that the outcomes of such processes can be difficult to predict. The reference is rather meant to point out the origin of our research hypothesis: that participants in education are consistent in their choice of priorities, preferences and beliefs, and that they always try to act accordingly.

In the same vein, we refer to education participants as collective identities (Melucci, 1989) and do not consider factors such as individual character traits, predispositions, or personal circumstances, despite the role they may be playing in motivating integrity violations. The collective identities are those of education professionals, students, external stakeholders (*e.g.* parents, guardians or equivalent, civil society, media), and representatives of national and regional education authorities.

Finally, to identify which practices in education qualify as integrity violations, the INTES model borrows from international anti-corruption practice in defining anti-corruption offences, as reflected in major conventions against corruption such as the United National Convention Against Corruption (UNCAC) (United Nations, 2004) and the Council of Europe Criminal Law Convention on Corruption (Council of Europe, 1999a).

These Conventions forego an overarching definition of corruption and describe specific forms of corrupt conduct instead, *i.e.* bribery, illicit payments, obstruction of justice, etc., which all signatories agree are undesirable and must be prevented (Council of Europe, 1999b). The offences are distinctly different from each other, but they share common features. For instance, they all involve public sector officials, deliver undue personal benefits, are intentional, and states-signatories of the Conventions should define them as illicit or illegal. We used these features to set the criteria that helped us determine which practices in education qualify as integrity violations.

Methodology

Our inquiry into corruption and its system-wide context was guided by two questions: whether education participants engage in corrupt practices and if yes, how the systemic conditions in which they have (or deliver) their learning experiences may play a role in that. We approached these questions by dividing them in sub-questions and research routines, organized in three interconnected thematic protocols.

The focus of the first protocol was on the identification of sector-specific practices in each country, which qualify as acts of corrupt conduct against criteria such as prevalence, intent, involvement of official positions, and presence of undue personal benefits. The focus of the other two protocols was on the education policy environment in which each of these practices typically thrives, and specifically on the ways in which the education policy context may create incentives for corrupt conduct. We split that last query in two sub-questions: what education participants expect from their involvement in an integrity violation, and what prevents education from meeting their expectations in legitimate ways.

In each country, the implementation of the protocols took place in three phases. In the first phase in each country we relied on background questionnaires, literature review and on scoping missions for initial discussions with national authorities and stakeholders to consolidate a preliminary selection of integrity violations which the research will cover. On that basis we prepared an inventory of violations and factors in the education environment which may be promoting the proliferation of these violations.

The second phase was devoted to analysis of these factors through further desk research and site visits for individual and group interviews with education

participants, and in some cases (pre-school education in Armenia) through focus groups. The purpose was to explore the reasons of participants in education to engage in violations and the ways in which they do it.

Finally, in the third phase we prepared a draft of a report with our findings, which stakeholders and national authorities in each country complemented with recommendations and validated before it was finalized and published.

In the second phase in most[4] countries we met between 150 and 200 counterparts, which we selected through purposive sampling. Table 1 provides an overview of their number by role in education and country, and Table 2 gives a break-down by level of education and, where applicable, by type of institution. In total in all countries, we met approximately 760 education participants.

Table 1. Method of information collection, levels of education covered, and participants in the research by country and role in education

	Levels of education covered (1)	Method (2)	Number of education participants by role					
			Teachers	Students	Civil society	Parents	Administrators	Education Authorities
Serbia	S, HE	I, GRI	42	82	21	15	18	31
Tunisia	S, HE	I, GRI	11	6	8	2	0	0
Armenia	PS, S, HE	I, GRI, FG	52	37	22	30	44	41
Ukraine	PS, P, SE, HE	I, GRI	41	59	21	16	36	32
Kazakhstan	HE	I, GRI	14	6	11	6	20	36
Total	---	---	**160**	**190**	**83**	**69**	**118**	**140**

Notes: 1) PS: pre-school education; P: primary education; S: secondary education; HE: higher education. 2) I: One-on-one interviews; GRI: group interviews; FG: focus groups.

Table 2. Participants in the research by role, institution, level of education, and country

Education participants by role in education and institution		Serbia	Tunisia	Armenia	Ukraine	Kazakhstan
Teachers	School teachers	24	4	37	25	0
	University lecturers	18	7	15	16	14
Students	School students	32	0	12	14	0
	Students in higher education	50	6	25	45	6
Civil society	Civil society	21	8	22	21	11
Parents	Parents	15	2	30	16	6
School and university administrators	School principals	8	0	27	15	0
	University leaders and administrators	10	0	17	21	20
Education authorities	Regional education authorities	8	0	18	11	4
	National education authorities	10	0	14	7	10
	Parliamentary Committee on education	2	0	0	1	2
	Monitoring and QA bodies	11	0	9	13	20
Total		**209**	**27**	**226**	**205**	**93**

The sampling was based on judgement by national education authorities and researchers, who were asked to propose a balanced selection of education participants according to criteria which included role in the education system (teachers, administrators, students, parents, education authorities), and key features of the education providers they are associated with, such as quality (well-performing/poor performing), education level (pre-school/school/higher education), type (*e.g.* general/specialised schools), geographical location (urban/rural, central/regional), and form of ownership (public/private). Once into site visits, we also used snowball sampling to complement the initial selection of counterparts, which sometimes became necessary due to the sensitivity of our topic.

The individual and group interviews were semi-structured (Given, 2008). In the first third to half of the time, they would follow a simple protocol with a set of predefined questions for the purpose of establishing comfort with interviewees by explaining the purpose of research, clarifying the role of interview counterparts in the education system, and inviting them to comment on statements collected from peers in previous interviews. The remainder of the interview would then progress as a normal conversation in which we would probe for in-depth information about actions and contexts based on facts collected in the desk research and prior interviews.

At the end of each day, the research team and national experts would hold debriefing meetings to compare the written notes from the interviews, clarify interview statements and agree on possible interpretations, and agree on fact-finding questions to be included in the subsequent interviews. Considering the number of participants in each country, this was time consuming, but it allowed us to apply the research protocols in a contextually sensitive way.

In some countries (Armenia for pre-school education), the evidence collection was complemented by focus groups in which we used a funnel approach (Strauss & Corbin, 1998) to converse with parents, civil society, teachers and principals. The discussions lasted three hours with each group and started with broader questions on undesirable practices, before moving on to practices which may qualify as integrity violations. This was followed by an in-depth exploration of which integrity violations emerge as more common and how. The focus group discussions were audio recorded, transcribed verbatim and translated in English.

Findings and discussion

Education deliverables at the center of corrupt conduct

The involvement of individuals in corrupt conduct could be explained in a number of ways, which may range from personal traits to human nature in general ("opportunity makes the thief"). As far as education is concerned, the findings of our research confirm that conditions in the sector play a major role as well.

Most violations we came across were actions which crime prevention theory would call "routine activities" (Cohen & Felson, 1979) – the final outcomes of processes that are closely related to the environment of perpetrators, a form of highly problematic response to gaps in the routines of that environment. We noted a number of stories like those of students who pay their school teachers for private tutoring because of the low quality of teaching in class (OECD, 2012; Milovanovitch, 2014; OECD, 2017a), of parents who had to bribe neighbourhood schools through "donations" in exchange for

admission, because the schools were overfilled (OECD, 2017a), or of teachers who over-mark students to keep their jobs, in settings marked by arbitrary and non-transparent staffing decisions (OSF - Armenia, 2016).

These are not isolated cases, but examples of typical, education system-wide conduct, which took place in circumstances that are similar within and between countries. For instance, in all countries for which we had information, the practice of giving school students better grades than they deserve in exchange for favours, was particularly prevalent in regional contexts, around the end of the school year, and in the last years of secondary schooling.

The examples in our selection and numerous other cases that we recorded have one more common trait. They describe illicit ways of obtaining deliverables which education was designed to provide in legitimate manner, without corruption: good or at least fair school grades, education of acceptable quality, access to a good school in the neighborhood, adequate wages and secure employment, etc. Those who engaged in corrupt conduct in pursuit of such goals seemed to pursue their legitimate interests as education participants – an observation we made in all countries and for most integrity violations.

This doesn't mean that all partakers in education corruption are driven by a wish to secure education deliverables. Some of those who were abusing their professional position in order to provide such deliverables, were interested only in the monetary benefit. Yet, their benefit would always depend on whether they can deliver to unmet demand for an education deliverable. In Tunisia, for example, where at the time of our inquiry (2013) teachers were earning above the national average for occupations requiring similar qualifications, many teachers were providing paid private tutoring to their own students to earn even more, despite having a conflict of interest (Milovanovitch, 2014). The illicit practice was thriving only because the other side of the transaction, the parents of school children, felt that tutoring may provide two deliverables which public education cannot – effective learning in class and a fair chance to progress in school.

The range of deliverables which could motivate problematic conduct can be wide. Examples may include free schooling, fair access to higher education, good quality knowledge, credible graduation credentials, adequate employment conditions for teachers, transparent budgeting and resource allocations, etc. Early on in our research, we therefore summarized them through the lens of past and present global commitments in education, such as the UN Education for All initiative or the Sustainable Development Goals, in three broad areas of stakeholder demand: equity and access to education; quality of education; sound management, in particular of staff and financial resources (OECD, 2012). Based on results from two of the most recently analyzed countries (Armenia and Ukraine), Table 3 illustrates how various violations (Column 1) and the expectations for education deliverables that they serve (Column 2) fall in these four areas of demand (Column 3), as well as who is demanding and supplying the education deliverables (Columns 4 and 5).

Table 3. Overview of violations, examples of expected education deliverables, and areas of stakeholder demand

Country	Integrity violation	Education deliverable at stake	Area of demand	Deliverable demanded by	Abuse of professional position by
	1	2	3	4	5
Armenia	Undue recognition of student achievement, including grading in absentia, as a "favor" to parents	Employment security for teachers, funding for education infrastructure and content	Sound management	Principals, teachers	Teachers
		School success and progression	Equity and access to education	Parents, students	Teachers
	Politicisation of education: preferential allocations of public resources to schools with principals who are members of the ruling party	Funding for education infrastructure and content	Sound management	Principals	Education authorities
	Favoritism: arbitrariness in appointment and promotion of staff	Employment security for teachers, fair staff policies	Sound management	Teaching staff	Education authorities, principals
Ukraine	Illicit access to education: donations and bribes in exchange for enrollment in otherwise overfilled schools	Access to education	Equity and access to education	Parents, students	Education authorities, principals, teachers
	Misappropriation of parental donations to schools	Good teaching and learning conditions	Quality of education	Parents, students	Principals
	Improper private supplementary tutoring: teachers tutoring their own students	Effective teaching and learning	Quality of education	Parents, students	Teachers
		Fair pay for teachers	Sound management	Teachers	Teachers

Sources: OSF - Armenia, 2016; OECD, 2017a; OECD, 2018

Table 3 shows a diversity of expectations for education deliverables behind each violation, but also that the education deliverables at stake in each revolved around similar things: education that is accessible, equitable, of good quality, and provided in education environments that are managed properly, particularly with respect to staff and resources.

The Table also shows that sometimes education deliverables drive the motivation of all sides involved in an integrity violation, including of those who abuse their professional position. In Ukraine, private tutoring was a key source of income for school teachers who would have otherwise earned below the subsistence minimum,

while for parents it was a way to ensure that their children master the curriculum and prepare for graduation tests in subjects of importance. In Armenia, teachers were giving grades to students who were absent from school (mostly to attend private tutoring in preparation for university admission) as a favor to parents who were donating for maintenance and teaching materials. The benefit of parents and students in this arrangement was additional time to prepare for the highly competitive university entrance exams.

Violations in response to distrust and failed expectations

If education participants engage in integrity violations to obtain otherwise legitimate education deliverables, we also wanted to understand why they see corrupt instead of integral conduct as the better way to attain these deliverables. We therefore inquired about the circumstances in which an integrity violation appears to be the more promising course of action than respecting the rules.

In the examples described in Tables 3 and 4 (below), those concerned revealed that they did not believe that education will deliver as required. Their education environments were characterized by distrust in the capacity of the sector to address their expectations in legitimate ways and so, they felt compelled to find alternative solutions to secure the education deliverables they need. For some, the distrust and the illicit actions were the result of direct experiences with policy failure and its consequences. It is interesting to note that others who did not experience such failures first-hand, shared the distrust and engaged in integrity violations as well, as a form of pre-emption.

In Serbia and Tunisia, for example, parents believed that payments to school teachers in the form of supplementary tutoring are the best way to ensure student success (OECD, 2012; Milovanovitch, 2014), although none of their children was ever failed because of a refusal to take tutoring classes with a school teacher. In Ukraine, parental donations were a well-established way to secure a place in a sought-after school or pre-school (OECD, 2017a; Milovanovitch & Bloem, 2019). Most of the parents who believed that admission without such "voluntary" donations is impossible, were in fact never asked for such donations by the principals, but offered them nevertheless. In Armenia, where the license of private education providers to operate depends on licensing and inspection processes which are known to be unpredictable and corrupt, principals tend to seek "connections" to the officials in charge and offer them favors of their own accord (Milovanovitch & Bloem, 2019).

What prevents the provision of education deliverables in permissible ways?

The last sub-question in our protocol on incentives inquired how an education system can fail expectations to an extent where for a seemingly critical mass of people who participate in education, illicit conduct appears as a justifiable alternative to integrity.

In countries where, for example, illicit access to education was a widespread remedy for shortages in admission capacity, we inquired about the reasons for the capacity shortages in the school network. In places where, like in Armenia, teachers told us that they inflate student grades to preserve their employment, we asked about their employment conditions and what in those conditions might be fueling their conviction that their jobs are otherwise at risk. In Kazakhstan, where we established that the allocation of vacated public scholarships in universities is plagued by irregularities

and integrity violations (OECD, 2017b), we tried to understand why faculties and their members persistently handle decisions about such allocations in an illicit and non-transparent way.

We received numerous answers to such questions. Some of them were on macro level and went well beyond the education sector, pointing to the overall economic situation in a country (Ukraine, Tunisia), the legacy of a recent past (Armenia, Serbia), or the financial crisis and the decline in the price of natural resources, which affected the purchasing power of households (Kazakhstan). Another group of responses were on a more intermediate level of aggregation and provided account of broad problems in the education sector, such as low quality of teaching and low status of the teaching profession, decline in student motivation ("bad students"), or low spending on education. Finally, the remaining responses (the majority, in fact) directed us towards specific shortcomings in the education environment of our counterparts, where obvious shortcomings in policy and practice were limiting the capacity of education to deliver precisely in the areas affected by stakeholder distrust and integrity violations.

For instance, the contextual analysis of intentional grade inflation in Armenia and Ukraine exposed problems in the professional circumstances of teachers, which seemed to explain some of their readiness to participate in the integrity violation. One of these problems was the persistently low level of public funding for school maintenance, which made public schools financially dependent on parental contributions and gave parents a leverage over school staff. Parents used that leverage to pressure teachers into a preferential treatment of students (Milovanovitch & Lapham, 2018). The precarious employment conditions of teachers were another common problem, which put them in a vulnerable position vis-à-vis principals who could fire them at will (OSF - Armenia, 2016; OECD, 2017b). In some countries (Ukraine) teachers engaged in the integrity violation also in the hope of improving their sub-standard income through gifts from grateful parents at the end of the school year (OECD, 2017a).

Table 4 shows further examples like these. It lists integrity violations (Column 1), the policy areas affected by shortcomings which lead to these violations (Column 2), and the policy shortcomings themselves (Column 3). Column 4 presents the outcomes of the contextual analysis through which we linked the shortcomings, deliverables, and violations from the point of view of education participants who engage in them.

Table 4. Examples of contextual analysis: violations, education deliverables, and policy shortcomings

Country	Integrity violation	Policy areas affected by shortcomings	Shortcomings in these areas	Contextual analysis: links
	1	2	3	4
Armenia, Ukraine	Illicit access to pre-school education	Planning of the school and pre-school network	The network is outdated and there is no operational plans/strategy for expansion of pre-school coverage	Persistent shortage of pre-school places forces parents, especially those in full-time employment, to offer favours and "donations" to secure a place in a kindergarten

Serbia, Tunisia, Ukraine, Armenia	Improper private supplementary tutoring	Curriculum and study programs; teaching	Overloaded curriculum and weak control of teaching quality	Teachers do not have the motivation and time to teach the full curriculum in high-stake subjects. Parents distrust the effectiveness of teaching in regular education and resort to private tutoring
Armenia	Politicisation of education	Funding and financial management; staff policies	Resource allocations to schools are not transparent and accountable	Principals-members of the ruling party receive more generous allocations, which promotes politicisation of the schooling system
Kazakhstan	Undue recognition of student achievement	Quality assurance: assessment of learning outcomes	Outdated risk assessment criteria	Student grades have a disproportionate weight in the external risk assessment of universities, the outcomes of which can be decisive for their license to operate
Armenia, Serbia, Ukraine	Mismanagement (including embezzlement) of parental donations	Funding and financial management	No resource allocations for capital investment and maintenance of school infrastructure; low income for teachers	Funding shortages for maintenance and infrastructure motivate public providers to request donations, which are mismanaged, including for personal benefit

Sources: OECD, 2012; Milovanovitch, 2014; OSF - Armenia, 2016; OECD, 2017a; OECD, 2017b

It is interesting to note how similar shortcomings seem to motivate similar violations in different country contexts. Oversized networks of public schools and scarce resources for their maintenance lead to increased financial involvement by parents. Public education providers are ill-equipped to manage the parental donations, which facilitates embezzlement. Shortage of pre-school places can be traced back to lack of planning and foresight by municipalities and regional authorities regarding the provider network, which in turn creates situations conducive to corrupt transactions in exchange for access, especially in large cities and the capitals. Obstacles to effective teaching and learning in class, such as overloaded curriculum and lack of time or else, fuel demand for private tutoring which teachers often provide to their own students from regular education, and so on.

Conclusion

In this article we discussed some of the connections between corrupt practices in education and the conditions in which people partake in them as teachers, students, administrators, and parents. We outlined a conceptual framework and methodology which identifies and describes such practices and then investigates the typical circumstances in which they take place. The results we described drew on findings from research in five countries and illustrated how corrupt actions revolve around education deliverables which are in short supply. We provided examples of how violations can be traced back to shortcomings in education policy and practice, which fuel stakeholder distrust in the ability of education to deliver to expectations in legitimate ways, and motivate various forms of problematic conduct.

Our findings suggest that corruption in education does not necessarily call for measures that differ from ongoing reform processes in education. Corruption problems can be approached and interpreted as specific education policy problems, so

that corrupt conduct is addressed through improvement in common areas of education policy, not only through stricter rules and better enforcement. If the motivation of education participants to engage in corruption depends on education deliverables, then this motivation could be influenced through education improvement which targets the expectations at stake, for example by broadening access to the type of education and education providers in demand, by improving teacher policies, increasing transparency in resource allocations, and so on.

Some of the policy areas in focus of our research are sensitive and complex and changing them might be difficult. However, many countries have already embarked on reforms in areas which are difficult and of significance to integrity, such as teacher policies, funding for education, curriculum or assessment. Their reform plans are usually regularly updated, which could offer an opportunity for recalibration on the basis of findings from research like ours, as the INTES methodology that we used is in the public domain.

Designing or updating reforms in this way could make them more relevant for stakeholders by ensuring that they address the professional contexts in which expectations and corruption risks emerge. It would also allow countries to advance against corruption in education as part of their ongoing reform agenda in education, which is likely to be more effective than stand-alone anti-corruption plans. If aimed at the right selection of problems, education reforms can therefore become a viable corruption prevention strategy – one that is within the remit of education professionals and involves also those who participate in the integrity violations.

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Notes

[1] The Education for All (EFA) movement is a global commitment to provide quality basic education for all children, youth and adults. It is led by UNESCO.

[2] For more information about the Network see https://www.oecd.org/corruption/acn/aboutthenetwork/. We have provided an extended description of the INTES initiative and methodology in (Milovanovitch, 2013) and (OECD, 2018). Sections of this article draw on these papers, in particular on (OECD, 2018).

[3] For simplicity, in this article we may use adjectives such as “illicit”, “illegal”, “problematic” and “corrupt” as well as nouns such as “corruption”, “integrity

violation", "transgression" and "illicit/illegal conduct" interchangeably, although in legal terms they may imply different forms of liability for actions (criminal, civil, administrative, or disciplinary).

[4] Due to time and project constraints, in Tunisia and Kazakhstan the site visits were shorter and the number of interviews more limited.

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Evaluating Students' Perceptions on the Effectiveness of Online Intercultural Learning Experience via a SPOC

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Introduction

"Internationalization" has become a priority for many higher education institutions across the globe to raise the intercultural competence of their graduates. The major aim is for university graduates to become global citizens possessing essential attributes like a global mindset, intercultural competence, social responsibility and the ability to work in multicultural teams (Soria & Troisi, 2013). Intercultural competence refers to intercultural awareness, intercultural sensitivity and intercultural behaviour (Chen & Starosta, 1996; Root & Ngampornchai, 2012). It is broadly defined as having the knowledge about several dimensions of global and international cultures; appreciation of cultural, racial, and ethnic diversity; understanding of the complexity of issues in a global context; and comfort in working with people from other cultures (Soria & Troisi, 2013).

Despite the good intention by universities in developing students' intercultural sensitivity, awareness and maturity through overseas exchange programs (Braskamp et al., 2009) with their overseas partners, not all students can have the opportunity to partake in such programs due to factors like costs, possible delay in graduation, concerns to being in an unfamiliar environment, possible discriminations, etc. (Dessoff, 2006; Shaftel et al., 2007). Notwithstanding, with advances in telecommunication technologies, many institutions are deploying various online learning platforms for curriculum designers to create opportunities for international contact and intercultural exchange for their students with less physical and time constraints. Thus, students' learning contents can be enriched with the integration of intercultural dimensions which contribute to actualizing the concept of internationalizing the curriculum (Leask, 2013). An increasing demand to develop small private online courses (SPOCs) and the emergence of new technologies which allow students to interact with their invited overseas counterparts without leaving their respective hometowns, have given to the concept of 'Internationalization at Home' (IaH) (Landorf, Doscher, & Hardrick, 2018). IaH allows curriculum designers to incorporate the international and intercultural dimensions into the formal and informal curriculums for students to experience within domestic learning environments (Beelen & Jones, 2015).

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In order to provide students with the opportunity to learn with their overseas counterparts without leaving their homes, collaborative online learning could be a way forward. Two Asian partner universities located in Hong Kong and Singapore, with the same institutional strategic goal of "Internationalization" had worked together to enrich a diverse group of (n=93) research postgraduate students (referred as 'teaching assistants' [TAs] in this paper) by organizing a joint venture on collaborative online learning during the first semester of the 2018-2019 academic year. Participating TAs in this study had different levels of prior online learning experience. A 3-week online course was developed by a team from the teaching and learning office of a leading liberal arts university in Hong Kong (U1), using a proprietary e-learning platform. Out of the 93 TAs, 11 TAs from a leading technological university in Singapore (U2) enrolled in this online course. The purpose of the 3-week online course was to provide TAs with the key teaching and learning concepts and related pedagogies for teaching undergraduates at university. These concepts were similar to the curriculum contents of the TA training courses offered by U1 and U2 respectively. The online learning platform provided a variety of learning features such as the use of videos, quizzes, graded tests, articles and online asynchronous discussion forums for participants from different parts of the world to interact with each other.

The design of the online learning contents, participants' cultural context, and previous experience in e-learning could influence student perceptions on online learning and likewise affect interaction with overseas counterparts. It was therefore important to study students' perceptions of their online learning experience to identify factors that might influence online collaborative learning. The design of the online course contents and activities had also taken into the consideration of providing students with the constructive learning environment to support and motivate their learning. It was suggested by Wilson (1996, p.5) that a constructive learning environment was a place where students may work together and support each other with a given variety of tools and information resources to achieve the learning goals by undertaking different teaching and learning activities. It has also noted that constructive learning environments should provide a supportive and motivating environment for students to solve problems, interact with others, and assess their learning (Brandon, 2004).

The aim of the study was to evaluate students' perceptions on their online intercultural learning experience under a 3-phase strategic framework for implementation. We would like to address how do the intercultural online learning activities facilitate Internationalization at Home? Using a mixed method approach, both quantitative data in the form of online feedback survey, and qualitative data in the form of focus group discussion and an open-ended question set in the online feedback survey, were analyzed. A mixed method is adapted since it allows the identification of trends and new themes related to the area of interest (Creswell & Clark, 2011). Data collected and analyzed from this study could be used for future research to include universities from other parts of the world.

Literature Review

Internationalization in Higher Education

"Internationalization" has become an important topic in the higher education nowadays. In order to nurture students' intercultural competence to work with others from different cultural backgrounds, there is a growing demand for universities to produce graduates who can provide solutions for problems in a globalized society (Hunter et al., 2006). Universities, recognizing this need, have begun adopting intercultural skills as elements of desired graduate attributes, as well as internationalizing their curriculums (Jones & Killick, 2013; Leask, 2013). Intercultural competence is broadly defined as: knowledge about several dimensions of global and international cultures; appreciation of cultural, racial, and ethnic diversity; understanding of the complexities of issues in a global context; and comfort in working with people from other cultures (Soria & Troisi, 2013). It has been suggested that the possession of culturally specific knowledge enables one to be competent and effective in a globalized society (Lovvorn & Chen, 2011).

To aid students in the development of intercultural competence and create a multicultural environment, various programs and changes have been introduced, in formal way such as internationalizing the curriculum (Leask, 2013) and informal ways in the form of co-curricular activities such as overseas exchange programs (Root & Ngampornchai, 2012). Research has shown that studying abroad facilitated the development of intercultural sensitivity, awareness and maturity (Braskamp et al., 2009). However, factors like cost, possible delay in graduation, concerns to being in an unfamiliar environment and possible discriminations were some of the barriers identified to studying abroad or taking part in an exchange program (Dessoff, 2006; Shaftel et al., 2007). These studies although mostly carried out in Western communities, they highlighted the need to identify new ways of facilitating internationalization in universities.

Internationalization at Home (IaH)

With the adoption of the 'Internationalization at Home' (IaH) approach, students did not need to travel overseas to develop their intercultural competence. IaH is defined as a focused incorporation of international and intercultural dimensions into the formal and informal curriculum for all students within domestic learning environments (Beelen & Jones, 2015). Students were able to experience interacting with international students without having to leave their home countries and could be achieved in either formal or informal learning environment. Research has shown that interaction between local and international students within informal programs could improve their perceived intercultural competence (Jon, 2013). To examine the applicability of IaH at the university level, this study highlighted the significance of IaH in promoting intercultural competence.

There were numerous benefits of IaH. These include creating ample opportunities for students to interact with one another. Communicating or building friendship with international course-mates positively influenced students' perceived international or intercultural competence (Soria & Troisi, 2013). Soria and Troisi (2013) also posited that the experience and exposure gained by participating in cultural events and interacting with international students increased their cultural awareness which in turn enhanced students' perceived competence. These studies highlighted the potential of using IaH to develop students' intercultural competence locally.

Technology and IaH

Communication seems to be a crucial factor towards in developing intercultural competence. As discussed earlier, students benefit from the interaction with international students. With the advancement of technology, communication may take place offline/online in a virtual platform. This gives rise to the possibility of adapting online learning platform such as SPOCs to promote the intercultural learning experience. Obonyo and Wu (2008) introduced a web-based forum to postgraduate students as a platform that allowed them to discuss research topic with their counterparts from overseas institutions and found that at the end of the course, there was an increase in the number of local students that were interested to engage in projects involving cross-cultural elements. The study also found that the web-based platform was useful in allowing students to discuss, exchange ideas and collaborate with overseas counterparts (Obonyo & Wu, 2008). Regarding the development of social skills, Larsen et al., (2011) examined whether an online course developed for 'Community Work' could facilitate a group of 50 students with various nationalities, studying either bachelor or postgraduate programs of 'Social Work', to achieve new skills as future social workers. Data collected from the "mixed methods approach" found that participants acquired relevant social skills as a result of their online learning and discussion with students from other nationalities. These findings seem to suggest that there is potential to use online discussion platforms to facilitate IaH.

Harnessing the potential and effectiveness of technology to promote IaH, the adoption of SPOC indirectly promotes internationalization with invited overseas partners. Among the available online learning features as described above, the asynchronous discussion is considered to be the most effective online learning feature to motivate/engage students' online interaction with others (Bernard and Lundgren-Carol, 2001) as they have more time to reflect for thoughtful online discussion (De Wever et al., 2007).

Background of the Study

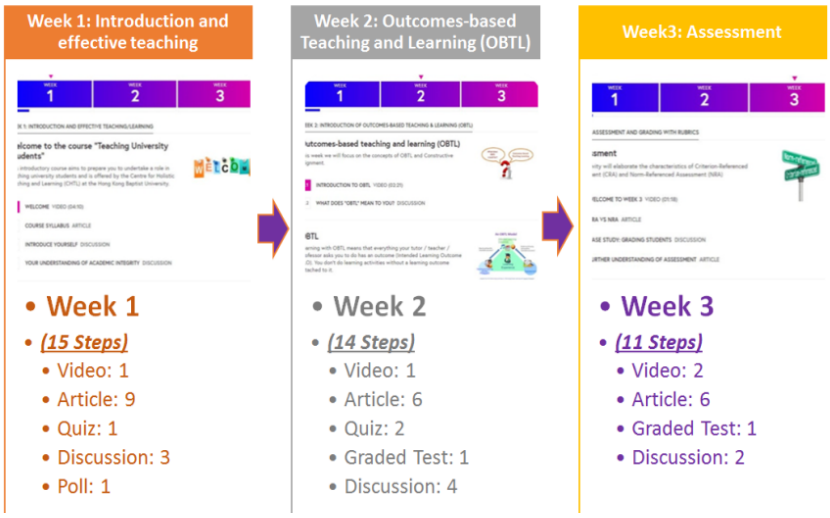
With the intention of providing the best student experience and in line with one of their institutional strategic foci of "Internationalization", U1 has taken an initiative to develop SPOCs since spring 2017. It is anticipated that online learning via SPOC platform offers opportunities for students to develop their self-directed and self-regulatory learning abilities, digital literacies and life-long learning skills. Online learning can also provide students with the platform to cultivate a better world view and intercultural awareness through interacting with their peers from diverse cultural backgrounds. SPOC can be used to support blended learning and flipped-classroom learning. Apart from online learning features as described above, the adoption of the online e-learning development platform has also provided a place on building a social or community-supported learning environment which is conducive to engaging students in online learning and knowledge building. More importantly, it offers opportunities for fostering cross-institutional collaboration in terms of sharing course contents and/or developing joint SPOCs. This kind of cross-institutional collaboration can help broaden students' intercultural learning experiences as well as benchmark the teaching curricula with those offered by invited international partners. A 3-phase strategic framework of implementing SPOC with the different levels of involving overseas counterparts was developed and explained below.

Phases of Implementing SPOC with the Different Levels of Interacting with Overseas Counterparts to Cultivate Intercultural Learning Experience

As a pioneer of developing the first ever SPOC in U1, a course team of 5 teaching staff from a teaching & learning unit decided to take phases of implementing a 3-week SPOC with the involvement of their invited overseas counterparts. The team first developed a 3-phase framework to guide themselves in implementing the pre-designed SPOC to facilitate the cultivation of students' intercultural learning over 3 consecutive semesters. This study focused on the data collected from the semester 1 of AY2018/19 (i.e. third time running of the SPOC in phase III) where overseas partners (teachers and students) were invited for the evaluation purpose. The approaches/actions taken by the course team in each phase of the framework to accomplish the goal of collaborative online learning with overseas counterparts (teachers and students) were explained below.

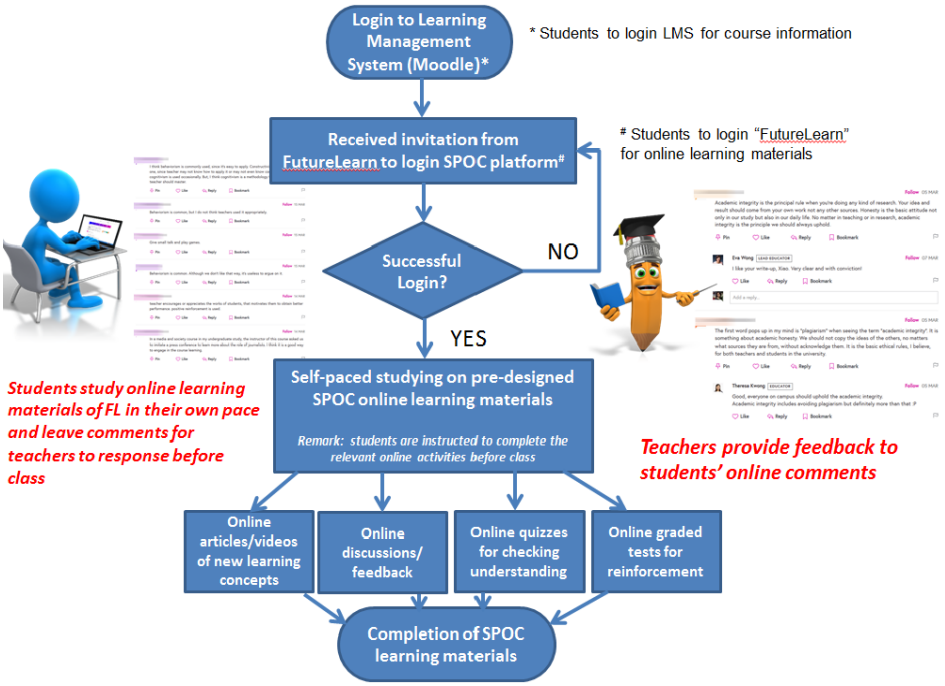
Phase I: Development of a 3-Week SPOC with invited overseas guest speakers but no overseas students' involvement. The course team re-designed an original 7-week face-to-face traditional classroom-based teaching course into a 6-week SPOC-flipped classroom team teaching for TAs on how to teach university students. The aim of the course was to prepare TAs with diverse backgrounds to take up assignment(s) in teaching undergraduate students at university. It provided an introduction to the basic theoretical knowledge and practical skills required to begin teaching at university. The 3-week SPOC incorporated key concepts of the curriculum like introduction and effective teaching, outcomes-based teaching and learning and assessment. Different learning features provided by the online e-learning development platform were incorporated into the SPOC to engage students with different online activities. The layout of the SPOC designed and adopted in semester 1 of AY2017/18 for the first run was shown in Figure 1. Figure 1 shows the learning topics designed for the 3-week online course with a variety of learning activities like videos, articles, quizzes, graded tests, polls and discussions to engage student participation online. The online learning activity of 'Discussion' used as a means to encourage students to interact with their overseas counterparts by sharing their views on the teaching topics.

Figure 1. 3-week SPOC designed for 1st run in semester 1 of AY2017



All participating TAs were instructed to spend about 2 hours per week of the 3-week online self-paced learning and to complete all the online activities before each class. A flow-chart designed by the course team to guide students' online self-paced learning is shown in Figure 2. TAs' online participation was assessed against a given set of participation (online) rubric with a weighting of 15% as an incentive. TAs were encouraged to exchange their views through the online discussions. SPOC-Flipped classroom approach was adopted by the teaching team and different in-class activities were designed to reinforce TAs' online learning concepts with teachers' timely feedback.

Figure 2. Flow-chart of guiding students' online self-paced learning



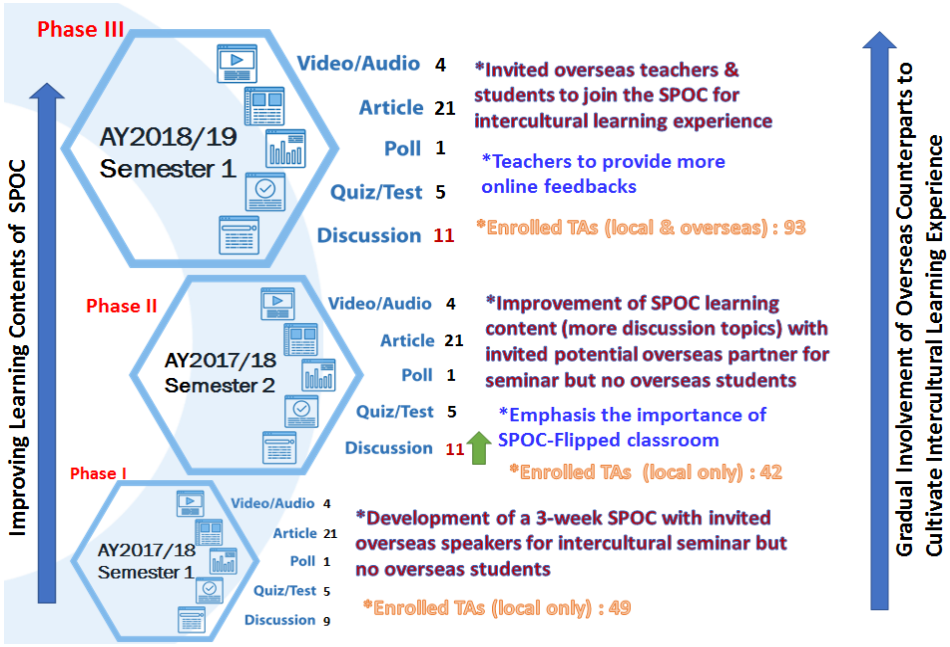
Phase II: Modification of learning contents of the 3-Week SPOC with invited potential overseas partner from U2 as overseas guest speaker but No overseas students' involvement. As part of the learning process for the course team of U1 after the first run of SPOC, the team modified the learning contents of SPOC by (i) increasing the number of discussion topics for better enhancing online interaction, (ii) explaining clearly the expectations of what was required regarding students' active online participation in this SPOC-Flipped classroom approach at the beginning of the course and (iii) increasing teachers' online participation to facilitate online discussion forums in the form of a community as follow-up actions after feedbacks received from the CFQ of phase I.

In parallel to the follow-up actions described above, preparation for inviting potential overseas partner(s) together with their students to join the 3-week SPOC scheduled in phase III was also carried out in phase II. The course team of U1 has taken an initiative to

contact an equivalent functional unit from U2 with comparable expertise and ambit to study the possible collaboration opportunity. It was noted that both U1 & U2 have the common strategic focus of "Internationalization" and similar teaching curriculum for their TA training courses, the two units then agreed to sign a Memorandum of Understanding (MOU) at the beginning of semester 1 of AY2017/18 for joint collaboration of teaching and learning activities, including a 5-day staff exchange program offered by each institution and other student learning activities to ensure both parties could receive the mutual benefits from the collaboration. The purpose of the 5-day exchange programs offered by the respective universities was for the nominated representatives to study the respective roles and responsibilities of the two units and the teaching practices for their TA courses, as well as to see the best way(s) of planning the partnership of teaching and learning related activities. Each nominated representative was invited to deliver a guest lecture to the respective TAs during his/her visits. The representative from U2 delivered a topic of "Team-based Learning" to TAs of U1 in semester 2 of AY2017/18 to have a feel on their learning atmosphere of the SPOC-Flipped classroom approach and it was well-received by TAs of U1. The respective person-in-charge of the teaching and learning units of U1 and U2 agreed to invite their respective participating TAs to join the 3-week SPOC scheduled in semester 1 of AY2018/19 since the course contents of SPOC were common to their TA training courses. This online joint venture provided participating TAs from U1 and U2 the opportunity to interact with each other and keep each other company in an online intercultural learning community.

Phase III: Invited overseas counterparts to participate the 3-Week SPOC for intercultural learning experience. In semester 1 of AY2018/19, the 3-week SPOC was a compulsory course for all enrolled TAs from U1 whereas it was an elective course for U2 TAs. There were 82 TAs enrolled with the SPOC from U1 and 11 TAs enrolled from U2 with a total number of 93 (n=93) involved in this study. With the learning contents of the SPOC being improved to increase more online discussion opportunities for participants (TAs and teachers from U1 & U2), more online dialogues and interactions had been observed. The gradual involvement of overseas counterparts over the 3 consecutive semesters allowed the course team to develop their confidence in adopting relevant online teaching pedagogies to facilitate students' intercultural learning experiences. A 3-phase strategic framework of implementing SPOC with the gradual involvement of overseas counterparts to cultivate online intercultural learning experiences are summarized and shown in Figure 3.

Figure 3. A 3-phase strategic framework of implementing SPOC with involvement of overseas counterparts to cultivate intercultural learning experience.



Methods

A total number of 93 (n=93) participating TAs with different cultural backgrounds from U1 & U2 were enrolled for this 3-week SPOC held in semester 1 of AY2018/19.

Data Collection

To better understand the perceptions of participating TAs on whether the design of an online course could facilitate their intercultural learning or not, both quantitative and qualitative methods, namely online survey and focus group interview were adopted respectively in this study for data collection.

Quantitative data was collected through the completion of an online feedback surveys. The online survey (see Appendix I) sent to all 93 participants immediately after the completion of the 3rd week of SPOC while their memories of learning with the online course were still fresh. The online survey consisted of eight quantitative questions with an open question to further solicit respondents' views that might not be covered in the eight questions. Students were required to indicate the degree of agreement or disagreement on a 5-point Likert scale to each of the statement (1- strongly disagree, 2 - disagree, 3 - neutral, 4 – agree, 5 – strongly agree. The mean score for each statement was calculated by computing the average scores of students' responses. The survey was anonymous. The valid response rate for the quantitative survey was 49.5% (46 out of 93) and only 35% (33 out of 93) respondents responded to the open-ended question. The data was tabulated and examined using Microsoft Excel, 2010.

Qualitative data was collected through focus group interview. A follow-up structured focus group interview with eight questions (see Appendix II) was conducted after the completion of the 6-week training course towards the end of the semester 1 of AY2018/19. The purpose of the focus interview was to gather more in-depth perception of participating TAs as part of the qualitative analysis. TAs were invited to participate in the focus group. Five participating TAs with different cultural backgrounds were invited on the voluntary basis for an hour face-to-face focus group interview held in the campus of U1. At the beginning of the focus group interview, participants were asked if they had any past experience of online learning and if they had the opportunity to learn with overseas students from a foreign institution. Two out of 5 participating TAs had past online learning experience. The focus group interview was audio recorded and the scripts were transcribed.

Responses were tallied and coded. The codes were examined and redundant codes were regrouped into the positive and negative themes. This process was repeated until all the categories were exclusive and exhaustive and no new ones were uncovered.

Questions used in both the online survey and focus group interview were designed to evaluate respondents' perceptions of their online learning experience and to find out ways for improvement on this kind of online course design for nurturing better intercultural learning experience in the future. The results analyzed from the quantitative method (i.e. online survey) could be further validated by the findings obtained from the qualitative method (i.e. focus group interview) as a kind of backup evidence. Findings from the online survey could be used as prompts to interviewees during the focus group interview to further unveil any online learning related issues that the designated questions might not cover.

With the advantage of using the learning analytic tools provided by the online e-learning development platform, the average number of comments posted per student per SPOC via the online discussion forum over the three consecutive semesters in this study was presented in Figure 11. Figures shown in Figure 11 acted as an indicator of answering the research question of this study, that is participating TAs enjoyed their online learning via the discussions with their overseas counterparts (intercultural learning) with the involvement of teachers giving feedback on the online discussion. It was really interesting to observe that with the increasing number of online discussions over the course of three semesters, together with the involvement of both teachers and overseas students in semester 1 of AY2018/19 (i.e. phase III of the 3-phase strategic framework shown in Figure 3 with the enrollment of both local and overseas TAs), participating TAs become more active in online discussions as reflected from the highest average number of comments posted per student per SPOC of that semester. This kind of active participation of online discussion has facilitated participating TAs' intercultural learning and skills through the exchange of views and ideas on the subject matters.

Results

Both the quantitative and qualitative data collected from the online survey and focus group interview respectively did support participants' intercultural competence by

interacting with their overseas counterparts through online asynchronous discussions. Suggestions were also given to further improve the online course design.

Quantitative Analysis

Quantitative data drawn from the online feedback survey were analyzed and summarized in **Table 1**. More than 50% of the TAs agreed with the perceived benefits and were satisfied with the use of e-learning platform as a tool to facilitate internationalization. Only Question 3, which was intended to measure TAs' perceived competitiveness with TAs from other institution, recorded an agreement level of less than 50%. Table 2 summarized the most occurrence statements raised by the respondents with positive, negative comments together with suggestions for online learning improvement.

Table 1. Summary of online survey for questions # 1 to 8 (n=46)

No.	Question	Mean Score	Agree	Neutral	Disagree
1.	I enjoy the online course which allows me to communicate with my overseas counterparts without limitations of time and space.	3.48	56% (26)	22% (10)	22% (10)
2.	The asynchronous online discussions help me appreciate the subject topics better with the different cultural perspectives; i.e. increasing cross-cultural awareness.	3.50	59% (27)	19% (9)	22% (10)
3.	I feel a sense of competition with my overseas counterparts especially in online activities like quizzes, or graded tests; i.e. challenging.	3.34	44% (20)	42% (19)	15% (7)
4.	I become more conscious of my inputs to the online activities like discussion forums, graded tests, quizzes etc. with the presence of my overseas counterparts; i.e. a sense of self-awareness.	3.54	59% (27)	24% (11)	17% (8)
5.	The interactive online exchange of thoughts/ideas has enhanced my critical thinking skills and allowed me to give reflection of my own learning experience.	3.67	63% (29)	22% (10)	15% (7)

6.	The active online participation of my course teachers and coursemates (both local and overseas) motivate/develop my self-directed learning of the online course.	3.76	68% (31)	17% (8)	15% (7)
7.	My participation of the online learning activities has helped me in learning new knowledge of becoming a future teacher.	3.59	65% (29)	22% (10)	13% (6)
8.	Online learning with good design of interactive activities is sufficient to facilitate learning with my overseas counterparts, even without face-to-face meetings.	3.43	52% (24)	24% (11)	24% (11)

Data collected from the open-ended question (question # 9) of the online survey asking respondents (n=33) to suggest ways of facilitating participants' interaction with their overseas counterparts on online learning. Some of the positive comments received for this kind of online learning platform including, enjoyed the online course, good for discussions and asking questions. Some of the negative comments received including too timely, the discussion was in one direction and could not interact with overseas counterparts. Eight respondents felt that areas for improvement were firstly having a face-to-face discussion to encourage more interaction and two respondents suggested that questions related to cultural differences should be introduced as topic for discussion. These areas of improvement were also identified by the respondents of the focus group discussion and highlighted in red under the column of "Suggestions for improvement" in Table 2.

Table 2. Summary of online survey question # 9 as an open-ended question i.e. Based on your online learning experience, please give suggestion(s) on how to better facilitate your interaction with your overseas counterparts with the aim of improving learning for all students involved. (n=33)

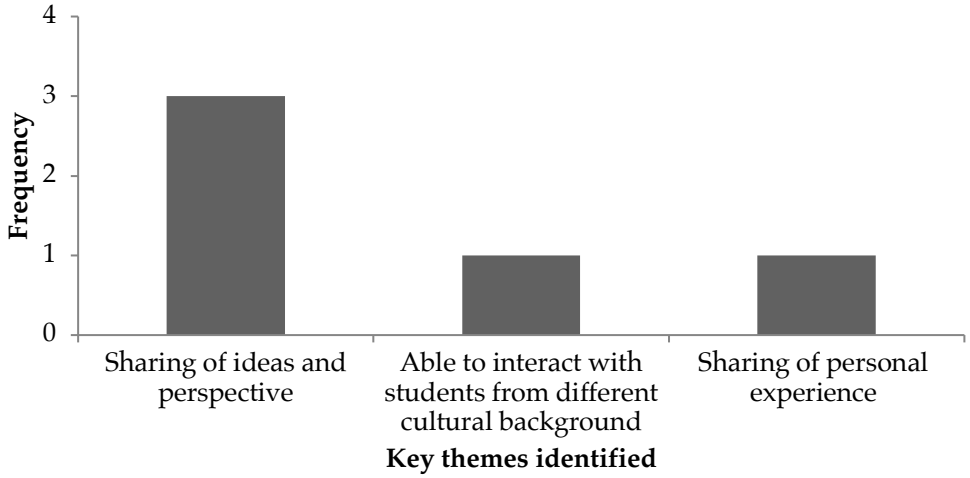
Positive comments	Negative comments	Suggestions for improvement
Make me clear about the goal/ what I have learnt x2 Please continue to inspire more students	Cancel this part x2 More instant information maybe better x2 I don't like online learning	Hope to add some F2F/VC discussions x8 Please introduce some questions that is cross-cultural awareness x2

Good for asking questions Good for discussions The VARK assessment was useful The knowledge was explained in a very simple but illustrative manner Enjoy the online course	Too timely (too much time) The discussion is in one direction The online course content is hugely overlap with U2 syllabus The lecturers' voice recording is a bit monotonous and rigid Can't interact with overseas counterparts in the platform	More tutorials Add more interesting materials Can upload picture

Qualitative Analysis

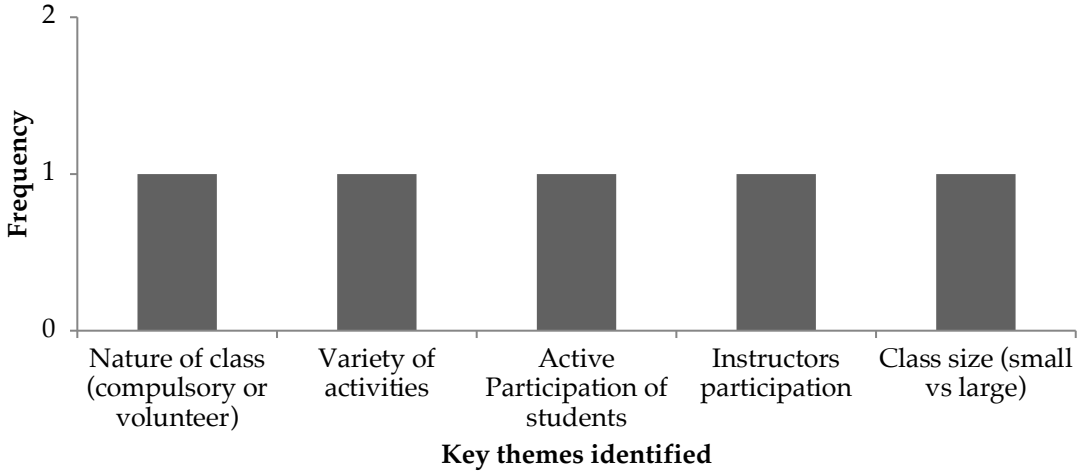
Appealing factors from the 3-week SPOC. Three participants with no prior online learning experience with overseas counterparts were asked to share about the activities that they found to be appealing from the 3-week SPOC. All three participants shared that the platform enabled the idea sharing and perspective with each other. They were able to 'share their experiences, learning before, opinions', their ideas and simultaneously read about the ideas of other participants from other institution. The other two aspects that the participants identified were the ability to interact with other participants and sharing of personal experience. The students shared that they 'can see how we interact …' and read 'the comment based on real experience'. Figure 4 showed the frequency of the appealing factors identified.

Figure 4. Frequency of identified appealing factors of the 3-week SPOC with overseas counterparts



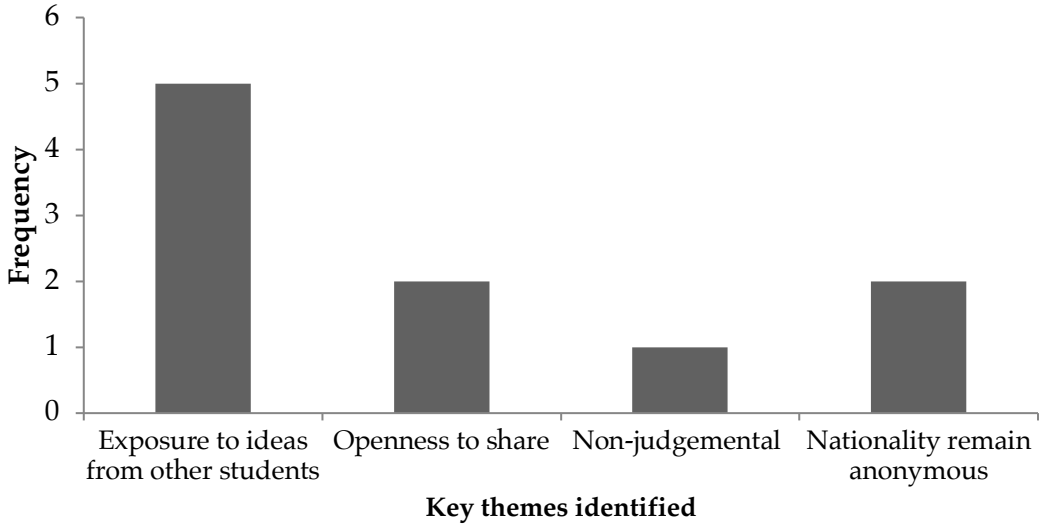
Differences identified between respondents' current and previous online learning experiences. As two participants had prior experience with online learning, the authors wanted to examine if there is any connection between the current online learning experience and their past online learning experience. The participants were asked to highlight their perceived differences between the current online learning experience and past online learning experience. Respondents shared that in the past, participation were not compulsory leading to inactive participation from the students and minimal interaction with the teachers. However, in the current course, participation was compulsory, and the course teachers were also actively involved in online activities like online discussions. They perceived these two factors led to a 'more' active participation in the online discussion. Size of class and the variety of activities that were available on the online platform were the other differences that were identified by the focus group participants. Figure 5 showed the percentages of identified differences of respondents' current SPOC and previous online learning experiences.

Figure 5. Differences identified between respondents' current and previous online learning experiences



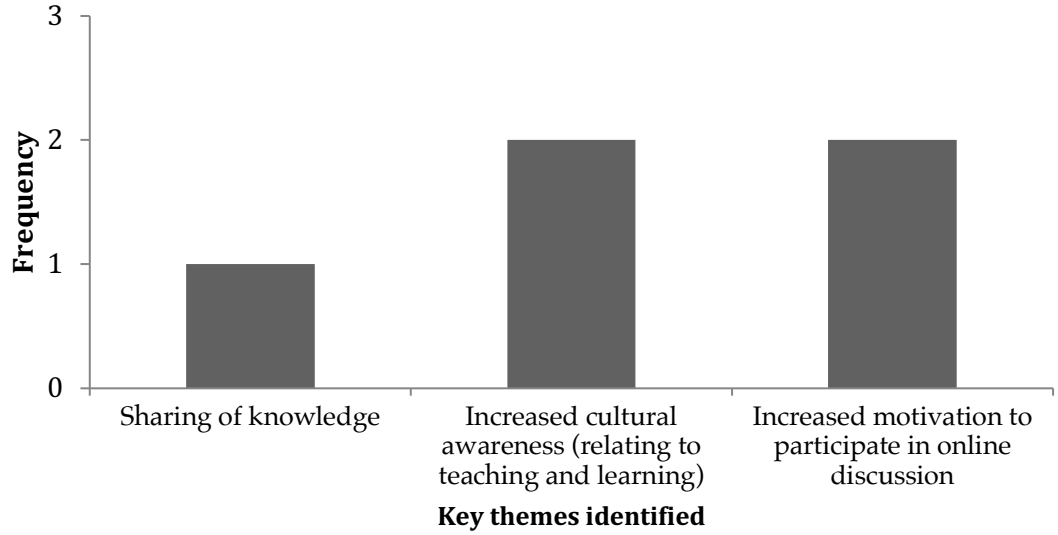
Enjoyable things identified of the online learning experience with overseas counterparts. TAs were asked to share the enjoyable things that they experience as a result of interacting with their overseas counterparts. All the respondents agreed that exposure to ideas from other respondents were the most enjoyable feature. One respondent commented that he or she '*go through their comments and go through their replies because we can get more exposure from their views on these teaching methods'*. They were also able to observe similarities and differences of ideas between the two groups of TAs. Other key themes that were identified in Figure 6 including openness to share, ability to remain anonymous (in terms of nationality) and non-judgmental.

Figure 6. Most Enjoyable things identified of online learning experience with overseas counterparts



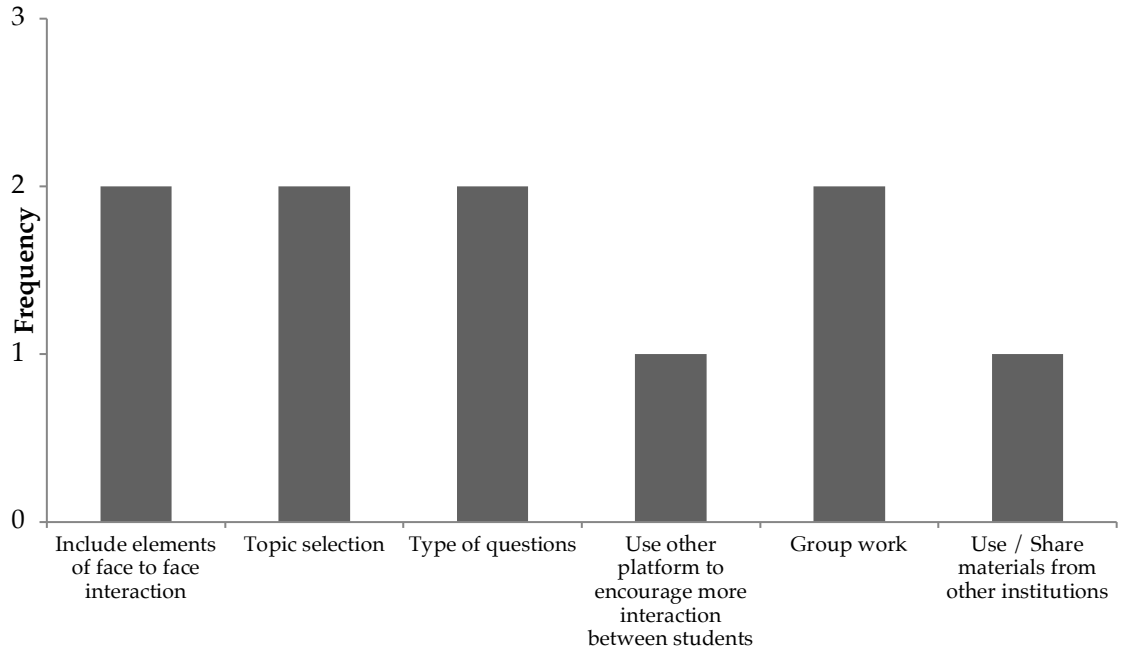
Perceived benefits. The third question was intended to examine respondents' perceived benefit(s) on the subject matter after interacting with TAs from other institutions. Increased cultural awareness, increased motivation to participate in the online discussion and sharing of knowledge were identified as the perceived benefits as shown in Figure 7. They shared that they *'are getting this kind of knowledge from the different country, different culture, into this platform,'*. They were also more motivated to share because *'the discussion online I'll have much more time to organize my language and I can think for much longer time'*.

Figure 7. Identified benefits of participating online learning activities with overseas counterparts



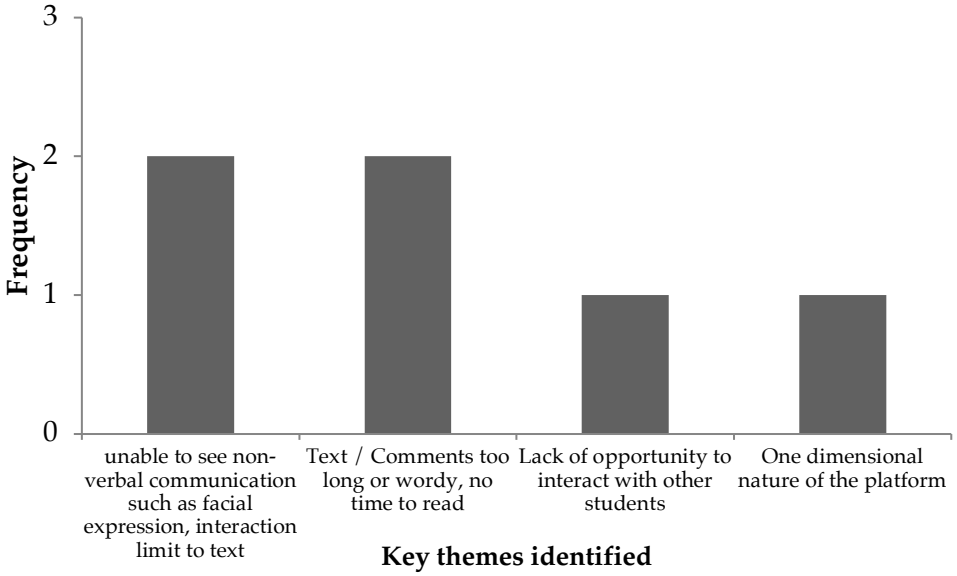
Ways of improvement for the 3-week SPOC. When it comes to improving the current 3-week SPOC, a number of recommendations were suggested. The recommendations include the introduction of face-to-face interaction, select topic(s) and ask relevant cultural related questions to elicit cultural differences on the subject matter, use group work to foster more collaborative learning, use other platform that allows students to interact with each other more and to use or share learning materials of partnering institutions. Figure 8 showed the percentage of the suggested recommendations.

Figure 8. Suggested improvements for the current 3-week SPOC learning



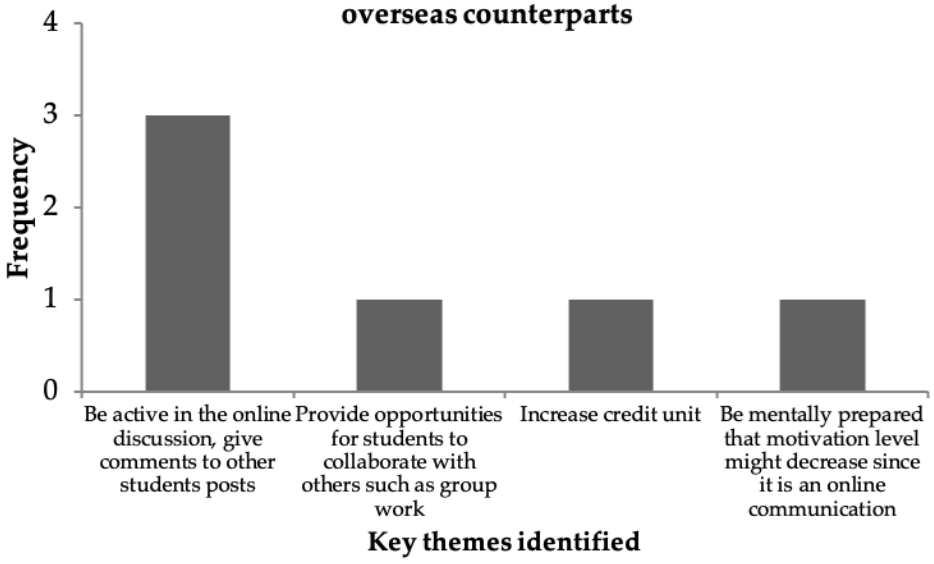
Challenges to intercultural learning via an online learning platform. There were however challenges to online intercultural learning. The TAs cited unable to see non-verbal communication, lengthy text or comments, lack of opportunity to interact with other students and the one-dimensional nature of the platform as the challenges towards achieving cross-cultural learning in a e-learning platform. The platform was viewed as one dimensional because '*We say comment, we give our own comments, but in most cases, we don't reply other people's comments'* and '*we only receive information is based on text'*. The distribution of these challenges can be found in Figure 9.

Figure 9. Challenges in achieving intercultural learning via an online learning platform



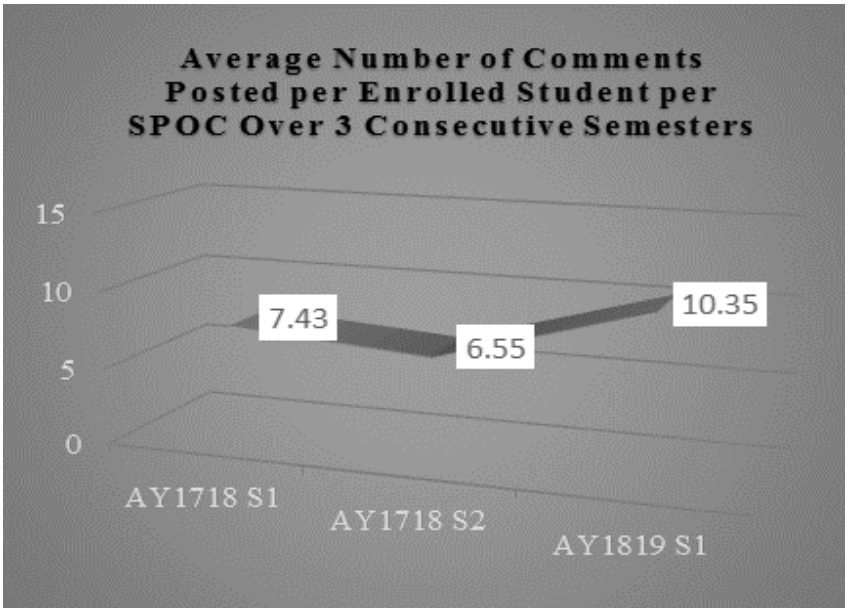
Suggestions / tips for an effective online learning with overseas counterparts. Respondents were asked to share any advice or tips that might be useful for future students who might embark on a similar online course. More than half of them suggested that future students should be encouraged to participate actively online provide comments to fellow students' posts. In doing so, it could increase their interaction with the online counterparts. Other suggestions for an effective online learning could be providing opportunity for online collaborative work, staying motivated throughout the online course or otherwise users would be easily demotivated if being inactive. One respondent requested for an increase in the credit unit. Refer to Figure 10 for the distribution.

Figure 10. Suggestions / tips for an effective online learning with overseas counterparts



Rate of participating online discussions over 3 consecutive semesters. Data gathered from the learning analytic tools of the online e-learning development platform indicated that there was an increase of 39.3% in the average number of comments posted per enrolled student between the first run and the third run of the 3-week SPOC over the 3 consecutive semesters as shown in Figure 11. Figure 11 showed that the highest average score of 10.35 over the 3 consecutive semesters was observed in semester 1 of AY2018/19 where the online learning experience involved the participation of overseas counterparts (i.e. TAs & teachers) from U2 together with active participation of TAs and teachers from U1 for the first time.

Figure 11. Average number of comments posted per enrolled student per SPOC over 3 consecutive semesters



Discussion/Conclusions

The 3-Phase strategic framework for "Implementing SPOC with Involvement of Overseas Counterparts to Cultivate Intercultural Learning Experience" as illustrated in Figure 3 was purposely designed by the course team of U1 to guide themselves in developing a SPOC with involvement of overseas counterparts in different phases to cultivate an online intercultural learning experience for 93 participating TAs. 46 out of 93 participating TAs responded to the online survey. The indicator of using "Average Number of Comments Posted per Enrolled Student per SPOC" as shown in Figure 11 over the three consecutive semesters in this study was to measure participating TAs' intercultural competence through their active participation in the online discussion. The overall quantitative results collected from the online survey indicated that (i) overall 50% of participating TAs agreed the perceived benefits and satisfied with the use of online learning activities to facilitate internationalization without leaving home; (ii) over 60% of participating TAs agreed that the online learning activities facilitated their sharing of ideas and perspective with overseas counterparts as discussed in both the 'Method' & 'Results' sections. This kind of active participation of online discussion has facilitated participating TAs' intercultural

learning and skills through the exchange of views and ideas on the subject matters; (iii) less than 50% (44%) of participating TAs, however, perceived competitiveness with TAs from other institutions on the online learning activities. These findings also echoed with the most frequently cited suggestion by respondents from the open-ended question #9 in the online survey as summarized in Table 2. Respondents had made positive, negative comments about their online learning experience together with their suggestions on how to further improve the design of the online course in order to facilitate intercultural learning.

The overall qualitative results collected from the focus group interview indicated that the appealing factors of the 3-week SPOC with overseas counterparts were (i) able to share ideas and perspectives (Obonyo and Wu (2008); (ii) able to interact with students from different cultural backgrounds; (iii) to share personal experience (Larsen et al., 2011), as illustrated in Figure 4; (iv) the compulsory online participation with teachers' active involvement in discussion forums facilitated active online participation as illustrated in Figure 5; (v) the most enjoyable elements of participating in online learning were the exposure to ideas from other overseas respondents, openness to share and remain anonymous (in terms of nationality), as well as exchanging non-judgmental comments, as presented in Figure 6; (vi) the perceived benefits of this type of online learning were increased respondents' cultural awareness by interacting with their overseas counterparts in the online discussion forums to share and exchange their subject related knowledge as illustrated in Figure 7. This study also revealed that among the many online learning features provided by the proprietary e-learning platform like discussion forum, quiz, graded test, video, article etc., asynchronous discussion was considered the most effective feature to engage students in online interaction (Bernard and Lundgren-Carol, 2001) as students have more time to reflect for thoughtful discussion (De Wever et al., 2007).

With the involvement of overseas partners (both teachers and students) in semester 1 of AY2018/19 on the online learning activities, participating TAs seemed to have higher engagement as reflected from the highest average number of comments posted per enrolled student of 10.35 (see Figure 11) among the three consecutive semesters observed in this study. The higher participation could be due to the content of the discussions. TAs highlighted that they were able to share and learn from each other's personal sharing. They also wanted to know if there were any differences observed between them and their overseas counterpart as suggested in the results.

Despite the many advantages and benefits discovered from this study for cultivating students' online intercultural learning experience with their overseas counterparts, respondents did identify some challenges of achieving intercultural learning via an online learning platform. These include the inability to see counterparts' non-verbal communication like facial expression, no time to read wordy messages, no reply(ies) to other's comments and one-dimensional nature of the online platform. Respondents had therefore expressed different ways of improving the online intercultural learning, which were similar to both the quantitative and qualitative findings of Creswell & Clark (2011), as outlined below:

- Firstly, introduction of face-to-face interaction in addition to online discussion may further enhance students' online collaborative learning;
- Secondly, provision of different online discussion topics for students to choose, and contextualizing discussions by drawing on diverse student backgrounds and perspectives of a topic;
- Thirdly, provision of collaborative group discussions on authentic content- and task-oriented topics for all students enrolled in the course;
- Fourthly, development of feelings of social presence in online discussion forums as students in distance learning may more likely experience isolation and alienation from the institution because of their physical separation from the institution and from other students as suggested by Garrison (2001). Garrison et al (2001) further pointed out that the role of teachers' online participation in discussion forums is to unite and create a strong sense of community within the online course for content- and concept-oriented discussions. The presence of teachers in the virtual classroom was to facilitate effective student-student discussions and interactions and to attend to any special issues that may have arisen from culturally diverse students.

In summary, a good SPOC design with relevant online learning features in particular, asynchronous discussions could effectively cultivate students' online intercultural learning (Bernard and Lundgren-Carol, 2001). This study had provided evidence on how the adoption of an online learning platform together with an appropriate strategic framework and pedagogical approaches could benefit students' intercultural learning without leaving their respective hometowns i.e. Internationalization at Home. Views expressed by respondents could be used for future reference for designing better online courses for the inclusion of intercultural dimensions and interactions. Although there was no obvious difference found in the findings of this study between U1 and U2, the data collected could be used as a pilot for future study. Further studies could be carried out to include other overseas partners not only restricted to the Asian regions but also other parts of the world to see if any other factors could be incorporated into the design of an online course to cultivate a better intercultural learning experience without students leaving their homes. This study has provided useful information with evidence to those universities that would like to develop their students' intercultural competence without leaving homes through the development of online courses.

Acknowledgement
Our sincere gratitude to Dr. Isaac Chan, Mr. Kendall Yan and Mr. Andy Chan for their dedicated and professional support of developing the 3-week SPOC to make this study possible.

Glossary of Terms
CFQ – Course Feedback Questionnaire
SPOC – Small Private Online Course
IaH – Internationalization at Home
MOU – Memorandum of Understanding
TA – Teaching Assistant

Lisa Law - *Lisa's main responsibilities at the Centre include: providing training/advice to academic staff to facilitate their teaching like Outcomes-based approach, e-tools application etc. in addition to her teaching role to teach research postgraduate students on the basic teaching skills. Her research interests include application of e-learning, blended learning and internationalization.*

Muhammad Hafiz - *Hafiz was a Project Officer at the Centre. He was tasked with supporting the Centre's effort in Teaching and Learning. His research interest includes innovative teaching and learning, learning and motivation and psychology of learning.*

Theresa Kwong - *Theresa's major responsibilities at the Centre include: providing expertise to academic faculty regarding pedagogical issues, teaching research postgraduate students basic teaching skills and applications of outcomes-based approach, taking charge of the evidence collection of student learning. Her research interests include academic integrity, technology enhanced learning, faculty professional development, outcomes assessment.*

Eva Wong - *with education and student learning being central to her work, her major responsibilities include the professional development of academic staff, assisting the implementation of the outcome-based approach to teaching and learning and supporting the University's e-learning endeavors, with the main focus on enhancing student learning via a holistic approach.*

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Appendix I

This survey is to collect your views on the online learning experience involving overseas counterparts. Your feedback will help us improve future offering of the course and for teaching and learning research purpose. *This is an anonymous survey, please be assured that no personal identity will be collected and only aggregated results will be reported.*

	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)
1. I enjoy the online course which allows me to communicate with my overseas counterparts without limitations of time and space.	○	○	○	○	○
2. The asynchronous online discussions help me appreciate the subject topics better with the different cultural perspectives; i.e. increasing cross-cultural awareness.	○	○	○	○	○
3. I feel a sense of competition with my overseas counterparts especially in online activities like quizzes, or graded tests; i.e. challenging.	○	○	○	○	○
4. I become more conscious of my inputs to the online activities like discussion forums, graded tests, quizzes etc. with the presence of my overseas counterparts; i.e. a sense of self-awareness.	○	○	○	○	○
5. The interactive online exchange of thoughts/ideas has enhanced my critical thinking skills and allowed me to give reflection of my own learning experience.	○	○	○	○	○
6. The active online participation of my course teachers and coursemates (both local and overseas) motivate/develop my self-directed learning of the online course.	○	○	○	○	○
7. My participation of the online learning activities has helped me in learning new knowledge of becoming a future teacher.	○	○	○	○	○
8. Online learning with good design of interactive activities is sufficient to facilitate learning with my overseas counterparts, even without face-to-face meetings.	○	○	○	○	○

9. Based on your online learning experience, please give suggestion(s) on how to better facilitate your interaction with your overseas counterparts with the aim of improving learning for all students involved.

Acknowledgement

This survey is adapted from the TALES workshop on 6 Nov, 2018 *"Internationalising On-Campus Education: Using Virtual Exchange to Promote Students' Globalized Perspectives" presented by Professor Nannette Commander and Dr Lisa Deng, HKBU.*

Appendix II

Focus Group Interview Questions

Students' Perceptions of Online Intercultural (Internationalisation) Learning Experience between U1 and U2

(i) Was this your first online learning experience with overseas counterparts?
- If **YES**, please tell us which activity(ies) of this online course is/are more appealing to you from the perspective of intercultural learning?
- If **NO**, how was it different from your previous one(s) from the perspective of intercultural learning and the diversity of students?

(ii) What did you enjoy the most from this kind of online learning experience with your overseas counterparts? For example, increased your awareness of cross-cultural similarities and differences, improved your global citizenship and/or intercultural competence etc.

(iii) Could you tell us how did your participation of online learning activity benefit your interaction with overseas counterparts on the subject matter?

(iv) Could you identify way(s) of improving the similar online learning course design / pedagogy to better developing your global citizenship such as arousing your interest to know more about other cultures, developing your eagerness to work with multicultural counterparts for collaboration opportunity etc. apart from the subject knowledge?

(v) What are your challenges in achieving intercultural learning via online course learning?
What might be some options to overcome the challenges?

(vi) What advice would you give to your fellow classmates / friends who are taking similar online learning approach with overseas counterparts without leaving their respective universities?

THANK YOU VERY MUCH

Pre-Service Teachers in Finland: Comparative Education through Short-Term Faculty-Led Study Abroad

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Study abroad is a popular enrichment of the U.S. postsecondary academic experience with short-term programs providing a cost-effective opportunity to enhance student international travel experiences. In this review, we critically examine a U.S. program we led to Finland with the goal of identifying the pedagogical features from that program that maximize and optimize student learning. We provided thirteen undergraduate and graduate students in a department of education at a mid-sized, public, land-grant university an opportunity to participate in a short-term, faculty-led study abroad program to learn about Finland's public, K-12 educational system. Program learning outcomes included comparing the country's top-ranked educational system with U.S. public K-12 education in order to enhance students' future teaching practices. The purpose of this essay is to deconstruct the pedagogical features from that program to identify what worked well and what could have been improved upon with the goal of providing a critically examined model for consideration and thereby enhance comparative educational practice for faculty-led study abroad programs.

Keywords: study abroad, pre-service teachers, experiential education, Finland

Introduction

Study abroad is an increasingly popular supplement to a university academic experience. According to the Institute for International Education's (2018) Open Doors Report, 285,322 U.S. students studied abroad during the 2015/2016 academic year, representing a four-fold increase from the early 1990's. Lewis and Niesenbaum (2005) identify the primary benefit of study abroad to be "learning about people from different cultures" (p. B20). They further show the following benefits associated with studying abroad: a) students tend to take more classes outside their major upon return, b) students exhibit a greater propensity to travel abroad again, c) students show increased interest in interdisciplinary studies, and d) students demonstrate influenced perception of the costs and benefits of globalization. In short, study abroad provides a unique opportunity for comparative education. The purpose of this essay is to conceptually deconstruct a faculty-led short-term study abroad program to Finland designed to provide its student-teachers with an opportunity for cross-cultural comparative education.

 Current Issues in Comparative Education 21(1), 93-103.

Study Abroad Formats

Study abroad programs have been differentiated by length and purpose. The Institute for International Education (2018) groups study abroad programs by length of duration into: a) short-term (eight weeks or less), b) mid-length (one semester), and c) long-term (academic year). Sachau, Brasher, and Fee (2010) distinguish study abroad programs according to purpose including: academic semester/year abroad, service-learning programs, and short-term programs. Mid-length and long-term programs typically involve students living abroad, independently at a university campus while completing a course of study designed to supplement interests and coursework at their home institution. Service-learning programs tend to be short duration and provide an opportunity for volunteer work abroad by "linking the work students do in the classroom to real-world problems and world needs" (Sachau et al., 2010, p. 656), and thereby supplementing students' academic experiences at the home institution, often satisfying fieldwork or internship degree requirements.

Short-term programs have gained widespread appeal in recent years accounting for an estimated 63% of U.S. students who study abroad (Institute for International Education, 2018). Prior to the era of short-term programs, study abroad was limited to individuals who could afford the long-term costs associated with attending university overseas. Today's students tend to be debt averse (Avery & Turner, 2012) and are often worried about financing higher education. Short-term programs are typically less than eight weeks in duration and therefore less likely to interfere with students' academic trajectories or college-supplementing jobs (Chieffo & Griffiths, 2009) making them more affordable study abroad options (Lewis & Niesenbaum, 2005; Nguyen 2017). Additionally, short-term programs allow participants to visit a considerable number of locations in a short period of time, maximizing cost/time efficiency (Sachau et al., 2010).

Despite growing interest, as highlighted by Chieffo and Griffiths (2009), some question the academic legitimacy of short-term programs. There is a tacit belief that study abroad provides an invaluable learning opportunity to experience foreign cultures, but key learnings have been difficult to assess. Long, Akande, Purdy, and Nakano (2010) identify an important dilemma for faculty in "how to keep a short trip academic while making sure students were engaged and benefitting from experiential learning" (p. 90). This pedagogical challenge compounds the difficulty in elucidating learning outcomes associated with short-term programs and stresses the importance of deliberate design and implementation to achieve academic outcomes and maximize student learning. Long et al. (2010) suggest a central aspect to the problem of establishing academic relevance is rooted in effectively assessing student learning, which has long been a challenge with study abroad experiences. In general, personal reflection captured through journals and formal written assignments tends to be the primary means of assessment, though Williams (2009) also proposes using student evaluations and a photo contest as a means of reflection to emphasize the cognitive, affective, and behavioral dimensions of learning from an intercultural experience.

Because short-term programs are frequently conducted by university faculty based on their specific areas of expertise, short-term program faculty have developed a variety of

pedagogical strategies and assessments of student learning, but there is not consensus on established best practices to serve as a model for short-term study abroad programs. As teacher educators with expertise in pedagogy and assessment, we wished to apply our expertise to a short-term program we led to Finland with the goal of evaluating our program design in order determine key learnings as well as identify areas for improvement.

Literacies and Libraries in Context: Finland

During the spring 2018 semester, we led a short-term study abroad program to investigate Finland's K-12 public education system. We selected Finland due to its internationally recognized, exemplary educational system, lauded by educational researchers for both student outcomes and innovative teaching practices, as well as our interest in studying a Nordic model of education that focuses on social democracy (Oftedal Telhaug, Asbjørn Mediås, & Aasen, 2006). Our student-participants were interested in learning more about Finland's top-ranked educational system (Ripley, 2013) and comparing those practices with Montana's, as a way of gleaning key learnings related to ongoing and future professional practice.

Conceptualizing the Course

Eighteen months prior to the program, we began preparations, which included: selecting Finland as an exemplary educational model, identifying a third-party provider for our in-country experience, negotiating and gaining permission to co-teach with our department head, and submitting a proposal and budget. Upon approval, we designed the eight-week online course to prepare students for the nine-day in-country experience.

We made a concerted effort in marketing the program by targeting faculty, advisors, student organizations, fraternities and sororities as well as advertising to students via electronic communications and personally reaching out to former students. We visited classrooms and conducted information sessions. Additionally, we nominated prospective students for university financial assistance and we were able to secure over $11,000 in travel support for five students. In total, the class consisted of thirteen students (ten undergraduate and three graduate) half of which had no previous travel experience outside the United States. None of the students or faculty had previously travelled to Finland.

Course Organization

The overall pedagogical experience consisted of a required eight-week, three-credit online course occurring prior to a nine-day study-abroad trip to Finland over spring break. Given the available opportunities based on university registration protocol, the graded academic portion of the course was completed prior to and independently of travel abroad. Thus, travel abroad to Finland was not part of academic coursework requirements.

The course was designed to provide a comparative study of the Finnish education system, focusing on literacy and libraries. The learning outcomes allowed student participants to:

- Identify aspects of Finnish culture, including that of the indigenous Sami people;

- Compare and contrast the Finnish compulsory education system with the U.S. public education system;
- Describe the history of the PISA assessment and its implications for educators;
- Describe Finland's approach to second language learning;
- Describe and critique the Finnish school and public library systems; and
- Participate in a nine-day experience in Finland, synthesizing what was learned in the class prior to departure (not academically evaluated).

We used *Finnish Lessons 2.0* (Sahlberg, 2015) and supplemental readings to learn about Finland. The graded assignments included a presentation about Finland, online discussions, a summary paper, and a study abroad plan. All course assignments were completed during the first eight weeks of the semester. Because the course ended prior to travel abroad, students were able to fully engage in intercultural activities while in Finland without feeling pressured to split their time between participating in activities and fulfilling course requirements. While in Finland, we toured Helsinki, visited three schools in the Tampere area, participated in facilitated discussions led by the Finnish Council for Creative Education, and engaged in cultural activities. Pockets of free time enabled students to explore the country independent of faculty. This format, we believe, enhanced the perceived economic benefit of the program by providing students with a grounded academic approach and a scaffolded in-country experience while also affording students opportunities to explore the country according to their individual interests.

Course Assignments

The eight-week course used Brightspace by D2L as an online learning platform and consisted of the following assignments: narrated online presentation about pre-assigned categories related Finnish governance, weekly asynchronous online discussions, a traditional academic paper synthesizing key learnings comparing the Finnish and U.S. educational systems, and personalized plan for making the most of the in-country experience.

Evaluation of the Assignments

The Finland presentation enabled students to research and present important information in a structured and easily accessible manner to other class members (e.g., Table 1, Appendix). The narrated online presentations resulted in concise, informative, and durable topic-area overviews accessible throughout the course.

Matched to weekly readings, the asynchronous online weekly discussions provided a mechanism to ensure students completed the reading assignments as well as enable students to critically engage in online discussions. Given the diverse composition of students' academic experiences, the content of posts varied by length and depth. Some students used the online discussions to express areas of curiosity or of concern related to international travel, such as fear about inadvertently violating cultural norms. Other students critically compared differences in Finnish and U.S. approaches to education. For example, one student wrote:

> …You raise an interesting point that has simultaneously troubled and intrigued me… Sahlberg (2015) mentioned the usefulness Finns have found with Multiple Intelligence Theory (MIT). Although MIT was an extremely popular educational theory for many years in the U.S., the idea has not been empirically validated (cf. Kirschner, Sweller & Clark, 2006), causing it to be considered invalid. What is occurring to cause an educational concept like MIT to be embraced by a nation doing extremely well, and simultaneously to be disregarded by the nation that pioneered it based on the lack of empirical evidence?

In this manner, the asynchronous online format supported the academic diversity of undergraduate and graduate students alike.

The summary paper provided a mechanism to synthesize key learnings as well as to express areas of confusion or concern. Because the format requirements allowed students to describe their experience in the first person, faculty could pinpoint the relevant aspects of each student's pre-trip curricular experience. One student remarked:

> The Finnish educational system is indeed a paradox. In many ways, I am still trying to wrap my mind around what I have learned...Part of the reason I am struggling to synthesize my learnings is because it doesn't feel like the story is complete. Sahlberg (2015) provides a focused depiction of Finland's educational history and yet, he concludes with a discussion of the current problems. This created a sense of incompleteness for me because, inevitably, there is more to come…

A noteworthy aspect about this student's paper lies in the unanswered questions about Finland precisely because the student had not yet visited the country. Because the course ended prior to the in-country experience, we wrestled with requiring a summary paper. Pedagogy aside, the summary paper provided a formal means of making connections between previously disparate ideas. Although this format did not allow students to synthesize the course learning outcomes and in-country experience, it did provide students with a structured means for summarizing the key learnings from the online class and subsequently prepared them for travel abroad.

The study abroad plan provided a mechanism for students to reflect upon their preparation for Finland and conclude the academic portion of the course pre-departure. Students with little international travel experience tended to use it pragmatically (e.g., packing checklist, international flight requirements, and navigating transportation in-country) whereas students with international travel experience used it as a means of structuring their intellectual thoughts to maximize their learning while in country.

In-Country Experience

The in-country experience began with a guided walking tour of Helsinki to acclimate participants to Finland's social, cultural, and political history. Next, the group travelled via train to Tampere to visit three public schools specializing in international education,

Montessori (1917) approaches, and nature-based learning (cf. O'Brien, 2009). After completing school visits in the mornings, the Finnish Council for Creative Education held debrief sessions at the University of Tampere to process site visits by comparing and constating U.S. and Finnish educational practices. Returning to Helsinki, we enjoyed a variety of activities showcasing unique features of Finnish culture including: sampling traditional foods, visiting the Finnish National Library, touring the historic fortress on Suomelinna Island, and experiencing a smoke sauna.

Discussion

The combination of the online class coupled with the in-country experience provided a focused, educative, and cost-effective way for students to study abroad. Pairing online coursework during the first eight weeks of semester with the in-country travel during spring break mitigated interference with student academic trajectories. The course served as mechanism to prepare students for a journey abroad and focus their attention on pedagogical interests. Moreover, the flexibility of the course curriculum enabled students to research Finland in preparation their in-country experience.

Student costs averaged $5000, which included tuition, international air fare, and program fees (e.g., lodging, in-country transportation, activities, and some meals). Most students qualified for and received some form of financial aid. While the program was expensive, it provided a high cost-benefit opportunity for students to earn academic credit while participating in a highly structured and unique academic experience, subsequently providing students with the sense that their financial investment was worth the expense.

The course assignments were intentionally designed to provide students with a forum to discuss their own travel (in)experience as well as a structured opportunity to learn about the country. The Finland presentations enabled participants to gain a common understanding of the major aspects of the country and explore areas of curiosity in a format that allowed participants to revisit those topic areas throughout the semester. The online discussion enabled students to engage in formal academic discourse structured around a specific theme according to a fixed schedule, but with enough flexibility to accommodate complex personal schedules. The structure of the discussion topics, paired with the required readings, focused students' attention on relevant parts of the Finnish educational system and assisted students in maintaining focus on the course learning outcomes. Finally, the summary paper invited students to reflect upon their learnings from the class and the study abroad plans spurred students to mentally prepare for departure. The format enabled all students to learn from one another and build a sense of community prior to travel.

The university academic term calendar required that the eight-week course be completed (i.e., grades were submitted) prior to departure, thus limiting opportunities to formally assess students' in-country learning. Study abroad programs have a problematic history with failing to adequately assess student learning (Long et al., 2010) by requiring conformity to the academic term calendar that can prevent assessment of learning outcomes afforded by the in-country experience. Given that reflection is widely regarded as the paramount mechanism for students to synthesize experiential learning (Dewey,

1916; Kolb, 1984; Williams, 2009), formal, required reflective activities would have strengthened this experience.

Although the course was well-aligned with the actual program abroad, the fact that students were not academically required to reflect upon their actual experience abroad was a pedagogical limitation. However, through internal mini-grant funding, we were able to provide several optional opportunities for reflection upon return. These included structuring time to create reflection photo-journals where students came together, shared pictures, dialogued about and debriefed their experience. Additionally, we held a social event where students shared their experiences with the college Dean, the Associate Provost for International Programs, and a columnist from a local paper. Additionally, several students voluntarily created a video depicting highlights from their experience.

Two students who were awarded funding for their independent research shared their findings at the university's annual Undergraduate Research Symposium. The success of this Finnish study-abroad program can also be measured by student feedback as well as through voluntary student attendance of post-program gatherings; student comments were overwhelmingly positive and their attendance at optional post-program gatherings was over 60%.

Improvements to Future Programs

Overall, this program was successful, for it provided a unique, enriching opportunity for students interested in international, comparative education. An essential question that emerged as a result of this experience is how to include the in-country experience as part of the formal course, rather than after final grades are given. Determining ways of matching coursework with the in-country experience is important for assessing student learning outcomes.

Although the available options for scheduling the course led to the decision about the course's conclusion prior to travel abroad, more flexibility within the academic term calendar would promote a richer educational experience for the students by prioritizing opportunities for students to reflect upon their experience abroad and link their learnings to important features of their academic coursework, aligning more closely with an established model of experiential learning (Kolb, 1984). Given that personal reflection is frequently used to assess student learning in addition to writing a substantive reflective post-experience paper, the program could be strengthened by formally building those pieces into the graded course. Lastly, exploring other timeframes for running the class and traveling abroad (e.g., winter holiday, May, August) may provide the infrastructure that better supports student learning.

Anecdotally, our colleagues have indicated that program participants frequently connect back to their experience while studying additional aspects of the U.S. public education system. We know that several participants are incorporating their learning into their student teaching experiences. While we were pleased with the outcome of our program, we recognize that improvements can be made, which have the potential to provide even richer learning opportunities for students to synthesize this experience with their teaching

practice. We are excited by the potential to incentivize colleagues to explore international learning experiences through future affordable and robust short-term, faculty-led study abroad programs. And it is our hope that this article adds to the ongoing conversation about comparative education by providing an example of a cost-effective way for educators to experience another unique and exemplary educational model.

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Appendix

Table 1. Example Information Table Created for the Finland Presentation
People and Society: Comparing Finland and Montana

	Finland	Montana
Population	5,518,371 (2017)	1,050,493 (2016)
Area	130,666 mi^2	147,040 mi^2
Ethnic composition	Finn (93.4%) Swede (5.6%) Russian (.5%) Estonian (.3%) Romani (gypsy; .1%) Sami (Indigenous; .1%)	White (86.5%) American Indian (6.6%) Hispanic (3.6%) Biracial (2.7%) African American (.6%)
Official Language(s)	Finnish & Swedish	English
Age structure	<14 (16.4%) 15-24 (11.4%) 25-64 (51.7%) >65 (21.1%)	<18 (21.8%) 18-65 (60.5%) >65 (17.7%)
Sex	50.7% female	49.7% female
Education	Completed upper secondary (88%)	High school graduate (92.9%) Bachelor's degree + (29.9%)
Education spending per student (USD)	$12,545	$11,028
PISA scores (2015) *scores for U.S.	Math: 511 (rank 13) Reading: 526 (rank 4) Science: 531 (rank 5)	Math: 470 (rank 40)* Reading: 497 (rank 24)* Science: 496 (rank 25)*
Median per capita income (USD)	$29,374 (OECD)	$27,309
Population grow rate	.36%	~.8%
Poverty rate	5.3%	13.3%
Life expectancy	82 years	~79 years
Health insurance	Universal for citizens	9.8% uninsured