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INTERNATIONAL EDUCATION
EDITORIAL COMMENTS:

In our spring 2011 issue of International Education, one of our review board members, Xiaodan Huang (Shawnee State University, USA), served as guest editor. Huang invited a group of scholars focused exclusively on one research project to present their work. The collaborative research is a language immersion project between China-Canada-USA. I hope you agree the issue was strong and significant in terms of the scholarship and should be of interest to second language teachers at all levels of instruction. Our next themed issue will be on poverty at an international level, for the Fall 2013 issue.

This Fall 2012 issue is an open issue and includes diverse topics. Once again we find that our expanded and strengthened editorial board held submissions to high standards, with all essays going through revisions after receiving excellent feedback from their reviewers. We are very pleased with the results. We hope you will appreciate the quality of the work you find within the covers. We continue to anticipate that by inviting more top scholars in diverse fields of education to the board, we will attract more submissions from diverse fields of study in education with an international focus. Please help us spread the word, and thank you for your support.

This issue begins with several policy-related essays that focus on different policies in different parts of the world. “Language of Instruction: Unlocking Educational Effectiveness and Sustainable Development in Sub-Saharan Africa,” by Natasha Truong, Bowling Green State University (USA) focuses on language instruction in Sub-Saharan Africa (SSA). Truong argues that indigenous SSA languages have suffered devaluation in colonial and post-colonial SSA education, causing alienation of the majority of SSA people. According to Truong, using the students’ first or native language as the medium of instruction is the key to unlocking local people’s talents and knowledge. This is a literature-based position paper that defends the notion of linguistic rights and demonstrates how SSA languages can be integrated into instruction.

Staying on the continent of Africa but turning our focus to Swaziland, Connie Titone, Emily Plummer, and Melissa Kielar, all at Villanova University (USA), contribute to the conversation on language learning, in particular English language learning, through their essay “Creating Culturally Relevant Instructional Material: A Swaziland Case Study.” Again, Swaziland is a country where English is not the native language, but it is the language of instruction. Because teachers are often given English books to use with their students that lack cultural relevance, many of the texts go unused. The researchers in this study investigate the creation of culturally relevant materials with undergraduate university students and how native English speakers must first gain a deeper understanding of the relationship between the learners’ lived realities and the cultural content depicted in the instructional material in order to increase the engagement, language acquisition, and self-worth of the English language learner.

Moving to the Asian continent, Guangyu Tan, State University of New York – Fredonia (USA), considers the impact of China’s one-child policy in “The One-Child Policy and Privatization of Education in China.” The author’s focus is on the relationship between the one-child policy and the privatization of K-12
education since China’s transformation of education policy in 1979.

In “Learning About Aging in Hong Kong through a Linked Service Learning Project,” Alicia Skinner Cook and Christine Fruhauf, both at Colorado State University (USA) explore cross-cultural gerontology. Their project linked Semester at Sea (SAS) study abroad students and gerontology students at Colorado State University with an elderly community center in Hong Kong. The SAS students served as English tutors to older adults in Hong Kong, while the gerontology students helped the SAS students prepare for their service-learning project. The project evaluation demonstrated that all groups benefitted from their involvement.

In our fifth essay Thomas Misco, Miami University, OH (USA) debates “The Importance of Context for Teaching Controversial Issues in International Settings.” Misco pulls together the various continents with a discussion of two empirical case studies in Korea and Latvia that highlight how context can serve as a pathway or obstacle to the discussion of controversial issues. The case studies suggest a variety of implications for teacher education programs and education policy makers.

Our final essay is a quantitative study that shifts our focus from students or teachers in other countries to students in higher education in the United States of America (USA) who are seeking to learn a second language, in particular introductory level Spanish. In “Do Foreign Language Learning, Cognitive, and Affective Variables Differ as a Function of Exceptionality Status and Gender?” Sherry Mee Bell and R. Steve McCallum, University of Tennessee (USA), study the relationships between foreign language learning, anxiety, aptitude, attitudes and attributions of success with 95 students enrolled in introductory level Spanish classes. Results underscore the importance of understanding and addressing both cognitive and affective variables in learning a new language.

This issue does not conclude with a book review as we made the decision to publish six accepted manuscripts instead. We will have a book review in the next issue.

Our Guidelines for Contributors can be found on the final page of this issue. I invite your contributions to this journal and look forward to hearing from you. Our Spring 2013 issue will also be an open issue to help us insure accepted manuscripts are published in a timely manner. We appreciate your excellent submissions and encourage more contributors to send their work our way.

Barbara J. Thayer-Bacon
ABSTRACT

The choice of the language of instruction in Sub-Saharan Africa (SSA) is a fundamental educational issue with ramifications for educational access and effectiveness and ultimately national development. Indigenous SSA languages have suffered devaluation in colonial and post-colonial SSA education, and this devaluation alienates the majority of SSA people, thus preventing them from participating in their own economic and political growth. Developmental policies that neglect to utilize local people’s talents and knowledge are failed policies. The language of instruction, specifically the use of the first or native language (L1) as the medium of instruction, is the key to unlocking these talents and knowledge because doing so will foster knowledge acquisition and preservation of SSA cultures and identities. This will in turn liberate SSA from neocolonialism and pave the way to true progress.

This is a literature-based, position paper that redresses common arguments against L1 instruction, defends the notion of linguistic rights, and demonstrates the ways in which SSA languages can be integrated into instruction via examples that have been successfully implemented throughout SSA.

INTRODUCTION

Under the Human Development Index 2010 Rankings section of the United Nations Human Development Reports website, 35 out of the 41 countries ranked as having the lowest human development were Sub-Saharan African (henceforth
SSA) countries (United Nations, 2010). These figures indicate that the majority of SSA nations are underdeveloped, and even though billions of dollars in foreign aid have been poured into this region, it seems as though development, in terms of the “improvement of the social…, economic and political lives of the people” (Bunyi, 1999, p. 338), has struggled. According to Alidou (2009), aid and international lending organizations have tended to neglect utilizing SSA’s greatest resource in finding sustainable solutions to development—its people. Instead, these organizations have historically taken a patronizing stance, making policies “on behalf of ‘poor Africans’” (p. 112) with little regard, whether intentionally or not, to the lived realities of the people and of SSA scholars’ research.

National and economic development requires the engagement of every citizen, but, in the SSA situation, only an urban, educated minority in each nation bears the burden of development (Simango, 2009). The word educated is key to having the social and economic access and ability to transform the status quo, but quality education remains out of reach for the majority of SSAs. Schools modeled after European systems are designed to train students for administrative work, a practice which does not reflect the reality that most SSA citizens are subsistence farmers (Lavoie, 2008). Various SSA associations and international forums have convened to discuss ways to make education in SSA more effective in terms of accessibility, quality, and meeting stated objectives of various ministries of education. In these professional, intergovernmental, or national conferences, the language of instruction (LOI) in primary schools has been viewed as a separate, less urgent educational issue, when, in fact, it is a fundamental issue (Alidou, 2009; Qorro, 2009; Roy-Campbell, 2001; Webb, 2010). At least 10 languages are spoken in most SSA countries, and yet language policies in education favor utilizing the least prevalent language, a European language such as French or English, as the LOI (Roy-Campbell, 2001, p. 269). For example, only 5% of the Tanzanian population speaks English, and yet English is the LOI for everyone (Mwinesi, 2009, p. 224). Education in SSA can be improved in many respects, such as teacher development, but the LOI should be a major consideration because it “is the means by which learners come to access and understand information that ultimately leads to their further acquisition of life skills” (Commeyras & Inyega, 2007, p. 266).

Students do not fully benefit from foreign language medium education (FLME) when they do not understand the concepts being taught in the LOI, and, as a result, they either fail or drop out due to feelings of inadequacy before completing primary school (Qorro, 2009). In Niger, for example, more than half the school-aged population do not attend school, and over 70% of those who do have academic problems (Alidou, 2009, p. 107). Not only does FLME contribute to economic and social inequality, but it also maintains gender inequality. Because female lives are more restricted to the private sphere, they are less exposed to foreign languages and thus begin on unequal footing with male students. This situation may cause them not to participate in class, which may result in teachers
assessing their behavior as indicative of limited academic ability (Lavoie, 2008). When the majority of the people are alienated by their own education systems that fall short in integrating SSA languages, knowledge, values, cultures, and philosophies of learning and teaching, this alienation feeds into a cycle of poverty that leaves the nation’s talents and creativity untapped. Thus, LOI plays a pivotal role in access to education and the effectiveness of education, which in turn impacts participation levels in the development of SSA nations. If improvement of the social, economic, and political lives of the people is to be successful, the creative and sustainable methods of education leading to development must begin with local SSA ideas and languages.

The Legacy of Colonialism

The mismatch between LOI and the language of the surrounding community stems from the colonization of SSA. After colonizers arbitrarily divided the African continent and discovered that their territories did not correspond with linguistic boundaries, they established their own languages as the common language, either to assimilate and advance Africans (typically the French, Spanish, and Portuguese style) or to separate themselves from the people they colonized (commonly the British, Dutch, and Belgian way of divide and rule) and allow only a select few the privilege of learning the colonial language to ensure that this minority would uphold colonial interests (Barkhuizen & Gough, 1996; Bunyi, 1999; Lavoie, 2008). Missionary schools that originally taught in indigenous languages with successful results changed to colonial languages in order to receive funding.

Within this historical context, this literature-based, position paper: 1) addresses common arguments against first or native language (L1) instruction; 2) defends the notion of linguistic rights; and 3) provides examples of successful multilingual education models; furthermore, this paper maintains that the LOI in SSA primary schools plays a key role in education effectiveness and true national development. This argument is based on Paulo Freire’s (1970) theory of critical literacy and pedagogy, in which teachers and students engage in active dialogue and reflection, which is facilitated when students are learning in a language with which they are most familiar, rather than in rote memorization of foreign concepts. This paper draws on existing and recent studies from a variety of disciplines in the social sciences (comparative and international education, linguistics, and African studies) to support its case.

THE DEBATE ON MULTILINGUAL EDUCATION

Common Arguments and Educational Effectiveness

The past and present decisions to continue to use European languages in government, law, media, development, and education derive from various reasons and can be interpreted through different lenses. First, for SSA leaders, it seemed practical not to favor any one indigenous language over another, so in effect, the colo-
nial language was perceived to be the neutral one (Akinnaso, 1993; Heugh, 1999; Lavoie, 2008; Qorro, 2009; Simango, 2009; Roy-Campbell, 2001; Trudell, 2000). In order to preserve national unity, it was important not to stir ethnic tensions. This attitude became the basis for viewing multilingualism as being detrimental to unity. Second, it was important to establish a *lingua franca*, a language that could be used “for cross-ethnic communication” (Commeyras & Inyega, 2007, p. 262) and transnational commerce, amidst all the languages that were argued to hinder this from happening. The effects of globalization elevated colonial languages into world languages, creating the notion that, in order to attain well-paying jobs and to succeed, one must be proficient (if not fluent) in a world language (Qorro, 2009). Third, indigenous languages are not now considered developed enough to be used in literature, science, technology, and international relations, and in regards to LOI, they are deemed unsuitable for teaching complex subjects (Bunyi, 1999; Lavoie, 2008; Qorro, 2009; Roy-Campbell, 2001). Furthermore, changing the medium of instruction is costly, since education materials are already in a world language (Commeyras & Inyega, 2007; Vawda & Patrinos, 1999).

A widely held belief among SSA nations is that if students are not exposed to a world language through LOI, they will not be able to use it effectively or pass national exams, which are in a world language (Trudell, 2007). Parents also fear that children will not take their education seriously if they are not taught in a world language. Misguided about effective learning, many parents are wary of changing the LOI because they believe that this will prevent their children from learning the world language that is seen as a form of social capital (Albaugh, 2007; Bunyi, 1999). They become suspicious that officials and teachers do not want their children to succeed and want to prevent them access to power, symbolized by the world language that was denied to them during colonial times. In fact, this belief has manifested itself in tangible actions, such as parents threatening to transfer their children in response to attempts to start Kiswahili-medium schools in Uganda, Tanzania, and Kenya, even though they knew their children were learning little in English and that if they did, they would probably not return to their communities after having found employment internationally or in the government (Qorro, 2009).

These are all compelling concerns and reasons, but they can be overcome. The first step is recognizing that teaching world languages as a subject should not be conflated with using them as the LOI (Qorro, 2009). When new concepts or terminologies are defined in a foreign language to students who are studying a subject, they do not learn the concepts. Freire’s (1970) vision of meaningful or transformative thinking and learning cannot take place if the LOI bars communication between teacher and students. Many linguists contend that the best medium for a child to learn is through the L1, and this view was endorsed by UNESCO in 1951 (Bunyi, 1999). According to Bunyi (1999):

Psychologically, it is the system of meaningful signs that in his mind works
automatically for expression and understanding. Sociologically, it is a means of identification among members of the community to which he belongs. (p. 339)

If the goal is to communicate proficiently in a world language, using an L1 throughout primary school as the LOI while teaching the world language as a subject by a specialist teacher would serve that purpose. Having a strong foundation in L1 literacy promotes the same abilities in a second language. In fact, English literacy and speaking levels dropped significantly in Zambia and Botswana after English was adopted as the LOI following independence (Miti & Monaka, 2009). Furthermore, knowing a foreign language is not requisite for learning science; science subjects performance in Tanzania began to decline in the 1970s (Mwinsheikhe, 2009).

Akinnaso (1993), Arthur and Martin (2006), Bunyi (1999), Clemons and Yerende (2009), Dembélé and Lefoka (2007), Lavoie (2008), Mwinsheikhe (2009), Qorro (2009), and Yohannes (2009) cited numerous studies which show that students perform well academically when they are proficient in the LOI; conversely, students suffer academically and cognitively when they do not understand the LOI. When the participants of a study in Burkina Faso were asked in French to calculate one stick plus one stick, only five out of 54 students were able to answer it (Lavoie, 2008, p. 671). In the same study of a bilingual school, 20 out of 24 students were able to answer a more difficult math problem. The 2004 National Second Learning Assessment of Ethiopia, which examined a representative population of students, indicated that students who were instructed in their L1 had higher mean achievement in all subjects, including English, and those in English medium instruction had the lowest mean scores. The National Organization of Examinations, which conducted the study, concluded that the English language was the “single variable…that negatively contributed to achievement” (Yohannes, 2009, p. 195). In 2000 repetition and drop-out rates were lower in the bilingual programs in Mali at 3.7% compared with 18.1% for monolingual French schools, and more of the bilingual program students passed the national exam (Dembélé & Lefoka, 2007, p. 545). The International Research Centre conducted a study in six SSA nations that suggested that L1 instruction “not only facilitates students’ learning capability but also…students’ acquisition of second and third languages” (Yohannes, 2009, p. 195). This study indicates that students can transfer the knowledge and concepts acquired from the L1 to a world language.

The use of foreign language medium education (FLME) disregards everyday life for many SSAs, especially for those who live in rural areas that are not conducive for practice of the foreign language. Therefore, the use of L1 instruction creates a bridge between home and school for many rural students. SSA languages are rendered minorities only in schools, but outside of school, they become the majority again (Alidou, 2009). Radio shows are broadcasted in people’s L1 or SSA lingua francas like Hausa or Kiswahili. The multilingual realities of SSA countries make it difficult to enforce a monolingual method of instruction. Code
Language of Instruction: Unlocking Effectiveness of Education and Sustainable Development in Sub-Saharan Africa

switching—a linguistic phenomenon in which different languages are used in the same utterance—is common in schools (Arthur & Martin, 2006; Banda, 2010; Barkhuizen & Gough, 1996; Commeyras & Inyega, 2007; Mwinsheikhe, 2009; Simango, 2009). Although frowned upon in the school setting, this happens typically because students and teachers both “lack adequate command of the European language to communicate effectively” (Simango, 2009, p. 205). Students and teachers need to be able to interact verbally and express themselves clearly in order for students to understand the concepts being taught. Additionally, it is not uncommon to find teachers code switching with each other. Even school inspectors and politicians will address important issues in L1 and deliver the rest of a speech in a colonial language (Albaugh, 2007).

In a study of two Tanzanian schools, Mwinsheikhe (2009) discovered that the classroom atmosphere was tense and students were less confident in the school that only taught in English; on the other hand, students and teachers of the Kiswahili-medium school claimed that concepts were easy to understand, and that teachers were able to teach efficiently. In the English medium class, there was minimal participation, creating a learner-unfriendly environment. The coping or mediation strategies teachers used here were to ask students if they understood (which did little to promote learning because students always answered positively), to punish students if they did not respond (which only intimidated students and consequently affected their learning), or to code-switch, especially when teachers needed to convey important information.

Critical literacy—the ability to reflect actively on information in texts—can only be attained through true dialogue between teacher and students (Bunyi, 1999; Qorro, 2009). Freire (1970) would describe the FLME classroom as teachers viewing students as empty vessels that need to be filled with information. As a result of students’ lack of active participation in this banking system and the fear instilled in them, they copied illegible words from the board incorrectly instead of asking the teacher what was written. This can be seen in a sentence from a student’s history notes: “By the end of the 18th some at the States had become beig sertralised king doms” (Qorro, 2009, p. 67). This is evidence that students are not learning English, which is one of the purposes of schooling for many SSA nations. Alarmingly, this particular student had one more year to complete secondary school to be eligible to teach primary school English if s/he wanted to do so. If students do not understand the basic functions of language, such as syntax, then they will not be able to move beyond that to grasp the underlying messages.

Both students and teachers need to understand the LOI in order to make education meaningful. A Tanzanian headmaster reported that 94% of his teachers were not proficient in English (Qorro, 2009, p. 69), and teacher training programs are problematic because they are delivered in colonial languages (Miti & Monaka, 2009). “Every subject teacher…dabbles in English teaching,” (Mwinsheikhe, 2009, p. 232), regardless of whether s/he is proficient. When teachers themselves are not competent in the LOI, they are unaware of their own errors and make
mistakes in teaching grammar and reading to their students. If children are to
learn a language, they must first hear it used correctly in an authentic situation.
“It is through this process of recycling poor-quality education and poor English
language into the school system that the levels of education and that of English
language proficiency have kept falling over the years” (Qorro, 2009, p. 68). In one
study of teacher training cited by Qorro (2009), the teachers submitted unintel-
ligible answers in English when asked how their education will be of use to them,
such as “My name secondary education is a treal secondary school for education
in Dodoma region in Tanzania” (p. 65). However, there was a remarkable clarity
when the students answered the same question in Kiswahili.

Colonial languages that are the property of a few cannot form the national
cultures of SSA nations. Those who argue that LOI should be world languages
because they are the equalizing factor that gives people social and economic capi-
tal do not recognize that the cultivated prestige given to world languages “can
be allocated to any language” (Alidou, 2009, p. 112). Linguists declare “that
all languages have the capacity to develop to meet all the communicative needs
of their users” (Bunyi, 1999, p. 348), but SSA languages were never given that
chance. Using FLME creates self-deprecation instead of self-confidence. SSA
policymakers lack faith in the “wisdom of instituting local language education”
(Trudell, 2007, p. 553); they argue that English is the language of the labor market
and science, but the reality is that the SSA labor market serves people who do not
speak any English (post offices, hospitals, schools, etc.) (Qorro, 2009). Students
have rarely been able to use the scientific knowledge acquired in a world language
to solve their everyday problems. SSA languages are marginalized because they
are not well taught; if they are to intellectualize and become world languages,
orthographies or writing systems need to be developed, and widespread use of
the new orthographies via literature needs to be encouraged (Trudell, 2007).
“Languages develop when we make the right inputs and provide the necessary
resources for their development…All languages develop because societies and
communities consciously and with political will develop them” (Prah, 2009, p.
103). If Afrikaans, which did not become official until the 1920s in South Africa,
could be elevated to a language of science and technology, then it is possible to do
the same for indigenous languages (Prah, 2009).

Although it is important to preserve the oral traditions, such as proverbs and
storytelling, of indigenous languages (Reagan, 2000), Prah (2009) argues that
SSA languages need written standards to challenge the world’s written cultures.
Quoting Goody, he remarks that, even though major Asian nations were colo-
nized, their “written traditions have provided them with a more solid basis for
cultural resistance than is the case with most oral cultures” (p. 85) and have given
them the ability to adapt Western technology and sciences. Ninety percent of SSA
intellectual production is written and archived in foreign languages, allowing the
West easy access to the information but remaining inaccessible to the majority
of SSAs (Qorro, 2009, p. 73). In fact, this was one of the reasons the colonists
educated Africans in the colonial language. In Nigeria, a country of about 400 indigenous languages in which three function as lingua francas (Hausa, Yoruba, and Igbo), the library and archival language is English (Akinnaso, 1993, p. 257). Perhaps SSA policymakers and parents “insist on FLME because they cannot access what researchers have written” (Qorro, 2009, p. 78), which makes it all the more imperative to translate research findings regarding the efficacy of L1 instruction into SSA languages. SSA scholars must reconnect with their communities. Quoting Okrah, Alidou (2009) acknowledges that “Western knowledge systems are now part of African people and societies but we also need to develop and encourage a pluralistic view of knowledge…This will not only help us [to] re-claim our education but also to reconstruct the knowledge-generation process we call ‘research’” (p. 120).

In regard to the cost of changing the LOI, scholars maintain that L1 instruction is more efficient and less costly in the long run (Alidou, 2009). As the literature suggests, time spent on ineffective FLME has ultimately led to the uneducation of SSA. The initial costs of L1 instruction—“the salaries of linguists, specialized teams to assist in the development/standardization of the language, as well as expenses incurred to prepare specialized materials suitable and acceptable to the local language communities” (Vawda & Patrinos, 1999, p. 291)—and the time taken to introduce L1 materials into the education system should be viewed as investments in human resources and in the achievement of societal goals. The argument that no teaching materials exist is unfounded, for indeed they do exist, as will be discussed later. Large-scale producers of L1 materials are lacking because the market is still limited, but the cost-saving benefits of inter-country partnerships may be incentive for producers because they expand the demand base for widely spoken SSA languages found in more than one country, such as the Niger-Congo language family (Vawda & Patrinos, 1999). The creation and standardization of orthographies and availability of L1 experts also affect production costs.

**Linguistic Imperialism and Neo-Colonialism**

With all the evidence to support L1 instruction, why has it not yet taken root in SSA? Conflict theorists would suggest linguistic imperialism (Mwinsheikhe, 2009). The medium of instruction in formal education is used to reproduce the power of the privileged class, and only members of the same class have amassed material and ideological properties from the education system throughout the generations. Furthermore, they have a vested interest in keeping their comparative advantage that brought about their leadership roles through the justification that, if they could successfully negotiate FMLE, others can too (Trudell, 2007). With the potential to succeed economically, subjugated groups voluntarily consent to the education systems that are failing them because they are unaware that the system of rote memorization in a foreign language does not allow critical questioning of the status quo. When people do not have a firm grasp of what is happening, they fail to see situations as they really are and are excluded from participating in the
development of their own countries (Qorro, 2009). This can lead to bad practices such as valuing schools only for the certification in the end, which can result in buying examinations and producing “graduates who are unwilling and unable…to provide alternative solutions to different problems facing communities in Africa” (Qorro, 2009, p. 73). FLME bars people from acquiring any knowledge, not even of any language. Unfortunately, rights-based language policies have never gained momentum in SSA, which is why much research has focused on the practical learning benefits of multilingual education (Heugh, 1999).

On a macro-level, some theorists argue that colonialism never quite ended, calling it neo-colonialism. Western countries have ensured that they will continue to benefit from ex-colonies by trading with them and pressuring them to depend on Western knowledge creation and distribution (Alidou, 2009; Heugh, 1999; Prah, 2009; Qorro, 2009). The English Language Teaching Support Project, introduced in Tanzania in 1986, was an agreement that English teaching materials would be published only in the U.K., even if materials originated in Tanzania (Qorro, 2009). As Qorro acknowledges, “Education and schooling in FLME to a large extent foster dependency on donors for financial aid, experts for technological know-how, and ideas for development models imported from outside” (2009, p. 73). SSA educational policies are tied to developmental policies: Because SSA nations are heavily reliant on IMF and World Bank loans, they must adhere to the stipulations of the loans. World Bank experts and policymakers tend to “undermine the availability of solid research based on field work in African classrooms” (Alidou, 2009, p. 113) of unbiased researchers, educationists, and linguists and instead advocate for transitional programs that are based on bilingual programs for linguistic minorities in the Americas. This wholesale program borrowing assumes that SSA languages are minority languages when in reality they are the dominant ones (Alidou, 2009). Furthermore, the majority of SSAs are multilingual, and to “advance a policy of bilingualism…will give automatic advantage to the supremacy of the colonial language. The concept of bilingualism…ignores…the linguistic landscape of Africa” (Prah, 2009, p. 101).

THE VALUE OF LINGUISTIC RIGHTS

Since language is a part of culture and also the means through which culture is transmitted, it is important to discuss the value of SSA languages. By devaluing indigenous languages, colonial education eroded SSA pride and self-esteem (Qorro, 2009). Corporal punishment and the shame of wearing a metal inscription of I AM STUPID for students caught speaking their L1 in school effectively deterred any desire to associate with it, which in turn erased SSA values associated with that language (Bunyi, 1999). By 1953 UNESCO declared that the use of L1 in primary school is “the birth right of every child” (Yohannes, 2009, p. 190). Proponents of this policy have extended the declaration to infer that people have a right to learn in their L1 to preserve their own cultures and identities, that
“people’s language rights affect all their other human and people’s rights” (Miti & Monaka, 2009, p. 214). Subject matter taught in a certain language is based on that language’s culture and values, so to teach in a colonial language is to present information based on Western knowledge (Prah, 2009; Simango, 2009; Trudell, 2007). The hijacking of language and subsequently cognitive processes lead to what Commeyras & Inyega (2007) refer to as “cultural hijacking” (p. 276).

Compared with the rest of the world, SSA nations are inconsistent in their language policies in education. No other country developed through using a foreign language as the primary LOI; rather, the L1 was always taken for granted as the LOI (Prah, 2009; Simango, 2009; Yohannes, 2009). Even multilingual countries like India and Switzerland have adopted multilingual education frameworks (Roy-Campbell, 2001). By not optimizing local linguistic resources, “Africa has not, to date, produced a single state that has achieved national integration and established national identity on that basis of the…’neutral’ ex-colonial language” (Simango, 2009, p 203). Further inequalities are created by testing students in a language that is foreign to them (Commeyras & Inyega, 2007).

SSA Ministers of Education and Heads of State have recently become increasingly aware of language rights and the necessity of elevating the status of SSA languages as the medium of transmitting culture and knowledge. This realization has fueled the trend towards adopting bilingual educational policies. Cameroon has produced six language planning institutions (Webb, 1999). Botswana, Malawi, Kenya, Burkina Faso, and Zimbabwe have allowed L1 instruction in the first few years of primary school before switching to English and teaching the L1 as a subject afterwards (Dembélé & Lefoka, 2007; Lavoie, 2008). The multilingual program in Mali has expanded to 11 languages (Dembélé & Lefoka, 2007). South Africa has adopted a laissez-faire attitude by allowing schools and parents to choose one of the eleven official languages to be used as the LOI for the first three years, with the L1 being taught as a subject afterwards (Barkhuizen & Gough, 1996; Heugh, 1999; Simago, 2009; Taylor, 2002; Webb, 1999). Nigeria has required students to learn at least one major Nigerian language in addition to English (Ufomata, 1999).

Despite the change in policies, the prevalent attitude still regards the L1 as a “necessary evil” (Simango, 2009, p. 204) for the ultimate purpose of learning a world language. The common feature across bilingual programs in SSA is the decrease in the use of the L1 in the later years of primary school and the increase of the use of a world language. Although second language research shows that there may be “threshold levels of language competence which…children must attain in their L1…in order to avoid cognitive disadvantages when the medium of instruction switches” (Akinnaso, 1993, p. 265) to the second language, many nations choose the early-exit model for political reasons, causing students to be proficient neither in a world language nor their L1. Proponents of FLME erroneously cite this problem as being the result of L1 instruction itself rather than of violating the critical period, or best learning years, for language acquisition.
(Akinnaso, 1993; Heugh, 1999). In South Africa “the increase in the pass rate may very well be partly attributed to the maintenance and development of the home language for 8 years of formal education, during which time English and Afrikaans were introduced and taught as subjects” (Heugh, 1999, p. 303). The results continued to improve until 1976, when students rebelled against their perceived inferior education in the apartheid system (Taylor, 2002). The government then changed its policy to reduce L1 instruction. Black failure in South Africa can be attributed to the timing of the switch from L1 to English; decreasing pass rates correlated with decreasing L1 instruction (Heugh, 1999). Because indigenous languages are stigmatized as ignorant and backward, the school system has produced people who cannot conceive of education except in a European language, which is the main resistance to L1 instruction (Simango, 2009). Knowledge and language are equated as one (Roy-Campbell, 2009). In Zambia and Botswana, newspapers were previously printed in indigenous languages, but now, if people are literate, they are only printed in English (Miti & Monaka, 2009).

World languages have been “overestimated in their capacity to serve the interests of the majority on the continent as useful vehicles of communication” by serving “only the interests of the ruling elites” (Heugh, 1999, p. 306). Having world language status need not be played out in a zero-sum field, where the elevation of European languages means the devaluation of SSA languages. The “language of the masses should be used to educate the majority of the population” (Simango, 2009, p. 206) so that they can preserve their heritage and linguistic diversity as well as participate in the dominant discourse of the world language. Not only will L1 instruction benefit students, but also their parents. In Burkina Faso, the language barrier removed by bilingual schools made school meetings more accessible to the community, and, because parents were able to understand and critique school practices, they became more involved in their child’s education (Lavoie, 2008). L1 instruction will “contribute to the emergence of a new kind of African citizen who accepts and experiences bilingualism and biculturalism as assets” (Dembélé & Lefoka, 2007, p. 543).

SUCCESSFUL MULTILINGUAL ENDEAVORS

In an increasingly globalized world, one in which countries have become more interdependent and integrated due to trading and communication, it is important to recognize that globalization does not necessarily have to mean a monoculture or monolingual world (Qorro, 2009). In fact, globalization actually requires flexibility in communicating in non-European languages (Heugh, 1999). For “most African contexts, one requires proficiency in at least two African languages plus a colonial language” (Banda, 2010, p. 224), and multilingualism is a valuable resource. Multilingual education, which connotes education that values diverse cultures, described as multicultural education, is about teaching “practical skills and building character among learners, preparing them to become productive and
active citizens in their own communities” (Alidou, 2009, p. 125). Trudell (2007) contends that “schools in Africa ‘destroy cultural values and personality’, turning out graduates ‘who are foreigners in their own society’” (p. 559). L1 instruction can be successfully implemented within SSA countries. The following cases are evidence that it is possible to use indigenous languages effectively in instruction and wean SSA from Europe’s paternalistic influences that have resulted in the loss of SSA’s “own identity and sense of direction” (Simango, 2009, p.208).

First, in order for a language to be used as a medium of instruction, it must have a standard orthography, and immense progress has been made in that regard, enabling local communities to be knowledge producers. A Guinean businessman, Kanté, invented the N’KO alphabet in 1949 (Clemons & Yerende, 2009). By codifying indigenous languages in dictionaries and in educational materials, these languages may be elevated into the formal sphere and be recognized as LOI. In Nigeria, the National Language Center developed a glossary of science and math terms in 12 languages, and the Rivers Readers Project created primers and readers in at least 28 languages at minimal cost (Akinnaso, 1993, p. 262). A sufficient number of SSA scholars exist to translate textbooks and create or refine scientific terms for the further development of indigenous languages (Prah, 2009). The expansion of indigenous orthographies contributes to sustainable development by stimulating “local private publishing that is supportive of the promotion of multilingual and multicultural education in” (Alidou, 2009, p. 126) Burkina Faso, Ghana, Madagascar, Mali, and Niger. In 1988 the Nigerian Education and Research Council published A Guide for Creating Metalinguistic Terms for African Languages (Akinnaso, 1993,). In East Africa, the East Africa Book Development Association and others like it have strengthened cross-border trade and established a culture of reading in Kenya (Commeyras & Inyega, 2007). Countries that share a language family or SSA lingua franca can look to East Africa for cooperation in maximizing the benefits of L1 print materials.

A second step in using an SSA language as the LOI is addressing the large numbers of different languages and dialects within each country, which Simango (2009) argues are already highly related. Languages should be grouped “into clusters of mutually intelligible language varieties” and teaching materials should be “tailored for clusters” (Simango, 2009, p. 208),—a system which the Centre for Advanced Studies of African Societies has actually implemented in South Africa with the standardization of Nguni, a group of Southern Bantu languages spoken in southern Africa (Hadebe, 2009). Similarly, a version of Kiswahili has been standardized through its use in formal education (Commeyras & Inyega, 2007). These existing practices can be imitated in neighboring countries, such as the use of Sesotho for liturgical materials by speakers of other varieties within the Sotho cluster, which can be expanded to other reading materials, or using a SSA lingua franca to teach other more localized SSA languages (Simango, 2009). For example, Ndebele speakers use Zulu literature, which is also used to teach the ciNgoni language (Simango, 2009, p. 208). Linguistic diversity is not necessarily equated
with disunity, especially when SSA children already tend to be bilingual or multi-
lingual in SSA languages (Simango, 2009). If anything, colonial languages have
created disunity by dividing SSAs along class lines (Bunyi, 1999).

The third successful L1 instruction endeavor includes the alternatives to for-
mal education systems in the form of bilingual community schools. For example,
Guinea’s N’KO schools locally publish and distribute L1 literacy materials based
on the same skills found in formal education materials, but with an emphasis on
“basic life skills and production-oriented experiences…sensitive to the local con-
text…to enable learners to transcend historical, structural limitations” (Clemons
& Yerende, 2009, p. 416). These informal programs developed as a local response
to the “systemic inequalities that have defused the transformative role of formal
schooling” (p. 417), and their success is attributed to the fact that they are locally
controlled. Similar to N’KO schools, Senegal’s Basic Community Schools func-
tion as bridges to formal schooling (Clemons & Yerende, 2009). Results from
experiments such as the Nigerian Ife schools, Écoles Expérimentales in Niger,
Zambia’s Primary Reading Program, and Écoles Bilingues in Burkina Faso prove
that students learn better when SSA languages are used as the LOI, especially if
used throughout primary school (Akinnaso, 1993; Alidou, 2009; Dembélé & Le-
foka, 2007; Yohannes, 2009). Early exit transitional programs adopted by many
SSA nations are not as effective, so another way to use L1 instruction successfully
would be to extend it to higher levels or throughout the duration of primary school
while teaching the foreign language as a subject. The common denominator for
the success of these programs, measured by retention, completion, and learning
achievement, is the holistic engagement of “local identity for students, curricular
content, and learning goals perceived by local communities as self-generated and
nationally supported” (Clemons & Yerende, 2009, p. 423).

Finally, successful implementation of national multilingual policies signi-
ficantly depends on community will and support, as already witnessed conversely
in the South Africa uprisings against L1 instruction. Teachers who have been
trained in L1 programs can explain to parents and communities the value and
practical efficacy of L1 instruction. Cameroonian teachers who were specifically
trained in the PROPELCA L1 program strongly favor L1 instruction: “They be-
lieved that if teachers advocate a certain pedagogy, then parents’ support would
follow” (Albaugh, 2007, p. 12). Persuading parents that L1 instruction will aid in
the learning of the world language will foster initial acceptance. In Mozambique,
parents’ attitudes began to change once they saw the positive academic results
of the program (Trudell, 2007). These parents will more likely view indigenous
languages as valuable in and of themselves and will support policies that argue
from a rights-based standpoint.

**CONCLUSION**

Learners’ acquisition of knowledge, the preservation of and confidence in
SSA cultures and identities, as well as liberation from neocolonialism are dependent upon the LOI in schools. The LOI “is not only a major condition for development, [but] it is also the most fundamental guarantee for a true evolution in the direction of development and democracy in countries of the South” (Webb, 1999, p. 365). The European models are not based on reality and have failed because the majority of the people are not being educated. Simango (2009) described it best when he said that the weaning process is painful and difficult at first, but necessary for the development of independence and responsibility for self. Education should be a political act (Ramirez, n.d.) for the transformation of SSA societies. The FLME that has been the norm since SSA independence has done little but to prevent many populations from participating in the economic, democratic, and social affairs of their countries.

The myth that learning in a world language will give students a head start in that language within an SSA linguistic setting has been dispelled by linguists and research data, and these findings need to be translated into SSA languages so that people will support the more inclusive multilingual methods of instruction. The message sent by FLME is “that if [students] want to be accepted by the teacher and society they have to renounce any allegiance to their home language and culture” (Lavoie, 2008, p.673). Negative attitudes towards indigenous languages can be changed, and the languages “can attain economic value” (Webb, 2010, para. 6) if they are harnessed for economic development. A wealth of knowledge that is beyond the material lies dormant in the majority of the people, and the LOI is crucial to unlocking this treasure.

NOTES

Because this paper focuses on Sub-Saharan Africa, the term world languages will refer to French and English since they are not indigenous to all Africans.

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CREATING CULTURALLY RELEVANT INSTRUCTIONAL MATERIALS: A SWAZILAND CASE STUDY

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ABSTRACT

In the field of English language learning, research proves that culturally relevant reading materials improve students’ language acquisition, learning motivation, self-esteem, and identity formation. Since English is the language of instruction in many distant countries, such as Swaziland, even when English is not the native language of those countries, how can native English speakers most easily produce and expand the reach of culturally relevant materials for foreign settings that require English materials? In a study involving undergraduate university students, the researchers investigate the extent to which individuals recognize and demonstrate the importance of cultural context and relevance when creating their own books for Swaziland students. From the study, it is clear that the focus must shift from simple book production and donation to first gaining a deeper understanding of the relationship between the learners’ lived realities and the cultural content depicted in the materials. The researchers conclude that five distinct characteristics should be present in instructional material in order to increase the engagement, language acquisition, and self-worth of the English Language Learner.

INTRODUCTION

The direct link between the relevance of instructional materials and a learner’s successful educational experience has long been documented within educational research (Brown, 2003; Curtin, 2005; Floyd & Hebert, 2010; Ma’ayan, 2010; Perrone, 1991) and continues to be investigated by researchers within the field
of English Language Learning (ELL) (Grassi & Barker, 2010; Ormrod, 2011). As a global language and the first, second, or only language of many developing countries’ formal instruction, the entire world needs instructional materials written in English. The USAID government website (2008), in their Africa Education Initiative, states that the US alone has sent more than 2.2 million donated books, valued at $25 million, to approximately twenty-nine African countries, including Ethiopia, Uganda, and Senegal, since 2003. Assuming that one wants the materials to have the greatest impact possible, one must consider carefully what type and content of English language materials we should be contributing to the world’s children. The purpose of giving must shift back from material production to a prior step which seeks to understand the relationship between the cultures lived by the students utilizing the materials and the cultural content depicted in those materials (Grassi & Barker, 2010; Ormrod, 2011). In order to better promote the academic achievement and language acquisition of the learner, the materials must also attend to the children’s feelings of security and self-worth (Brown, 2003, p. 279).

BACKGROUND

One of the authors gained important insight into these vast and complicated concerns during a 2010 volunteer experience within the country of Swaziland, at the orphanage at Cabrini Ministries in St. Philips. The teachers at the Mission’s after-school program are originally from Swaziland and, with few exceptions, are largely untrained as professional educators. Only one of the teachers has attended school beyond the U.S. equivalent of the 11th grade. Even though these Swazi teachers showed the visitor many hundreds of beautiful, high-quality, English language books donated from the United States and other developed nations, the materials remained unused, unpacked, stacked seven feet high and tucked away in a large storeroom at one end of the girls’ dormitory. When humbly asked why the teachers were not using these materials, the lead teacher repeated a few times that the materials were not practical. This puzzled the researcher, and she began to surmise that one obvious reason was that the North American culture represented in all of the books became a challenge that these Swazi teachers neither had the time, nor the willingness, nor the wherewithal to overcome.

The country of Swaziland is the smallest country in Africa, located in the southeastern part of the continent bordering South Africa and Mozambique. Although the capital city is Mbabane, Manzini is the cultural and industrial center of the kingdom. Swaziland is considered the only absolute monarchy left on the continent, and King Mswati III is the Head of State. As an absolute monarchy, the people of Swaziland practice many ancient traditions such as ceremonial rituals which often include dancing, singing, chanting, drumming, and other performances as one way of honoring the Royal family (Forrester, 2009). The Swazi educational system in most parts of the kingdom is a pay-to-go model.1 Its struc-
ture is based on a British framework and provides for young people from the ages of four to twenty-two. The native language in Swaziland is siSwati, but after form 2 (our equivalent of 4th grade in U.S. schools), all instruction in schools is offered in English (Forrester, 2009).

The population of Swaziland at the end of 2009 was approximately 1.2 million people (Fleminger, 2009). The people suffer tragically from the HIV/AIDS epidemic, which has resulted in 80% of its children having lost one parent and 50% having lost both (U.S. Government, Center for Disease Control, 2010). Available data suggests that half of the eligible children enter into the educational system at large, and only about one-half of those complete the 7-year primary school education. In 2010, the number of orphans and vulnerable children in Swaziland was approximately 210,000 (World Data on Education, [UNESCO] 7th edition, 2010/11). The pay-to-go model that Swaziland has based its current educational system on provides for children beginning at the age of four, whereas the hostel or orphanage at St. Philips houses and educates over 150 students between the ages of three and twenty-two. According to the teachers, the circumstances of the children’s lives have deeply affected their feelings of self-worth and hopefulness. In addition to teaching academic subjects, one of the hostel’s greatest challenges is to help children find the hope to live meaningful lives.

Prior to the initial visit to the St. Philips Mission, the author created a short children’s picture book entitled Gogo’s Swaziland Homestead as a gift for teachers and learners. The cultural information honored and presented in the book was taken from a video entitled Today the Hawk Takes One Chick shot in the vicinity near St. Philips Mission. The head teacher embraced and immediately used this simple, fifteen-page book. The hypothesis is that the gift was not only received by the teacher as an act of kindness and generosity, but more importantly the book’s cultural relevance meets the needs of early English language learners in Swaziland. When a book is culturally relevant, the content is true to the lives of the children reading it. It reflects their everyday reality and is therefore immediately accessible to them.

After visiting the country, talking to the people, and experiencing Swazi culture for approximately ten days, a second, much longer reader, Road Trip to Manzini, was created by the author. According to the Swazi teachers, this reader was also immediately taught to and enjoyed by the Swazi children. From the narrative story to the themes of the books and the illustrations, the Swazi people can see themselves, their landscape, and their values in these two readers. Sleeter (2008) states, “Evidence suggests that students learn more, attend more regularly, and participate more actively when they can relate to curriculum by seeing themselves and their communities mirrored in it than when they do not” (p. 151). A founding principle of successful ELL education mandates that the learner be able to see him or herself in the educational materials (Grassi & Barker, 2010). These two books increased the practicality of using the ELL materials and enhanced the students’ interactions with the English language by providing content which reflects Swazi
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culture.

Other works have been written in the last several decades about working in international sites with children. In 1963, Sylvia Ashton-Warner, a New Zealander, for example, published her book, *Teacher*, about her work in a Maori school in New Zealand from the innovative perspective of a teacher who finds a way to bridge the gap between native and European cultures by working directly with the young people in their community over many years. Her philosophy of education and her focus on what she calls “organic teaching” resulted in the children’s creations of their own texts for reading lessons which captured their experiences and their lives while simultaneously increasing their desire to read.

Unlike Warner’s work, this project seeks to find ways to create and provide reading materials from afar which reflect the lives of the Swazi children and their teachers. In fact, we seek to create works which the Swazi children and/or their teachers might create themselves if they had the skill in writing and in English. What is quite different in this case as compared to the Ashton-Warner case is that there is no educator on the ground in Swaziland proficient enough in English to create such materials, and, unfortunately, the content of the donated materials is completely alien to their culture.

In the next sections of this article, the reader will find a brief review of relevant literature on materials proven useful in the field of ELL and cultural context, particularly the formation of culturally relevant educational materials. Following this literature review, the article will then provide an in-depth discussion of each of the author’s readers, attending to how they meet the needs of English Language Learners, the extent to which they demonstrate an awareness of the Swazi culture, and their eventual reception by those in Swaziland. The authors will also present an analysis of additional readers created by United States university students after they heard a presentation on Swaziland, did their own independent research, and read the author’s readers. These students also filled out a survey in which they discussed their perceptions of the significance of culture in their creations. Both their survey responses and their readers reveal the challenges of creating materials which will be practical to teachers and students in distant English learning populations. The researchers conclude that five distinct characteristics should be present in instructional material in order to increase the engagement, language acquisition, and self-worth of the English Language Learner. This project opens possibilities for future research on service and how to increase the impact of giving through acting on specified needs rather than more generalized and perceived lack, acknowledging the other’s cultures and lived realities, and above all, establishing caring relationships. It also suggests the need to create bilingual readers in siSwati and English.
LITERATURE REVIEW

English Language Learners

Teaching content to a young person in the process of learning English presents a complex set of challenges for any teacher. The significance of the cultural shaping and lens that underlies instructional materials takes on heightened importance, as reflected throughout educational literature. This literature is largely dominated by explicit calls for the creation and implementation of culturally relevant instructional materials and content. Grassi and Barker (2010) discuss the necessity of “mak[ing] linkages between home and school knowledge” when instructing students for whom English is a second language. Offering as an example the use of a young woman’s quinceanera as the context for a mathematics word problem (p. 190), Grassi and Barker (2010) further assert that student motivation increases through connections to a student’s cultural background and home life. Not only are learners more likely to be more motivated to learn when their cultural contexts are included in the curriculum, but the authors also detail students’ sharpened abilities to both retain and apply their learning. Moreover, it is not only the words in a text which convey meaning and make links between curriculum and real life, but it is also the images in that text. Novels with graphics have proven effective when working with ELLs in part because students can identify with the illustrations which “privilege certain perspectives” (Boatright, 2010, p. 469) especially those reflecting the ELL’s home culture.

The need to include culturally relevant materials in effective ELL instruction is echoed throughout the research literature. Floyd and Hebert (2010) argue the necessity of utilizing picture book biographies that feature the lives of noteworthy African American individuals when teaching young African American students so that they may identify with these successful people, perhaps further realize their own potential, and feel connected to the curriculum at hand. Ormrod (2011) similarly asserts the relevance of instructional materials to the ELL’s experience. She contends, “Incorporating children’s culture as well as their native language into the classroom curriculum can further promote their academic success” (Ormrod, 2011, p. 57). Perrone (1991), teacher educator, makes a comparable reference to the idea of relevance in instruction: “...what is taught takes on greater significance if it is related whenever possible to the lives of the students, if it can be seen as making connections physically, spiritually, morally, and historically” (p. 16).

Culturally relevant materials in the classroom not only enhance ELL students’ abilities and motivations to learn but further positively impact ELL students’ perceptions of self-worth. Sumaryono and Ortiz (2004) speak to the affirmative relationship between cultural relevance in ELL instruction, students’ self-esteem, and students’ learning:

Recognizing and validating multiple cultural identities in the classroom community . . . strengthen the individuals’ sense of worth, and, ultimately their
academic performance. Similarly, understanding and supporting the cultural norms of diverse learners help to create a safe and nurturing environment, which motivates students to take the necessary risks to be successful. (p. 16-17)

Culturally relevant instructional materials allow ELL students to feel secure and self-confident in their academic capabilities. Sumaryono and Ortiz (2004) further articulate specific ways in which instructional materials and teacher instruction can be created and delivered to enhance ELL students’ self-esteem, most significantly including the learners’ native language; they assert that, “When teachers support students’ primary language in meaningful ways, students feel recognized and validated in the mainstream classroom, which results in a strong sense of self” (p. 17).

Psychologists traditionally define identity as the “self-constructed definition of who one is and what things are important in life” (Ormrod, 2011, p. 75). However, Reeves (2009) presents the sociocultural perspective that interactions and relationships also affect identity formation, where ELLs may experience conflict, coercion, and subsequent low self-esteem as they attempt to accommodate their identity with the dominant group’s culture, norms, or even the academic classroom. Ajayi (2006) suggests pedagogy to increase an ELL’s academic success, self worth, and identity: “Instructional practices and language learning curriculum in …schools must be grounded in the diverse experiences of the learners in such a way that their multiple viewpoints, diverse cultures, languages and personalities serve as resources for English language learning” (p. 472).

Cultural Context

The necessity of culturally relevant materials when teaching ELLs requires the understanding of the all-encompassing nature of culture. Anthropologist Hall (1967) asserts in his foundational book Beyond Culture, “Culture is man’s medium; there is not one aspect of human life that is not altered and touched by it” (p. 14). An examination of the literature on the topic of cultural context furthers the understanding of the relationship between cultural relevance and the perceived practicality of such materials.

In their work Understanding Cultural Differences: Germans, French, and Americans, anthropologists Hall and Hall (1990) characterize a culture by the context, with the cultures of the world situated on a scale ranging from high context to low context, as characterized by their predominant communication styles. High context cultures are typified by high context communication; low context cultures are typified by low context communication. Prasad, Mannes, Ahmed, Kaur, and Griffiths (2004) precisely sum up the distinctions between these communication styles in their article “Adjusting Teaching Style and Practice to Accommodate the Needs of International Students;” “… low context communication tends to be direct and verbal whereas high context communication tends to be indirect and nonverbal” (p. 3). These basic characterizations identify the United
States as a low context culture and Swaziland as a high context culture.

Within this understanding of cultures as high context or low context lies the important related notion of cultures as collectivistic or individualistic. High context cultures, such as that within Swaziland, are collectivistic; low context cultures, such as that within the United States, are individualistic. Prasad, et al. (2004) describe this characterization, “Low context, individualistic culture tends to rely more on the explicit verbal content of messages whilst people from a high context, collectivistic culture rely heavily on the overall situation and nonverbal cues to interpret meaning” (p. 3). In order to better understand the connectedness of these classifications of cultures, Fisch, Trumbull, and Garcia (2009) offer detailed descriptions of the terms individualistic and collectivistic:

Cultures that give priority to the needs of the individual—such as independence, freedom of choice, self-expression, and private property—can be described as “individualistic.” Those that give priority to the needs of the family or group, such as social relationships, group success, group consensus, respect, and shared property can be described as “collectivistic.” (p. 475)

High context, collectivistic cultures, such as Swaziland, emphasize personal relationships and group dynamics while engaging in more nonverbal communication; low context, individualistic cultures, such as the United States, emphasize the individual and independence while engaging in direct, verbal communication.

**PROJECT OVERVIEW**

Based on this review of the research literature as well as the information gained from the initial Swaziland experience, cultural relevance obviously holds tremendous importance for the successful creation, practicality, and use of reading materials for English language learners in foreign settings. What the literature does not include is the answers to two important questions which have guided this research project: 1) How can people in the U.S. most easily produce and expand the reach of culturally relevant materials for foreign settings that need instructional materials in English? 2) Can American university students with little specific training and skill, but with an innate desire to assist others in need, create practical reading materials for ELLs?

**THE AUTHOR’S READERS**

The two readers produced by the author will serve as our starting point for analysis. Swazi teachers have received and used the readers with their students, and they have provided their own analysis in interviews as to why these materials were practical in their classrooms. These readers embody the culture of Swaziland on many different levels, from the literal dimension of everyday activities,
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to an artistic representation of culture through the books’ illustrations, to a symbolic representation of Swazi traditions and values. The readers also communicate respect for the culture and for the Swazi people. *Gogo’s Swaziland Homestead* depicts the everyday life for gogos and children living on homesteads: gogo does all the cooking for the family and provides most of the care for the children. The children gather wild fruit and play soccer, and everyone participates in song and dance. For the Swazi child who is learning English, *Gogo’s Swaziland Homestead* portrays authentic life experiences.

As one reads *Gogo’s Swaziland Homestead*, the actual surroundings of the people and landscape of Swaziland are conveyed to the readers through the beautiful illustrations by Robert Duggan. When the narrator says, “When it gets dark we say goodnight to the stars and moon” (Titone, 2010a, p. 12), an illustration of the star constellation, Andromeda, “The Queen,” accompanies the text. This specific star constellation is visible in the sky above Swaziland; thus, the reader sees this familiar image of nature in the book. Therefore, the author directly incorporates the Swazi’s natural surroundings into the reader.

In *Road Trip to Manzini*, the children, teacher, and Auntie embark on a road trip to see how artisans make candles and other crafts in Manzini. A Swazi person reading the book can relate to the experiences of the characters, can envision the Lubombo Mountains, the Mhzutuze River, the Usutfu River, and the Mdzimba Mountains in the book and, perhaps, also in real life. *Road Trip to Manzini* depicts sites that an individual in Swaziland would see on a journey from St. Philips to Manzini--the beauty salons, irrigation systems on the farmlands, people walking on the roads, animals one might see, including the crocodiles in the Usutfu River. In contrast, a donated book from America, combining relevant content with language instruction, may describe a road trip from the Appalachian Mountains to the Grand Canyon, with deer and bison along the way. This content would obviously have fewer possibilities of engaging the young Swazi. It may even alienate them and slow the pace of the language acquisition process. However, *Gogo’s Swaziland Homestead* and *Road Trip to Manzini* depict the actual surroundings of the intended audience. They increase reader accessibility and language learning by allowing students to see their world, acknowledge their realities, and have positive feelings about that reality.

Not only do the books illustrate the daily life of the Swazi people, the readers also capture the values, traditions, and spirit of Swazi culture. In *Gogo’s Swaziland Homestead*, as the children listen to gogo, a deep respect for and honoring of family is reflected in their obedience. Rituals and traditions of the Swazi people represent another theme that is central to the reader. *Gogo’s Swaziland Homestead* shows the costumes from Swazi rituals. *Road Trip to Manzini* portrays the King of Swaziland as the children journey through the Ezulwini Valley on their road trip to see the crafts. In addition to the book’s reflection of culture, the reader includes some traces of the native language in the illustration of the King in his traditional garb: “On our way, we drive through the Ezulwini Valley where His
Majesty, the King of Swaziland, lives. Ezulwini means ‘heaven’ in siSwati; this is the Valley of Heaven” (Titone, 2010b, p. 19). Furthermore, the arts play an important role in the readers, as in Swazi culture. The entire purpose of the road trip lies in the children’s desire to see the handicrafts made in their homeland: candles, woven baskets, dyed cloth called batik, and Swaziland’s beautiful, blown glass. Although the country experiences great tragedy due to the AIDS epidemic, both readers close with positive, hopeful images of a better future and a warm, enveloping, Swazi love: *Gogo’s Swaziland Homestead* ends as the children reflect that they will always remember the good things Gogo teaches them, while *Road Trip to Manzini*’s journey ends back at home with the children drifting off to sleep, as they say, “The soft glow of candlelight fills our room with warmth, and we feel hugged by a tender, unmistakable Swazi love” (Titone, 2010b, p. 25).

In addition to the visual recognition and spirit of their culture, made possible through the inclusion of Swaziland-specific content and accompanying illustrations, the author’s readers also embody the natural communication style and reflect the high context, collectivistic culture of Swaziland. The following page from within *Roadtrip to Manzini* exemplifies a number of characteristics regarded and practiced within Swaziland’s high context, collectivistic culture—namely the emphasis on group interaction and mutual achievement as well as nonverbal forms of communication, including smiling in this particular example:

> We begin to compose a song about our trip, and we sing it several times together. We like to find just the right harmonies that blend well and produce a heavenly sound. When we practice, we put a lot of soul into it. We can’t help but smile. (Titone, 2010b, p. 6)

These instructional materials make frequent use of the pronoun “we” and refer both indirectly and directly to family and other familial group memberships and activities such as composing songs, singing and dancing, and traveling and exploring together. The book indirectly praises those aspects of the Swazi culture, giving the reader a sense of acceptance, approval and well-being.

The author deliberately places aspects of daily life, the landscape, traditions and values, and the collectivist mode of communication, into the readers to capture and reflect the culture of Swaziland, to ease the language barrier and enhance learning. Carlsen (2001) states, “Every time we select a piece of literature to read, we are exposing ourselves to a vision: a vision of people and places and things; a vision of relationship and feelings and strivings” (p. 220). For an individual learning a new language, a positive view of his or her culture must be included in that vision, which the author achieves in *Gogo’s Swaziland Homestead* and *Road Trip to Manzini*. Creating these readers for one small country in Africa was labor-intensive and quite time-consuming; therefore, after returning to the U.S., the authors began to explore how they might leverage their discoveries to increase the scale of practical materials produced.
UNDERGRADUATE PEACE AND JUSTICE STUDENTS

We were invited to give a short report on the Swazi project to a group of twenty-four undergraduate students, who were enrolled in a class entitled Education for Social Justice. One of the purposes of this course, according to the syllabus, is to explore the current tensions of the U.S. educational system as a liberating potential, while unequal access to education simultaneously reproduces and sustains societal inequalities, based on issues of race, class, gender, and socioeconomics. While we were unsure as to the level of interaction we may have with the students, we hoped to involve them in collaborative efforts. In that initial meeting, we engaged the students through a variety of mediums to see, hear, and understand the culture of Swaziland. We provided historical information, the video, *Today the Hawk Takes one Chick*, and photographs of the site, the children, and the community surrounding the Mission. We spoke about the problems with Swaziland’s educational system. The purpose of the presentation was to share an experience of education and culture from the perspective of individuals who traveled to the country and connected with the people. We also showed the two books which we had already created and which had been well-received by the Swazis. After this fairly extensive information session, followed by a detailed question and answer period, the students came up with the idea to write their own books to send to the Swazi children as a service project.

When we realized that the students were going to write books of their own, we strongly encouraged them to look further into the culture of Swaziland. We provided websites and other resources which the students could use to begin their research. The class of twenty-four students divided into six groups, each of which would take responsibility for writing one book for the six age groups represented at the hostel at St. Philips (ages 3-4, 5-6, 6-7, 8-9, 10-12, and high school). The researchers returned twice during the next six weeks to discuss the groups’ specific ideas, review book drafts, and offer feedback and guidance on the work. By the end of the semester, after several revisions, the students had completed six children’s readers: *A to Z Animals, The King who Loves to Sing, Gogos Around the World, Letters from America, A Day in the Life of a University Student,* and *School Day.* The students’ creations and responses to a three-question, open-ended survey reveal an innate and culturally ingrained desire “to give” and “to broaden” the visions of the Swazi people. Some students include aspects of Swazi culture in their books, but an analysis of their readers illustrates that students require a greater understanding of the significance of cultural context and the need to respect Swazi culture when attempting to create the most engaging and practical books for Swazi children who are English learners.

Readers Created by University Students

Three of the students’ readers, *The King Who Loves to Sing, Gogos Around the World,* and *A to Z Animals* succeed in varying degrees in contextualizing the
reading content in relation to the culture of Swaziland. However, the other three books display a clear lack of attention to Swazi culture, with an intrinsic goal of “broadening” the minds of the students in Swaziland. Brief descriptions of the readers follow.

The King Who Loves to Sing
The students’ most culturally relevant reader for the young Swazi is The King Who Loves to Sing. This reader directly reflects the culture of Swaziland from the plot of the rhyming story to the illustrations. Traditional song and dance remain a defining element of Swaziland culture, which plays a crucial role in the storyline, as the song comes from the King’s heart, capturing his spirit and revealing the importance of song to the Swazi people. The colors of the drawings capture the traditional clothing of the king and people of Swaziland. The student authors incorporate other aspects of Swazi culture into the illustrations; for example, the king kicks a soccer ball to the school children, and animals and nature possess a significant role in the story. The student authors rhyme their story, embodying a song-like quality. The notion of a king, of singing, of playing soccer, and of living in what look like traditional Swazi homesteads would be innately familiar to the Swazi students and teachers. Moreover, the work addresses aspects of cultural context by its directions that students will repeat the indicated portions of the song. The student writers have thus made the assumption that this book will be read and enjoyed by a group of Swaziland students, which is in line with the collectivistic nature of their culture. Drawings throughout the book similarly highlight pairs and groups of individuals.

Gogos Around the World
Gogos Around the World reflects different cultures while also discussing the similarities and interconnectivity of people around the world. The reader opens with gogos from Swaziland and then compares the Swazi gogo with gogos in other parts of the world. When specifically addressing the country of Swaziland in the book’s beginning pages, the word “we” is used frequently, which speaks to the collectivistic and group-oriented Swazi culture. The student authors incorporate many different cultures; however, the story describes the differences amongst cultures through a predominant focus on food, which may reflect how these American students define or view culture. The student authors also integrate more abstract aspects of culture such as religion and dress, as illustrated through the Egyptian gogo’s Muslim hijab or the Indian gogo’s sari. The last page of the book captures a goal of connecting with other cultures. The students write “We learned a lot about the world and how much we have in common even though the world is so big…Gogos around the world love their children and their children love their Gogos just like in Swaziland” (p. 17). The student authors bring the storyline full circle with a discussion of Swaziland and the importance of familial love.
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A to Z Animals

*A to Z Animals* takes the youngest reader through the alphabet by associating an animal to the letter with which the word begins. The student authors use simple, short sentences, and large illustrations for those just beginning to learn English. The animal depicted on each page has a dialogue bubble, stating in first person what the creature eats or does. Although the student authors describe many of the animals’ natural habitats, they continually point out which animals (antelope, lion, and zebra) are native to Africa. Other animals, such as the koala bear which is indigenous to Australia, are not identified by country of origin. *A to Z Animals* reflects Swazi culture through the incorporation of many animals that live in Swaziland.

Although the next three readers we discuss attempt to connect and create a relationship with the students in Swaziland, *Letters from America*, *Day in the Life of a University Student*, and *School Day*, these books fail to include the cultural context and native language of the Swazi learner. Clearly, the student authors’ most pressing purpose was to broaden the minds of the Swazi students, rather than making the content accessible to the Swazi learner by centering it on his or her reality.

Letters from America

Although this reader reveals different aspects of American culture and portrays the natural wonders of America as well as its most cherished values, such as freedom and hard work, *Letters from America* does not include the culture of Swaziland. The student writers are careful to offer additional descriptions and information about aspects of U.S. culture that appear in the reader, such as “subway,” “ferry,” and “aquarium,” but clarity of language does not translate into accessibility when the culture of the ELL remains completely absent. The letters seek only to tell the Swazi students about life in different parts of America. The reader’s greatest strength, however, lies in the student authors’ desire to connect with the students in Swaziland. At the close of each of the letters, the student writer includes a picture of him or herself and warmly signs his or her name, which demonstrates the aim of forming a relationship with the Swazi student.

A Day in the Life of a University Student

Similarly, while *A Day in the Life of a University Student* succeeds in making connections, this book does not provide context and cultural relevancy for the ELL in Swaziland. *A Day in the Life of a University Student*, a compilation of letters from fictitious university students around the world, seeks to increase connectivity amongst different cultures, as the letters describe the students’ day-to-day experiences as well as aspects unique to each culture. Direct forms of address as well as requests for relationship-building with the students in Swaziland are found throughout. The student authors’ decision to include the greetings and farewells in different languages manifests an ELL approach by acknowledging a
country’s native language. However, one glaring omission is a letter about life for an individual at the University of Swaziland. On both occasions when the authors interacted with the undergraduate students, we strongly recommended including such a letter, but the students rejected this idea. The student authors’ failure to include this letter further illustrates the importance of the student authors’ goal: to show the Swazi students a possible life path beyond their immediate experiences in Swaziland. It also fails to show respect or acknowledgment for the university just 100 kilometers from the Mission at St. Philips.

**School Day**

*School Day* is more successful than *A Day in the Life of a University Student* and *Letters from America* in establishing connection, particularly as the student creators open their book with a collectively written letter that closes with, “[Middle schools] students drew the pictures in the book for you. We hope you enjoyed learning about some parts of our school day; we like learning about Swaziland” (p. 2). However, cultural context and cultural relevance are again non-existent. While having U.S. middle school students provide the illustrations, and assuming that Swazi students would likely be attracted to this approach, the illustrations pertain only to elements of the U.S. school day, nearly all of which are culturally foreign to the students of Swaziland. Additional drawings pertaining to what the creators learned of the Swazi school experience could have been included and would have offered a more culturally relevant reader as well as further capitalizing on the goal of reciprocal connection.

**INTERVIEWS WITH THE SWAZI TEACHERS AND ANALYSIS OF THE READERS**

In January of 2011, two of the Swazi teachers made a trip to the U.S. and stayed for two weeks. During that time, we had the opportunity to show them the new books created by the university students and had them assess all of the readers’ practicality. It should be stated at the outset that the teachers exhibited an overall positive evaluation of the student readers, and they were extremely grateful for all of the efforts. Nonetheless, the report of Swazi teachers reveals the challenges of creating culturally accurate and relevant—practical—instructional materials.

As discussed previously, the teachers had a positive reaction and immediately put to use *Gogo’s Swaziland Homestead* and *Roadtrip to Manzini*. In describing the reasons that these were so easily and promptly utilized, the teachers reiterated a number of very specific points which the literature reveal as important: clear and beautiful illustrations of the children’s own homeland, accurate representations of their cultural habits and interactions, and an ongoing sense of reciprocity and connection with the creators of the readers. In a succinct but telling summation, one of the teachers articulated: “It’s all in there, and they [the students] can identify
with it (Singleton & Mamba, personal communication, January 20, 2011). Mr. Mamba also said, “When we have a connection to you, to the author, we can ask you to change things or to write other stories that we might like to teach, and we know you will do it” (Singleton & Mamba, personal communication, January 18, 2011).

When prompted to further comment on the university-student created readers, the teachers echoed some of these same positive sentiments. Reflecting on The King Who Loves to Sing, the teachers shared excitement about the possibility to “role-play” the reader with the students, indicating a level of success in connecting with the collectivistic aspect of Swaziland’s cultural context. With the story’s closing line of “. . . They praised all the gifts of this beautiful day” (p. 13), the teachers further indicated a wider potential for cultural relevance through a student discussion of what constitutes a beautiful day. If a Swazi student were to comment, for example, that a rainy day is not a beautiful day, the teacher could educate about the importance of rain for the country’s vegetation. And while the reader’s depiction of the King as going to the market himself is one that the teachers indicated was not fully in touch with the reality of his position, the building of a story around a figure whom they recognize was appreciated. Overall, the teachers described The King Who Loves to Sing as “beautiful” and “ideal,” asserting, “We’re going to do this [use it with the students]” (Singleton & Mamba, personal communication, January 20, 2011).

In reference to the reader Gogos Around the World, the teachers seemed most impressed by the work’s ability to build connections across countries and cultures. One teacher described this reader: “It is just talking about different grannies . . . it gives the different names, and what I think is a gogo is a gogo whichever country or continent. A gogo is a gogo” (Singleton & Mamba, personal communication, January 20, 2011). Both teachers agreed that their students would enjoy reading and learning about the information in Gogos Around the World, and it would be very helpful to begin with a Swazi gogo, someone who requires no explanation to their students, before introducing new information in a second language.

When the conversation moved to the A to Z Animals reader, the teachers pointed out a greater number of problems despite agreeing upon its general practicality. A number of the animals were not known to the teachers. They suggested that changes be made to better reflect creatures that the Swazi students would know or might see in their environment. The teachers offered useful alterations involving pronunciation, so that the book could better be used for students just learning to read through decoding word sounds. They suggested that Giraffe, for example, should not be used for the letter “G” because giraffe does not begin with a hard “G” sound. They also suggested that their students might be interested in learning the words for the babies of each species. Despite these issues, the teachers thought that the reader, as a whole, was “special” and held practical potential as a first introduction to reading.

Even recognizing the potential limitations of or changes needed within these
three readers, the teachers felt that each would be useful to their teaching efforts. The conversations with the Swazi teachers also reveal other valuable ideas about English instruction that could assist countries or individuals seeking to donate. One teacher discussed the initial problems with the unused donated reading materials as compared to the educational success of the culturally relevant readers:

> What we did with those books [unused donations], we’d say to the groups [of children], go and choose a book you like, and they would choose a book, but most of the books were lots of words, lots of words, and new words, and they’ll be only one of each [book]. So it’s not easy for us to sit and help this child. But when we have one of a number, …we all go through it together. And that worked out, I found that made my job easier. And the excitement of we’re all reading the same book, we’re all understanding the same book. It worked out. (Singleton & Mamba, personal communication, January 20, 2011)

These insights illuminate another fundamental problem with developed nations simply donating random books in the hopes of filling a gap without determining the specific need at hand. Singleton reflects that reading instruction improves when the class has a set of at least fifteen copies of any reader. This creates the possibility for students to learn together and increases the practicality of the teacher being able to help all of the students with language acquisition. In addition to lacking class sets of books, the teachers also remarked upon the difficulty of the unused, donated books: not only do they contain too many words and too few culturally relevant illustrations, these books are too advanced for the early learner of English. In fact, these donated materials are not written with the English Language Learner in mind. The teachers need simple, culturally relevant readers that enhance the quality of English instruction for individuals beginning to learn the language. Then, series of readers should increase in difficulty of language and of content.

The experience of working with the university students and discussing the books with the Singleton and Mamba provide more insight into how people can create materials which actually meet the need of the recipient. Although the students’ intentions were valiant and their efforts were conscientious, several of the student readers and survey responses reveal a lack of understanding of the importance of cultural relevance and ELL educational principles. After the presentation and creation of the readers, the students completed a short three question open-ended survey, which assesses the extent to which they recognize the importance of creating culturally relevant reading materials for the ELL. The first question asks, “Beyond socioeconomic disparities, what do you see as the most significant differences between U.S. culture and what you know of Swaziland culture?” The second question reads, “Both the teachers and the students in Swaziland are considered English Language Learners, or ELLs. Although all Swaziland education
is taught in English, the country’s native language is siSwati. How does this fact prove important to your creations?” The third question asks, “What was/is your ultimate goal in creating these projects for Swaziland?”

Of the class of twenty-four undergraduate students, nineteen responded to the above survey questions. The first two responses were then independently scored on a scale of 1, 0.5, and 0 by the researchers. The value of 1 indicates the respondent accurately addressed the importance of each idea in his or her response. As an example of a response that was scored at this value of 1, consider the following responses to the first question of the survey, which asks about significant cultural differences between Swaziland the U.S.: “I see a difference in the culture and mindset of the people in Swaziland in comparison to American culture that entails the value that each places on families and individuals.” This response reflects an understanding of the importance of cultural context. One-half is given to responses that indirectly mention the importance of the question’s concepts. The following serves as an example of a response scored at this one-half value, again in response to the first question, which asks about significant cultural differences between Swaziland and the U.S.: “The difference in the family structure is very significant. They have extended families in contrast to U.S.’s dominant nuclear family.” Although this response is not precisely in line with the discussion of cultural context offered in this article, the respondent seems to understand that family and group dynamics are of greater cultural importance in Swaziland. Zero applies to responses that fail to mention the importance of culture, and ELL in each respective question. An example of a response scored at this zero value follows, again in response to the first survey question: “The differences that are critical in my eyes are the housing, shelter, and many differences. Basically, they cannot indulge in many things besides what they do in school. The food they receive are not delicious like we experience and our houses, even the poor people in America are much bigger and cleaner.” This respondent focuses solely on socioeconomic, rather than broader and more culturally based, differences between the U.S. and Swaziland.

The researcher’s independent coding efforts were then compared, with definitive scores for each survey response ultimately agreed upon. The results of the survey were compiled into the data table below in the form of percentages, reflecting the percentage of the nineteen responding students whose expressed answers to the first two survey questions reflected each above described value.
**Undergraduate Student Survey Results**

<table>
<thead>
<tr>
<th>Question 1</th>
<th>Student demonstrates full understanding</th>
<th>Student indirectly mentions the importance</th>
<th>Student shows no recognition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Significance of Cultural Relevance</td>
<td>52.6%</td>
<td>5.3%</td>
<td>42.1%</td>
</tr>
<tr>
<td>Question 2</td>
<td>15.8%</td>
<td>5.3%</td>
<td>79.9%</td>
</tr>
<tr>
<td>Importance of Cultural Relevance to an ELL</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

While a majority of the students seem to understand the significance of cultural relevance, this knowledge did not translate into the importance of cultural relevance to an English Language Learner. In fact nearly 85% of the students showed no recognition of this fact.

The third survey question, which asked about the students’ ultimate goals in creating their service projects, was used as a tool in analyzing each individual work, as reflected in the Readers Created by University Students section of this article. When asked about their ultimate goal in creating the projects for Swaziland, half of the respondents centered on their notion of service especially as it relates to what he or she imagines the people of Swaziland need, rather than seeking first to understand what the recipients say they need. The responses include a desire, for example, to broaden the Swazi’s mind: “To give them a glimpse of other things and places outside of their world,” to “broaden their horizons,” or to simply “teach them of what they do not know.” One could say that the undergraduate students attempt to reach out and help the people of Swaziland on their own culturally defined terms, rather than viewing the world through the eyes of the people of Swaziland and understanding their feelings of hopelessness and suffering. Addressing this conundrum, Kirby (2009), a Service Learning scholar states:

> How, then, can I ever know what is good for the Other, what she needs, and how I might help alleviate her suffering? I am not able to acquire such understanding on my own, for I can only ever know my own suffering and need. Who, then, is the most reliable source of information regarding the Other’s need? Only the Other herself can be such an authority on her own suffering. (p. 158)

A simple continuum of the ways an individual can gain knowledge to enact culturally relevant and culturally sensitive service exists. On one end of the spectrum one might simply employ the internet or other technological source in order to gain information about another culture. At the other end, one must actively work alongside the indigenous population developing strategies for successful collaboration as well as creating culturally relevant books and other materials. Obviously, other effective possibilities exist within this pedagogical model. Al-
Although Kirby (2009) articulates that individuals should ultimately seek opportunities for face to face encounters with those in need, any attempt to increase one’s understanding and knowledge of the other’s perspective, culture, and specific need holds the promise of greatly enhancing the creation of useful materials.

**CONCLUSION**

Although the US government statistics reveal that the US alone donated reading materials valued at 25 million dollars to improve the educational opportunities in Africa since 2003, and Swaziland is the recipient of donated educational materials, the interviews with the Swazi teachers provide direct evidence that needs are still not being met in their setting. The research literature indicates that the success of an English Language Learner improves when the educational materials reflect cultural relevance. However, the university students’ final creations reveal the challenges inherent in creating this kind of work.

The researchers conclude that five distinct characteristics should be present in instructional material in order to increase the engagement, language acquisition, and self-worth of the English Language Learner:

- Content that is true to the students’ lived experiences (reflects everyday experience and is therefore completely accessible to the learner);
- Illustrations in which learners can see themselves, their surroundings, and their values—as if looking into a mirror;
- Use or mention of learners’ first language even if only minimally;
- Content, illustrations, and language which directly communicate respect for the students’ native/home culture; and
- Content, illustrations, and language which explicitly communicate hope, care and/or positive regard of the learner to the learner.

Transformative change begins with the donor’s willingness to consider another individual’s perspective. One must both appreciate another’s culture as well as devote the time to learn about it. Finally one must seek clear knowledge of the other’s need. When authors create instructional materials for children who live the same reality as they do, this is tacitly understood, but when we desire to provide helpful and practical materials in English for children living outside our cultural reality, a different understanding is required of the giver—a different kind of caring must be enacted. Educational philosopher Noddings (2005) describes caring for distant others:

. . . we often fail to treat the recipients of our care as individuals. We may also mistakenly suppose that they want to live exactly as we do—that they want the same knowledge, the same kinds of work, the same forms of worship, the same daily customs . . . Because we are not in relation, our acts can easily degenerate into acts of false generosity. (p. 116)
For the beginning learner of English at any age, it is best to create materials which embed the culture of the learner within the content. This type of material is not only more practical for the teacher, but it has the added advantage of instilling a love of oneself, an appreciation for one’s culture, and a love of reading. It builds a culture of reading as it builds self-esteem.

In a country like Swaziland, deeply affected by the AIDS epidemic and other harsh realities, the children at Cabrini Ministries in St. Philips were deeply moved by Gogo’s Swaziland Homestead and Roadtrip to Manzini. They were astonished to see materials created especially for and about them, in part, because, as their teachers tell us, they have little sense of their own worth. The way in which the students expressed such surprise and emotion at the notion that books would be created about their own culture and for their enjoyment and education is illustrative of the low regard they hold of themselves and of their culture. Thus, to truly attempt to serve those who have life experiences and needs far different from our own requires an underlying desire to connect and results in an impact far deeper than mere material fulfillment or language acquisition. Consider the following powerful statement from one of the Swaziland teachers when she speaks about the dedication in Road Trip to Manzini: “And to know each time we read this, what the cover had. ‘This book is dedicated to the spirit of each student at the hostel at Cabrini Ministries in St. Philips.’ Oh, the excitement, the excitement of those children. I explained that, yes, this book is written for you. That means for you, to help you improve, and for who you are, the beautiful person you are” (Singleton & Mamba, personal communication, January 20, 2011). This heart-felt statement illustrates the profound impact of the readers on the Swaziland students’ views of themselves and their culture as precious, valuable, and unique. While the creation of culturally relevant educational materials for all the countries of Africa is certainly a daunting challenge, three groups (out of six) of minimally-trained undergraduates were able to succeed at this task for a group of Swazi children. Certainly, well-endowed, non-profit organizations and trained educators have the resources to provide children around the world with effective educational tools. We argue that this work is more than worth the effort when one imagines the Swazi child’s sense of pride and exhilaration to join the community of readers, who embrace English as their second language, and who begin to realize some measure of their own worth and potential.
NOTES

1. Currently the Swazi government has decided to offer public schooling free of charge. They will begin with the lowest grades and add one grade per year.

2. The quinceanera is a traditional Hispanic celebration on the occasion of a girl’s fifteenth birthday in parts of Latin America and elsewhere in communities of immigrants from Latin America. This birthday is celebrated differently from any other birthday, as it marks the transition from childhood to young womanhood. The celebration varies significantly across countries.

3. “Gogo” is siSwati for grandmother.

REFERENCES


THE ONE-CHILD POLICY AND PRIVATIZATION OF EDUCATION IN CHINA

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ABSTRACT

China’s one-child policy is one of the most significant, yet controversial, programs of planned fertility. While the focus of the controversy is on the nature of the policy (for example, whether the policy is humane, or whether it violates the basic human rights of individual freedom), the impact of such population control program on China’s educational policy and practices is understudied. Moreover, the relationship between the one-child policy and the privatization of K-12 education in China remains insufficiently understood. Therefore, the purpose of this article is to address this gap in the literature and to explore the impact of one-child policy on privatization of education, and the transformation of education policy in China since 1979.

INTRODUCTION

Implemented in 1979, China’s one-child policy is one of the most significant, yet controversial, programs of planned fertility. It emerged as a panacea for the country’s many pressing social problems, including population crisis, poverty, inflation, agricultural stagnation, inadequate school facilities and unemployment (Chow & Chen, 1989). The one-child policy was designed to restrict population growth, thereby advancing economic prosperity in China. Since the inception of the one-child policy in 1979, China’s population has decreased by about 250 million (Kane & Choi, 1999). This reduction in fertility has eased some of the pressures on communities, the state, and the environment in a country that still carries one fifth of the world’s population. Moreover, because of the low fertility rate, China can focus on developing its economy and raising the living standards of its
people. Since 1979, an unprecedented 150 million people have been lifted out of poverty (Potts, 2006). As Greenhalgh (2003a) suggests, the one-child policy has served as a means for China to accelerate its industrialization and modernization, catch up with the West, and achieve its rightful place in a global stage.

Despite these positive effects, China’s one-child population policy has been highly controversial and it has been criticized by the Western world as “totalitarian,” “coercive,” “barbaric,” and “uncivilized” (Ebenstein, 2010; Greenhalgh, 2003a; Li, 1989; and Wasserstrom, 1984). While the focus of the debate is on the nature of the one-child policy (for example, whether the policy is humane, or whether the policy violates the basic human rights of individual freedom), the impact of such population control program on China’s educational policy and practices is understudied. Furthermore, the relationship between the one-child policy and the privatization of K-12 education in China remains insufficiently reported. Therefore, the purpose of this article is to address this gap in the literature on the impact of one-child policy on privatization of education and the transformation of education policy in China since 1979.

This article is a review of literature and legislation on family planning in China from 1979 to the present. It aims at answering the following research questions: 1) What is the relationship between the one-child mandate and the emergence of private education in China? 2) How does one-child policy affect family choice of schools?

This article begins with an historical overview of China’s one-child policy, elucidating the historical, social and political context of its implementation. The article further focuses on the relationship between the one-child policy and parental school choices in China. It closely examines two forms of private schools: the elite private schools (Gui zu xue xiao) and the people-run schools (Min ban xue xiao).

Previous research has considered these private schools primarily as an economic response to the liberalized climate of the 1980s when the once intrusive state acceded a role, even in the provision of education, to entrepreneurs (Kwong, 1997). However, this article argues that the one-child policy has contributed to and facilitated the emergence of private schools. Because each couple could only have one child, the parents were not satisfied with the mediocre educational services that public schools offered to their single children. Many parents were anxious to improve the chances for their single children to learn marketable and employable skills or to gain entrance to Ivy League education. Boasting high educational standards, strict discipline, highly qualified instructors, and state-of-art technology, elite private schools (Gui zu xue xiao) have been established to cater to the needs and demands of a wealthy clientele (Kwong, 1997; Lin, 1994). Indeed, China’s growing middle class and nouveau riche regard these elite private schools for their single children as the latest status symbol (Arora, 2010).

It would be incorrect, however, to assume that all private schools are elite, catering to the rich and the powerful. The people-run schools (Min ban xue xiao) are
often short in funding, lack qualified teachers, and lack high standards in school administration (Lin, 1994). Nevertheless, these private schools have been set up to serve the unplanned children or those who were born outside of the family planning policy. As a result of the one-child mandate, unplanned children or illegitimate children are denied basic benefits and rights, including the right to a free 9-year public education (Greenhalgh, 2003b). Therefore, the people-run schools are a response to the increasing demand for a basic education for unplanned children. The discrepancy between the elite private schools and the people-run schools symbolizes the increasing gap between the rich and poor in China, the second largest economic power of the world.

THE ONE-CHILD POLICY: HISTORICAL AND POLITICAL BACKGROUND

For thousands of years, the traditional ideal Chinese family was patriarchal in authority, patrilineal in descent, and patrilocal in residence (Huang, 1982). The feudal ideology, which values fecundity and favors male offspring to maintain paternal lineages, has dominated Chinese culture and family life. It was commonly believed that the more sons one had, the more good fortune a family would have. Birth control or family planning has conflicted with such cultural values and with the patriarchal system, and therefore was alien to Chinese society before the People’s Republic of China (PRC) was established in 1949.

During the first decade of Chinese Communist Party (CCP) rule between 1949 and 1959, the Chinese leaders introduced the novel concept of state-controlled family planning as “an irrefutable task of the socialist state” (Greenhalgh, 2003b, p. 201). Any unregulated or unplanned human reproduction was considered antisocial and contrary to the fundamental interests of the Chinese state (Greenhalgh). In keeping with this idea, births were planned by the state on the basis of the collective good, and state planned birth control has been placed at the center of China’s approach to population control to this day. Yet, no specific policies or measures were adopted to slow the birth rate.

This birth-control campaign was suspended during the 1960s and 1970s because a large population was once again considered to be an asset to economic growth. The Chinese government shifted its focus from overpopulation to the shortage of manpower (Freeberne, 1965). Unrestrained population growth, a falling morality rate, and concurrent improvements in health care resulted in a demographic explosion in China that taxed the country beyond its economic and political resources. China’s population grew from 500 million in 1947 to 800 million by 1970, and was close to one billion in 1980—approximately 22.7% of the world’s population (Rosenberg & Jing, 1996). If the trend had continued, the three-child family would have produced a projected population of 1.414 billion by the year 2000; of 2.923 billion by 2050; and of 4.260 billion by 2080 (Goodstadt, 1982, p. 39).
In response to this population crisis, the Chinese government launched a birth-control campaign from 1971-1979, advising its citizens to marry late, not to have their first child until the age of 25, to have children spaced at longer intervals, and to have fewer offspring (Chow & Chen, 1989). This campaign laid the groundwork for the one-child per married couple policy instituted in 1979. The one-child policy was also a result of the government’s effort to improve population quality and individual living standards. After decades of political turmoil (especially ten years of destruction of “Cultural Revolution” from 1966-1976), China’s economy was stagnant, and people were living with bare necessity. Determined to overcome the sluggish economic growth and low living standards, the new regime under Deng Xiao Ping’s leadership, launched an economic reform in 1979, placing the development of “market socialism” and the transformation of China into a modern nation within decades as the top priority (Greenhalgh, 2003a). As economic goals were expressed as per capita gains, population control was the key to this new reform agenda. Muhua Chen, vice premier and head of the State Council Birth Planning Leading Group, stated,

Under present conditions in China, whether or not to control population growth is definitely not merely a question of having fewer or more children, but a serious question related to the development of our social productive force, to the realization of the four modernizations, to socialist construction, and to the strategic transition to communism (Chen, 1979, p. 2; as cited in Greenhalgh, 2003b, p. 203).

Between the mid1970s and early 1980s, discursive elements from various sources were drawn and elaborated into a complex conceptual framework that served to legitimize and, later, in 1980s and 1990s, guided the enforcement of the one-child policy. This discourse established the basic goals, rationale, and measures of birth planning and control. The one-child policy generally allows one child per couple under normal circumstances (Yang, 2007). However, depending on the provincial economic development, population size, location, and to some extent, fertility desires, the one-child policy has varied at the provincial and local levels. To battle the patriarchal belief of “the more sons, the better,” the Chinese government offered four major rationales for planned fertility and few children: better health care for both children and mothers; better social conditions for raising future generations; increasing work efficiency and political awareness; and promoting gender equity (Huang, 1982).

With the introduction of the one-child policy, the Chinese government has undertaken tremendous efforts and a number of measures, including education, persuasion, and media promotion coupled with economic rewards or sanctions (Huang, 1982; Chow & Chen, 1989; Rosenberg & Jing, 1996; Greenhalgh, 2003). Government policy has emphasized education about modern methods of contraception, eugenics, maternal care and child-care. Furthermore, the government has
dispensed free birth-control pills and devices and has legalized abortion. Couples who comply with the mandate receive an honorary certificate along with monetary awards and privileges such as extended maternity leave, free nursery care, free medical care, and special access to education and job opportunities (Chow & Chen; and Rosenberg & Jing). Parents who violate the one-child policy are severely penalized or disciplined with economic sanctions commonly known as “social compensation fee [SCF]”, and they forfeit other social benefits (Huang; and Chow & Chen).

As a result of the one-child policy, the total birth rate decreased from 2.9 in 1979 to 1.7 in 2004, with a rate of 1.3 in urban areas and just under 2.0 in rural areas (Hesketh, Li, & Zhu, 2005). The policy is estimated to have reduced the number of births by over 400 million since 1979 (NPDSRG, 2007; Zhang, 2007); however, the impact of the one-child policy is beyond population control. It has far-reaching effects on Chinese social structure, women’s roles in production and reproduction, children’s development and well-being, and education policies and practices in China. It is beyond the scope of this article to discuss all of the impacts of the one-child policy, and, therefore, this article focuses on the role that the policy plays in the emergence of private schooling in China.

**THE ONE-CHILD POLICY AND PRIVATIZATION OF EDUCATION**

Since the launch of the economic reforms in 1979, Chinese education, like other institutions and enterprises, has experienced the processes of privatization, commercialization and marketization. In the context of capitalism with Chinese characteristics, the centralized educational system has been rendered inappropriately (Yang, 2004). Acknowledging that the over-centralization and stringent rules would hinder the initiatives and enthusiasm of local and non-government educational institutions, the Chinese Communist Party (CCP) called in 1985 for steps to streamline administration and devolve powers to local government—steps that would allow them more flexibility to manage education. Since then, the state has begun to diversify educational services, allowing and encouraging the non-government sectors to establish and administer educational institutions. The central government has changed its monopolistic role to macro-management, providing the necessary framework for educational development (Hawkins, 2000; Ngok and Chan, 2003). The retreat of the central government has provided space for local government as well as non-government sectors to assume more responsibilities for education provision, financing and regulation. Thus, non-government organizations now provide education services in the formal public education sector, thereby leading to the emergence of private schools. Compared with public schools, the private education sector remains small; however, privatization of education has become an inevitable trend in China. According to China’s Ministry of Education [MOE] (2008), there were 95,200 private schools of various
levels, and 22,300 private vocational training institutions, enrolling as many as 34 million students in 2007. The total number of students in China’s private schools in 2007 was equivalent to more than half of France’s population and nearly four times the population of Switzerland (Bing, 2009).

In addition to the top-down educational reform, this article argues that the one-child policy plays an important role in the emergence of private education in China. First, the government has made strenuous efforts to limit parents’ childbearing in exchange for the greater opportunities it provides for the “only child,” including educational opportunities. The official slogan for the one-child campaign is You Sheng You Yu (give birth to fewer children, but give them better care and education), aimed at improving children’s well-being (Yang, 2007, p. 417). The underlying rationale is that more resources at the national, community, and household levels will be available for children and that children with fewer siblings will garner more resources and fare better in physical and intellectual development (Peng, 1997). The long-lasting You Sheng You Yu campaign has greatly influenced parents’ expectations for the only child and has provided them incentives to better educate their children. Furthermore, in an era of a competitive labor market, parents—especially the middle and upper class parents in urban China—are not satisfied with the mediocre education provided by public schools, and they are preoccupied with giving their only child the best education despite the overwhelming financial burdens (Mok, Wang, & Zhang, 2009). Parents’ obsession with children’s education facilitated the emergence of private schools, private tutoring services, and private extra-curricular classes, which have become an important component of the marketization of China’s education. For example, in order to prepare their children for the competitive globalized world, Chinese parents consider learning English to be very important to the future of their children. A growing number of parents have sent their children to private tutoring classes or to private English schools in order to learn English (Mok, et al). Many bilingual private schools have been established to cater to the demand of middle and upper middle class parents. These elite or so called Gui Zu (noble) schools boast high educational standards, strict discipline, excellent learning conditions and environment, high technology, and high quality faculty, including some native English speakers (Lin, 1994). These schools charge stunningly high tuitions and fees—some equivalent to 35 or more years of income of an ordinary peasant in rural China (Mok, et al.). These private schools or “checkbook” schools are a luxury reserved for nouveau riche.

In addition to academic performance, Chinese parents increasingly expect their children to master a variety of skills. Equipping their children with artistic or athletic skills has been popular among urban middle class parents. Such skills can be counted as part of the national entrance examination scores for college, thereby giving them a better chance of getting into prestigious universities. These skills are considered as necessary stepping-stones in getting established in a successful career. According to a survey conducted by a market research company, 52%
of children under the age of 12 in China attend private extra-curricular classes
on weekends, and 62% of children aged 10-12 take additional private lessons in
English, math, music, art, dance and martial arts (Mok, et. al, 2009). Private tutors
and schools are flourishing under these demands.

However, private schools and education in China are diverse; the Gui Zu Xue Xiao, or noble schools, provide sophisticated instructional equipment and
luxurious accommodations serving only the elites, whereas the Min Ban Xue Xiao, or the people-run schools, operate from makeshift facilities catering to the masses, especially the unplanned children who were born out of the family planning policy (Kwong, 1997). As mentioned above, couples who have unplanned births are subject to severe penalties, including the high “social compensation fee [SCF],” job loss or demotion (Yang, 2007). Government policy also punishes unplanned children by denying them essential rights and social support. Ineligible for Hu Kou or the household registration 4, the unplanned children have no right to schooling, health care, state-sector employment, and a host of other state services and benefits (Fan & Huang, 1989). Parents still demand a basic education for their unplanned children. Under this social context, the Min Ban, or people-run schools, are set up in response to the inability of the current educational system to adapt to the rapid social reconfigurations and changes in society. These schools have played a supplementary and self-help function within the present educational system (Han, 2004). The emergence and expansion of Min Ban or people-run schools have basically filled the gap in compulsory education for unplanned children.

Moreover, the internal migration has also contributed to the emergence of
the people-run schools. Since the economic reforms initiated in the late 1970s,
China has undergone rapid modernization, industrialization, and urbanization. As urbanization expanded, so did the discrepancy between urban and rural incomes and living standards (China Labour Bulletin [CLB], 2009). As a result of such discrepancy, millions of farmers have left their homes and migrated to the cities in search of work and a better life. Large-scale internal migration has thus become one of the most prominent by-products of the socioeconomic development of China. According to the National Bureau of Statistics (NBS) of China (2009), there are 225.42 million migrant workers in China—more than the populations of the United Kingdom, France, and Australia combined (Hamey, 2008). An estimated 19 million children have accompanied their migrant parents to the cities (Chan, 2009). Because urban governments are only responsible for the education of children with an urban hu kuo, they have no obligations to educate migrant children. As the governments of the host cities do not have a responsibility to provide social welfare and services to migrants and their children, migrant children’s basic rights to health care, education, and socialization are denied, leading to a higher rate of emotional, behavioral, and psychological problems (Chan, 2009). Ignored, migrant children have become the city’s “invisible population.” As a collective response to such educational inequity, migrant communities are try-
ing to rebuild social networks and renew the sense of hope among the children through people-run migrant schools. People-run schools are thus an alternative for migrant children’s education.

Nonetheless, many of the Min Ban, or people-run schools, are plagued by high turnover of students, high rate of teacher turnover, less qualified teachers, poor school conditions, and substandard curriculum. Furthermore, Min Ban schools, face the problem of recruiting and retaining qualified teachers. The teacher turnover rate is high due to low wages and heavy teaching loads. For example, according to a survey of 59 Min Ban schools in Shanghai, Ding (2004) reports that about 78.3 percent of the teachers earned a monthly income of RMB 700 yuan or less, and, of these, 13.7 percent earned between RMB 300 yuan and RMB 500 yuan. The average monthly income for local office workers, however, was RMB 2,815 yuan (US$339) in 2004. Moreover, the operating conditions in Min Ban schools vary greatly, because these schools are set up with private funds and rely mainly on student tuition as revenue. Some more effective schools lease empty public school buildings, whereas others have classes in civilian homes, dilapidated warehouses, or primitive jerrybuilt houses (Ding, 2004; Han, 2004). Classrooms are overcrowded with as many as ninety-three students (Ding). Lighting, heating, and ventilation are poor; some lack fire exits, drinking water, sanitary facilities, health clinics, and playgrounds. The inequity of unplanned children’s education is further exacerbated by the substandard curriculum in Min Ban schools. Due to lack of funding, qualified teachers and facilities, many Min Ban schools can only offer basic Chinese language and math classes. In contrast, the urban students in public schools or in elite private schools have the opportunity to learn English, computer skills, music, arts, social studies, science, and so forth (Han, 2004).

The emergence and growing importance of private education in China have indeed evolved from China’s unique transitional social and economic context. Gui Zu or noble private schools are catering to China’s nouveau riche’s demand for the best education for their only children, who are often referred to as “the little emperors.” Moreover, these parents regard the elite private schools as a symbol of high social status (Arora, 2010). On the other hand, for parents of unplanned children and for many migrant parents, Min Ban, or people-run private schools, are “merely temporary venues for education, providing their children with a basic knowledge of mathematics, reading and writing” (Han. 2004, p. 44). Nonetheless, with the increasing number of self-financing students and non-government education providers (including elite private schools and people-run schools), China’s education has been undergoing diversification, marketization, privatization, commodification and decentralization (Borevskaya, 2003; Mok, et al., 2009). The one-child policy has led to inequities in schooling experiences for planned and unplanned children in China.
The One-Child Policy and Privatization of Education in China.

CONCLUSION

It is evident that one of the foremost objectives of China’s one-child policy is to control population growth in order to ensure quality of life. As noted at the Cairo Conference on Population in 1994, “any effort to slow population growth necessarily involved reducing poverty, seeking economic progress, improving the status of women, environmental protection, and reducing unsustainable consumption and production” (United Nations General Assembly, 1994, p.2). The profound impacts of the one-child policy on family structure, women’s rights and roles, and socialization process have been wildly acknowledged (Goodstadt, 1982; Chow & Chen, 1989; Greenhalgh, 2003; Yang, 2007). Less well known, however, is the nature and extent of this policy’s effect on the privatization of education in China. Therefore, this article reviews literature, media reports, and laws in order to document the direct and indirect impact of the one-child policy on China’s education system. It further investigates the relationship between the policy and the emergence of two types of private schools (Gui Zu Xue Xiao and Min Ban Xue Xiao). I argue that parents of only children put all their hopes on the single child and have higher expectations for him or her. Parents devote more financial resources, time, attention, and energy to the only children, which may contribute to their cognitive advancement and increase the ability of the children to compete academically. Gui Zu Xue Xiao have emerged to cater to these parents’ needs and demands. For many parents of unplanned children or migrant parents, Min Ban Xue Xiao are the alternative venue that their children can receive a basic education, since unplanned children are deprived of basic rights and social services.

Educational stratification and inequality is evident between the Gui Zu Xue Xiao and the Min Ban Xue Xiao, which reflects the increasing gap between the rich and the poor, and intensified social inequality between the haves and the have-nots. What will the Chinese government do to alleviate the growing tensions between different social groups, for example, the elite and the poor, the planned and unplanned people? Will China move towards attracting capital flows to cities and the amelioration of the unequal distribution of knowledge, power, language and material resources to growing populations? Will China develop into a society of fundamental social divisions between the poor and the rich with the emergence of binary provision in education? Will the education system continue to deny basic education rights to the unplanned children? What is the future of private schools (both the Gui Zu Xue Xiao and the Min Ban Xue Xiao) like? These are the questions that future research should address. Policy makers should also focus on new approaches to family planning and ways of improving educational and social equality for unplanned children. If the Chinese government fails to properly balance the tensions between economic efficiency and social inequality, these social problems could escalate and cause significant political pressures and turmoil.
NOTES

1. The “Great Proletarian Cultural Revolution” (1966-76) was launched by Chinese Communist Party (CCP) chairman Mao Zedong to stem what he perceived as the country’s drift away from socialism and toward the “restoration of capitalism.” The Cultural Revolution is now referred to in China as the “decade of chaos” and is generally regarded as one of the bleakest periods in the country’s modern history. The movement’s ideals were betrayed at every turn by its destructive impulses. The much-vaunted initiatives that were to transform the nation often had disastrous consequences for China’s education and cultural life. Economic development was disrupted by factional strife and misguided “ultraleftist” policies (Joseph, 2001).

2. Normal circumstances are broadly defined as that the couple is not ethnic minorities, is not from overseas, has siblings, has a healthy child. If, for example, the first child has health problems (broadly defined), the couple is allowed to have a second birth (Yang, 2007).

3. Currently, the amount of SCF to be paid for an out-of-plan birth is from 2 to 3 times the amount of the local per capita annual income (Yang, 2007, p. 473).

4. The government instituted a permanent and rigorous system of household registration or hu kou in 1955 to control migration (Han, 2004). A rural household (nong cu hu kou) or an urban household (cheng shi hu kou) was assigned to a Chinese citizen based on his or her mother’s residence. Local governments were responsible for providing the residents whose hu kou was registered in its jurisdiction with welfare and social services, including education, housing, and health care (CLB, 2009). Residents were not allowed to work or live outside the administrative boundaries of their household registration (hu kou) without permission of the authorities.

5. The current exchange rate is one US dollar equals 6.5 Ren Min Bi [RMB] yuan.

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LEARNING ABOUT AGING IN HONG KONG THROUGH A LINKED SERVICE LEARNING PROJECT

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ABSTRACT

With the goal of enhancing knowledge and skills related to cross-cultural aging, a linked service learning project was implemented through a partnership with an elderly community center in Hong Kong. The project linked Semester at Sea (SAS) study abroad students with gerontology students at Colorado State University through collaborative service learning activities. SAS students served as English tutors to older adults in Hong Kong. Gerontology students helped SAS students prepare for their service learning activity by creating instructional materials specific to aging in Hong Kong. The project evaluation demonstrated that all groups benefited from their involvement. SAS students reported positive cognitive and attitudinal outcomes, gerontology students believed their support of study abroad students enhanced their own learning of course content, and the Hong Kong elders reported positive benefits from their interactions with American students.

INTRODUCTION

Service learning has evolved as an alternative to the traditional passive, didactic process of education prevalent in postsecondary education. Over the past two decades, service learning courses have increased dramatically on college and university campuses and now involve approximately 12% of faculty (Campus Compact, 2007). Contemporary service learning practices are grounded in Dewey’s (1938) and Kolb’s (1984) philosophies of experiential education that purport that this form of education provides valuable opportunities to enhance conceptual understanding, apply abstract concepts, and advance communication, teamwork, and leadership skills.
Research demonstrates that through service learning, students have the opportunity to develop professional and personal competencies and perspectives that are not so easily gained with traditional teaching methodologies (Fruhauf, Jarrott, & Lambert-Shute, 2004; Flannery & Pragman, 2008). Through service learning, students are providing a service to others and, at the same time, learning and developing greater understanding about complex issues in a particular field of study.

Service learning typically involves application of content knowledge, reflection, and skill development. Reflection differentiates service learning from other forms of experiential learning in that it stimulates deeper thinking and an opportunity for students to examine their own beliefs, values, and stereotypes (Fruhauf et al., 2004). A successful service learning project also requires background knowledge about the cultural context in which the project will be implemented (Cook, 2008).

Service learning activities have expanded into the international arena in recent years. International service learning combines academic instruction and service in an international context with the general objectives of increasing global awareness and intercultural understanding (Crabtree, 2008). Bringle and Hatcher (2011) conceptualize international service learning as the intersection of three different educational domains: service learning, study abroad, and international education. Through this intersection, an opportunity is provided for study abroad students to have educationally meaningful experiences as they interact with, learn from, and contribute to an international community. The service experience adds an enriching dimension to the study abroad experience and gives the opportunity for a deeper understanding of cross-cultural content.

Effective international service learning, like service learning in general, is the result of intentional design. The most effective instructional design processes are those which begin with a clear understanding of the intended instructional outcomes for the activity (Plater, Jones, Bringle, & Clayton, 2009). While the benefits of international service learning are receiving increased attention, the number of students who currently benefit remains quite small. While study abroad participation has doubled over the past decade, the percentage is only about 1% of all students enrolled in U.S. higher education (International Institute of Education, 2010).

Cook (2008) has shown that strong potential exists for students to engage in international service learning opportunities while remaining on their own campuses. Through a collaborative grant writing project conducted electronically, Cook demonstrated the effectiveness of international service learning “at a distance” for undergraduate students unable to travel internationally. In this project, students in a senior capstone course on grant writing and program development assisted a South African non-profit organization to enhance their programs. In addition to providing a completed grant proposal to the organization based on their stated priorities, U.S. students advanced their own grant-writing skills, expanded their
awareness of contemporary societal issues in South Africa, and gained valuable knowledge in culturally-relevant program planning. Advances in technology and electronic communication enable this form of service learning to be a viable option for students to learn more about other cultures.

The project described in this article further expanded the traditional model of international service learning using a unique design that linked gerontology students studying on a U.S. campus with study abroad students visiting Hong Kong. The learning objective for both groups was to enhance learning about older adults in Hong Kong.

THE IMPORTANCE OF A GLOBAL PERSPECTIVE ON AGING

Cross-cultural gerontology has received limited attention in the international education literature, but it is a field that is growing due to changing world demographics. Estimates suggest that by 2040 the world’s population will include 1.3 billion older people (Kinsella, He, & U.S. Census Bureau, 2009). This increase in the global aging population coupled with the increase in the number of culturally diverse elders makes cross-cultural experiences an important component of students’ education and training in the United States (Elliott, 2005). Support for cross-cultural service and curriculum development has become a current focus of gerontological pedagogy as colleges and universities strive to integrate international perspectives into their courses (Ingman, Amin, Clarke, & Brune, 2010; Kunkel, 2009; Shenk & Groger, 2005). Further, the involvement of national and international organizations (e.g., the Association for Gerontology in Higher Education and the Gerontological Society of America) in global aging issues has raised awareness of the fact that gerontology is quickly becoming a globalized field of study (Kunkel, 2009). As a result, the next decade will witness the development of increased international opportunities for students studying gerontology.

Mezirow’s (2000) transformational learning theory suggests that students often approach international experiences with a set of unexamined assumptions and beliefs about other cultures. Another level of biases and expectations can exist when students interact with older adults outside their home cultures. In Mezirow’s conceptual model, an examination of one’s assumptions and stereotypes when confronted with direct experience often leads to a reconstruction of meanings, resulting in powerful learning experiences. In addition to reflecting on their own perspectives, college and university students involved in international service learning also critique the knowledge learned in the classroom and its applicability to real-life situations.

OLDER ADULTS IN HONG KONG

Hong Kong became a Special Administrative Region (SAR) of the People’s Republic of China in 1997, after 150 years as a British colony. Although West-
ern practices have been prevalent in Hong Kong among the young and better-educated, Chinese culture is still dominant among the older population (Chou, 2009). According to the Census and Statistics Department (2007), 95 percent of the Hong Kong population is ethnically Chinese. Most also come from agrarian backgrounds and are now the first generation to grow old in a highly industrialized city.

As a result of declining birth rates and increased longevity, Hong Kong has a rapidly growing aging population which is expected to double in the next 25 years (Chou, 2009; Leung, Lui, & Chi, 2005). In 2009, the elderly population 65 and over made up a total of 12.8% of the entire population in Hong Kong (Food and Health Bureau, 2011). In 2010, the life expectancy at birth for males in Hong Kong was 80.0 years and for females it was 85.9 years (Census and Statistics Department, 2011).

Due to the size and needs of the older segment of the population, a wide range of scholarly work is currently available on elderly persons in densely-populated Hong Kong (Phillips, Siu, Yeh, & Cheng, 2008; Woo, in press). One recent study focused on a large sample of Hong Kong elderly adults over 60 and found that 23.5% thought that the best years of their lives were in late adulthood (Lee, 2011).

In addition to issues of quality of life, health, social support, caregiving, and a variety of other topics, researchers have investigated the continuing education needs and attitudes of Hong Kong’s elderly population. Fok (2010) conducted in-depth interviews with Chinese older adults in Hong Kong and found that the majority were enthusiastic and had serious attitudes toward learning in the later stages of their lives, reflecting strong cultural values. These traits were demonstrated through their class attendance, willingness to study outside of class, and time devoted to learning new information and developing new skills. The most common reason the interviewees gave for taking courses was that they wanted to keep pace with society and be part of it. Other reasons included boredom and available time. Rapid technological and social change has rendered much of the knowledge and skills of older adults obsolete. In a city like Hong Kong which “glorifies productivity and success” (Fok, 2010, p. 308) older adults appear to be influenced by attitudes of contemporary society.

Research has confirmed that continued learning in old age is related to good health, life satisfaction, and independence. In a recent study, Fok (2010) found that continued learning contributed to higher self-esteem of the older adults he interviewed. The cognitive benefits of education during later life have also been well documented. According to Leung and her colleagues (2011), “Encouraging an older person to lead an active lifestyle, especially to engage in intellectual activities, offers a practical means of preserving cognitive function…” (p. 46).

Recognizing the importance of learning in the later years of life, the Hong Kong government has established policies and programs to encourage participation and enhance the quality of life of elderly persons. While learning opportunities are available to most older adults in Hong Kong and appear to be meeting an
important need, Leung, Lui, and Chi (2005) believe strategies to foster lifelong learning should be strengthened. These researchers recommend establishing collaborative systems between the government, NGOs, universities, and professionals from different disciplines for more effective planning and implementation.

**DESCRIPTION OF THE PROJECT**

Students in an interdisciplinary gerontology course, *Perspectives in Gerontology*, at Colorado State University (CSU) were electronically linked with Semester at Sea (SAS) study abroad students. The purpose of the linkage was twofold: (1) to enhance preparation of study abroad students for their service learning project with older adults, and (2) to enrich course content for gerontology students through a “distance” international service learning activity in which they applied course content to a community project in Hong Kong. The two groups of students involved in the project had different goals and expected learning outcomes for their complementary service activities. A common denominator was enhanced learning about cross-cultural aging through service learning, albeit through very different avenues. Figure 1 depicts the core elements of this reciprocal learning model.

Semester at Sea is a ship-based study abroad program operated by the Institute of Shipboard Education with academic credits awarded through the University of Virginia. Approximately 650-700 undergraduate students and 30 faculty from various U.S. colleges and universities circumnavigate the globe each semester, holding regular academic classes at sea and participating in field experiences in approximately ten ports. One of these field experiences involved tutoring older adult learners enrolled in an English language class at the Shun Lee Neighborhood Elderly Centre in Hong Kong. Fifteen SAS students chose to participate at the Hong Kong Elderly Centre as a service learning site. The service learning activity gave older adult learners the opportunity to practice their English language skills and expand their vocabulary while interacting with U.S. college students. The SAS students (12 females and 3 males) represented diverse majors enrolled in a service learning course; none had formal coursework or experience in gerontology.

*Perspectives in Gerontology* is a required course for the undergraduate Gerontology Interdisciplinary Minor at Colorado State University. This interdisciplinary course covers a variety of perspectives (i.e., psychological, sociological, philosophical, biological, familial and developmental) on aging. The class meets once a week for three hours, and one class session usually focuses on cross-cultural aging issues. This class session typically includes a general discussion about global aging (i.e., demographic shifts, population changes, differences in life expectancy, and implications of an aging world on society) and aging in a specific country. To strengthen and expand the study of cross-cultural aging during the term the current international service learning project was implemented, students
were given the option of preparing an instructional packet on aging in Hong Kong for SAS students. Of the 24 students enrolled in the course, eight students (6 females and 2 males) selected this option and collaborated on this service learning task. Students accessed current information from international databases, government documents, research reports, and other international online resources. Through this project gerontology students in the U.S. developed culturally-relevant instructional materials for their study abroad peers.

**Stages of the Project**

The linked course project consisted of three distinct stages: (1) instructor and international partner collaboration, (2) preparation and implementation, and (3) debriefing and evaluation.

**Stage 1: Instructor and International Partner Collaboration.** The SAS instructor supervising the Hong Kong service learning activity and the gerontology instructor met on a regular basis beginning several months prior to the start of academic term in which the project was implemented. Particular attention was given to objectives of the project and the most effective and feasible means of implementation to maximize complementarity. As a result, the project began with clear mutually-defined goals and expectations. The SAS instructor had visited the Shun Lee Neighbourhood Elderly Centre two years prior with another group of SAS students. She had maintained communication with the centre director and one of the elder leaders in the English class. This first-hand experience and the establishment of a solid relationship with the Hong Kong Neighbourhood Centre provided a crucial foundation for implementation of the current project.

**Stage 2: Preparation and Implementation.** Both groups of students were given information related to the linked service learning activity early in the academic term. As part of their planning for the service learning project in Hong Kong, the SAS student group identified key areas in which they needed more background information to interact effectively with the older adult learners. These areas were then communicated to the CSU gerontology students, who also added topics they thought to be important based on their prior knowledge of working with older adults.

In consultation with their instructor, CSU students refined the topics for the instructional modules and then proceeded to conduct library and internet research. A CSU doctoral student from Hong Kong specializing in gerontology was also available as a resource for the gerontology students. The resulting eight-page instructional packet completed by the CSU gerontology students included brief summaries and key points from the professional literature on traditional and contemporary views toward aging in Hong Kong, cultural practices and traditions, adult learning principles, and the demographics of older Hong Kong residents. This document was submitted to both the course instructor and to the SAS students.

The SAS students reviewed the materials in the instructional packet as they planned their four-hour service learning visit. The logistics of the visit had been...
arranged well in advance in coordination with the centre director. The project was implemented when the Semester at Sea ship was in port in Hong Kong for two days. Upon arrival at the Community Centre, the students were greeted by approximately 20 older learners (16 females, 4 males) ranging in age from 60-80 years, their teacher, and the centre staff.

The SAS students introduced a Bingo game as a way of building vocabulary with words associated with the Semester at Sea academic voyage (i.e., ship, library). All students were paired with older learners and assisted them while the game was played. The game format allowed time for informal interaction between students and the older learners. Visual aids were also provided to reinforce learning and retention as well as to contribute to the relaxed atmosphere. This session was followed by additional group time for discussion of programs for older adults in the United States, a topic raised by the Hong Kong class members who seemed very eager to learn about their American peers. A SAS videographer and photographer were also present and documented the learning experience for later review in class.

Structured group opportunities for student reflection were provided immediately after the service learning activity and continued after returning to the ship though ongoing reflection assignments. The evaluation methods described in the following section were designed to prompt further reflection as students were asked to consider what they had learned from the experience.

**Stage 3: Debriefing and Evaluation.** Upon completion of their service learning experience in Hong Kong, SAS students were asked to evaluate the educational value of the project. Shortly thereafter, photos and a short video of the English language class at the Shun Lee Neighbourhood Elderly Centre were shown to the CSU gerontology students. Feedback from SAS students was also shared regarding the usefulness of the instructional module as well as concrete suggestions for refining the materials. CSU students were then asked to critique the value of the linked project for their own learning related to international aging.

**BENEFITS OF THE LINKED PROJECT TO PARTICIPANTS**

When creating new innovative curriculum initiatives with international partners, evaluation of outcomes is an essential ingredient. Gelmon (2000) has advocated for increased assessment of service learning activities, and points out that this component has been lacking in the professional literature. Input was collected from all participants to better understand the impact and benefit of the project of the current project.

**Semester at Sea Students.** Semester at Sea students were asked to indicate on a Likert scale (1=not at all; 5=definitely) the degree to which their participation in the service learning project resulted in enhanced cognitive and affective learning on 11 items. As indicated in Table 1, all participating SAS students thought the service learning activity was an effective way to be more meaningfully en-
gaged with the host culture while in port. High ratings were also given to aspects of learning about elderly adults in Hong Kong and their culture. As a result of the experience, students were more confident working in unfamiliar situations with individuals and groups from other cultures. They also indicated increased motivation to learn about other cultures. In addition, the service learning experience resulted in students gaining personal insights.

Only moderate ratings were given for gaining a “better understanding of my own culture.” Similar future projects might be designed to incorporate a comparative perspective. Informal discussions with SAS students revealed that many had limited experience with older adults in their own country (the United States), and had limited information on aging in United States in general. The same Likert scale asked students to report the skills the service project required them to use. High ratings were given to teaching ($M = 5.0$), planning ($M = 4.9$), communication ($M = 4.7$), group process ($M = 4.6$), and teamwork ($M = 4.6$).

A critical component directly related to the linked service learning approach was the evaluation of the instructional materials prepared by the CSU students. When asked to rate the value of these materials on a Likert scale from 1 (not useful at all) to 5 (very useful), 100% of the SAS students rated the materials as either useful or very useful in preparing for their service learning experience in Hong Kong. When asked how the materials could be improved, the service learning students indicated they would have liked more information on daily life of Hong Kong older adults and general background on Hong Kong as well as more information on cultural customs and additional references to websites and books. Since few of the service learning students had experience working directly with older adults, they also said they would have liked to have more information on the elderly population in the United States as well as suggestions for questions to ask the older learners to facilitate interaction.

Overall, the SAS students believed their learning about cross-cultural aging, and elderly adults in general, was significantly enhanced. One student described the experience as “life-changing.” More revealing are the student comments regarding the most significant aspect of the service-learning experience. One student wrote: “The dedication and time these elderly put into learning our language was inspiring. I learned you are never too old to do something.” Another reflected on her learning experience as follows:

“I learned that we all want to learn and have a meaningful life. Though cultures differ so much, there are still universal similarities. The significant part was the excitement and preparation of the elderly. It was impossible not to catch their enthusiasm. I left with a feeling of fulfillment and like I had done something meaningful.”

The personal insights reported by the SAS students paralleled findings in the service learning research literature on the positive effect of service learning on at-
titudes, perceptions, and level of engagement. In his review of research on service learning outcomes, Eyler (2011) reported that service learning participation has been shown to contribute to reduced stereotypes and increased tolerance and confidence.

**CSU Gerontology Students.** The feedback from CSU Gerontology students on the linked service learning project was very positive. The following students’ comments supported the model of the linked service learning design and illustrated the value-added benefits of this learning approach:

“Knowing that my work was not just being graded but was going to be used by other students made me want to do a better job on this project.”

“I think both sides benefit from educating each other on not only aging, but culture, lifestyle, and general knowledge of other cultures in the world.”

“I really liked hearing how we impacted them and how the project turned out.”

“It was a creative way to use resources.”

“It’s nice to see our work go so far.”

“I think it is awesome to have a linked course. In college it is rare to see your work pay off or actually be applicable in the real world. Helping other college students and those students contributing to others makes all the research worth it for sure.”

“I felt that since this project was actually real-life, i.e., giving information to someone who is not knowledgeable about the subject, made me feel more responsible in providing accurate information.”

The CSU gerontology instructor determined that the research by the CSU students resulted in an expanded knowledge base on cross-cultural aging that far exceeded the material covered in the textbook or through lectures. Several students said they had gained important insights about cross-cultural aging through the assignment. In addition, the students enhanced their cognitive and applied skills as illustrated by the following statements:

“The skill that I strengthened was my research skill and determining the important facts that would be important to SAS students.”

“I expanded my research skills and expanded my knowledge and respect for other cultures.”

“I learned the importance of service learning and the impact it has on students and organizations.”

“I strengthened my ability to take a bulk of information and narrow in on what was important. Also, strengthening my ability to think in the place of another (What did they really know? How would I want the material presented if I were them?)”

When asked how to improve the linked course project in the future, the major-
ity of the students mentioned more frequent and direct communication with the SAS students. More strategic use of current technology and social media (i.e., a Facebook site, videoconferencing via Skype, direct emailing to the Hong Kong elders) could have facilitated an even stronger connection between the two groups of students and with the older adults in Hong Kong.

One student suggested that the feedback from the current service activity be used to improve future projects. Another had the novel idea of CSU students training a small group of SAS students who could then work on service activities in different countries and be the “gerontology experts” on their voyage. The project appeared to have stimulated students’ thinking about creating effective training techniques and materials as well as the value of using feedback to enhance future international service learning initiatives.

**Older Learners.** Evaluation of the impact on the older adult learners at the Hong Kong Neighbourhood Centre was also conducted. Most service learning projects tend to focus exclusively on assessment of students without gathering feedback from the community served (Gelmon, Holland, Driscoll, Spring, & Kerrigan, 2001). In fact, Tonkin (2011) notes that it is rare that those who are served are asked about their views regarding the value of a service learning activity. He emphasizes that “community voice” is integral in international service learning assessment and research, and this community input provides a key element in identifying effective practices. Given the critical role of the partner organization to the success of the current project, feedback from the older adult learners was considered to be essential.

One older learner, together with the centre director, volunteered to solicit comments from his peers. Using a rating scale (with 5 indicating the highest level of satisfaction), the older learners gave a satisfaction level of 4.9 points to the service learning visit. Their specific comments were translated as follows:

“The visit was very successful, we learned a lot from your students, and it was such a perfect performance from your side.”

“The students paid this visit from the bottom of their heart. They are polite and easy to get along with. They take care of elders.”

“The game Bingo is very good. We are not only learning English phrases but also getting fun from this game. Bingo is advised to add more words related to Semester At Sea into the game Bingo. This will help us to have a better and deeper understanding of Semester At Sea. For those handouts, it is suggested having both English and Chinese versions.”

“Our tutor also used BINGO and re-edited the learning materials and helped us to refresh those vocabularies. Those are the things that you brought us and it was really helpful and easy for us to remember.”

The group also recommended an afternoon, instead of a morning visit, to allow a longer period of time for interaction. They also indicated an interest in
learning more about elderly centers in the United States and suggested use of a PowerPoint presentation to show visual images of older adults participating in programs at these facilities.

CONCLUSION, CHALLENGES, AND RECOMMENDATIONS

Incorporating international projects in the classroom provides students with insights not gained through traditional assignments. Today’s college and university students have grown up in the computer age, are technology savvy, and are generally comfortable communicating at a distance. Modern technologies now provide educators and students with opportunities for collaboration and access to world-wide resources. This access is particularly important given the small number of American students who study abroad. The project described in this article stretched geographical boundaries and enriched the learning experience for both students studying abroad as well as students learning in a campus-based U.S. classroom.

Overall, the project met its stated objectives. The practical application of academic content facilitated more meaningful learning about international aging by gerontology students. At the same time, study abroad students became more confident in their ability to effectively interact with an elderly adult population in Hong Kong, and stereotypes were challenged for both groups. This linked service learning activity holds potential for greater student collaboration on college/university campuses and through study abroad experiences. Giles and Eyler (1998) raised the question “How can service-learning enhance subject matter?” and stated that this question was one of the top unanswered, yet most important, questions in the field of service learning. The outcomes from the project described in this article contribute to an ever-expanding base of knowledge that addresses this question and presents a unique approach to strengthening the study of cross-cultural aging.

While most gerontology students will not seek international careers, they need to understand that global aging issues are increasingly important as the cultural diversity within one’s own country increases. In order to prepare a skilled and professional workforce primed to meet the needs of culturally diverse older adults, training should include practical and culturally relevant content (Ingman et al., 2010; Yeo & McBride, 2009). Students of today can expand their cultural horizons and cross-cultural understanding of gerontology through well structured assignments that incorporate tools such as real-time chat rooms, virtual field trips, and participation in global group projects that have real-life applications. By integrating service into the teaching and learning process, more students will have the opportunity to become engaged internationally even while remaining on their own campuses (Wall, Hardin, & Harris, 2005). The challenge for instructors is to create meaningful learning experiences that engage students with global communities in more effective ways.
It is highly recommended that partners in a linked project have prior direct experience in the country in which the service learning project will be implemented. Cross-cultural collaborations involve unique challenges as service learning partners work through different communication styles, perceptions of time, approaches to organization, and preferred methods of interaction. For example, in the current project the American instructors were accustomed to email communication with international colleagues but the Hong Kong contact preferred to hold planning sessions by phone. In this particular case, the individual was more comfortable speaking rather than writing in English. Also, detailed advance planning for Semester at Sea instruction usually takes place a full year prior to an actual voyage. While the Elderly Community Centre director was extremely cooperative during the planning stage, she preferred to do planning closer to the time when students would actually be arriving in Hong Kong since schedules and personnel can change frequently in these settings. Careful planning, clear and consistent communication, and close collaboration between instructors and with the Hong Kong partner were essential to the success of the linked project.

Communication technologies are rapidly changing and expanding. While these emerging tools present extraordinary opportunities for stronger international connections for undergraduate students, attention needs to be given to the most appropriate use of these technologies. Cost, access, and support of the project goals are critical in the choice of technologies by instructors. In the project described in this article, increased use of current technology and social media (i.e., a Facebook site, videoconferencing via Skype) would have enhanced direct student-to-student interactions. While the high costs of internet access at sea prohibited the use of advanced technologies and social networking in the current project, with sufficient advance planning these challenges can be overcome in the future. Further, we believe that connecting students via technology with the Hong Kong elders prior to their visit to the Centre would likely have made both students and the elders’ experiences much richer.

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ternational Education, 37(2), 6-16.
Learning About Aging in Hong Kong through a Linked Service Learning Project


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**Figure 1**

*Engaging Undergraduate Students through Linked International Service Learning Activities*
Table 1
*SAS Student Evaluation of Service Learning Project*

<table>
<thead>
<tr>
<th>Item</th>
<th>M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Helped me to be more meaningfully engaged while in port</td>
<td>5.0</td>
</tr>
<tr>
<td>Helped me learn about the elderly in Hong Kong</td>
<td>4.9</td>
</tr>
<tr>
<td>Made me more confident in working with individuals and groups from other cultures</td>
<td>4.7</td>
</tr>
<tr>
<td>Was very rewarding</td>
<td>4.7</td>
</tr>
<tr>
<td>Challenged me to reflect on my role as a global citizen</td>
<td>4.6</td>
</tr>
<tr>
<td>Made me more confident in unfamiliar situations</td>
<td>4.6</td>
</tr>
<tr>
<td>Helped me learn about Hong Kong/Chinese culture</td>
<td>4.4</td>
</tr>
<tr>
<td>Motivated me to learn more about this culture</td>
<td>4.4</td>
</tr>
<tr>
<td>Gave me personal insights</td>
<td>4.4</td>
</tr>
<tr>
<td>Helped me learn about teaching English as a second language</td>
<td>4.1</td>
</tr>
<tr>
<td>Gave me a better understanding of my own culture</td>
<td>3.7</td>
</tr>
</tbody>
</table>

*Note. N = 15. Scale of 1 (not at all) to 5 (definitely)*
THE IMPORTANCE OF CONTEXT FOR TEACHING CONTROVERSIAL ISSUES IN INTERNATIONAL SETTINGS

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ABSTRACT

This article explores the underlying and epiphenomenal manifestations of milieus and contexts that serve to control and undermine, or provide pathways to, the discussion of controversial issues in classrooms. Given the importance of teaching and discussing controversial issues, as an essential lever for democratic citizenship education, I draw on two empirical case studies in Korea and Latvia. These cases suggest a variety of implications for teacher education programs and education policy makers, both domestically and abroad, including the need for teachers to develop a clear rationale for teaching controversial issues; understand their role as mediator of the larger normative mandate of citizenship education in their school and the reality of their particular context; and reflect upon their pivotal role as curricularist, gatekeeper, and professional within context and, in some cases, change the epistemological cultures of their classrooms and schools to foster free expression of ideas within an open and inviting classroom climate.

INTRODUCTION

The primary objective of this article is to explore the underlying and epiphenomenal manifestations of milieus and context that serve to control and undermine, or provide pathways to, the discussion of controversial issues in classrooms. Controversial issues are integral to democratic education (Camicia, 2008; Engle, 1960; Engle & Ochoa, 1988; Graseck, 2009; Hahn, 1991; Harwood & Hahn, 1990; Hess, 2008; 2009; Hunt & Metcalf, 1968; Lee, 2004; Ochoa-Becker, 2007; Oliver & Shaver, 1966). Controversies constitute a normative anchor within citizenship education curriculum, and the degree to which controversial issues are subjected to reflection has profound implications for the vibrancy of a democracy. If we think of democracy
not in terms of governmental structures but in Dewey’s (1916) “mode of associated living, of conjoint communicated experience” (p. 87), citizenship is predicated on foundational ideas of free participation and communication.

Engaging controversial issues pays a democratic dividend for student-citizens by increasing civic participation, critical thinking skills, interpersonal skills, content understanding, and political activity. These judgments also elevate interest in current events, social studies, and social issues, and increase the development of tolerance. Students tend to develop democratic values such as open-mindedness, dissent, skepticism, and embracing diversity. (Curtis & Shaver, 1980; Goldensen, 1978; Harwood & Hahn, 1990; Hess & Ganzler, 2006; Hess & Posselt, 2002; Hess, 2009; Misco, 2010a, 2011; Remy, 1972; Torney-Purta et al., 2002).

Students who engage in discussions involving controversial issues are well-positioned to become agents of change and to recognize, celebrate, and embrace diversity among and within groups, as well as to expand content knowledge though the consideration of other perspectives and to develop understandings of justice and the common good (Crossa, 2005; King, 2009; Young, 1996). In addition, opening heretofore taboo subjects and entering into polemical discussions help to make political issues become meaningful and relevant for students (McGowan, McGowan, & Lombard, 1994). Challenging assumptions and addressing prejudices (Gaughan, 2001) fit within the aims of prejudice reduction, democratic citizenship education, and reflective pedagogy, where “right” answers are not sought (Graseck, 2009; Hunt & Metcalf, 1968).

Ideally, schooling should challenge local traditions (Hlebowitsh, 2005), and unearthing controversies can help shift student focus from authoritative narratives and perspectives to heterogeneous micronarratives that draw on and challenge local and individual knowledge (Levinson, 2008). Discussions of controversial topics can help widen and enlarge student experiences in terms of both the normativity of topics and also the multiple perspectives entertained among teachers and peers to establish understandings and formulate solutions without succumbing to the tyranny of forced meaning (Giroux, 1983) and the often seductive appeal of prevailing belief and opinion. Discussing controversial issues can overlap with ideological battles outside the school, or within it, but it trumps those given the essential mandate for students to deliberate about the common good, take a stand on issues, and look at issues with multiple sources and perspectives (Hess, 2004; Marcus & Stoddard, 2009).

The context of controversial issues matters to a degree that is “not always obvious in other Western nations,” and we need to be wary of “too-facile application of policies and ideas that are well-suited for other contexts” (Barton & McCully, 2007, p. 127). There are no nomothetic prescriptions for addressing controversial issues independent of context and certainly no “easy answers” for devising their enactment within learning experiences (Barton & McCully, 2007, p. 127). Sometimes a critical obstacle hinges on the “social and political winds” that blow through the school and “grab hold of the curriculum in a way that limits the range of expression that can emerge” (Hlebowitsh, 2005, p. 222). Yet, decontextualized fidelity approaches
to curriculum implementation have enjoyed resurgence within a measurement and high-stakes era of teaching, whereby context, or milieus, can overpower other commonplaces to stymie the discussion of controversial issues (Misco, 2010b). When teachers subscribe to a fidelity model, controversies are often no longer important or are rendered independent of social context and milieus which also risks enactment. In addition, pushing too far into the discomfort zone can often invite rejection of enactment (McCully, 2006; Patrick, 2005). Given these hazards, the sociohistorical location of the teacher and the teacher’s negotiation of context is critical for the normative decision about what should be done about an issue, which is typically underpinned by the differences in “key beliefs or understandings about the issue held by the protagonists” (Oulton, Dillon, & Grace, 2004, p. 411).

THE CONTEXTUAL MILIEUS

Schwab (1973) distilled educational phenomena into four commonplaces, in which someone is teaching something to someone, somewhere (teacher, subject matter, learner, and milieu), all of which demand coordination when we focus on the ultimate goal of doing what is best for the learner as a human being, child, and citizen. It is the final commonplace, which Schwab referred to as “the milieus,” that include the school, classroom, and relationships of students to each other. The relationships of students to subgroups, students to structures of authority, teachers to educational leaders, as well as student to student, teacher to student, and teacher to teacher all help shape not only what is taught, but also how it is taught. Other relevant milieus include the “family, community, the particular groupings of religious, class or ethnic genus” (p. 367) and the aspirations of these groups. Milieus also include the relations of groups and individuals within town, city, country, and locale as “represented in miniature” by the students of each genus (p. 367). Many of these milieus—in the form of school structure, community members, and parents who want students to reflect parental views—undermine a marketplace of ideas and act as barriers to discussion of controversy (Hess, 2009).

Schwab (1973) suggests that connected to these milieus are what teachers know, the degree of flexibility they bring to teaching and learning new techniques, as well as the “biases they bring” (p. 367). When considering controversial issues within overlapping milieus, Schwab emphasizes whether learning experiences will not only lead to the improvement of the community, but also if they will be acceptable to the community and if not, what steps can be taken to facilitate acceptance. Teacher preparation, student relations, and the juxtaposition of multiple layers of incommensurable values suggest that these milieus are of paramount consideration for designing learning experiences that address controversial issues. Even with a provocative curriculum, eager students, and well-prepared teachers poised to confront controversy, the milieus act as pathways and obstacles to opening and discussing closed areas. Controversial issues span both societal and educational knowledge domains, and learning about these issues is a negotiation between individuals and
their social milieu (Barnett & Hodson, 2001).

Context and the milieux are therefore of paramount concern for teaching controversial issues as they influence and act in conjunction with prior knowledge to influence reticence (Ersoy, 2010; Leib, 1998). Employing Pedagogical Context Knowledge (PCK) (Barnett & Hodson, 2001) is instructive here as it focuses our attention on the knowledge of learners’ understanding, knowledge of effective teaching strategies for particular content, alternative methods of presenting the subject matter, and curricular saliency. Part and parcel of saliency is teacher judgment of matters of depth and treatment because a “teacher’s classroom decisions are located in, and contingent upon, a specific social, cultural, and educational context” (Barnett & Hodson, 2001, p. 433).

Because controversies change over time, as personal narratives are interpreted and mediated with local knowledge to create new knowledge (Levinson, 2008), context is a critical lever for how an issue is filtered, rendered, or avoided. Controversial issues are controversial because they ultimately speak to normative value judgments, which individuals frame within their ethical principles (Oulton, Dillon, & Grace, 2004), but also within historical, social, political, and ethnic contexts. Often, it is not the issue itself that prompts the type or degree of treatment in a classroom but rather the dynamics as shaped through the attitudes and experiences of participants (McCully, 2006). It is not the teaching controversy which raises concerns typically, but the moral, social, and political substructure and the ways by which schools handle these issues that provoke resistance and brings about teacher protection-oriented postures (Bridges, 1986; Byford, Lennon, & Russell, 2009). For example, Taiwanese curricula focuses on social and cultural issues instead of controversial political ones (Meihui, 2004), and only the top schools in Singapore provide students with the opportunity to debate controversial issues (Gopinathan & Sharpe, 2004). Conflicting beliefs about issues reflect “contested terrain supported by deeply embedded cultural values” (Evans, Avery, & Pederson, 2000, p. 298), and these can be both recondite and readily apparent. Ultimately there are “multiple tensions” and “conflicting demands” that inform classroom life, including school policies directly relating to the treatment of controversial issues (Barnett & Hodson, 2001, p. 434).

Of the numerous variables influencing the discussion of controversial issues, a key determinant is the extent to which the classroom enjoys an “open climate” where students are encouraged to examine competing views of controversial public issues. But classroom climate, while important for a flow of diverse ideas among teachers and peers (Hahn, 1998), is not a panacea. Teachers are not the sole condition of climate: student perception of peers can have a profound influence leading to self-censure (Hess, 2002; King, 2009). School environmental factors--context and milieu--are significant variables where the “wider cultural milieu also mediates the effects of classroom climate” (Hahn & Tocci, 1990, p. 358) and an intractable web of “social, cultural, and historical relations in which students themselves are situated” (King, 2009, p. 240). In some communities, issues simply take on more
controversy if they are perceived as “inappropriate for the curriculum or because there is pressure to deal with only one perspective on an issue” (Hess, 2002, p. 14).

**BRIEF CASE STUDIES OF CONTEXT**

Given the critical role of context and the importance of unique characteristics of the milieus in different cultures, the explications of two brief cases highlight the ways in which context can serve as a pathway or as an obstacle to the discussion of controversial issues. Rather than analyze the details of one case, this article explores multiple cases which illustrate the similarities and differences of context as rooted in culture and explores the possible ways in which we might consider working in other contexts to breathe life into controversial issues discussions within classrooms. In Latvia, I conducted multiple process-oriented studies concerning teacher attitudes about new curricular, documentation of a curriculum-making process, and longitudinal inquiry in the nature of implementation five years later. In Korea, my research is nascent, with formal interviews taking place during the winter of 2011-2012. In both cases, I was clearly an outsider, known to the respondents as a researcher keenly interested in the challenges and pathways to broaching controversial issues in unique contexts. Finally, as a researcher I recognize both my positionality as a Westerner and a personal perspective informed by life within the United States. Yet, the sum total of my international experiences and research has allowed me to be conscious of that limitation and assume a more transnational and global perspective on controversial issue instruction.

**South Korea**

For the past 35 years, moral education has existed as an independent and compulsory core subject in South Korea, serving as a foundation for all education and enjoying 1-2 hours per week of class-time in secondary schools (Jung, 2010). Within this course, great emphasis is placed on the necessity for children to respect cultural traditions and authorities through “appropriate role behavior” (Baek, 2002), not unlike the morality of custom Dewey outlined decades ago (Dewey, 1908/1960). As one of the most Confucian countries in the world (Koh, 1996), in which filial piety and respect for elders are regarded as the most important virtues, South Korean culture positions students to view the self as interdependent and irrevocably connected to others (Jeong, 2005; Jung, 2010; Shweder et al., 1998). This *gemeinschaft* cultural orientation, reinforced in social education classes, influences individuals to refrain from “pursuing and advocating one’s own desires, interests, and rights” (Jeong, 2005, p. 80). This orientation benefits student agility to take on multiple perspectives (Jeong, 2005) but can ultimately undermine reason (Choi & Choi, 1990) and create a more conforming, authoritarian, and status-oriented culture (Baek, 2002). Within this cultural paradigm, individuals become defined in reference to their relationships with others (Poole, 1991), and Confucian hierarchy serves as a conduit for the transmission of tradi-
The tension of the individual versus the group as the unit for decision-making about controversial issues is highlighted in moral education classes. Since 1993, the social studies curriculum of South Korea has sought to promote “democratic values and attitudes” and “decision-making processes” in order to cultivate independent and creative thinkers who respect human rights and are able to make autonomous decisions about social issues (South Korean Ministry of Education and Human Resources Development, 2001). This curriculum calls for open classrooms so that students can explore differences in terms of multiple perspectives and issues and feel comfortable expressing opinions (Choi, 2010). Traditionally, families have taken on the main responsibility of moral education, but due to a lack of time to devote to education, concerns about harmful surroundings and moral pressures in society, parents now prefer schools to serve as the main moral educator (Jung, 2010). Some of these pressures include the growing fear of Americanization, which is perceived as corrupting traditional values as found in popular culture and individualistic, amoral expressions (Joh, 2002). Western educational systems began to influence South Korea following liberation (Chu, Park, & Hoge, 2002), and globalization has exacerbated issues of minority rights, meritocracy, class disparities, sexual orientation, distributive justice, and social welfare (Jung, 2010). In particular, the increased heterogeneity of South Korea, after centuries of homogeneity, has led to calls for a more substantive multicultural education in order to develop tolerant and inclusive attitudes (Lee, 2008). As it stands, treatment of multiculturalism is often “one-way,” focusing on the adjustment of foreigners to dominant cultural expectations (Choi, 2010, p. 176).

Multiculturalism and other controversial issues face a variety of obstacles to free discussion and deliberation within moral education classrooms. Cultural inhibitions related to controversy are connected to pre-1993 governmental structures that undermined free expression of opinion and participation in society (Choi, 2010). Korean teachers had once led students to one idea that was socially acceptable. Students now find divergent questions with multiple answers, however, many classroom cultures have not shifted to a climate that allows student reflection and judgment, and many students base moral reasoning within the parameters of authority and punishment avoidance (Baek, 2002; Choi, 2010). Moral education textbooks are provided by the Ministry of Education, a policy leading to a uniform national curriculum that easily avoids controversy and advances pro-governmental beliefs (Chu, Park, & Hoge, 2002; Moon, 1995). As recent as 2002, moral education classrooms were still very much teacher-oriented and used traditional methods, including inculcation and heavy textbook reliance (Chu, Park, & Hoge, 2002). Because classes typically have 30-50 students and Korean teachers have little freedom to interpret textbooks (Kang, 2002), lessons too often have little interest or relevance for students (Chu, Park, & Hoge, 2002; Jung, 2010). Lack of relevance is reinforced by teachers who pay little attention to moral education and, instead, favor subject areas that are included in the high-stakes national ex-
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Decision-making about controversial moral issues is highly contextual. In South Korea, traditional and modern conceptions of the individual contribute to a moral confusion whereby teachers find difficulty in talking about human rights and democratic dispositions (Kang, 2002). Moral reasoning differs within and between cultures, to be sure (Baek, 2002), but the morality of custom and institutional structures are presently undermining attention to meaningful, relevant, and socially significant topics that, through their full release and attention, provide an effective democratic citizenship education and develop student-citizens who are able to make informed and reasoned decisions. South Korea contains a deeply-embedded Confucian culture and tradition that—through textbooks, curriculum, and teacher decisions—ultimately creates a singularity of normativity that confounds reflective thinking about controversial issues and instead gives saliency to customary and prevailing beliefs.

Latvia

In the case of Latvia, the Holocaust as it occurred in Latvia, the overlapping historical contexts of dual occupation, Latvian collaboration, decades of Soviet occupation, and nascent democracy collectively informed different forces within the milieu. Within schools located in geographic areas where murders and other atrocities occurred, there are very small instructional time allocations. For example, one teacher in rural Western Latvia taught the entire topic of the Holocaust in Latvia in one 40 minute period (Misco, 2010b). In the 9th grade the national exam covers Latvian history but does not refer to the Holocaust. When teachers follow the Ministry of Education’s interpretation that the Holocaust in Latvia is really not part of Latvian history but rather world history, the Holocaust receives little or no attention (Misco, 2010b). Some students are exposed to a richer treatment in the 12th grade but only after the state exam. One respondent remarked that “those in charge of development say each teacher can develop [their] own program. But guidelines don’t fit with the evaluation. The guideline is they have to know “what is the Holocaust?” and when it took place. What goes into that is up to the teacher.” Teacher decisions to utilize their autonomy and to teach outside of the curriculum and test standards often rest upon a sense of academic freedom and a bit of subversive action, to be sure, but also an efficient use of their time to select materials. As one respondent stated,

I think it’s more important to talk about the Holocaust as a part of life; one part of life, looking at individuals. And if we speak about it as a part of human life, it’s not a heavy thing to talk about, just a part of life. There are no contradictions with Ministry demands. There can’t be any contradictions--I have to speak about human life before and after the war and I do.

Viewing standards broadly and actively finding ways for the topic to fit represents...
a key implementation lever in terms of external forces constraining teachers.

Even though teachers are equipped with “six inches of curriculum for a topic we teach once a year,” there is an instructive syllogism as to the primary external factor limiting implementation: “the situation is that in the exams, there are no questions about this. To prepare students for the exam, we have to teach other things. The Ministry of Education designs the exam.” The Ministry purposefully omitted any reference to the Holocaust on the exams, and privileged other topics, in spite of “so many stereotypes concerning Jews” and the general lack of understanding students have on the topic. In this sense, because the Holocaust remains a largely forbidden area, it has therefore become a controversial topic.

Although controversies are a critical curricular component in social education, teachers have to broach them and the potential benefits attached to their release in a public school environment. Most of the Latvian teachers interviewed associated the lack of coverage of controversies as a “good” or “ideal” circumstance of their school. This is in contrast to the literature suggesting the general need to address controversial issues for citizenship education, but that teachers fail to initiate this in practice. In a number of Latvian classrooms, teachers reported that there are no controversies, historical or contemporary, within their subject area. This finding is significant, given the rationale for teaching about controversy and its central place in social studies education within other countries, in contrast to a history-education focus in Latvia. In general, most of the respondents I interviewed choose not to pursue controversy (Misco, 2010b).

Some teachers had a more inviting perspective of controversies but found that the Holocaust was in fact not controversial for their students because of their lack of knowledge about it. It is no doubt difficult to be controversial if the topic is not known in any depth because it has been forbidden by fiat. Respondents suggested that no real silencing force exists in schools as “nobody says don’t talk about it . . . all depends on the teacher . . . a lot of students don’t have an idea about what the Holocaust was . . . if the teachers have an interest, they will find a way to do it.” One respondent recognized the waning hold the controversy has within Latvian society. She indicated that “the farther we move away, each generation gets less knowledge about it. Those memories were so alive—this life was not ancient, but now people know less about it.” When asked what controversies do appear with regularity in history classes, respondents cited the lack of complicated questions because they “have such little time to investigate” these sorts of issues (Misco, 2010).

Yet, other teachers suggested the Holocaust was very much a live and contested controversial issue but not as the Holocaust—instead, simply a topic connected to WWII. For example, one teacher in Riga reported a lack of controversy in her school, “except for whatever concerns WWII, and then this is very controversial.” Others suggested that the Holocaust is controversial but only for “older people; it’s not a problem for students” and that whether it is situated in a class as a controversy or connected to a larger society issue that is unresolved “depends
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on the teacher.” The teacher therefore acts as the true fulcrum for the way students encounter and construct their past, and this difference is also part of the tension resulting within the larger milieu of the school and ethnicity. The teacher holds the power to respond to this problem: “Soviet occupation and the Holocaust are often not connected in the minds of children.” In addition, depending on whether a student is in Russian or Latvian schools, they will view some topics of the past differently (Makarov, 2009).

One respondent recalled how there is a great deal of “discussion about [the Holocaust] and different events to commemorate.” Some students say “Why focus on Jews? Why not focus on Roma, Latvians, or Russians?” Another respondent recalled students asking, “Why are we talking about Jews? There people of other nations who were killed, why aren’t we talking about them?” Teachers often view these remarks in terms of the “child’s opinion,” one which is fairly irrevocable as the family serves to counter what students learn in class. One respondent suggested that some students with more extreme views “are afraid to discuss their opinion in front of class. Some are smiling—you know they don’t agree with you—they express their opinions in essays with paper and pen.” Occasionally students remark that “Jews are to be blamed themselves and they provoked it,” an apocryphal interpretation perpetuated through propaganda published by Nazi Germany in Latvia (Bagais Gads), but these are rare. Students are discussing “whether the Holocaust took place” and a growing “tendency to evaluate Hitler highly, to call him a great beast,” resulting in one respondent’s reaction to not “press on those students but I do give them new information that will hopefully modify their thinking.”

Although the Holocaust appeared to be a controversial issue a priori from an outsider’s perspective, in reality an overlooked corner of the milieus in the Latvian context is the linguistic orientation of schools which creates a de facto segregation of ethnic Latvian and Russian students. Acrimony towards Russians is sometimes voiced in Latvian-speaking schools with comments including “Why are there so many Russians? Why should we study Russian?” One respondent felt the controversy at the “level of speaking” whereby friction is rarely exhibited outside of class discussions. Yet, the nature of the comments concerning Russians in Latvia seemed fairly wide-ranging and complicated. One student complained that “those with more Russian background are against anything good attached to a Latvian leader.” Another felt that Russians “blame Latvians for everything.”

In Russian-speaking schools, I found the Holocaust as not an uncomfortable topic, but rather the relationship of the Soviet Union and Latvia prior to and following WWII—this is “what makes people uncomfortable; this is the emotional topic nobody wants to cover.” There is also a “tender topic” concerning discrimination in Latvia today. Some students advance discussions about Russians in Latvia in terms of treatment, discrimination, job opportunities, and equal rights. There appears to be a decoupling among Russian students, whereby they “don’t care about Latvia.” Some respondents indicated that some Russian students voice
a sense of discrimination, and some remarked on how their students “know about politics, which they get from their parents” and now there is “so much negativity when this is covered in schools, especially with the crisis now . . . they don’t see this country as home—there are no opportunities and they see they want to leave.” One teacher cited the only controversy as the “economic crises and discrimination of Russians. My task is to help students learn how to have beliefs and not offend others.” Occasionally beliefs appeared in more inflammatory ways, such as one student’s suggestion that “Latvia should pay Russia for all the buildings built during occupation” and “another boy’s father told him that he wasn’t learning correct history in school—he said that occupation didn’t happen and that Latvia entered the Soviet Union on its own will.” Other students point to popular media and the television show *The Hour*, which recently determined that “yes, one nation is responsible for that [recent economic crisis]—they point it out who is responsible—the Jews are responsible.” As one respondent concluded, some students have anti-Semitic views “they come from their home—it’s in them.” Other respondents suggest there is no real controversy on Latvian and Russian acrimony, except for “the language issue which really separates the people.” As for the Holocaust, it is in some ways purely a historical controversy, not a current and contested one. As one teacher noted, this is “not a controversy—it happened, it’s accepted, and that’s how it was over. Perhaps there is a difference in terms of education with those who know more having fewer stereotypes” (Misco, 2010b).

After the role of teachers, the milieus had the greatest influence on teachers’ decision making regarding implementation of a new Holocaust curriculum. The Ministry of Education’s construction of standards and exams do not privilege controversial issues as requiring considerable time or energy. Moreover, the structure of the macrocurriculum affords little instructional time to history classes generally. Finally, the Ministry promotes a focus on history, as opposed to an integrated social studies approach, which is primarily focused on preparing democratic citizens. These three factors do a great deal to undermine any motivation or realization of teachers addressing a topic of this kind. The extreme paucity of time, which acts as insufficient support resulting from the Ministry, presents a formidable challenge to any curricular change (Carless, 1988).

The findings revealed that, although the Holocaust in Latvia may at times be controversial among some students, the majority of students do not know enough about the history to feel the same level of controversy that the prior generation may have encountered. Instead, more prominent and palpable historical controversies are those tied to present conditions, specifically the relationship of Latvians and Russians in an economic, political, and historical context. Teachers cited the fact that the lack of curricular materials on this topic and future projects, at least in Latvia, may benefit from squarely addressing this issue as it relates to present challenges and the deportations of 1940.
CONTEXTUAL IMPLICATIONS FOR TEACHING CONTROVERSIAL ISSUES

Each of these two cases contains underlying and epiphenomenal manifestations of milieus reaching into classrooms to control and undermine the discussion of controversial issues. In South Korea, Confucian culture permeates the milieus with teachers and Ministry of Education’s curriculum closely adhering to a morality of custom (Dewey, 1908/1960) on matters of controversy. In Latvia, the Ministry also undermines the treatment of controversies, both overtly in the curriculum and through the lack of attention to these issues on national exams. In addition, the case of Latvia highlights the importance of false controversies, which can deflect attention from the actual controversies felt by community members and students. In both cases, teachers lack a strong rationale or urgency in discussing controversial issues.

These are two cases in a larger universe of unique contexts and cultures grappling with controversial issue instruction. Advocates of grounded theory claim that universality is situated within social interaction, but, as Glaser (2002) recently suggested, data does not exist “waiting to be collected” (p. 323). Rather, we generate data based on interactions with others within a specific place and time. Quite significantly, Glaser went on to underscore that we can never again generate this data, but that it is possible to create description and interpretation from this data. In short, he criticizes those who are unwilling or incapable of conceptualizing from description, which is on par with reader generalizability. Yet, because grounded theory is an abstraction of the particular, it produces conceptualizations that are “timeless in their applicability” (p. 319). Therefore, the schism between descriptive data and transcendental abstractions exposes a gap in the literature of external validity and transferability. The process of arriving at grounded understandings is similar to the work of grounded theory, with the important exception of stopping short of claiming conceptualizations and theory that are dislocated from the particular. Instead, grounded understandings are tentative apprehensions of the importance or significance of phenomena, which conceptualize to the point of producing meaning and explanatory power. This process aids in producing associated understandings based on additional unique cases and contexts, but it is only embryonic and nascent, not ready to pull apart from its umbilical ties to the particular (Misco, 2007).

When we really want to know “what is happening here” (Erickson, 1986, p. 121) as part of making “the familiar strange,” it is precisely about generative reflection based on localized meanings. The need for a “comparative understanding of different social settings” beyond the circumstances of the local or unique setting need not be oriented toward a potential reader, but rather future researchers and curriculum writers. Grounded understandings, in this sense, are not that far removed from “concrete universals” (Erickson, 1986, p. 130) that we arrive at by “studying a specific case in great detail and then comparing it with other cases
studied in equally great detail,” even if those cases have yet to arise. Because each case contains unique particularities and non-recurring localized meanings, it is not necessary, as Geertz (1973) suggested, “to know everything in order to understand something” (p. 20). Even though few methods can rival ethnography for developing understandings of social knowledge and how social attitudes are constructed (Palonsky, 1987), many times these are simply understandings that have not developed into formal theory. Understanding, in the sense that Dewey (1933) proposed, pertains to parts of information as grasped in their relations to each other, which comes about through reflection upon the meaning of what is studied (Misco, 2007).

**ADDITIONAL IMPLICATIONS**

This article ultimately provides a point of departure and framework for country-specific case studies that reveal how controversies are determined, the ways in which educational systems broach or avoid those issues, and the extent to which educational commonplaces shape their instructional use. Collectively, these case studies can provide a unified understanding of currently divergent research efforts on teaching controversial issues. The synthesis of these international perspectives and grounded theoretical propositions provides a multi-voiced and post-positivistic direction for policy makers and curriculum developers who are interested in cultivating democratic dispositions and habits of mind through controversial issues, as well as for inservice and preservice teacher training.

These two cases suggest a variety of implications for teacher education programs and education policy makers, both domestically and abroad. Given the rather unassailable benefits of controversial issue instruction and the complicated, as well as nuanced, challenges of the milieu for their treatment in classrooms, teachers need to develop a clear rationale for addressing these issues. Teachers should develop this rationale in both preservice and inservice experiences, given their role as mediator of the larger normative mandate of citizenship education in their school and the reality of their particular context. Teachers also need to realize their pivotal role as curriculum writers, gatekeepers, and professionals within context and in some cases change the epistemological cultures of their classrooms and schools to foster free expression of ideas within an open and inviting climate. Teachers need to recognize their charge to, in some cases, be subversive in reaction to the pressures of exams, standards, parents, and limited instructional time. Ultimately teachers will choose on a daily basis whether to succumb to the pressures of the milieu or negotiate within it and afford students the opportunity to grapple with normative and moral issues.

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DO FOREIGN LANGUAGE LEARNING, COGNITIVE, AND AFFECTIVE VARIABLES DIFFER AS A FUNCTION OF EXCEPTIONALITY STATUS AND GENDER?

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ABSTRACT

Relationships between foreign language learning and four characteristics—anxiety, aptitude, attitudes and attributions for success—were investigated for 95 students enrolled in introductory level Spanish classes at a large, southeastern university in the United States. Examination grades resulted in significantly positive correlation with an aptitude measure and significantly negative correlation with luck attributions for foreign language success ($p < .05$). Students identified as gifted tended to score higher than those with learning disabilities on exams, though not significantly higher, perhaps as a result of the small sample size and highly variable performance of the gifted students ($p < .05$). In addition, the gifted students reported less anxiety ($p < .04$). Females reported higher anxiety ($p < .001$) than males though they earned (non-significantly) higher scores (than males) on exams ($p > .05$). Modern Language Aptitude Test Part IV and luck attributions significantly predicted exam grades within a multiple regression analysis. In a second multiple regression analysis, only effort and ability attributions significantly predicted anxiety. Results underscore the importance of understanding and addressing both cognitive and affective variables in learning a new language.

DO FOREIGN LANGUAGE LEARNING, COGNITIVE, AND AFFECTIVE VARIABLES DIFFER AS A FUNCTION OF EXCEPTIONALITY STATUS AND GENDER?

The purpose of this paper is to examine the relationships among cognitive, affective, and achievement variables for college students enrolled in foreign
language classes in the United States. Specifically, this study was designed to investigate the relationships between foreign language learning aptitude, foreign language learning affective variables (attributions, anxiety, attitudes), and achievement in a foreign language class for U.S. college students. Furthermore, this study was designed to determine whether foreign language cognitive, affective, and achievement differences exist between those characterized as having learning disabilities and those characterized as intellectually gifted, and whether such differences exist as a function of gender.

The advantages of students’ learning other languages permeate the world-language learning literature and the popular press (e.g., Wooldridge, 2011), and the call for foreign language education comes from a variety of sources for both the general school population (e.g., Rhodes & Pufahl, 2009) and students with learning disabilities (e.g., Artiles & Ortiz, 2002). According to Peckham (2010) the (United States) College Board recommended expanding basic skills to include foreign language education for all students in 1983, and in 1996 the American Association of School Administrators identified knowledge of foreign languages as one of the most important skills students need to develop to prosper in the 21st century. But what are the specific arguments in favor of requiring foreign language learning? Peckham summarized a report from the College Entrance Examination Board entitled “College Seniors: The 1993 Profile of SAT and Achievement Test Takers,” by noting that students who averaged four or more years of foreign language study scored higher on the verbal section of the SAT than those who had studied four or more years in any other subject area; in addition, he noted that the 1979 President’s Commission on Foreign Language and International Studies recommended foreign language requirements for all U.S. colleges and universities. In summary, a number of experts tout that the knowledge of other languages enhances travel enjoyment, encourages learning the roots of one’s own language, increases interest in multiple cultures, challenges the individual, increases neural efficiency, and, as mentioned above, increases cognitive and academic skills (see Armstrong & Rogers, 1997; Cooper, 1987; Peckham, 2010; Stewart, 2005). Although there is a growing consensus in the U.S. that language study is worthwhile, formal instruction in a foreign language may not occur until secondary (i.e., high) school in many school systems. And perhaps more alarming, results from a national survey (Rhodes & Pufahl, 2009) indicate that foreign language learning instruction remained relatively stable at the high school level over the past decade, but decreased substantially in elementary and secondary school. This means that many students in the U.S. are not formally exposed to foreign language learning until they are at least 14 years of age. Almost all U.S. high schools now require only two semesters of language study, which means that most U.S. students enter college with limited exposure to a foreign language. This limited exposure may make U.S. college students apprehensive about language learning; in addition, students vary in their aptitude and appreciation of foreign language learning.
Do Foreign Language Learning, Cognitive, and Affective Variables Differ as a Function of Exceptionality Status and Gender?

Language Aptitude

The literature describing variables affecting acquisition of a non-native language can be confusing because terms are not universally used by experts in the field. That is, although some theorists describe within-the-individual aptitude for learning a language other than one’s native language (regardless of context) as second language (L2) acquisition, not all do. For example, while Oxford (2003) distinguishes between the terms foreign language learning and second language learning, others do not. Oxford defines foreign language learning as a process that occurs when the target language is not the dominant language in use, using it is not necessary for everyday life, and, hence, motivation to learn it may be low. In contrast, second language learning occurs when the to-be-learned language is the dominant language, using it may be necessary in everyday life, and, hence, motivation to learn may be higher. Oxford’s distinction is reasonable; certainly the context in which a non-native language is learned can have a significant impact on motivation. For clarity, we refer to the language learning investigated in this study as foreign language learning but defer to the terminology used by researchers in the review of the literature.

Much has been written about the relationship between native language learning (L1) and second language learning (L2) with an apparent consensus that there is a relationship (Cummins, 1979; Krashen, 1982; Van der Silk, 2010). Sparks and Ganschow (2001) posited a Linguistic Coding Differences Hypothesis (LCDH), arguing that “(a) native language skills serve as the foundation for learning a FL [foreign language]; (b) difficulties with one component of language (e.g., phonology/orthography) are likely to have a negative effect on both native and FL learning; and (c) there are innate individual differences in students’ ability to use language” (p. 97). Interestingly, they also noted that successful second language learners tend to exhibit stronger performance on measures of phonology, orthography and syntax but not semantics. In their 2001 review of the research to date on aptitude for foreign language learning, Sparks and Ganschow recommended more widespread use of the Modern Language Aptitude Test (MLAT; Carroll & Sapon, 1959, 2002) as a valuable predictor of foreign language aptitude. The MLAT was developed to predict native English-speaking students’ ability to acquire a foreign language; it is comprised of five sets of tasks that rely on a simulated format (i.e., an artificial language) and English grammar tasks to yield an indicator of a student’s probable success in learning a foreign (i.e., not English) language. Positive relationships between MLAT performance and foreign language learning have been demonstrated in several research studies in the United States (Ayers, Bustamante, & Campana, 1973; Carroll, 1981, 1985; Gajar, 1987; Wesche, Edwards, & Wells, 1982).

The relationship between foreign language learning aptitude and learning disabilities has been the focus of numerous studies, most prolifically by Sparks, Ganschow, Javorsky and other colleagues (see Sparks, 2008; Sparks, Javorsky, & Philips, 2005; Sparks, Patton, Ganschow, Humbach & Javorsky, 2006). Their
research led them to conclude that native language aptitude (e.g., as measured by the MLAT) rather than a learning disability per se is predictive of foreign language performance. However, to the extent that students with learning disabilities exhibit difficulty with native language learning (i.e., as in the case of dyslexia, the most common type of learning disability [Shaywitz, 2003]), they tend to exhibit difficulty with learning a new language, and these difficulties can be detected by one or more sections of the MLAT. Though foreign language performance of students identified with learning disabilities has been the focus of considerable research, few studies have examined the foreign language aptitude of students who are intellectually gifted. We do know that students identified as intellectually gifted have higher achievement levels in foreign language acquisition than peers who are not identified as gifted. Bain, Bell, McCallum, Cochran and Chocate (2010) investigated the performance of 94 U.S. college students in Spanish classes; they found that students identified as gifted performed better on measures of foreign language aptitude and had higher exam grades than students not identified as gifted. Little other research has focused on gifted students’ acquisition of foreign languages.

In contrast to the foreign language acquisition of students who are gifted, the gender-foreign language learning relationship has been explored, albeit with mixed results. For example, Jakobsdottir and Hooper (1995) reported better foreign language performance for fifth-grade female versus male students in the U.S. On the other hand, Tong, Irby, Lara-Alecio, Yoon and Mathes (2010) found that Hispanic boys acquired receptive vocabulary in English faster than girls. In a study of Taiwanese children who were learning English, Lan and Oxford (2003) found that girls used language learning strategies more often than boys, though the overall proficiency levels did not differ. In a study of 1200 U.S. university students, Oxford and Nyiokos (1989) also found that females who were learning a foreign language used more of certain types of strategies (e.g., practice based on formal rules, engaging in conversation), but the study did not address proficiency level based on gender. In a study exploring differential item functioning (DIF), Ryan and Bachman (1992) reported very few differences between males and females on the Test of English as a Foreign Language (TOEFL, 2011), and mean scores for 575 non-native speaking males from eight countries were very similar to the mean scores of 851 female peers.

Considerable evidence indicates that first language abilities affect second language acquisition; further, MacIntyre (1995) noted that affective variables also affect second language acquisition. Below we discuss three types of affective variables (attributions, anxiety, and attitudes) that have demonstrated relationships with foreign language achievement.

Affective Variables

Sideridis, Mouzaki, Simos, and Protopapas (2006) noted that motivational factors can have a significant influence on academic engagement, which has im-
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Research has demonstrated that, in general, high-achieving students tend to make stronger internal attributions (i.e., they more strongly attribute their success to ability and effort rather than to external causes such as context or luck) for their academic success relative to low-achieving peers (Marsh, 1984). However, less is known about links between attributional style and foreign language learning. Cochran, McCallum, and Bell (2010) found that general attributions for academic success did not contribute significantly to a prediction of foreign language exam grades; they recommended investigation using language-learning specific attributions. Bown (2006) found that second language learners with an internal locus of control were more successful than peers with external locus of control in a self-structured language-learning approach. Cheng (2001), in a study of 162 Taiwanese enrolled in university freshman-level English language classes, found that those with higher foreign language self-efficacy (the extent to which a student believes he/she can be successful at a given task) had significantly lower scores on a measure of foreign language anxiety and on a scale assessing the belief that some students are “gifted” in learning a foreign language (i.e., ability attributions).

Evidence indicates that students with learning disabilities who experience academic success acknowledge the effort required. According to Sideridis and Scanlon (2006), “evidence points to the fact that motivation exerts significant effects on the academic functioning of students with LD [learning disability]” (p. 131). That is, their effort attributions tend to be stronger than their unsuccessful peers with learning disabilities. As a 14-year old male identified with learning disabilities noted, “Most of the time somebody with learning disabilities can do the same as somebody without, but you have to put so many hours into studying to do a good job” (Klassen & Lynch, 2007, p. 7). Foreign language attributions may also vary as a function of gender. In a study of Korean middle schoolers studying English, Kang (2000) found that Korean girls tended to have more positive attitudes and to attribute more of their success to internal factors. However, there
is little published research examining the foreign language attributions of males versus females.

**Anxiety**

Gardner and MacIntyre (1993) built upon the work of Alpert and Haber (1960) who described two types of anxiety, facilitative and debilitative, wherein facilitative anxiety serves a positive, motivating role. Facilitative anxiety, according to Gardner and MacIntyre, enhances language performance because it energizes students to succeed. Horwitz, Horwitz and Cope (1986) theorized that foreign language anxiety is situation-specific. And, according to Krashen’s (1982/2009) affective filter theory, second language learners who are anxious are less effective in acquiring spoken or written second language content. In a study of more than 200 high school and university students, Young (1990) found that positive teacher factors are associated with lower anxiety in their students. Horwitz and Young (1991) argued for the importance of—and provided practical suggestions for—making the foreign language classroom more accessible. Horwitz (2010) provided a comprehensive review of research and theoretical debate around foreign language anxiety. Though the literature has been characterized by spirited debate (Sparks, Ganschow, Artzer, et al., 1997) about the relative role of anxiety versus native ability in foreign language learning, Sparks and Ganschow (2001) have asserted that both native language proficiency/foreign language aptitude and foreign language anxiety are important in foreign language acquisition.

**Attitudes**

As might be expected, students who perform well in foreign language classes tend to have more positive attitudes about foreign language learning. Sparks, Ganschow, and Javorsky (1993) demonstrated differences in foreign language attitudes and perceptions among high school students who were identified as at-risk/learning disabled compared to non at-risk students using the Foreign Language Attitudes and Perceptions Survey (FLAPS). Similarly, Scott, Bell and McCallum (2009) found differences in foreign language attitudes among 278 U.S. college students enrolled in introductory level French, German or Spanish classes on a modified version of the FLAPS-C (College). Students who performed poorly on native language learning tasks had more negative attitudes on the FLAPS-C than did students who performed well on the native language learning tasks despite similar ratings on an item assessing desire to learn a foreign language.

According to several researchers (e.g., Kissau, 2007; MacIntyre &Gardner, 1994; and Muchnick &Wolfe, 1982), females tend to have more favorable attitudes toward learning a second language. Specifically, Kissau (2006) reported that 9th grade Canadian males were less motivated to enroll in French classes and considered themselves less capable than females; similarly, Kissau, Kolano, and Wang (2010) reported that U.S. high school males were less motivated to study Spanish than their female peers. Clark and Trafford (1996) concluded that
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public school boys in the United Kingdom attach less importance to learning a foreign language than girls and are less conscientious about their schoolwork—a finding consistent with other literature showing greater motivation for learning a second language by female students in India (Narayanan, Rajasekaran, & Iyappan, 2007). Oxford and Nyiokos (1989) and Lan and Oxford (2003) found that both gender (being female) and motivation for learning a language (i.e., “liking a language”) were positively related to using language-learning strategies, but they did not report gender differences in motivation per se.

Statement of the Problem and Research Questions

Relatively little research has systemically addressed relationships among cognitive, affective, and achievement variables for U.S. college students enrolled in foreign language classes. Specifically, few or no other studies have examined the relationships between foreign language learning and foreign language-learning attributions. Consequently, this study was designed to address relationships among foreign language-learning attributions, anxiety, attitudes, and aptitude for U.S. college students. Research on foreign language performance of students identified with learning disabilities is mixed, and little research examines foreign language performance of students identified as gifted. Thus, this study has been designed to determine whether there are foreign language cognitive, affective, and achievement differences between those characterized as having learning disabilities and those who are characterized as intellectually gifted, and whether such differences exist as a function of gender.

METHOD

Participants

Participants were 95 college students in five introductory (100-level) Spanish classes at a large university in the southeastern U.S.; English was the native language for all of them. Data were collected at the beginning of summer semester, 2010. Forty-five (47%) participants were female and 50 (53%) were male. Seventy-nine (83%) were between the ages of 18 and 25; three participants (3%) were above the age of 40. One student was a freshman; 16 were sophomores; 36 were juniors, 39 were seniors, and 3 were graduate students. Sixteen students indicated they had been previously identified as having a learning disability, and 20 reported they had been previously identified as intellectually gifted based on U.S. federal guidelines for determining eligibility for special education services. Thirty-seven were humanities majors; 22 were math/science majors; 5 were education majors; 2 were fine arts majors; and 29 were “other.”

Instruments and Measures

Anxiety. Foreign language anxiety was operationalized by a 4-item scale derived from an 11-item scale assessing variables that previous research has shown
to be related to foreign language anxiety (Young, 1990). To determine the most valid measure of anxiety, an exploratory, principal components factor analysis with varimax rotation was performed on the 11-item scale. Three factors emerged with eigenvalues greater than 1. Of these factors, the second appears to be the most valid measure of anxiety. Only four items with loadings greater than 0.4 loaded on the second factor; these four items did not load significantly on the other two factors. The four items and their factor loadings are presented in Table 1. Additional evidence for the psychometric adequacy of the 4-item anxiety scale was established by determining internal consistency; Cronbach’s alpha, $r = .63$, which is above the critical value recommended by Salvia, Ysseldyke, & Bolt, 2007 for group purposes.

**Foreign Language Aptitude.** The short form of the Modern Language Aptitude Test (MLAT; Carroll & Sapon, 1959, 2002) was used as a measure of foreign language aptitude. The short form is comprised of the last three MLAT subtests: Part III – Spelling Clues (English vocabulary, sound-symbol association ability); Part IV – Words in Sentences (grammatical structure); and Part V – Paired Associates (rote memory). The MLAT’s norms are dated and not representative of a typical college population. Consequently, raw scores were used in the data analyses in this study.

**Attributions.** The Foreign Language Attributions Scale was developed for this study. It was modeled after the College Academic Attribution Scale (CAAS), developed by Williams (2002) which in turn was modeled after the Student Academic Attribution Scale (Bell & McCallum, 1995) and the Sydney Attribution Scale (Marsh, 1984). The FLAS contains ten positive academic outcomes (e.g., “I make a high grade on a foreign language vocabulary test”) relating to a variety of student products (e.g., tests, homework, group projects). Each item then identifies an outcome and poses four possible explanations for each outcome (effort – “I studied hard for the test”; ability – “I am good at taking vocabulary tests”; context – “the teacher prepared me well for the test”; and chance or luck – “I was fortunate”). Participants are asked to rate how frequently each explanation would apply to a particular outcome for them (on a scale from 1 = seldom to 3 = often). Because forced-choice rankings have been demonstrated to produce artificial dichotomies (Bell & McCallum, 1995) and because it is likely that success is attributable to more than one cause, each response category is rated independently. Consequently, all causes can be rated high or low. Cronbach’s alphas for the four attributional dimensions were strong ($r = .84$ for effort, $r = .80$ ability, $r = .84$ for context, and $r = .89$ for luck) and provide support for the reliability of the scales.

**Attitudes.** Nine items from the attitudes section of the Foreign Language Attitudes and Perceptions Survey (FLAPS; Sparks, et al., 1993) were used as the measure of foreign language attitudes for this study. These Likert-type items are designed to assess students’ attitudes about learning a foreign language (e.g., “I feel that I am not in control of my grades in my foreign language course.”) (See Bell, McCallum, Kirk, Brown, Fuller and Scott (2009) for a complete descrip-
tion of the FLAPS adapted for college students.) In a study of 278 college students, Bell and colleagues (2009) reported support for psychometric integrity of the FLAPS. Bell et al. reported evidence of reliability (i.e., Cronbach’s alpha, \( r = .74 \)) and construct validity (factor analytic data). For the current sample, internal consistency was strong (Cronbach’s alpha, \( r = .84 \)).

**Grades.** Because final course grades can include a variety of factors (e.g., attendance, homework completion, class participation), the criteria selected as the measure of foreign language performance in this study was a combined midterm and final grade. The midterm and final contain 50 objective items and were constant across the five sections of participants.

**Procedure**

The last three subtests of the MLAT and a 92-item questionnaire (containing 32 demographic items, 9 attitude items, 40 attribution items, and 11 anxiety items) were administered by trained graduate students in school psychology to students in five sections of Spanish 100-level classes summer semester. In each case, the MLAT was administered first, according to standardized directions. Then students responded to the 92-item questionnaire via scan forms. In addition, grades were collected from instructors at the end of the session. Student identity remained confidential, and procedures conformed to guidelines for the rights of human subjects at the university. Data analyses were conducted using Statistical Package for the Social Sciences –Version 16 (SPSS, Inc, Chicago, IL).

**RESULTS**

The relationships between foreign language performance and cognitive and affective variables were investigated using correlational and mean difference analyses. First, descriptive statistics (means and standard deviations, sample sizes) for the total sample, for those identified as having learning disabilities, those identified as gifted, females, and males for combined exam grades, anxiety, attributions to ability, effort, context, and luck, FLAPS Total score, and MLAT Parts III, IV, and V, are shown in Table 2. Because grades and anxiety are the focus (i.e., dependent variables) of several analyses below, their distributions were checked for normality. Data for grades (mean of 156.77, \( SD = 25.16 \)) reveal that the distribution is slightly negatively skewed (-.70) and that the distribution of scores is somewhat restricted (kurtosis, 1.23). These characteristics probably limit the magnitude of the correlation coefficients defining the relationship between grades and other relevant variables. Data for the anxiety variable (mean of 15.30, \( SD = 2.67 \)) is also slightly negatively skewed (-.50) and is relatively normally distributed (kurtosis only .25).

Correlation coefficients defining relationships between grades and cognitive and affective variables for the total sample are depicted in Table 3. As is apparent from the Table, all the coefficients reflecting correlations between exam grades
and anxiety with the other variables are modest; four are statistically significant. With exam grades, luck attributions are significantly negatively correlated ($r = - .27, p < .05$) and MLAT Part V is positively correlated ($r = .32, p < .01$). Anxiety is significantly negatively correlated with ability attributions ($r = - .28, p < .01$) and positively correlated with effort attributions ($r = .30, p < .01$). The relationship between exam grades and anxiety is not significant ($r = .21, p > .05$). In addition, (negative) foreign language attitudes are positively correlated with anxiety ($r = .30, p < .01$) and negatively correlated with ability attributions ($r = -.64, p < .01$). And, interestingly, effort attributions are significantly positively correlated with context attributions ($r = .57, p < .01$).

To further define the relationships between cognitive and affective variables and foreign language performance, two stepwise multiple regression equations were calculated. In the first, the criterion variable was combined exam grades in the Spanish classes. Two significant predictor variables entered into the equation, MLAT Part V and luck attributions. MLAT Part V accounted for 10% of the variance and luck attributions for success accounted for an additional 5% for a total of 15%. Neither the anxiety scale, the attitude scale (FLAPS-C), nor any of the other attribution scales, contributed significant unique variance beyond that accounted for by MLAT Part V and luck attributions. For the second multiple regression, anxiety was the criterion variable. Interestingly, only effort attributions and ability attributions significantly predicted anxiety, accounting for approximately 13% and 9% respectively for a total of almost 22% of the variance accounted for in the anxiety scale.

**Relationships as a Function of Exceptionality Status**

In general, the relationships among foreign language learning (exam grades), attributions (ability effort, context, and luck), anxiety, foreign language attitudes and perceptions (FLAPS-C), and foreign language aptitude (MLAT III, IV, and V) are modest for these U.S. college students (see Table 3), and, when these relationships are considered separately based on exceptionality status, the pattern remains the same generally (see Table 4). Of the 90 relationships expressed via these scores, eight are statistically significant, and students who are gifted differ from students with LD for four of these. For those who are gifted and for those with learning disabilities, the relation between effort and context attributions for successful foreign language learning is strong ($p < .05$ for both); similarly, for both groups, ability attributions for successful foreign language learning are strongly related to attitudes and perceptions for foreign language learning ($p < .01$ for both).

However, the correlation between ability attributions for successful foreign language learning and anxiety ($r = - .71, p < .01$) is statistically significant for those with learning disabilities, but the same relationship is not statistically significant for those who are gifted ($r = .01, p > .05$). Similarly, the correlation between foreign language learning aptitude, as operationalized by the MLAT III,
and anxiety is statistically significant for those with learning disabilities ($r = -.52$, $p < .05$), but not for those who are gifted ($r = -.11$, $p > .05$). Alternatively, two correlations are statistically significant for those who are gifted but not for those with learning disabilities: the relationship between effort attributions for successful foreign language learning and aptitude for learning a foreign language for gifted students (MLAT III) is significant at the .01 level ($r = -.60$) but is not for those with learning disabilities ($r = .01$). Finally, the relationship between luck attributions for successful foreign language learning and aptitude for learning a foreign language (MLAT V) is significant for gifted students at the .05 level ($r = .56$) but not for those with learning disabilities ($r = .14$).

The relationships between foreign language performance and cognitive and affective variables for those who have a learning disability versus those who are gifted were further explored using mean difference analyses. First, exam grade means for the two groups were compared. The mean for the gifted sample (159.78, $SD = 35.02$) was not statistically significantly higher than the mean for those with learning disabilities (152.57, $SD = 24.09$). Based on results of Levene’s test of equality of variances, an independent samples $t$ test was computed and yielded $t(33) = .70, p > .05$. On the other hand, means on the anxiety scale were significantly different between the two groups ($t(33) = 2.22, p < .04$). The mean for the students with learning disabilities (16.73, $SD = 2.09$) was statistically significantly higher than for the gifted sample (14.60, $SD = 3.25$). Of particular interest is the result that those with learning disabilities demonstrated more negative attitudes toward learning a foreign language than those characterized as gifted, based on the difference between the mean FLAPS-C score for the two groups ($t(34) = -3.00, p < .01$): 26.40 ($SD = 4.91$) and 32.06 ($SD = 6.41$), respectively.

**Relationships as a Function of Gender**

Similar to relationships for students identified as LD versus gifted, relationships based on gender are generally modest in strength and similarity (see Table 5). However, there are notable exceptions. Of the 90 relationships expressed via these scores, 12 are statistically significant, and females differ from males for six of these. For both females and males, the relationship between effort and context attributions for successful foreign language learning is strong ($p. < .01$ for both); similarly, for both females and males, ability attributions for successful foreign language learning are strongly related to attitudes and perceptions for foreign language learning ($p < .01$ for both); and finally, for both females and males foreign language learning aptitude is significantly related to exam grades ($p < 01$, for both). However, the relationship between exam grades and anxiety ($r = -.36$, $p < .05$) is statistically significant for males, but the same relationship is not statistically significant for females ($r = -.07$, $p > .05$). Similarly, the relationship between effort attributions for successful foreign language learning and anxiety was statistically significant for males ($r = .43$, $p < .01$) but not for females ($r = .08$, $p > .05$). On the other hand, three relationships were statistically significant for females but
not males: the relationship between ability attributions for successful foreign language learning and anxiety for females was significant at the .05 level ($r = -.35$) but was not for males ($r = -.07$). The relationship between ability attributions and context attributions was significant for females at the .05 level ($r = .37$) but not for males ($r = .10$). Finally, the relationship between exam grades and aptitude for learning a foreign language as defined by MLAT IV was significant at the .05 level ($r = .40$) for females but not for males ($r = .09$).

Finally, the relationship between foreign language performance and cognitive and affective variables for females and males was explored using mean difference analyses. An apriori $t$ test was calculated for exam grades ($t(86) = .58$, $p > .05$). The mean for the females ($157.90$, $SD = 21.38$) was not statistically significantly higher than for the males ($154.68$, $SD = 29.35$). In contrast, females scored significantly higher on the anxiety variable. Their mean for the anxiety variable ($16.77$, $SD = 2.07$) is statistically significantly higher than the one for males ($13.96$, $SD = 2.46$; $t(88) = 5.83$, $p < .001$). There are two additional statistically significant mean differences. The female mean for effort attributions ($25.58$, $SD = 3.75$) is significantly higher than the one for males ($23.82$, $SD = 4.08$; $t(93) = 2.18$, $p < .04$). However, this pattern is reversed for ability attributions; the mean for males ($17.89$, $SD = 4.28$) is significantly higher than the mean for females ($19.75$, $SD = 3.68$; $t(91) = -2.26$, $p < .03$). Apparently, females attribute successful foreign language learning outcomes to effort more than do males; on the other hand, females attribute successful outcomes to ability less than do males. In summary, while females seem to be more anxious and attribute their success to stronger effort for success than do males, they seem to attribute their success less to ability than males, despite the fact that they make (slightly) higher grades.

**DISCUSSION**

Data from this study allowed us to examine the relationships among cognitive, affective, and achievement variables for college students enrolled in foreign language classes, and specifically, relationships between foreign language learning and foreign language learning attributions, anxiety, attitudes, and aptitude for U.S. college students. In addition, we investigated foreign language cognitive, affective, and achievement differences between those characterized as having learning disabilities versus those characterized as being intellectually gifted, and whether such differences exist as a function of gender. As expected, for these college students, foreign language exam grades are positively related to a memory task on the measure of language aptitude (MLAT Part V, Paired Associates). Furthermore, exam grades are negatively related to luck attributions for success. Apparently, memory skills contributed to good performance on the midterm and final Spanish exams in these courses. In addition, students who cited luck as a cause for success performed less well on the exams than peers who did not rely on luck to perform well. Anxiety is positively correlated with effort attributions, suggest-
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ing that more anxious students endorse effort as a means of attaining successful performance. This finding is consistent with the notion that some anxiety can be facilitative, i.e., resulting in positive behaviors designed to reduce the anxiety (Alpert & Haber, 1960; Gardner & MacIntyre, 1993). Our results suggest that the more anxious students tend not to attribute success to ability; that is, they apparently see success as more a function of hard work than of innate ability to learn a new language.

Anxiety was also significantly related to overall attitudes as measured by the FLAPS-C abbreviated version used in this study. As anxiety increased, so did negative attitudes about learning a foreign language. However, the attitudes (FLAPS-C) score did not significantly predict anxiety, perhaps because of the strong relationship between ability attributions and attitudes. That is, students with more negative attitudes did not endorse ability attributions as a means of attaining foreign language success. In fact, the negative relationship between (negative) attitudes and ability was the most robust of all the relationships generated. This finding can be related to Cheng’s (2001) determination that Taiwanese students who ascribe to the idea that some individuals are “gifted” in language learning tend to have lower self-efficacy for language learning and more negative attitudes about language learning.

Another interesting relationship emerged—between context and effort, suggesting that students tend to exhibit more effort in learning environments and with instructors they perceive as conducive to learning. This relationship provides additional empirical evidence for Young’s earlier findings that positive teacher factors are associated with lower anxiety (Young, 1990) and support the importance of making the foreign language classroom more conducive to learning (Young, 1991).

Relationships and patterns of scores for students identified as gifted or with learning disabilities tended to follow predicted directions. For example, the gifted students scored higher (though not significantly) on examinations and produced lower anxiety scores than those with learning disabilities, consistent with findings by Bain et al. (2010). For students with learning disabilities, the relationships between both ability attributions and one measure of language aptitude (MLAT III) and anxiety is significant. This finding makes sense: students who perceive and who exhibit weaker language aptitudes have more anxiety about learning a language.

Interestingly, females scored higher (though not significantly) on the language exams but were also more anxious than males; in addition, females exhibited higher effort attributions but lower ability attributions than males. These results are in part consistent with Kang (2000) who found that Korean girls were more conscientious about English language learning; with Clark and Trafford (1996) who found that girls in the U.K. attached more importance to foreign language learning; with Narayanan and colleagues (2007) who found that Indian girls showed greater motivation for language learning; and with Kissau (2006, 2007),...
MacIntyre and Gardner (1994), and Muchnick and Wolfe (1982) who found that females exhibited more positive attitudes toward learning a language than males.

Surprisingly, a relatively small degree of variance in exam grades was accounted for by the cognitive and affective variables in this study. Although the MLAT has shown robust correlations with foreign language learning performance in some studies (Ayers, et al., 1973; Carroll, 1981, 1985; Gajar, 1987; Wesche, et al., 1982), not all have found strong correlations (Goodman, Freed, & McManus, 1990). Our results are consistent with Goodman et al, indicating very modest correlations between MLAT scores and foreign language learning as operationalized in this study.

This study is significant because it is the first to examine specifically attributions for foreign language learning and to attempt to predict foreign language learning using a host of cognitive and affective variables for students identified with learning disabilities and intellectual giftedness and for males and females in the U.S. It is interesting that at least in part the results are consistent with studies of students of various ages from different countries, learning various languages. Because language learning is typically delayed in the United States, increased negative affect toward language learning might be expected in the U.S. Future research should include cross-cultural studies of cognitive and affective factors related to foreign/other language acquisition.

Limitations include the relatively small sample size drawn from one university in the southeastern U.S. and the use of only one target language at one level. In addition, the results generalize only to the variables as they were operationalized in the study (e.g., aptitude defined as MLAT scores; anxiety, attributions, and attitudes defined by self-report). Nonetheless, results produced some interesting findings that should be examined in future research. Finally, only exam grades were used as the criterion for language learning success; future research should investigate whether similar patterns emerge when success is based on different criteria (e.g., end-of-course grades that include a wider range of learning assessments).

Implications

Results from this study provide evidence for relationships between various affective variables and foreign language learning aptitude and success. Based on these results some practical implications seem warranted. For example, it may be possible for instructors to use a series of instruments (e.g., MLAT, FLAPS-C) to determine at-risk status at the beginning of a foreign language class. Specifically, those who show less aptitude (particularly for the memory section of the MLAT), who may have stronger attributions to luck for their foreign language learning success, and who have a history of learning disabilities may be targeted for specific assistance early on. This assistance might consist of additional practice with the course content. Increased familiarity should motivate at-risk students to be more optimistic regarding their success and less anxious during class time. Also,
at-risk students might benefit from having the relationships between attributions such as effort, ability, luck and difficulty explained, which may lead to the pursuit of more effortful attributions and, consequently, more success. Finally, at-risk students may benefit from learning about the complex relationships between anxiety and foreign language learning outcomes. Although the literature shows a negative relationship between anxiety and success in general, apparently that relationship is not straightforward and linear. Some level of anxiety may actually enhance success, as suggested by the trend in our data showing females to be more anxious but also more successful.

As with all types of instruction, foreign language instructors need to be sensitized to individual differences among their students. Implications include the importance of making second language classrooms more accessible to all learners (see Horwitz & Young, 1991; Sparks & Young, 2009; Young, 1990; 1991). According to Oxford, (1990) learning will be more enjoyable, faster and more effective when instructors employ learning strategies that are suited to needs of different types of learners. Young (1999) provides a comprehensive review of practical and specific suggestions for reducing anxiety during common types of foreign language class activities. Not surprisingly results suggest that students identified as gifted considered second language learning easy and non-threatening. Although presumably a positive finding, it is possible that they would have benefitted from more challenging learning experiences. As Sparks and Ganschow assert, “Good teachers have always known that students have different ways of taking in new information and that instruction which is best for one student is not necessarily so for another” (1991, p.11).

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Table 1.
Factor Loadings of the Strongest Four Items from a Foreign Language Learning Anxiety Scale

<table>
<thead>
<tr>
<th>Items</th>
<th>Factor Loadings</th>
</tr>
</thead>
<tbody>
<tr>
<td>The number of hours a day you study</td>
<td>.49</td>
</tr>
<tr>
<td>How good your teachers are</td>
<td>.62</td>
</tr>
<tr>
<td>The level of anxiety you experience in learning a foreign language</td>
<td>.56</td>
</tr>
<tr>
<td>Indicate your level of anxiety going into this class (1 = No anxiety; 5 = Extreme anxiety)</td>
<td>.84</td>
</tr>
</tbody>
</table>

Table 2.
Descriptive Statistics for Total Sample, Students Identified with Learning Disabilities and as Gifted, Females, and Males for Numerical Grades, Brief Foreign Language Anxiety Scale (Anxiety), Foreign Language Attributions Scale (Attributions to Ability, Effort, Context, and Luck), Foreign Language Attitudes and Perceptions Survey-College (FLAPS-C) Total Scores, and Modern Language Aptitude Test (MLAT), Parts III, IV, and V

<table>
<thead>
<tr>
<th></th>
<th>Total Sample n = 95</th>
<th>Females n = 45</th>
<th>Males n = 50</th>
<th>Gifted n = 20</th>
<th>Learning Disabled n = 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anxiety</td>
<td>M: 16.77 SD: 2.08</td>
<td>M: 13.96 SD: 2.46</td>
<td>M: 14.60 SD: 3.25</td>
<td>M: 16.73 SD: 2.09</td>
<td></td>
</tr>
<tr>
<td>Ability</td>
<td>M: 17.89 SD: 4.28</td>
<td>M: 19.76 SD: 3.68</td>
<td>M: 19.79 SD: 4.42</td>
<td>M: 18.00 SD: 4.43</td>
<td></td>
</tr>
<tr>
<td>Effort</td>
<td>M: 25.58 SD: 3.75</td>
<td>M: 23.82 SD: 4.08</td>
<td>M: 24.20 SD: 3.47</td>
<td>M: 25.81 SD: 2.95</td>
<td></td>
</tr>
<tr>
<td>Context</td>
<td>M: 3.91 SD: 4.94</td>
<td>M: 23.43 SD: 3.76</td>
<td>M: 23.75 SD: 3.16</td>
<td>M: 25.31 SD: 3.50</td>
<td></td>
</tr>
<tr>
<td>Luck</td>
<td>M: 17.16 SD: 4.25</td>
<td>M: 18.43 SD: 5.47</td>
<td>M: 17.50 SD: 5.81</td>
<td>M: 18.06 SD: 4.88</td>
<td></td>
</tr>
<tr>
<td>MLAT III</td>
<td>M: 13.99 SD: 5.24</td>
<td>M: 13.85 SD: 5.07</td>
<td>M: 14.61 SD: 5.43</td>
<td>M: 16.11 SD: 5.02</td>
<td></td>
</tr>
<tr>
<td>MLAT IV</td>
<td>M: 18.03 SD: 5.36</td>
<td>M: 17.63 SD: 5.68</td>
<td>M: 18.79 SD: 4.88</td>
<td>M: 21.89 SD: 6.72</td>
<td></td>
</tr>
<tr>
<td>MLAT V</td>
<td>M: 14.62 SD: 5.05</td>
<td>M: 14.12 SD: 5.00</td>
<td>M: 14.85 SD: 5.00</td>
<td>M: 15.84 SD: 4.53</td>
<td></td>
</tr>
</tbody>
</table>

Table 3.
**Correlation Coefficients Showing Relationships Between Foreign Language Combined Exam Grades and Cognitive and Affective Variables for the Total Sample**

<table>
<thead>
<tr>
<th></th>
<th>Exam Grades</th>
<th>Anxiety</th>
<th>Ability</th>
<th>Effort</th>
<th>Context</th>
<th>Luck</th>
<th>FLAPS-C</th>
<th>MLAT III</th>
<th>MLAT IV</th>
<th>MLAT V</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exam Grades</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>Anxiety</td>
<td>-.21</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>Ability</td>
<td>.06</td>
<td>-.28**</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>Effort</td>
<td>-.08</td>
<td>.36**</td>
<td>.10</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>Context</td>
<td>.04</td>
<td>.18</td>
<td>.18</td>
<td>.57**</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>Luck</td>
<td>-.27**</td>
<td>-.06</td>
<td>-.01</td>
<td>-.11</td>
<td>-.09</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>FLAPS-C</td>
<td>-.12</td>
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**Table 4**

**Correlation Coefficients Showing Relationships Between Foreign Language Combined Exam Grades and Cognitive and Affective Variables for Students Identified as Intellectually Gifted (n = 20) and as Learning Disabled (n = 16)**

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GUIDELINES FOR CONTRIBUTORS

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