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Article

A Canadian Perspective: French Language Learning

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Abstract

In Canada, language learning is viewed as an international, national and local need. Herein an international perspective is provided that guides the reader into a National language perspective which is uniquely Canadian. For instance, within Ontario there are concerns about French language education and the multiple entry points for students and inequities in most school boards in Ontario. The fact that School Boards across the province have identified the supply and demand for Ontario elementary and secondary teachers as variable especially in certain subjects such as French Language is unsettling. Future recruitment needs to cast a wide net and move deep into Faculties of Education in a proactive manner. Having the necessary French teachers and support staff is very important yet the need to retain students and educators in French programs is equally essential since retention and attrition rates impact program viability. Recent history in Ontario Core French (CF) programs demonstrate reduced enrollments over time therefore the government of Ontario has acknowledged a need to increase FSL student retention via improved access, training, relationships and special programs, to ensure students are enrolled and retained as long as possible.

Keywords

language learning, French, FSL

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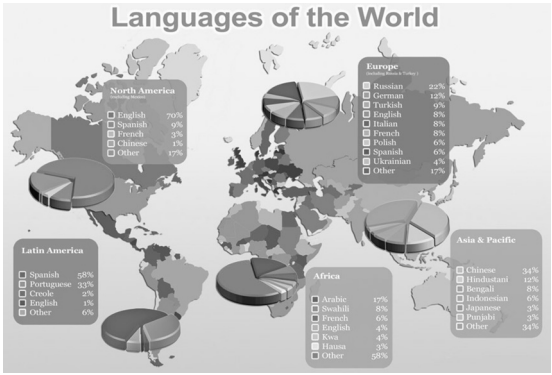
Background

An intentional framework unfolds that addresses the impact of various overt and covert inequities rooted in language and learning. In doing so various constituencies and resultant implications are illuminated which can have a lasting impact on the changing Canadian population. For instance, recent Canadian government census data clearly states that nationally ". . . outside Quebec, the English–French bilingualism rate among youth aged 5 to 17 was 15%, up from less than 13% in 2006. Among their Quebec counterparts, the rate was 33% in 2016, compared with 28% in 2006 (Turcotte, 2019, p. 1). This positive growth in bilingualism signals positive change, however, the percentages are quite low and draw attention to the many people who are not bilingual in a supposed bilingual country. Overall,

> the English–French bilingualism rate varied from province to province. In 2016, Quebec had the highest English–French bilingualism rate (44.5%), followed by New Brunswick (33.9%). The English–French bilingualism rate in the most populated Canadian provinces was lower than the overall national rate: 11.2% in Ontario, 6.8% in British Columbia and 6.6% in Alberta. (Turcotte, 2019, p. 1)

Nonetheless, French is a very popular language spoken by over 130 million people worldwide (Alberta Education, 2014). French is "27% lexically similar to English, 89% similar to Italian and 75% similar to Portuguese, Romanian, Spanish and German" (Alberta Education, 2014, p. 70).

> After English, French is spoken in more countries and on more continents than any other language. French is the second language of the Internet (after English). French is a language of world diplomacy and a working language of international organizations, such as the European Economic Community, the United Nations, NATO, the International Monetary Fund and the International Olympic Committee. (Alberta Education, 2014, p. 70)



Source: Language acquisition abroad - Retrieved from http://www.languageacquisitionabroad.com/northamericalanguagecourses.html.

Herdina and Jessner (2002) suggest people with "the command and/or use of two or more languages" (Herdina & Jessner, 2002, p.52) are indeed multilingual. For clarity it is important to note that bilingualism is actually a "variant of multilingualism, since it focuses on the study of two languages and not more" (Pedersen, 2016, p. 5). For many years it has been theorized that, "bilinguals integrate knowledge of and from both languages to create something more than two languages that function independently of each other" (Grosjean, 1982, p 471). Therefore, bilingualism has been shown to benefit "language acquisition when it comes to metalinguistic awareness. The term is subsumed under metalinguistic competence" (Pedersen, 2016, p. 17), referring to the "ability to focus attention on language as an object in and of itself, to reflect upon language and to evaluate it" (Thomas, 1988, p. 531). As a result of these positive elements nationally Canada seems well positioned to advance multilingualism, which is arguably a global competency within the 21st century worldwide (Lapkin et al., 2009).

French immersion "began in Canada in 1965 as a well-researched experiment in St. Lambert, Quebec. The success of the program and the extensive research related to the learning of French, English and subject area content quickly became known across Canada" (Alberta Education, 2014, p.1). Because French is so popular in Canada there is a very good chance that newly arrived students to Canada will want to be in a language program other than English. Consider current projections that suggest by 2031 between 25 and 28% of the Canadian population may be foreign-born (between 11.4 and 14.4 million people) (Statistics Canada, 2010, 2013). Therefore, in order to maintain the unique cultures and heritages, as well as foster academic success, attitudes, beliefs, and languages of this population, there is a need to offer multilingual educational programming (Statistics Canada, 2014).

A current Pan-Canadian report suggests research from "2000-2016 shows that FSL students are active learners, with interpersonal skills and linguistic and cultural repertoires that can be used to advance their French proficiency development" (Canadian Parents for French, 2017, p. 6). This characterization is helpful when advancing French proficiency within the Toronto District School Board (TDSB) via two French language programs entitled: French Immersion (FI) and Extended French (EF) which currently operate daily in many schools. Each program provides instruction and challenges students through diverse subject matter from all disciplines.

Student enrolment in French as a Second Language (FSL) programs varies yearly and when viewed through the lens of variables such as student gender, language, country of birth, recent arrivals, and Special Education Needs (SENs). Of note is the fact that a larger percentage of English speaking students who were born in Canada were enrolled in the FI compared to students enrolled in EF and students who spoke a language other than English at home have been equally represented in the EF compared to FI. Overall, enrolments in FI programs have increased by 5.5% from 2012-2014 (Statistics Canada, 2015). Interestingly, more female students were enrolled in FSL

programs and few students who arrived in Canada in the last 1-3 years were enrolled in French programming and even fewer students with Special Education Needs (excluding Gifted) attended FSL programs. In recent years students with SENs who were enrolled in the FSL programs increased slightly over a 10-year period beginning in 2006-07.

Most FSL students came from a two-parent household, had parents with a higher level of education, and came from a family with a higher socio-economic status (SES) when compared to TDSB students in general. Family structure patterns were pronounced in FI compared to EF. Students with both parents born outside Canada had a higher representation in the EF than FI program compared to the TDSB in general. The FI and EF student academic achievement in both the elementary and secondary school panels as measured by standardized assessments and teachers' grades where higher compared to other students in TDSB. Slightly higher achievement patterns were observed among students enrolled in the EF compared to the FI.

Methodology

This analysis utilized descriptive data to summarize FSL programs both inside and outside TDSB, which happens to be the largest school Board in Canada. At times this involved the calculation of variables such as frequency and indices for gender that lead toward gender-focused contrasts within the TDSB population. Descriptive computation revealed proportions, rates, and averages, via surveys, and measures of association that were used to realize statistical significance. Student demographics and achievement in FI, alternative schools, and other specialized schools and programs in the TDSB were examined.

Articles and other resource documents were located within the category of FSL education and the ERIC (EBSCOhost) database was accessed to locate articles in other databases such as Scholars Portal, Elsevier Science Direct, and the DOAJ (Directory of Open Access Journals). Similar key words used in Google Scholar were used in the ERIC database including: FSL, FI, EF, Language teaching and Second Language Learning.

Students enrolled in FI, EF, alternative, and other specialized schools and programs were based on the data extracts provided by the TDSB Information Technology - School Information Systems Department. Demographic and achievement characteristics of the TDSB students in these programs were based on parent and student surveys, the Student Information System, provincial assessments, the Early Development Instrument (EDI), report card marks, and secondary success indicators.

Language Education: An International Perspective

A primary purpose for teaching "languages is for students to confront their own monolingual biases and to understand the many pragmatic and humanitarian benefits of language learning" (Larsen-Freeman, 2018, p. 61). Current understanding

communicated by international researchers suggests learning a Second Language (SL) "enhances learners' reading and writing abilities, mathematical skills and performance in other school-related subjects" (O'Brien, 2017, p. 16). Indeed, British researchers revealed that primary children in SL Italian and French groups outperformed other children leading to the claim that learning a SL contributes to first-language literacy skills such as reading and raises language awareness (Murphy et al., 2015). Also, an Australian study completed by Hemsley et al. (2014) found bilingual (Samoan/English) instruction can enhance learning in mathematics and Vega (2014) examined an elementary Spanish-English immersion program and realized immersion students outperformed monolinguals, in areas such as English, reading, writing and mathematics. These studies underscore positives that support the finding that "children who learn a second language show either comparable or enhanced first-language literacy" (O'Brien, 2017, p. 17) and "second-language learners often show enhanced spelling ability as well as superior reading comprehension" (O'Brien, 2017, p. 17).

Still, international researchers caution that the "field must adopt multidisciplinary, ecologically valid, reliable, and innovative methods to capture children's full range of abilities and experiences. [This may help]. . . improve children's educational experiences and illuminate the social and cognitive processes that underlie child language development" (Philp et al., 2017, p. 11). It is not about comparing programs or outcomes since each region of the world has its own distinct challenges, variables and limitations, hence there is a reluctance to compare apples to oranges; instead researchers such as Marzano (2003) have identified key themes that can be compared, to look into certain elements of effective schools. Indeed, we now know that "scientifically based-evidence should be used to inform the educational community and guide decision-making and policy development. One of the challenges facing the educational community is the lack of research evidence to inform decision making" (Halton District School Board, 2009, p. 13) especially in the area of French language program comparison and evaluation. Lamarre (1996) believes,

> …research alone should not be considered as the answer in French immersion education, especially when major decisions have to be made. Research findings should by all means be studied, and referred to, but at the same time should serve as a guide rather than the 'gospel truth'. Because so little is known for sure in the field of French immersion, there is a tendency in all of us to hang on to research findings as tightly as possible even though these may be subject to change. (p. 10)

Therefore, given the "paucity of quality studies on this topic, it is prudent to look to board, school, and student-level data for additional information (Halton District School Board, 2009, p. 13). Learning a SL is not straightforward and there many human elements that can weaken SL learning pace, depth, and breadth, as Larsen-Freeman (2018) explains,

> important research has been conducted that investigates individual [SL learning] differences, such as aptitude, age, attitude, and motivation. Newer items have been added more recently, e.g., willingness to communicate, learner anxiety, identity, emotions, beliefs, and learning strategies. It is no exaggeration to state that more than 100 dimensions in which learners differ have been identified. (p. 59)

While SL learning pace, progress and literacy can differ for each person due to a myriad of reasons, learning a second language is really possible for all and should be considered appositive pursuit. An Icelandic researcher claims that being "bilingual is not a liability. Being part of two cultures, being able to visit other countries, and not having to face any problems due to languages, can open many doors in regards of studying or living in other countries" (Darko, 2016, p. 12). In other words, parents who understand the benefits of multilingualism understand that people who possess SL skills often have "greater mobility in local and international markets" (O'Brien, 2017, p. 51), since SL skills "aid communication, trade and business in global markets" (O'Brien, 2017, p. 51). Certainly, there are many encouraging aspects related to the knowledge of more than one language, which include the "development of positive personality traits, enhanced communication skills, and a greater sense of open-mindedness and empathy" (O'Brien, 2017, p. 71).

The approach or mode utilized to teach a SL is just as important as the content and/or qualification of the person teaching. A Finnish study into the tone created in SL classes and concluded, that "social activities involving communication are used both because they are fun and because they promote core language skills such as speaking and listening" (Lawrence, 2017, p. 49). Being an entertaining educator who is creative in the classroom enhances SL learning and being able to connect with learners via creative play is also "important to teachers along with other technical linguistic aspects such as grammar and pronunciation, which in turn are also taught in a fun manner (Lawrence, 2017, p. 56). While teaching a SL, educators often find themselves working in a program "based on a century-old model of the gradual acquisition of a new language through careful study over a number of years with the aim—for some—of reaching near native proficiency" (King, 2017, p. 34). However, today people are using hand-held (phone, pads, pods) computers that take pictures and provide many services at the touch of a finger; they are "managing to communicate across cultures and languages because they want to and need to, making use of prior knowledge, language acquired online or through the media and electronic translation tools" (King, 2017, p. 34). Therefore, we need to ask: Does technology now drive the vision, or do we provide the vision for SL learning? As well we can ask: While SL learning unfolds in our traditional system do we need to work within a tradition or can we use digital realities to motivate and reach certain expectations?

FSL Education in Canada

FSL education in Canada has been very successful over the past 50 years; however, some of the disenchantment with "immersion comes from unrealistic expectations. Immersion doesn't – and isn't intended to – produce graduates who speak French with the fluency of native speakers. What immersion does provide is an important building block on which graduates can develop their language skills" (Fraser, 2016, p. 1). It is important to remind all stakeholders that FSL provides a foundation upon which to build and is not the end of language learning once a person completes a program. Some parents of students have "felt that overall it was a good experience, but their frustrations were the result of the mixed messaging they had received surrounding the importance of official bilingualism in Canada and the actual reality of it within Canadian society" (MacCormac, 2016, p. 4). Perhaps some of this tension has evolved because Canada drafted and adopted legislation to promote multicultural heritage yet little support for multilingual programs has been forthcoming which is unfortunate since these programs promote acquisition and immigrant languages while integrating people into Canada's bilingual society (Canadian Parents for French, 2017; Cummins, 2014; MacCormac, 2016). The result is that,

> in Canada outside Quebec, 10- to 19-year-olds had the highest bilingualism rate in 2,016 (16%). These are the ages when youth attend elementary or high school. In Quebec, the highest English–French bilingualism rate in 2016 was observed among 20- to 29-year-olds (65%)—the ages when many young adults enter the labour market or pursue postsecondary education. (Turcotte, 2019, p. 1)

Brief Summary of FSL Education in Canada

Canadian FI programs can trace their roots back to a program that was developed for "Anglophone students in Québec to acquire adequate French language skills to compete in the Canadian labour market" (MacCormac, 2016, p. 21). FI spread to other regions in Canada to help students become bilingual, increase economic success and social status within Canadian society (Galarneau, 2014; Heller, 2010; MacCormac, 2016; Smala et al., 2013). While the path to success and status is not straightforward it is generally believed that being bilingual gives one an advantage in a country that is officially bilingual (Canadian Parents for French, 2017). Looking to other provinces such as Manitoba certain beliefs have led to the current suggestion that,

> the French Immersion Program enables students to interact spontaneously, autonomously, and confidently in French with pride and ease. They seek opportunities to engage in the Francophone community. Their identity as Canadian citizens, competent in both French and English, creates lifelong opportunities and fosters openness to other languages and cultures. (Government of Manitoba Education and Training, 2017, p. 6)

Another province, Saskatchewan, has recently offered this declaration:

> The aim of the Core French program is not to produce bilingual students. It does, however, provide a solid introduction and base upon which students can build second language skills. The program also provides many of the cognitive and other benefits that result from second language learning. (Saskatchewan Ministry of Education, 2015, p. 7)

Nationally, recent estimates suggest there are 377, 838 English-speaking children in Canada (Canadian Parents for French, 2017) enrolled in 2000 French immersion programs spread across ten provinces and territories (Baker, 2011, p. 240). Within Ontario there are about 6 times the elementary French Immersion (FI) sites than Extended French (EF) sites and 1.5 times more at the secondary level. Ontario has 98,697 students enrolled in French-language schools (Ontario Ministry of Education, 2013c) at a cost of $79,083,312 annually in each year from 2013 to 2018. This targeted funding supported second language and minority-language education programs in Ontario (Government of Canada, & Council of Ministers of Education, Canada, 2012, p. 10).

More recent funding information suggests Ontario over the next 5 years will receive $274,963,390 for minority languages, $120,453,170 for second language for a total of $395,416,560 dollars for language-related programs and support (Government of Canada, & Council of Ministers of Education, Canada, 2012, Appendix C). The investment has produced Immersion Students (IS) who outperform other French Second Language (FSL) streams on skill tests and have demonstrated superior proficiency skills (Canadian Council on Learning, 2007a). Also notable is the fact that French Immersion (FI) students usually out-perform nonimmersion (NI) students (Galarneau, 2014). Yet, student attrition in these programs remains a problematic issue (Berube, 2015; Ontario Ministry of Education, 2013c; Stauble et al., 2012) along with elitism and exclusivity (Hutchins, 2015) which tends to isolate students within the school they attend.

A somewhat recent census survey concluded,

> In 2011, 17.5% of Canadians, or 5.8 million people, reported being able to conduct a conversation in both English and French, up from the 12.2% recorded 50 years earlier, in 1961. In Canada, the proportion of bilingual people went from 17.7% to 17.5% between 2001 and 2011, even though the number of bilingual people rose continuously. Quebec was the only province in which the rate of bilingualism rose steadily between 2001 and 2011—from 40.8% to 42.6%. In 1961, the rate was 25.5%. In the rest of Canada, the rate of bilingualism went from 10.3% in 2001 to 9.7% in 2011. In 1961, the rate was 6.9%. (Statistics Canada, 2012, p. 1)

Notable is the fact that between 2001 and 2011, bilingualism outside Quebec growth stalled as the non-Francophone immigrant population grew and the proportion of students in French-as-a-second-language (FSL) programs was shrinking. Still, there

is no denying that knowledge of French "allow students to communicate with French-speaking people in Canada and around the world, to understand and appreciate the history and evolution of their cultures, and to develop and benefit from a competitive advantage in the workforce" (Ontario Ministry of Education, 2013b, c, p. 6). Anglophones and Francophones who were in the minority mother tongue group,

> —both in Quebec and in the rest of Canada—were more likely to be bilingual in English and French in 2016 than those who were in the majority mother tongue group. The gap between the two groups, however, was much more pronounced in Canada outside Quebec, where people with French as a mother tongue were significantly more likely to be bilingual in English and French than those with English as a mother tongue. This was true for both children and adults. (Turcotte, 2019, p. 1)

FSL Education in Ontario: Overview

As for next steps most Ontario Boards are looking at enrolment, attrition and funding to arrive at a next step. For instance, one Ontario Board determined, after looking at 31 English public boards and the 29 English Catholic boards, with EF and FI that,

> approximately 23% of the elementary and 36% of the secondary school sites in the province offered one or both of Extended French or French Immersion programs . . . . In Ontario there are approximately 6 times more elementary French Immersion sites than Extended French sites and about 1.5 times more at the secondary level. Some Boards have already eliminated Extended French or are in the phase out process. (Limestone District School Board, 2015, p. 4)

More recently the Upper Grand District School Board (2017) reported that most school boards "utilize the vision and goals from the Ministry's FSL Framework" (p. 4) and approximately,

> 78% of school boards offered French Immersion as the most common optional program. Extended French was offered in 66% of school boards and 50% of all boards contacted offered both FI and Extended French. Three school boards (9%) did not offer either French immersion or Extended French. (p. 4)

Clearly change is occurring due to enrollments or lack of, and this trend may continue to influence the decisions and shape of French programming in Ontario. Waddell (2017) reported that recent "figures provided by the Ministry of Education show the number of students in French immersion in Ontario has increased by 74.5 per cent since 2003" (p. 1). For instance, the Essex public Board has seen the "number of students enrolled in French immersion at the elementary level double to 4,376 since 2008" (Waddell, 2017, p. 1).

Still, retention and attrition rates impact program viability amid many other concerns (Masson et al., 2017). Consider that the "Halton Catholic Board is so frustrated in its attempts to find enough teachers, it's considering scrapping French immersion completely" (Waddell, 2017, p. 1). Researchers such as Vanderveen (2015) concede that FI programs in Ontario hope to produce "English-French bilingual individuals in order to contribute to maintaining positive relationships with French speaking Canada" (p. 9). It is an acknowledgment since Canada is officially bilingual and FI does help "Ontario students to understand Canada's history and to develop an appreciation of French culture" (Ontario Ministry of Education, 2013c, p. 6).

Core French

Following the guidance of the Ontario Ministry of Education Ontario educators at the elementary level, teach French so that students can "accumulate a minimum of 600 hr of French instruction by the end of Grade 8. At the secondary level, academic, applied and open courses are offered for Grades 9 and 10; university preparation and open courses are offered for Grades 11 and 12" (Ontario Ministry of Education, 2018, p. 1). Core French (CF) continues to be not only "a basis of Canadian identity, but also an essential tool for ensuring Canadians' openness to the world. Through second-language education, the Government offers young Canadians a boost toward wider professional horizons and a key to the international stage" (Ontario Ministry of Education, 2013a, p. 8). CF has a deep past in Ontario that predates confederation (Stern & Stern, 1986) with the very first French class taught in an Ontario high school in 1854 (Ontario Ministry of Education, 1974). Today CF continues to be the primary mode of FSL instruction in Canada with more than three-quarters of students in Ontario learning French in CF programs (Canadian Parents for French, 2012). This position however has been eroding and attrition is an annual concern, as many students do not continue beyond elementary school offerings (Canadian Council on Learning, 2007a, 2007b; Lapkin et al., 2009; Makropoulos, 2007).

The Ontario Ministry of Education (2013a) suggests that teaching,

> language as a system of disconnected and isolated components gives learners some knowledge of the language but does not allow them to use the language effectively. In contrast, communicative and action-oriented approaches to teaching French put meaningful and authentic communication at the centre of all learning activities. (p. 9)

While this position can be challenged it is certainly a worthy research study which many have recently investigated for instance Viswanathan (2016) examined the relationship between beginning CF teachers' beliefs about CF teaching and their instructional practices in Ontario and found "important differences in outcome (e.g., teacher and student use of the target language) in classes taught by teachers with a high degree of self-efficacy versus those with lower levels of self-efficacy" (p. iii). Hence, teacher "levels of self-efficacy had important implications for how teachers viewed and

navigated the chaos" (p. iii) wherein belief in oneself as a French teacher seems to be of more importance than the instructional mode (communicative/action-oriented approach). Of interest is the characterization of teaching CF as a time of chaos.

As well as the chaos, educators must work to make all communications comprehensible as the Ontario Ministry of Education (2014) advises, it is the ". . . teacher's responsibility to provide comprehensible input, ensuring that the messages that students receive are understandable. Making the input relevant – to the learner, the context, the situation – is one way of doing this" (p. 9). In other words, make the content progressive via authentic, hands-on activity that is both meaningful and engaging, however, "repetition and recycling are also integral to making input comprehensible" (p. 9) educators are cautioned.

Policy can propose anything is possible however, given the research findings of multiple researchers which suggest there is inadequate time for CF instruction and that this is a recurring situation (Mady, 2014; Marshall, 2011) then policy may fail to be implemented. As well, "CF instructional time was further limited by frequent interruptions, time lost traveling from class to class, and time spent setting up activities in each new classroom" (Marshall, 2011, p. 9). This loss of time can contribute to a frenzied work pace and environment that could be portrayed as chaos (Viswanathan, 2016).

Another Ontario researcher Gour (2015) recently found that perceptions of the 2,013 French curriculum matured and changed over time, and this impacted the implementation which was perceived as a dynamic process enhanced by support at the school and district levels. Gour (2015) details the praxes of a number of Ontario French teachers and suggests while their instructional efforts were varied, diverse and disparate their instructional approach could not be characterized as static, or antiquated. Gour (2015) does successfully illuminate a "need for professional development during the early stages of implementing a new and vastly different FSL curriculum" (p. ii). The need to change can be linked to many variables however there is one variable that needs attention – respect for the CF teacher in the midst of chaos.

Perhaps the characterization of chaos emerged from the fact that many CF teachers move from class to class or from school to school (itinerate) which can create a bit of chaos for all since you are teaching in another teachers' class or in different schools in 1 day. It was Cooke (2013) that suggested it is important for CF teachers to have their own classrooms, since not having one's own classroom "clearly signals […] the status" (p. 33), or lack thereof, of FSL teachers. In fact, Ontario FSL '*à la carte*' or trolley teachers, feel like 'phantom teachers' "(Gour, 2015, p. 8). This feeling can impact self-efficacy and erode classroom teaching, management and the overall quality of the French program in a school creating a perception of chaos.

Another researcher, Gauthier (2015) concludes: "Despite the generally low levels of enthusiasm, there were still some students who were thriving in the core French program; students who were motivated to learn French, regardless of the environment or the opinions of their peers" (p. 2). These enthusiastic students hold many key insights that would inform past studies such as Lapkin et al. (2009) who discovered that "while the official discourse promotes bilingualism in Canada, the study of French

in schools is often paradoxically marginalized" (p. 8). Gauthier (2015) responds, suggesting:

> We need to make them aware of their multilingualism and multiple identities, so that they can have the volition to incorporate them into their own self-identities and world views. Most importantly, we need to accept that their identities are complex, changing, and a site of struggle; that the best thing we can do is to support and educate them, and provide a safe place for them to explore their potential, developing, and at the same time, complex, identities. (p. 118)

Potential is something educators witness daily and this proves to be a research motivation in some cases, for example, Mowbray (2017) investigated primary students who were struggling readers within CF. It was determined that primary CF students who were struggling readers increased their levels of engagement, confidence, and willingness to read over the course of the study. These findings suggest that all of the sample primary students improved their French reading skills and therefore have a place in French immersion if they want to continue learning in French, "as long as appropriate support services are available" (Mowbray, 2017, p. 110).

Canadian research continues to add support for inclusion in CF and sends a number of factual messages to all stakeholders for instance Marshall (2011) examined CF and now believes that "compact CF formats promote similar levels of student proficiency" (p. 220). This finding may lead to less importance placed on format of the program because "it is feasible to implement the multidimensional, project-based curriculum approach in classes of different distribution of time" (p. 220).

Brief Summary of FSL Education in Canada's Largest School Board

In the Toronto District School Board (TDSB) "there are two types of intensive French programs: French Immersion and Extended French. Both programs are designed to give students the opportunity to learn French, not simply as a language program but also through other subjects taught in French" (Toronto District School Board, 2014, School Choices, French Programs, para. 3). Following is a summary of student access and student behavior characteristics within the French Immersion and Extended French from within the current literature that potentially lead to the establishment and maintenance of relationships.

Improving FSL Education: Relationships and Access

Relationships

Relationships can be impacted at many levels and strengthen by many events. One such relationship variable would be the fact that currently Canada has an "inadequate

supply of qualified teachers (language proficient and skilled in L2 pedagogy)" (Council of Ministers of Education, 2015, p. 11). Some may argue that if the teacher is unqualified, that the teaching is less than what might be realized in the classroom of a qualified Ontario French educator. No matter if this belief is factual the rumored information in a school can be enough to damage relationships with peers, students, and the wider community. Even if the teacher is qualified there are issues such as noted by Tedick et al. (2011) who found immersion teachers misunderstand the systematic relationship between content and language" (p. 22). This misunderstanding could instigate student confusion and impair relationships. Not all French teachers are equal in their ability; consider the thoughts of Norris (1999) who argues,

> the term "language teacher proficiency" of itself suggests an emphasis on linguistic knowledge as opposed to pedagogical or cultural knowledge. It is clear, however, that effective language teaching involves more than linguistic competence. The "multiple knowledges" approach provides a more complete picture of the interrelated components of language teacher proficiency. (pp. 52–53)

It seems logical to believe that a teacher with a "higher proficiency will be more at ease with more challenging resources and topics. Without a doubt, a proficient teacher is more desirable in any circumstance, but the issue of proficiency is one which is difficult to define" (Sparks, 2006, p. 33). As well, Hickey and de Mejía (2014) found teaching solely in French, for example, leads to greater student fluency, student self-confidence, and positive student attitudes toward the language. Yet, one teacher may be very able to speak French yet has difficulty with interpersonal relationships and is challenged pedagogically. Which begs the question: Is it better to be strong in one area to increase engagement, and not worry about other teacher domain weaknesses?

It is widely believed that positive classroom relationships contribute to a strong community atmosphere" (Bettney, 2015, p. 72), of learning, growth and feedback. In a recent study it was found that,

> some students believed their positive relationship with teachers limited this feedback. They believed their teachers were overly concerned about hurting their students' feelings, so they were not direct enough in their feedback. One student described the situation with his teachers: They are very, very careful with what they say, and sometimes it's good, I mean, I like it. I love they're careful with what they say, because it doesn't hurt you, but it wouldn't hurt me, too, for them to be a little more…a little harsher.…tough love. (Bettney, 2015, p.102)

This excerpt addresses the fact that, while students highly valued their relationship with their teachers, they needed more direct correction (Bettney, 2015, p. 102). Bettney (2015) also realized,

> teachers highly valued their relationships with their students and believed they were a very important element in the classroom. One teacher explained, "I really value relationships…until you know your students, it's just really hard to help them and I think getting to know them first is always just so key. And I value that almost above anything else" (Teacher I, Focus Group Interview #2, line 29). Teachers believed they could develop these positive relationships through various means, including: interacting with students outside of the classroom, incorporating student interests in the classroom, sharing about their own lives with students, valuing students' opinions and allowing. (p. 73)

The strategies noted to enhance relationships link to progressivism with authentic tasks connected to the world outside the classroom. Indeed, communicative language teaching (CLT) has been the "dominant approach to teaching second and foreign languages for the past two decades. With its emphasis on real-world, authentic tasks, interaction in the target language and student-centred instruction, CLT would seem to incorporate many of the lacking pedagogical elements" (Kissau & Turnbull, 2008b, p. 156).

Even though teachers want a comprehensive relationship with students, one that reaches outside the subject classroom and often into the school; research has noted that French classes may often exclude males, and even isolate males within schools. Nonetheless, French is but 1 subject or is it? For instance, "in an interdisciplinary program, the French language becomes a tool for reflection and communication thereby helping the development of students' awareness and ultimately leading them to make positive contributions to classroom, school and community" (Varga, 2016, p. 46). The need to include reflection in FSL is supported in The Standards of Practice for the Teaching Profession which recognized the importance of reflective practice (Ontario College of Teachers, 2010, 2015). Teachers apply both professional knowledge and experience to promote student learning and refine their professional practice through ongoing inquiry, dialog, and reflection (Curriculum Services Canada, 2015, p. 8).

"There is considerable potential in instructional approaches that encourage students to use the target language, not only as a communicative tool, but also as a cognitive tool for interacting with the teacher, with one another, and with content knowledge itself" (Lyster, 2007, p. 22).

Kissau and Turnbull (2008b) found that within the many studies reviewed many have shown that "students who are encouraged to study a language by parents, teachers and peers are more likely to do so than students who do not receive such encouragement" (p. 161). Male students need support, encouragement and more French teachers who are male to erode the idea that French is for females only and is very much effeminate. In fact, a somewhat recent study by the "Elementary Teachers' Federation of Ontario (2006) reported of the 2,341 teachers who self-identified as core French teachers, only 247 were male (10.7%)" (Kissau & Turnbull, 2008b, p. 163). A teacher is very important as they set the tone of the class, guide and motivate learners

especially in a second language (French) classroom (Chambers, 2005; Office for Standards in Education, 2002).

The Ontario Public School Boards' Association (2011) reported that students drop "French after completing the mandatory credit in Grade 9" (p. 1) they also report an on-going negative attitude toward French as students "do not see the importance of learning the French language and its relevance to their future goals" (p. 1).

Post-Secondary: Access

Approximately 45% of francophone students may not pursue their education in French after high school according to the Franco-Ontarian Students' Association (2016)

> because of poor access to postsecondary programs in their language and region, as well as the high costs of relocating to another region; There is also a need to create a better understanding of existing French-language postsecondary programs amongst teachers, parents and students at the primary and secondary levels. (p. 1)

In another study over "105 university students involved in the study who had previously been enrolled in core French or extended French programs in elementary or secondary school strongly believed that the study of French in Canada was not given the same respect as other subjects (Canadian Parents for French, 2015). Indeed, it has been suggested that Canadian "post-secondary institutions should place greater emphasis on investing in French language instruction to better promote the importance of gaining research skills in both official languages" (MacCormac, 2016, p. 27). By doing so it sends a message to students at all levels that French is respected, used and valued by post-secondary education.

Special Education

"Denying some students' the added advantages of learning a second language, based on their disabilities, brings forth major ethical and legal questions" (Bourgoin, 2014. p. 5). Which leads to the reality that "school board respondents indicated that they felt more students with special needs could be retained [in French immersion] if appropriate resources and programs were put in place" (Genesee & Jared, 2008, p. 143). However, locating personnel who can give "remedial assistance in French are not readily available in most communities" (Ontario Public School Boards' Association, 2011, p. 1). Many "learning resources are designed for French first language students" (Ontario Public School Boards' Association, 2011, p. 1).

With the recent creation of Ontario Ministry of Education documents entitled: A Framework for French as a Second Language in Ontario Schools, Kindergarten to Grade 12, and Including Students with Special Education Needs in French as a Second Language Programs – A Guide for Ontario Schools (2013a, 2015) the province seems to be aware of both the positives and needs of school board FSL programs such as FI

and Extended French (EF). Awareness needs to lead to action to take the steps in funding, professional development and ongoing support to maintain a healthy FI program (Cobb, 2015), in Ontario. Indeed, school boards consistently "expressed the efforts underway to shift the culture of exemption for Grade 9 French and the focus on supporting special needs and English language learners to attract and retain students in FSL programs" (Upper Grand District School Board, 2017, p. 4).

Porter (2008) believes "inclusive education means, simply, that all students, including those with disabilities and other special needs, are educated in regular classrooms with their age peers in their community schools" (p. 63). Alquraini and Gut (2012) examined over 70 research studies of inclusive practices only to conclude that there are many benefits within inclusion efforts in regular classrooms, because inclusion "is a successful approach for ensuring that those students develop skills in many different areas of academic achievement, social development, and general communication" (p. 46). As well, Alquraini and Gut (2012) encourage all educators to engage in "effective instruction practices to improve access to core general curriculum, peer support for students with severe disabilities, assistive technology, and administrative support, professional development training for educators, and effective involvement and support of parents or families in inclusive settings" (p. 47). Peer support and associated learning is often a one-to-one relationship with elevated levels of engagement (interactivity) with more time on task, simple communication, modeling, demonstration, chances to question, to receive and give immediate feedback and reinforcement impacting social and communicative behavior, as well as self-esteem building (Topping et al., 2016). In other words, many other people and support needs to be in place for inclusion to work. This is not the first instance where a team needs to be in place and working together for and with students.

Real harm can occur if stakeholders are in any way, discouraging identified and nonidentified students from entering immersion especially "in the absence of empirical support for such a policy is questionable on ethical grounds; because it denies subgroups of learners' access to employment-related skills that are important in a bilingual country" (Genesee & Jared, 2008, p. 141).

Summary

In sum, many of the inequities rooted in language and learning surfaces in day-to-day life yet, various constituencies and resultant implications linked to SL learning can be overcome via tolerance, training, and inclusion efforts. Admittedly, there are mixed messages surrounding the significance of official bilingualism in Canada and the actual reality of it within Canadian society. With low levels of Bilingualism in Canada there is much work to do in the area of SL learning which could start with training more qualified teachers. Much work needs to be done such as, a concerted effort to improve French-English relationships, improvement post-secondary language programming and access, and a re-examination of legal issues. Each aspect within this framework actually improves inclusion, yet another goal needing attention.

Learning a language, especially French is an international, national and local concern that can be seen in Canadian provinces such as Ontario where there are many concerns about French language education. At present Ontario have multiple entry points for students to learn French yet this can be viewed as an inequity by various stakeholders such as parents. School Boards across the province and country of Canada have identified the supply and demand for Ontario elementary and secondary French Language as wanting. Therefore, of the few French teachers available there is more competition to hire this minority. Hence, school board recruitment needs to cast a wide net and move deep into teacher training institutions. Having the required French teachers and support staff (French occasional teachers) is very important; as is the need to retain immersion students and educators in French programs since retention and attrition rates impact program viability. To review, recent history in Ontario Core French (CF) programs demonstrates reduced enrollments over time therefore the provincial government of Ontario has acknowledged a need to increase FSL student retention to ensure students are enrolled as long as possible.

Looking over recent Ontario Ministry of Education actions such as the current *Framework* on improving FSL education in Ontario Ministry of Education (2013a), and the newly released inclusion in FSL education (2015), and the Ontario FSL elementary curricula (2013b); Ontario Ministry of Education (2014), and healthy funding and recognition Ontario seems well positioned to attract, support and encourage students to remain in FI. However, FI retention rates need to be monitored, documented and communicated through annual Elementary and Secondary School Reports. The reason for this is to track movement and change in French programs such as the "31% average migration out of the French Immersion program from Kindergarten to Grade 4" (Limestone District School Board, 2015, p. 54). Access, retention and improved programing can provide a framework for SL learning success. There is a need to look to other Ontario Boards of Education to learn from them and work to be better at offering French. One Board that leads on the web, with respect to French Second Language Programs, is the Algoma District School Board at http://www.adsb.on.ca/programs/SitePages/FSLPrograms.aspx Given the need to be online and have a presence it is necessary in 2,019 to expand recruitment practices to hire more French language teachers to meet demands and this begins with a good digital presence.

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Article

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Abstract

Recent union-supported teachers' walkouts and strikes across several U.S. states and cities highlighted union-led and grassroots efforts to amplify teachers' voices. Yet, the recent U.S. Supreme Court decision, *Janus v. AFSCME, Council 31*, provides a strength test for teachers' unions and members engaging in social justice/equity work within a post-*Janus* landscape. This article first explores traditional functions of teachers' unions. Next, it examines *Janus* and potential consequences for union participation, teachers' advocacy, and civil rights. Using a social justice lens, the article discusses how and why unions may need to consider strengthening "social justice unionism" by building on walkouts and strikes.

Keywords

teachers, educational policy, unions, social justice

Teachers' unions have historically played a vital role within the education policymaking process—both as conduits for organizing teachers and as representatives of those teachers to advance teachers' concerns and their students' concerns within the classroom and communities (Shelton, 2018). Teachers' unions have also had significant roles in state and federal elections and political action committee (PAC) participation both to support candidates favorable to unions and to influence education policymaking within the representative democratic process (Wade, 2018). While teachers' unions have focused largely on "bread and butter" issues such as wages and benefits

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and protections of academic freedoms and procedural rights, areas critically important to rank-and-file members, union activity has focused less on social justice or equity commitments of teachers (Weiner, 2012). That is, teachers' unions have largely existed to serve as a voice for teachers by focusing on wages, benefits, and working conditions, along with employee protections, and the professional concerns of teachers (Weiner, 2012). However, teachers' concerns regarding social justice issues (e.g., increasing support for parent involvement within public education) or equity concerns (e.g., district-wide examination of racial or ethnic disparities in discipline proceedings) have often not been included within formal collective bargaining, particularly because contract negotiation between teachers' unions and districts can often "engender a 'serve the contract' mentality that narrowly focuses on individual members' concerns rather than larger professional or social issues" (Peterson, 1999, p. 15).

Yet, despite a narrow niche of representation for teachers' interests and with a steady membership decline since the height of teacher union membership in the 1980s, teachers continue to have the highest levels of union participation (approximately 33.5%, or 3 million) among public sector employees (Bureau of Labor Statistics, 2018). Even with strong membership support, and to some extent in reaction to that strong support, teachers' unions have faced significant challenges to their political strength and their ability to further their members' interests through activities such as collective bargaining, a process whereby parties negotiate contracts that determine wage rates, work hours, and employment terms and conditions (Koppich, 2005; Malin, 2012; Superfine & Woo, 2018).

Moreover, in recent years, there have been several threats to teacher unions' abilities to protect teachers even regarding bread and butter union issues (e.g., increased pay or improved working conditions for teachers), with even more resistance shown toward union demands regarding social justice or equity concerns. For instance, within a shifting political landscape increasingly more hostile to unions, several states have enacted legislation curtailing the matters over which teachers' unions can bargain, thus limiting the ability of unions to achieve their bargaining objectives (Malin, 2012). These restrictions on collective bargaining are not the only challenge to teachers' unions. On both the state and federal level, new threats challenge the economic viability of teachers' unions. In 2018, the Supreme Court decided *Janus v. American Federation of State, County, and Municipal Employees (AFSCME), Council 31*, which held that public sector employees may not be forced to pay any agency fees if they choose not to belong to a union that represents their bargaining unit (*Janus v. AFSCME, Council 31*, 2018). *Janus* has significant consequences for how teachers' unions operate and, potentially, whether they will continue to exist at all. In addition, *Janus* will further change the boundaries and extent of influence for teachers' unions within the policymaking process and during collective bargaining for the approximately 50% of school districts that have entered into a collective bargaining agreement (CBA) within the most recently reported school year (National Center for Education Statistics, 2012).

In addition, there have been challenges for teachers as they, either with or without union support, have advocated for improved wages and working conditions for themselves and/or have advocated for resources to address social justice or equity concerns on behalf of the students they teach and their families. For instance, such activity occurred within a series of teacher (and other school service workers) strikes and walkouts that began statewide in West Virginia in February 2018 and then spread to several other states and large school districts over the following year (Crain & Matheny, 2018; Fisk, 2018). Therefore, this article first explores how teachers' unions have historically served their members—namely through efforts to ensure protections such as quality working conditions, development of union-achieved CBAs to directly influence teachers' instruction within classrooms and student outcomes, or professional development programs via bread and butter unionism. In addition, this article employs legal analysis to examine *Janus* and how it potentially changes the ways in which public sector teachers' unions can protect members and may, as evidenced by events such as the recent teachers' walkouts and strikes, necessitate the need for a stronger social justice focus within the union's goals. Finally, using a social justice lens, this article concludes with considerations for how teachers' unions can better attend to members and gain their support for the wage, employment, and working conditions and social justice/equity needs of its members within a post-*Janus* environment.

Teachers' Unions, Historical Functions, and Domains of Organization

Among unions, teachers' unions are particularly different in that union membership can protect the interests of both teachers (members and nonmembers) and students (Superfine & Woo, 2018). Yet, the ability of teachers' unions to participate fully in the democratic process, where citizens and interest groups participate in governmental decision-making, has historically been disfavored by some policymakers (DeBray-Pelot & McGuinn, 2009). This may, in part, be because of the dual interests of teachers to secure additional protections for themselves as public employees and for students (Malin, 2009). Since the 20th century, two teachers' unions, the National Education Association (NEA) and the American Federation of Teachers (AFT), affiliated with the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO) have largely dominated the teachers' union landscape (Koppich, 2005), and both aim to increase the use of collective bargaining and to improve public education (National Education Association, 2019).

Teachers' unions are often a state's largest and most visible public union. They engage in education policymaking under the constraints of visibility, responding in real-time to potentially negative perceptions about union activities such as collective bargaining, and functioning within a system comprised of "fragmented, political authorities deciding who gets 'what, when, and how' within and across three levels of government" (Hartney & Flavin, 2011, p. 252). If public support or political influence wanes, organizations must modify their strategies and behaviors for survival to ensure

a sustainable future. Therefore, in order to thrive and survive, teachers' unions often lean toward creating a public platform with a primary emphasis on ensuring protections to teacher-members in policy areas that have been historically agreed-upon as noncontroversial and narrowly tied to the workaday lives of teachers (Peterson, 1999).

Teachers' Unions and Collective Bargaining

Workers choose whether or not to be represented by a union through a democratic process, almost always a secret-ballot election determined by a majority vote and supervised by the appropriate government agency (National Labor Relations Act [NLRA], 29 U.S.C. § 160 *et seq*., 2018). To win majority support, a union must convince those employees that it will be effective in delivering benefits to them. Because the union is also subject to the possibility of subsequent rejection by the workers that it represents, it must maintain support by effectively representing them (NLRA, 29 U.S.C. § 160 *et seq*., 2018). There are several components of that representation. First, unions attempt to achieve higher wages, increased benefits, and more favorable working conditions for those that they represent through collective bargaining. Further, it enforces those bargaining gains against unilateral employer encroachments both through arbitration and, when necessary, through unfair labor practice proceedings before the appropriate administrative agency (NLRA, 29 U.S.C. § 160 *et seq*., 2018). Finally, it uses the same mechanisms to enforce individual claims against unfair or discriminatory treatment in the workplace.

Collective Bargaining Agreements and Education Policymaking

Specifically, in negotiating CBAs, teachers' unions attempt to attain favorable wages, benefits, and working conditions for teachers and to establish a shared role for the union in shaping education policy and decision-making (Malin, 2009; Superfine & Woo, 2018). Specifically, a CBA "lays out the parameters of many aspects of local education policy," and also signals the level of influence that the local union has on district policy and district administrators' abilities to make decisions on key areas including teacher pay, hiring practices, and grievance protocols (Strunk & Grissom, 2010, p. 391). Within the limited empirical analysis of associations between a strong union presence within a district, as measured by school board members' perceptions of union strength and union support of particular candidates during recent elections and school district policy established within CBAs, studies have found a positive association between the strength of a union and influence regarding district policy (Strunk & Grissom, 2010). However, teachers' unions' influence varies by state. In several states, legal restrictions on the scope of teachers' union collective bargaining has diminished their ability to advocate for teachers or influence policy (Hodges, 2012). For instance, teacher evaluation processes have been excluded from collective bargaining in several states (Malin, 2012; Superfine & Woo, 2018).

Business Unionism

Within the standard model of U.S. union representation, unions typically engage in what is referred to as "business unionism" in which they focus on promoting the interests of the particular workers that they represent by achieving and enforcing favorable contractual terms through the collective bargaining process. For teachers' unions, typical bargaining over bread and butter issues resembles the sort of concerns that all unions share and can include such issues as wages, hours and other working conditions, pensions, and medical benefits. Because teachers have a strong interest in protecting and advancing their professional status, teachers' unions also attempt to bargain over matters related to maintaining a seat at the table for teachers to help determine a variety of decisions that have an impact on the work lives of teachers as professional educators (Superfine & Woo, 2018).

Bargaining Over Professional Matters. Across local, state, and nationwide fronts, another aspect of the business unionism of teachers' unions is protecting the professional status of teachers by focusing on such matters as professional teaching standards and methods of teacher evaluation, instituting collaborative approaches for teacher-school leader practice, protecting teacher academic freedom, and promoting opportunities for professional development. Within this form of unionism, unions insist on recognition that teachers are both engaged in the practice of teaching and dedicated to serving as expert school leaders (Superfine & Woo, 2018). As in the more traditional bread and butter issues that teachers' unions bargain over, these "teacher as school leader issues" often put teachers and school systems at odds over the allocation of limited resources. Further, even more than negotiations over such matters as wages and benefits, these professional concerns often identify conflicts between teachers and their schools over fundamental questions about decision-making regarding school operation and policy. Consequently, some of the recent legislative roll back of collective bargaining rights has limited the ability of teachers' unions to insist on bargaining over these issues (Malin, 2012).

Social Justice Unionism

Recent teacher strikes and walkouts have demonstrated that teachers have concerns and interests that go beyond mere business unionism and may encompass issues regarding community or social welfare resources, equal educational opportunity, equity, or relationship-building between schools and the communities that they serve. Moreover, as teachers engage in practice within classrooms, some teachers develop a critical stance whereby, for example, teachers "[not] only recognize the inequities and disadvantages experienced by urban students of color but [realize] that history dictates that educational opportunities are born out of political struggle" (Montaño et al., 2002, p. 265). Yet, for many teachers who desire to effectuate change within the communities they teach, advocacy at the individual- or group-level may also be used to trigger

further union activity to pursue those goals. Thus, social justice unionism seeks to establish teachers' unions as an integral partner with teachers to address and defend the rights of members, identify, recognize, and address disparity and inequality within school communities, and involve parents and community members within efforts to address these disparities and inequalities (Peterson, 1999). Moreover, it calls for education reform and a "concern for broader issues of equity throughout society" (Peterson, 1999, p. 14).

There is a fine-line distinction between business unionism and social justice unionism. For instance, teachers' unions might assert that union efforts to secure reasonable wages and benefits and to protect teachers from unfair and arbitrary treatment in their schools constitute both business and social justice unionism. Moreover, there are historical instances of union advocacy, within a business unionism realm, where unions, on behalf of workers and other people who did not occupy the workplaces that labor unions had organized, won labor protective legislation, secured rights of all workers to free speech and freedom of association, and gained broad education reforms. While unions that engage in social justice unionism still do bread and butter bargaining, they tend to link bread and butter issues "to broader discourses of social dignity and universal civil rights," and they forge links of solidarity to other communities (Fantasia & Voss, 2004, p. 130). As shown below, recent teacher strikes and walkouts have drawn from this tradition, and social justice unionism has a major role to play in the response of public sector unions, including teachers' unions, to *Janus*.

Collective Action and the Limitations of Unions

Whether engaged in business unionism bargaining or in social justice unionism bargaining, unions seek to provide valuable things that individual employees would be unlikely to provide. In so doing, unions confront and overcome the collective action problem, a historical one, examined as far back as 1965 by Mancur Olson in his seminal study, *The Logic of Collective Action* (Olson, 1965). That is, when unions function well, they produce collective goods that benefit all or most of the employees in the workplace that they represent. For example, teachers in a school district might prefer that the school day begin and end a half hour earlier than it currently does in order to better accommodate their own child care and pickup needs. Absent a union, teachers might have to rely on the actions of a specific teacher who might be willing to "speak out" and request a meeting with school administrators where he or she would advocate for the change. However, an individual teacher mulling the option to speak out might consider whether or not school administrators would retaliate after an individual teacher's request. By comparison, when a union seeks and accomplishes a change in the school-day schedule, it confers the benefit equally to every teacher who views the change as beneficial, whether or not they otherwise support the union. The schedule change is a nonexcludable collective good which the union cannot provide to its members only, even if it wanted to, because it is not possible to run the district on two different schedules simultaneously. Further, labor law does not allow the union to bargain

only on behalf of its members to the detriment of other employees in the workplace who are, by law, represented by the union.

Production of such collective goods costs money (Hodges, 2012). Union staff is needed to run the day-to-day affairs of the union, to deal with workaday issues that arise for the employees, to determine and coordinate the preferences of those employees for purposes of collective bargaining, and then to act on their behalf both at the bargaining table and in contract enforcement. Depending on the nature and size of the workforce, the union must also rely on the services of experts, such as lawyers, accountants, financial planners, and lobbyists (Hodges, 2012). Unions provide for these costs by collecting dues and other fees from the workers that they represent. Given that unions have an obligation to fairly represent every worker in the bargaining unit and that many of the gains that unions achieve are nonexcludable collective goods, workers who do not otherwise feel strong loyalty to the union or who oppose it have a powerful incentive to accept those goods for free, or free ride, if the law allows them (Hodges, 2012). Legal change that restricts the ability of unions to raise necessary funds to engage in their activities will force a union to adapt its behavior or face decline and possible extinction.

Janus v. AFSCME

Unions have, in fact, faced a sustained campaign to curtail the nature and scope of their representation within a timeline that predates the rise of public sector unions. On the state and federal level, this effort has been pursued in legislatures and the courts. The litigation campaign to limit the function of and defund unions has been spearheaded by legal advocacy organizations, most notably the National Right to Work Legal Defense Foundation, in support of challenges to fair share agreements brought by ideologically motivated workers. Mark Janus, a child support specialist employed by the Illinois Department of Healthcare who, along with many other state employees, was represented by the AFSCME Council 31 union, joined such a claim in a case that would eventually bear his name (*Janus v. AFSCME, Council 31*, 2018).

Janus Origins

The relationship between public sector employees and their employers are primarily governed by state, rather than federal, law (NLRA, 29 U.S.C. §152(2), 2018). As an Illinois state employee, Janus's employment was covered by the Illinois Public Labor Relations Act (IPLRA) ["The Act"] (5 ILCS 315, 2018). The Act describes the process by which public employees may choose to select a union as their representative for purposes of collective bargaining (IPLRA, 5 ILCS 315/9, 2018). If employees opt for such representation, the Illinois Labor Relations Board will designate the union as the *exclusive* representative of the employees, meaning that the union has the authority to bargain on behalf of all the employees in a particular bargaining unit, whether or not a particular employee supports the union or wishes for it to act on his or her behalf (i.e.,

the union enjoys exclusivity) [IPLRA, 5 ILCS 315/9, 2018]. Thus, the employer both has a duty to bargain with the union over statutorily designated matters and an obligation to refrain from bargaining with anyone else, including with individual employees (IPLRA, 5 ILCS 315/7, 2018).

Union exclusivity is powerful and susceptible to abuse (Ray et al., 2019). Consequently, Illinois law imposes a duty of fair representation on unions, meaning that they may not act arbitrarily, discriminatorily, or in bad faith in their representation of anyone, member or nonmember (*Stahulak v. The City of Chicago*, 1998). A union's failure to meet its duty of fair representation as construed by the IPLRA is an unfair labor practice (IPLRA, 5 ILCS 315/10, 2018). In Illinois, as under federal labor law, dissenters who oppose a union may not be compelled to join that union (IPLRA, 5 ILCS 315/6, 2018). Recognizing the incentives for public employees to free ride on the union's efforts, Illinois law permitted public sector unions to enter into "fair share agreements" with public employers (IPLRA, 5 ILCS/6, 2018). Such agreements, also known as agency agreements, provided that the employer would deduct a sum from dissenters' paychecks to be paid directly to the union equivalent to the portion of a union member's dues that supported the union's collective bargaining and contract administration efforts. In *Abood v. Detroit Board of Education* (1977), the U.S. Supreme Court upheld the use of fair share agreements provided for in Michigan's public sector labor statute in the face of a constitutional challenge grounded in the First Amendment. The Court distinguished between fees required of nonmembers that were attributable to union expenditures "germane to its duties as collective-bargaining representative," and those connected to the union's "ideological activities unrelated to collective bargaining," deeming only the former constitutionally permissible (*Abood v. Detroit Board of Education*, 1977, pp. 235–36).

In 2015, Mark Janus and another Illinois public employee received permission from a federal district court to intervene as additional plaintiffs in a suit brought by Illinois Governor Bruce Rauner challenging the lawfulness of the provision of the IPLRA that allowed fair share agreements. Janus, who was critical of the union and had declined membership, objected to having to pay nearly $45 monthly under the fair share agreement (*Janus v. AFSCME, Council 31*, 2017). On the basis of *Abood*, the district court dismissed Janus's claim, and the U.S. Court of Appeals for the Seventh Circuit affirmed the dismissal (*Janus v. AFSCME, Council 31*, 2017).

Supreme Court Decision

Writing for the majority of the U.S. Supreme Court, Justice Samuel Alito dismissed *Abood* as a "poorly reasoned" decision, and, in overruling *Abood*, held the fair-share provision of the Illinois statute unconstitutional (*Janus v. AFSCME, Council 31*, 2018, p. 2460). Justice Alito characterized the mandatory payment of agency fees as "compulsory subsidization" of speech, which a state can only demand if it can show that the statute served "a compelling state interest that cannot be achieved through means significantly less restrictive of associational freedoms" (*Janus v.*

AFSCME, Council 31, 2018, pp. 2464-2465). *Abood* identified Michigan's compelling state interest as maintenance of "labor peace" which it said was furthered by establishing a system of public sector labor relations that was guaranteed stability and orderliness by creating the mechanism whereby a single union would serve as the exclusive representative of a group of public employees (*Janus v. AFSCME, Council 31*, 2018, p. 2466). It further saw the free rider problem that would exist absent a fair share arrangement as destructive of the ability of unions to play their role in this system of labor relations (*Janus v. AFSCME, Council 31*, 2018).

Justice Alito rejected *Abood*'s analysis and found that the Illinois statute failed the standard of "exacting scrutiny" which the Court was applying to determine if the impingement on Janus's and other dissenters' free speech was constitutionally permitted (*Janus v. AFSCME, Council 31*, 2018, pp. 2465–2469). In rejecting the argument that by protecting exclusive representation by a single union the law permitting fair share agreements served a compelling state interest, Justice Alito's argument depended on a comparison between state public sector unions and federal employee unions, the latter of which managed to operate as exclusive representatives without the benefit of fair share agreements. (*Janus v. AFSCME Council 31*, 2018). As Justice Kagan explained in her dissenting opinion, Justice Alito failed to consider the broad differences between the law governing federal employee unions, which tended to minimize the relevance of fair share agreements for federal employee unions, and those governing public sector unions in states like Illinois (*Janus v. AFSCME Council 31*, 2018). Regarding the free rider issue, Justice Alito relied in part on dictum that he had inserted into a prior case, *Knox v. Service Employees*, stating that concerns about free riders do not trump First Amendment concerns (*Knox v. Service Employees*, 2012). Additionally, he argued that despite the free rider problem, unions take on exclusive representation because of the desirability of being the exclusive representative. Justice Kagan rejected these arguments and instead stated that the issue is not whether or not unions continue to try to function when they face free riders. Instead, Kagan reasoned that the issue is whether or not they can continue to serve those they are bound to represent in the face of a collective action problem when unions no longer have the ability to compel those they represent to pay a fair share for their efforts and when the incentive for everyone, even strong supporters of the union, is to free ride on the assumed contributions of others (*Janus v. AFSCME Council 31*, 2018).

In addition, Justice Alito rejected the union's other two arguments based on post-*Abood* jurisprudence, whereby regulation of public employee speech is sometimes permitted and when there is a need to adhere to longstanding precedent (*Janus v. AFSCME, Council 31*, 2018). Here too, Justice Kagan found those arguments compelling and strongly dissented. See Table 1 for an analysis of the key points from *Janus*.

It will take some time before the full impact of *Janus* can be assessed. However, in the immediate aftermath of *Janus*, the collection of agency fees from nonconsenting bargaining unit members became unlawful. That change had no immediate impact in the 27 right-to-work states (e.g., Alabama, Kentucky, Wisconsin) that already prohibited fair share agreements. However, most unionized public sector workers work in the

Table 1. Key Provisions of *Janus v. AFSCME, Council 31* (2018)

Legal Question in *Janus*	Does a state statute that allows a state or local governmental agency to enter into an "agency fee agreement" with a union that represents its employees under which the agency deducts a portion of employee wages to pay for the union's collective bargaining and other costs of representation violate the First Amendment rights of employees who object to subsidizing any activity of the union?
Prior Governing Precedent	The Supreme Court ruling, *Abood v. Detroit Board of Education* (1977), upheld a similar Michigan statute allowing an agreement where nonunion member employees were compelled to pay their share of that portion of a union's costs that were "germane to its duties as collective bargaining representative," but not for those costs that are related to the union's ideological or political activities.
Janus Majority's Analysis of *Abood*	Justice Alito, writing for the majority in *Janus*, rejected Abood's analysis that the agency fees served a compelling state interest by ensuring a stable system of public sector labor relations and labor peace, which would be undermined by allowing nonmembers, whom the union nevertheless had a duty to represent, to free ride on the union's efforts. Because the *Janus* Court concluded that the agency fee could not be shown to serve a compelling state interest, it instead constituted subsidization of union speech compelled by the State of Illinois in violation of the First Amendment.
Ruling	The Court (5-4 decision) outlawed the use of agency fee agreements to compel the extraction of agency fees from public employees who, while represented by a union, choose not to be union members.
Janus Implications	The ruling allows public sector unions to enter into arrangements with state and local governmental agencies to deduct union dues and fees from the paychecks of union members. Unions may not similarly receive agency fees from dissenters who choose not to be members. This will likely diminish their financial resources and membership ranks.

remaining 23 states and the District of Columbia (Manzo & Bruno, 2018). Unions themselves have predicted that a loss in *Janus* would result in a loss of financial resources as agency fee payers opted to free ride (Henig & Lyon, 2019). Additionally, those losses coupled with the perception of union weakness could exacerbate the collective action problem leading to union membership decrease and diminishment of financial resources and collective bargaining strength. To date, the results have been less severe than initially expected. For example, in October 2018, the NEA reported a loss of less than .6% of its membership since April 2018 (Antonnuci, 2018). More significantly, it lost 87,000 agency-fee payers since the Supreme Court announced the *Janus* decision (Antonnuci, 2018). Elsewhere, however, results have been mixed, with some unions even reporting membership gains since *Janus* (DiSalvo, 2019).

Losses in greater numbers are likely as more employees learn of *Janus*. Using data compiled by the Bureau of Labor Statistics contained in the Current Population Survey Outgoing Rotation Groups (CPS ORG), a study co-sponsored by the Illinois Economic Policy Institute and the Project for Middle Class Renewal forecasted the likely impact of a decision striking down the fair-share agreements for public sector employees on a variety of outcomes including wages and union membership (Manzo & Bruno, 2018). Specifically, the report predicted that an adverse decision to unions in *Janus* will result in an average pay decrease of 3.6% for public sector employees and a greater average decrease of 5.4% for public school teachers (Manzo & Bruno, 2018). The report also found that such a decision would reduce union membership rates by 8.2% while reducing the rate for "pre-K through 12 and special education teachers by 4.8%" (Manzo & Bruno, 2018, p. ii). Finally, the report concluded that these impacts would largely be limited to the 23 states that allow fair share agreements and the District of Columbia (Manzo & Bruno, 2018). However, others have predicted that there is reason to believe that, over time, the decision will weaken unions in the 27 right-to-work states, as national unions find it harder to subsidize affiliated unions in those states, and as support for the labor movement generally further erodes (Fisk & Malin, 2019; Slater, 2018). Other studies that have drawn on the impact of recent adoption of right-to-work rules in several states demonstrate how difficult it is to predict the likely impact of *Janus*, but all point to more dramatic losses of members and fees (Tang, 2019).

In addition, *Janus*, though seemingly a facially neutral decision regarding race, is likely to have more of an adverse impact on African American workers and their families than on other workers. African American workers, especially African American females, gravitate disproportionately to public sector employment. According to a 2011 study examining data from 2008 to 2010, African American workers were 30% more likely to be public sector workers than all other workers, and 21.2% of African American workers were employed in the public sector compared to 16.3% of all other workers (Pitts, 2011). Public sector employment has often been a pathway to the middle class for African American workers, both because of greater job stability and a union wage differential that allowed those workers to earn considerably more than comparable workers employed in the private sector. The same study found that African American men employed in the education and health fields by public employers earned

121.4% of the wages of their privately employed counterparts, while publicly employed African American women in those sectors earned 126.7% of the earnings of their private sector counterparts (Pitts, 2011, p. 5). To the extent that *Janus* reduces public sector employment rates and wages, it will likely have a particularly severe impact on African American workers.

Toward a *Janus*-Informed Teacher Unionism

Teachers' and other public sector unions will need to adapt to the more challenging post-*Janus* environment. In response, unions have pursued new legislation to soften the decision's impact. Many teachers' unions have also responded with renewed energy in a series of walkouts or strikes that demonstrated both undiminished fervor and a reimagining of the unions' advocacy role to include not only the pursuit of bread and butter gains but also gains for students, their families, and their communities under a banner of social justice. A combination of both strategies may hold the key for long-term success for these unions. The following considerations may also need to be weighed.

Consideration #1: Partnering with State Legislatures in the Post-Janus Era

Janus adds a significant legal change that may undermine the ability of public unions, particularly teachers' unions, in fair share states attempting to muster the resources they need to fulfill their representative mission and obligations. In the face of that challenge, public unions must adapt to their environment, either by expanding their access to resources or by finding a way to thrive with fewer resources. A number of proposals for change have been suggested. To succeed, these proposals must be impactful and legally and politically viable. An approach that has seen some legislative success has been to create greater union access to public sector workers to facilitate recruiting new members. New Jersey, for example, enacted legislation in anticipation of *Janus*, which, among other things, guarantees union access to public workplaces both for purposes of discussing grievances with public employees and to recruit newly hired employees (New Jersey Workplace Democracy Enhancement Act, 2018). Several states have adopted similar legislation that provide for union access either to workplaces or new employee contact information (DiSalvo, 2019). Specifically, U.S. teachers' unions may need to consider working with legislators, as done in Maryland, to enact mandates that unions representing a particular public employer's workers must be included in orientation programs for new hires (e.g., newly hired teachers beginning a job with a school district; State of Maryland, Office of the Attorney General, 2018). While access is an important issue for unions (Ray et al., 2019), such legislation is likely to have limited impact on the membership and resource problem that *Janus* poses, since access appears to be less of a problem in the public sector than the private sector, and greater access can only be so useful in the face of the collective action problem and incentives to free ride.

In addition, it may be necessary for unions to consider pursuing legislation that would eliminate some of the costs of representation that follow from exclusivity by eliminating a union's obligation to act on behalf of a nonmember in most roles other than collective bargaining (Fisk & Malin, 2019). While such an approach would shrink the union's size and role, eliminating the costs of acting on behalf of non-fee-paying employees in such settings as teacher disciplinary investigations and arbitration would protect union resources. Thus, the union could act on behalf of everyone in collective bargaining and of its members in other roles. This idea is a variation on what is typically called members-only collective bargaining (Crain & Matheny, 2018). Legislation that retained exclusivity for collective bargaining, while eliminating a union's duty of fair representation to act on behalf of non-fee-paying employees for other purposes (unless they paid for the specific service that they were requesting) may emerge as both a practical and ethical legislative solution to the *Janus* problem. However, members-only unions have been disfavored by the labor movement, which will hesitate to sacrifice exclusivity (Tang, 2019).

Consideration #2: A Social Justice Unionism Response to the Collective Action Problem

Since 2018, teachers' unions have seen a series of prominent, union-supported teacher walkouts and strikes across the U.S. in states including West Virginia, Oklahoma, and Arizona and in cities including Los Angeles and Denver (Henig & Lyon, 2019; Loomis, 2018). Many of these teachers' actions occurred in right-to-work states that prohibited both teacher collective bargaining and strikes. In the statewide actions, rather than appealing to an individual school district, teachers and their unions made direct appeals to state legislatures, while building a coalition of support that included parents, students, neighbors, and school administrators. This coalition-building also extended beyond issues that directly impacted teachers and included student- and parent-focused concerns such as securing additional nurses and librarians within district schools and gaining commitments to fund public education. Though the gains, both for teachers and on behalf of the schools and students they serve, have been mixed, these walkouts suggest an additional or alternative strategy for unions operating under *Janus*. See Table 2 for a list of organized teachers' walkouts or strikes, the subsequent state legislation enacted or proposed since 2018, and key components of negotiated agreements with local school districts.

These walkouts and strikes contain important lessons for how teachers' unions can adapt to the post-*Janus* environment to revitalize member support and to broaden their alliances with students, parents, and communities.

Encouraging Rank and File Leadership. Unions must consider maximizing the use of their most valuable resource: teachers. The flurry of walkouts was rank and file driven (Crain & Matheny, 2018). For example, West Virginia teachers initiated the walkouts, and their unions followed (Loomis, 2018). When union leadership suggested accepting the state's initial offer, teachers insisted on staying out on strike and achieved a better deal (Loomis, 2018). Of course, unions played a major role coordinating events, but the impetus for

Table 2. Major U.S. Public Teacher Strikes/Walkouts and Associated Outcomes, 2018–2019

State/City	Strike/Walkout Year	Outcomes Post-Strike or Walkout	Statutory Authority or Collective Bargaining Agreement (CBA)
Atlanta, GA	2018	Verbal commitment by elected officials to fully fund public education	Neither
Arizona	2018	Passage of AZ House Bill 2663 which provided a 20% teacher pay raise by 2020	Arizona H.B. 2663, 53rd Legislature, Second Regular Session (AZ, 2018)
Chicago, IL	2019	Pay increases, agreement to gradually add support staff to schools, and funds to address overcrowding and homelessness	CBA*
Denver, CO	2019	Agreement made between Denver Public Schools and teachers' union for a 7% to 11% teacher pay raise	CBA*
Kentucky	2019	Rejected House Bill 205 that would have provided Kentucky residents incentives to donate to private school scholarship programs in exchange for tax breaks; Rejected House Bill 525 that would have restructured the board of trustees that oversees Kentucky's teacher pension system	Neither
Los Angeles, CA	2019	Agreement reached between school district and teachers' unions to increase teacher pay by 6%; Agreement also secured caps on class size, reduction of standardized tests, and commitment to hiring additional nurses and librarians	CBA*
North Carolina	2018	An allocation provided within the budget bill to increase teacher pay by 6.5%	North Carolina S.B. 99, 2017-2018 General Assembly; 2017-2018 Reg. Session (NC, 2018)

(Continued)

Table 2. Continued

State/City	Strike/Walkout Year	Outcomes Post-Strike or Walkout	Statutory Authority or Collective Bargaining Agreement (CBA)
Oakland, CA	2019	An agreement between the teachers' unions and Oakland Unified School District (OUSD) provided an 11% pay raise over four years and a 3% bonus; OUSD also agreed to hire more special education teachers, school counselors, and psychologists. OUSD also agreed to provide school nurses.	CBA*
Oklahoma	2018	Updated statute to generate teacher pay raise of $6,100 on average for teachers and $1,250 for school professionals; The state passed an additional increase of $50 million for education funding	70 Okl. St. Ann. § 18-114.14 (OK, 2018)
Pueblo, CO	2018	Agreement reached between Pueblo County School District 70 and teachers' union to increase teacher pay by 2%;	CBA*
Virginia	2019	Proposed amendment to the education budget to allocate 5% teacher pay raise	Neither
WestVirginia	2018	Statute updated to allocate 5% teacher pay raise;	18A W. Va. Code Art. 4-2 (WV, 2018)
	2019	Strike defeated legislative effort to punish teachers who participated in future strikes and to create charter schools and private school vouchers	Neither

Note. *Collective bargaining agreements are not done in conjunction with a legislative act.

action and the energy that fueled walkouts and strikes came from the teachers and other support staff. By encouraging the democratic impulses of rank and file leadership, post-*Janus* unions can foster teacher enthusiasm and build bridges toward community allies. Indeed, it has been noted that more democratic unions tend to foster more fervent commitment by members to the union's mission and may, in turn, attract increased membership (Milbank, 2019).

Embracing Social Justice to Solve the Collective Action Problem. Within the current climate, part of the solution to the collective action problem faced by teachers' unions may be to foster more and broader collective action. Ultimately, in order for these unions to flourish, they may need to consider adding new areas of representation to their bread and butter goals in such a manner that bread and butter concerns are still an integral component of union representation. Nevertheless, as the 2018 and 2019 strikes and walkouts have demonstrated, teachers made considerable gains by coupling traditional union demands with a critique of the underfunding of schools and the consequences of that policy for students and communities. As described above, teacher demands went beyond immediate needs of teachers as employees to include demands for greater spending on schools generally and on the hiring of such necessary support staff as nurses, psychologists, and counselors. Communities responded positively to teacher demands, and this type of union activism, coupled with concessions for greater social welfare supports for students and communities, could help to re-fashion the social justice unionism component of teacher practice.

However, if social justice unionism becomes a component of teacher union representation, union leadership will need to be mindful of how issues are identified as meriting union backing. That is, it will be critical for unions to push issues that have been highlighted as important to teacher members, instead of merely adopting a social justice stance that serves to only "reinforce top-down practices" (Ross, 2007, p. 28). Identifying appropriate broad collective goals will require thoughtful union leadership and sufficient rank and file involvement to select new initiatives. For instance, in 2019, striking Chicago teachers bargained for a commitment of city resources to provide adequate housing for teachers and for the families of district-residing children that they educate within a large, racially, and socioeconomically diverse city (Burns, 2019). By linking the need for secure quality housing for their students, these teachers built bridges to the communities they serve, while asserting the importance of their expertise in setting education priorities. In any such effort, understanding the needs of the relevant communities may become increasingly more critical (Strassfeld, 2019).

Conclusion

In conclusion, *Janus* has certainly limited the power of unions within the public sector regarding collective bargaining and fair share agreements. Specifically, *Janus* provides another challenge to teachers' unions regarding both the type and extent of representation that can be provided to teacher members. As membership rolls potentially decline, it will

be necessary for unions to engage current and active members while bolstering the causes important to those members. In particular, the diminished level of influence is notable for teachers' unions, as teachers' unions have historically functioned to provide representation within this component of unionism that has been curtailed by recent case law such as *Janus*. Moving forward, teachers' unions may have to face a radically different landscape, both politically and organizationally. That is, due to the increasing limitations of teachers' unions, it may now be time to radically shift union priorities and focus to include a meaningful and inclusive form of social justice unionism that incorporates activist teacher members within leadership and allows activist members to set the agenda regarding issue identification and representation on behalf of students, families, and community members.

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American Undergraduate Students' Social Experiences With Chinese International Students

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Abstract

The purpose of this study was to describe and explain American undergraduate students' social experiences interacting with non-native English-speaking Chinese international students during conversational practices at an American university. This study used an explanatory (holistic) multiple case study design (Yin, 2003) using in-depth, semistructured interviews grounded in the social exchange theory. The participants were seven American students (three men and four women) who served as conversation partners of Chinese international exchange students during each fall semester. Three major interrelated and complex themes emerged from the data. They were (a) *developing social reward relationships,* (b) *proving the social norm information during the conversational partnerships,* and (c) *employing/utilizing strategies for developing trust relationships*. The results of this study can be utilized to encourage faculty, global education office staff, and all students to respect, value, and embrace the languages and cultures of Chinese international students. This contribution can prompt a greater appreciation for diversity which leads to meaningful academic, athletic, and social experiences for all students at American college and university.

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Keywords

conversational partnerships, English as a second language, international students, undergraduate experiences, social exchange

Introduction

International students are an increasingly vibrant source of diversity on college and university campuses in the United States (Sato & Hodge, 2015a). According to the Open Doors Report on Institute for International Education Network (2018), there were 1,094,792 international students enrolled in American colleges and universities. In 2017, international students made a significant financial impact on the United States, contributing $42.4 billion to the U.S. economy through tuition, room and board, and other expenses, according to the U.S. Department of Commerce (Institute for International Education Network, 2018). International students believe that globalization impacts the world especially since prospective employers and companies increasingly seek college graduates who have international skills and expertise (Sato & Hodge, 2015b). Studying abroad must be viewed as an essential component of a college degree and/or credits critical to prepare future leaders.

Although cultural and linguistic diversity provides a unique and underutilized opportunity to develop skills for communicating and working with diversity, many English speaking countries (including the United States, United Kingdom, Australia, and New Zealand) have difficulties in enhancing interactions between domestic and international students (Guo & Chase, 2011). An explanation for this missed opportunity is domestic students perceive international students as maladjusted, naïve, and confused about domestic customs, social practices, and the educational system (Leong & Chou, 1996). For example, Chinese international students have some linguistic adjustment challenges regarding spoken English (fluency and accent) which prompts American students to view them as linguistically incapable and less competent in the United States (Zhang-Wu, 2018). Therefore, the Chinese international students never feel a part of the American college and university campus and community and had feelings of loneliness and isolation (e.g., Mason & Eva, 2014; Sato & Hodge, 2009; Sato, 2016). The international students also perceived that American students find international students as cold, distant, and clannish (Pedersen, 1991). Poor receptibility by students, faculty, and staff at the American college and university campuses and community has been highlighted as a widespread concern in various studies over the past decades (e.g., Brown, 2009; Ward et al., 2005). Successful intercultural communication is challenging and requires intercultural sensitivity which is not fully developed in American colleges and universities.

It is important that American students help international students be exposed to English, the target language, and have opportunities to communicate with other students and faculty (who are native speakers) for their language development (Nishioka, 2014). More specifically, it would be helpful for American students to assist the international students to pass a language proficiency examination such as the Test of

English as a Foreign Language proficiency (TOEFL). If exposed to English enough, then the international students may feel welcomed and be motivated to take at least one class at the universities without minimal language barriers and miscommunication (Chang, 2011). To date, little is known about the meanings that American undergraduate students' experiences ascribe to their interpersonal relationships with international students through conversational partnership. Thus, this study seeks to provide unique insights into the experiences of American undergraduate students that have been previously unexamined.

Purpose and Theoretical Framework

The purpose of the current study was to describe and explain American undergraduate students' social experiences interacting with non-native English-speaking Chinese international students during conversation practices at an American university. The three research questions that guided this study are: (a) How did American undergraduate students understand and engage with the ways Chinese international students spoke? (b) How did American undergraduate students value the reward experiences after engaging and communicating with Chinese international students during conversation practices? and (c) How did American undergraduate students develop trust relationships with Chinese international students during conversation practices?

The current study was grounded in the Social Exchange Theory (Blau, 1964; Byrd et al., 2009; Emerson, 1976; Homans, 1958, 1961). The theory is considered as the economic analysis of noneconomic social situations (Emerson, 1976, p. 336). College students, for example, often make decisions based on their communication and choices of friendships on campus (Mitchell et al., 2012). The definition of social exchange describes the voluntary actions of individuals that are motivated by the return they are expected to bring from others (Blau, 1964). The Social Exchange Theory describes when individuals consciously incur a cost with an expectation of receiving a reward that produces values and outcomes among students in interpersonal relationships. Emerson (1962) discusses that the concept of power is a central and important component of the social exchange process of college students' social development. The conversational partners' ability may influence the outcome of international students' behaviors and experiences (Wrong, 1979).

Trust is another component of the interpersonal construct of the Social Exchange Theory (Leonidou et al., 2008). Trust is defined as expectations that an exchange partner behaves benignly, based on the attribution of positive dispositions and intensions to the partner in a situation of uncertainly and risk (Molm et al., 2000). Students involved in a social exchange evaluate relationships with conversation partners in a behavioral context and look beyond short-term inequities and concentrate on long term benefits (Luo, 2002). Thus, a conversation partner's trustworthiness should be demonstrated when social exchange occurs without any obligations to return the benefits or an explicit "quid pro quo" of transactions where returns are contractual and binding (Nunkoo, 2016). Blau (1964) explains that trust among students is generated

in two ways: (a) through regular discharge of obligations and (b) through the gradual expansion of exchange over time. University students and international students should learn how social exchange impacts the initiation of social relationships during the conversational partnerships. "If good outcomes are experienced in initial contacts or if these contacts lead the persons to anticipate good outcomes in the future, the interaction is likely to be repeated" (Thibaut & Kelley, 1959). When domestic students interact with international students, they must have the cultural literacy as well as stimulate their ability to socially interact with peers from diverse cultural backgrounds in different geographical contexts. The Social Exchange Theory is, therefore, a powerful lens to examine how conversation partners are positioned in cross-cultural social exchange contexts.

Method

Research Design

This study used an explanatory (holistic) multiple case study design (Yin, 2003). The study is unique in its focus is on American undergraduate students' social experiences interacting with non-native English-speaking Chinese international students during conversational practices at an American university. Qualitative studies typically focus in depth on small samples, even single cases, sampled purposefully (Patton, 2002). The purpose of the case study method is to better understand complex social phenomena while retaining the holistic and meaningful particularities of campus circumstances (Yin, 2003). In line with that logic, the explanatory case study method is appropriate for exploring domestic students' conversational partnership experiences with international students.

Research Site

One flagship university, Midwestern University (pseudonym), is the site for this study. This site was chosen because they have a large Chinese international student population in one semester academic exchange programs (only fall semester) within undergraduate programs. The rationale was to include participants from Midwestern University in the accessible geographical region.

Participants and Sampling

A nomination process was used in this case study (Yin, 2003). It consisted of collecting relevant information about the American conversation partners of Chinese international students. The selection of participants involved contacting the university's international education office for nomination of American students matching the selection protocol criteria. The first selection criterion was that all American students must serve as an English-speaking conversation partner of each Chinese international student. The second criterion was that they must meet Chinese international students and

exchange conversations on a weekly basis. In this study, participants were recruited by the lead researcher during the spring semester of 2019. The study was approved by the lead researcher's university's Institutional Review Board (IRB). The researcher contacted the American undergraduate students via electronic mail (e-mail), and asked them to participate in this study. In this study, the lead researcher sought prospective participants who agreed to participate and complete two interview sessions during spring semester 2019. Seven participants provided permission to use interview data from this study.

The participants were seven American undergraduate students (three men and four women) at Midwestern University. All seven participants (pseudonyms: Kyle, Ronnie, Chuck, Heather, MaryBeth, Izzy, and Lisa) were born and raised in the Midwest region of the United States. Pseudonyms were used to protect the identities of participants. They served as conversation partners of Chinese international exchange students during each fall semester. Approximately 30 to 40 Chinese international exchange students participated in English as a Second Language Programs and registered for a few academic major courses each fall semester. Each conversation partner was assigned to meet a few Chinese students as one group on a weekly basis. Two participants (Kyle and Chuck) subsequently traveled and participated in a summer program at the Chinese university where their Chinese international exchange student partners attended.

Participants were purposefully sampled using maximum variation sampling (Patton, 2002). All participants were undergraduate academic students with varying academic classifications (sophomore through senior), ages, genders, locations and types of high schools they had attended as well as academic majors (i.e., art, international relations, computer science, accounting, mathematic science, psychology, and sociology; see Table 1).

Table 1. Participants' Demographic Information.

Student	Age	Gender	Academic status	Academic major
Kyle	22	Male	Senior	Accounting
Heather	22	Female	Senior	Journalism
MaryBeth	21	Female	Junior	English
Chuck	22	Male	Senior	Mathematics
Izzy	22	Female	Senior	Art
Lisa	20	Female	Sophomore	International Studies
Ronnie	21	Male	Junior	Computer Science

Face-to-Face Open-Ended Interviews

According to Yin (2003), researchers have two jobs in conducting interviews: (a) to follow the interview case study protocol, and (b) to ask the researcher's actual (conversational) questions. The researcher asked participants open-ended questions about factual information as well as their opinions about people, places, and events related to their conversation partnerships using a face-to-face focused interview in which participants were interviewed for a short time (approximately 60–90 min). In these cases, the interviews remained open-ended and assumed a conversational tone. The semi-structured interviews were guided by a pre-established set of questions developed by Lewis et al. (2004), Sato and Hodge (2009), and Sato et al. (2016). For this study, the specific questions were modified and carefully worded so as to be relevant to the current investigation of undergraduate students in conversation partnership programs (Yin, 2003).

Trustworthiness

Trustworthiness was established through member checking and peer debriefing. Member checking was used to reduce the impact of subjective bias (Patton, 2002). The researcher sent copies of the interview transcripts and themes that emerged to the participants by postal mail. Their acknowledgment of the accuracy of the transcripts and of the researchers' interpretations of the data ensured that trustworthiness was established (Merriam, 1998). Peer debriefing is a process of exposing oneself to a knowledgeable peer in a manner paralleling an analytic session, with the purpose of exploring aspects of inquiry that might remain only implicit in the inquirer's mind (Patton, 2002). For this study, two professional colleagues who have expertise in qualitative research agreed to serve as peer debriefers. They deemed the interpretations of the data to be accurate and representative of the participants' statements.

Data Analysis

A constant comparative method (Boeije, 2010) was used to interpret the data. The basic strategy of this analytical process is to constantly compare pieces of data while inductively deriving meaning or themes. More specifically, the transcripts from the set of interviews with each participant were coded independently by the researchers, and the differences were discussed until agreement was reached in relation to themes. In addition, two peer debriefers reviewed the codes to avoid potential researcher bias. Further coded data from the sets of transcripts from each participant were compared to identify similarities and differences. For example, after peer debriefing, the researchers conducted a second round of coding key terms (e.g., practices, culture, and speaking) in the transcripts of data sources (i.e., recoded the original ones). Some codes were combined during this process, whereas others were split into subcategories (subthemes). Finally, the researchers examined the final codes to organize them into a hierarchical structure using individual and group coding percentage (how many times

key terms appear in the data source). Then all data and definition of key terms were sent back to all participants for a second round of member checking. Final confirmation from all participants was received and the researchers grouped the codes into thematic categories, which were then refined into recurring themes (Boeije, 2010).

Results

Three major interrelated and complex themes emerged from the data. They were

(a) *developing social reward relationships,* (b) *proving the social norm information during the conversational partnerships,* and (c) *strategies for developing the trust relationships*. The American undergraduate students' experiences were positioned accordingly. These themes and subthemes are discussed below in narrative form, with quotes from participants.

Theme I: Developing Social Reward Relationships

This theme captures that the participants felt that there was one-way communication from the conversational practice; it was lecture-based and occurred in one direction only, from the American undergraduate students to the Chinese international students in the beginning of the conversational partnership practices. The participants were upset because there was no opportunity for receiving any feedback from Chinese international students. However, they believed that receiving feedback from the Chinese international students could help them to assess time and effort commitment and negotiate the dynamics of social reward relationships (Thibaut & Kelley, 1959). The participants realized that integrating how to access cultural informants (cultural adjustment and appropriate physical gesture) extremely important to include in the conversational practices. This information significantly may help to meet the international students' needs and help them analyze the differences between American (host) and students' home culture. For example, Kyle explained that:

> I did not know what content I should cover in the conversational partnership in the beginning of the semester, so I began to cover basic English conversations using English as Second Language textbooks. I did not have any formal or informal training of effective communication strategies when we communicated with the international students. Several weeks later, I began to think how I should change my conversational strategies that allowed them speak English more. I found an article about sharing cultural differences with international students (Kyle, interview).

Kyle felt that the Chinese international students need to have better ideas of how to become successful students on university campus. Therefore, the conversation about cultural differences and adjustments was extremely important for the international students. Another student Izzy shared her conversation experiences during the interview that:

> I explained the differences of inappropriate and appropriate gestures to Chinese international students. I thought it was important to explain. You know that thumbs up is good and thumbs down is bad. These international students may not know what these meant. I cannot assume that they understand American culture correctly. I needed to be careful when I explained (Izzy, interview).

Izzy believed that her role was to prevent the Chinese international students from the challenging or troubling situations on campus. She also said that "some Chinese international students thanked and appreciated what I have done." Similarly, Chuck shared his experiences that:

> I learned that Chinese students have not had much experience interacting with students from racially diverse backgrounds on U.S. campus. For example, African American and White American students speak differently and there are some discriminative words and expression. Some words are acceptable within students with same or similar racial backgrounds, but Chinese international students should be careful what and how to say things. After I explained that they were shocked, but they thanked me. I felt social rewards and it made me feel good that I did good things for them. I think this was my turning point when I felt really close to them (Chuck, interview).

Chuck believed that there is no guarantee that there are reciprocal benefits from social exchange with the Chinese international students, but it was important for him to seek an opportunity for rewarding and satisfying social exchange with them.

Theme II: Proving the Social Norm Information During the Conversational Partnerships

This theme exposed the fact that the participants felt that it was important to maintain power relationships between American undergraduate students and the Chinese international students during the conversational partnership. The definition of a power relationship in this study is that the participants can make behavioral change decisions for the Chinese international students. Then the Chinese international students' willingness to follow directions based on what the participants said during the conversational practices (Nunkoo, 2016). The participants believed that power relationships should not be used in the conversational contexts of authoritarian rules, but they helped the Chinese international students find ways to use resources (e.g., campus support, monetary tipping practices, competence, knowledge, and skills) and achieve their own goals and objectives during study abroad experiences. For example, Heather explained that she believed that it was important to tell the Chinese students what to do and not to do on American college and university campuses. She said:

> I think it is important to let them know about right or wrong behaviors on campus. I know that there are cultural differences, but it is important to let them know. For example, many

> Chinese students did not know anything about how much they should pay for their tips at restaurants. They also did not know anything about how to write personal checks. It seems that I am telling them what to do and how to do. Some students may see me that I looked down on them, but I felt important (Heather, interviews).

Heather felt that finding resources allowed them to be included in the community because she believed the resources may influence the students' ability to adjust to the host culture and satisfy their needs (Nunkoo, 2016). Another participant Ronnie mentioned that he must be responsible for preventing the Chinese international students from criminal activities such as under-age drinking, harassment, and troubling behaviors on campus. Ronnie said:

> Under-age drinking is significant issue and concern of international students in general. In the United States, the legal age drinking is age of 21, but it seems that the legal age drinking is 18 in some regions of China. Many Chinese international students did not know much about the legal age of drinking in the United States. Plus, all individuals are not allowed to drink in public. They did not know about this either. I do not want them to have troubles (arrests) by campus police officers. This is a life living skill of what to do and not to do, it worked well for expanding our conversations with the Chinese international students on campus (Ronnie, interviews).

Ronnie pointed out that international students' unconscious behaviors may adversely lead to the troubling and/or unacceptable behaviors. Therefore, he believed that this type of conversation was an eye-opening experience and helped him improve social engagement with the Chinese international students. Ronnie expected to develop social relationships or friendships with the Chinese international students. He wanted to minimize the stranger anxiety of the Chinese international students, which meant they were reserved around culture on American college and university campus. Although some participants (e.g., Ronnie, Heather, Chuck, and Izzy) stated that they were unable to find mutual topics of interest for initiating a conversation with Chinese international students, the participants and Chinese international students socially interacted more through exchanging helpful daily social norm information during the conversational partnerships. Chuck said that "during the conversation practices, studentsshared information about campus life skills, accessibility of academicservices, public tranportation, and physical activity opportunities that helpedthem develop interview questions. Therefore, it was important to integrate thisinformation into the conversational programs."

Theme III: Strategies for Developing the Trust Relationships

This theme captures that the participants felt that trust relationships and interpersonal constructs were important factors of the social exchange process during conversations with the Chinese international students. There are three key points the participants

shared during the interview including (a) be honest about own beliefs and values, (b) be honest about own personal weakness, and (c) learn to accept criticism by the Chinese international students. The participants also believed that trust relationships are their psychological developmental process of honesty, respect, and acceptability of international students. For example, Lisa explained that:

> I think that it was important to express my own opinions to them. I did not want to give socially acceptable answers to international students. Honestly, I do not think I could be the best friend of all of the international students, so I should be honest with my own value and beliefs. When I have conversation with the Chinese international students, I asked all off the questions and requested their clarification when I did not understand. I think this was the first step of developing trust relationships (Lisa, interviews).

Lisa felt that American conversation partners and Chinese international students must understand positive and negative outcomes to assess the trustworthiness (Bhattacharya et al., 1998). Another participant, MaryBeth explained that it was essential to acknowledge that American conversation partners must understand and reflect personal weakness. She said:

> We need to acknowledge that we have not had any study abroad experiences or lived in foreign countries. Personally, I have never left the United States. I think this is a significant weakness in this role. I have not experienced and practiced foreign languages. I think this is my significant weakness to understand language barriers the international students had. In order to develop trust relationships, I needed to visit and travel to their universities and practice Chinese languages (MaryBeth, interviews).

MaryBeth respected the Chinese international students who practiced English as second language. She was motivated to develop her trust relationships through the gradual expansion of social exchanges over the conversational practices (Blau, 1964). Izzy learned that it seemed that the Chinese international students were viewed as intellectually inferior to American students. Izzy mentioned that:

> English occupies a unique position in today's world as the global language. It seems the Chinese international students perceived that American students do not need to learn different languages. They also said that if they do not speak English well, we (American students) may look down the international students and treat them as intellectually inferior. I was really hurt when I heard these comments, but I should accept their criticism. Now, they are my good friends. In this summer, I am going to spend several weeks and study Chinese languages at their university. I think this is how we develop our trust relationships between American conversation partners and Chinese international students (Izzy, interviews).

Izzy clearly stated that although knowledge of English language is a highly valuable skill on both the national and individual levels, American college and university students should seek reasons to learn foreign languages.

Discussion

The findings indicate that these American conversation partners gave meaning to three different themes: (a) developing social reward relationships, (b) proving the social norm information during the conversational partnerships, and (c) strategies for developing the trust relationships in interacting with Chinese international students during their conversations. Their social exchange experiences related to campus life experiences, cultural differences and adjustment, and trust relationships associated with the study abroad experiences of international students.

These American conversation partners had situational anxiety in regards to communicating with the Chinese international students during conversational practices on the campus. Situation-specific anxiety directly and negatively affects an individual in specific situations (e.g., miscommunication and misunderstanding) or cultural differences (Woodrow, 2006). For example, the American conversation partners had social exchange goals and objectives in the sense of rewards and costs of their expectations about in comparison to what they believed and deserved in social exchange experiences with the Chinese international students (Thibaut & Kelley, 1959). In the Social Exchange Theory, the American students sought constructive, informative, and useful feedback that helped them make sense of what the Chinese international students were learning. The Americans wanted to ensure their conversation partners received more than receiving simple or no judgmental feedback such as right or wrong (Song & Hill, 2007). While the American conversation partners believed that English listening and speaking competency directly influenced the academic and social success of the Chinese international students on U.S. college and university campuses, the Chinese international students focused on learning English grammar, reading, and writing at their Chinese universities (Zhang-Wu, 2018). Therefore, icebreaking activities may help to develop a better social exchange process between the conversation partners and the international students. The icebreaking activities are designed to establish common ground in the first conversations, students will introduce themselves to others and talk to others in a conversational environment. Effective delivery of the icebreaking session requires the American conversational partner to engage both American students and the Chinese international students in simple activities. For example, find someone who has a brother, this is to encourage students to interact (Kavanagh et al., 2011).

These American conversation partners found themselves as campus mentors who taught the international students what to do and not to do on campus. They believed the most important role of the American conversational partner was to provide a chance for the Chinese international students to succeed. The American students also felt that they had a chance to become more aware of their own culturally

determined values and attitudes (Mason & Eva, 2014). For example, the United States enacted a minimum legal drinking age, with most setting the age at 21 years (Toomey et al., 2009). However, other foreign countries show preferences for different frequency and quantities of alcoholic beverages and for different choices of drinking environment and context (Heath, 2000). More specifically, in the Chinese culture alcohol plays an important role in communication. The Chinese international students had regarded alcohol as a representation of happiness and the embodiment of the auspiciousness of an occasion (Newman, 2002). The American undergraduate students realized that some behaviors including under-age drinking or drinking in public are not appropriate in the United States, but may be acceptable in China (Mason & Eva, 2014).

In the Social Exchange Theory, Sutton (1967) suggests that both American conversation partners and international students should provide various opportunities for rewarding and satisfying their social exchanges. Therefore, there exists an expectation of some future or investment returns through the social exchange process between the American partners and the Chinese students although the exact nature of the future return is unknown or/and negotiated in social exchange (Blau, 1964). The social exchanges between the American conversation partners and the Chinese international students may involve social benefits with and/or without any tangible and intangible rewards and costs but may have significant impact on the social dimension of the relationship (Nunkoo, 2016).

This study found the American conversation partners believed that trust relationships with the Chinese international students would help increase social success in their conversational practices. In these relationships, the American conversation partners and the Chinese international students shaped and constrained honest conversations (e.g., sharing honest opinions and personal weakness) so that they develop knowledge, interests, and rhetorical expectations (Sato & Hodge, 2015b). In the Social Exchange Theory, trust between American conversation partners and the Chinese international students can be generated in two ways: (a) through the regular discharge of obligation and (b) through the gradual expansion of exchange over time (Blau, 1964). Through the trust relationships, they learned how to develop cooperation (Moorman et al., 1992), goodwill (Kumar, 1996), decrease fear and greed (Hwang et al., 1997), and enhance satisfaction and commitment to the social exchange (Anderson & Narus, 1990).

Although positive social and conversational outcomes resulted from the social exchange between the American conversation partners and the Chinese international students including increased trust and the commitment to maintain the relationships, the American conversation partners realized that there was a danger in believing the notion that it was insufficient for them to use only English when they dealt with international individuals (Gil, 2010). Gil (2010) explains that adding another language to their existing linguistic repertoires may allow bi/multilingual individuals to compete for future educational opportunities especially for those that English language is a requirement. Gil (2010) suggests conversational partners may need to seriously study

foreign languages and cultures to ensure that bi/multilingualism is mainstream in global society.

Study Limitations

This study has several limitations. First, the participants were deliberately selected from just one public research university in the Midwest of the United States. Statistically speaking, therefore, the findings are not generalizable. From a qualitative perspective, however, the reader may assume transferability to the context of colleges or universities elsewhere in cases where there are contextual similarities with conversation partners (Leininger, 1994). Second, the number of participants was small and they had similar backgrounds, experiences, and cultures. However, qualitative inquiries, including case studies, typically use small samples and variation sampling, the intent is to capture and describe the central themes that cut across a vast array of participant variation (Patton, 2002). Our intent in using this sampling approach was to uncover common themes reflecting American conversation partners who interact with the Chinese international students.

Recommendations and Conclusions

Based on their conversational experiences with Chinese international students, the American conversation partners had self-directed learning experiences as a result of coping with linguistic differences and intercultural communication. American colleges and universities still need to do more to promote cultural learning and positive relationship outcomes between conversation partners and the Chinese international students.

One key factor of studying abroad is the Chinese international students experienced American culture directly (Chang, 2011). The conversational programs must recruit culturally, linguistically, ethnically, and socioeconomically diverse undergraduate students (Burden et al., 2004) and infuse culturally relevant communication into the conversational programs. This recommendation might help avoid denial or difference (not recognizing cultural differences). This opportunity may be able to help the American conversation partners show a higher level of confidence in their ability to educate the diverse Chinese international students in positive ways.

Second, this study recommends that the American conversation partners should arrange homestay programs, so that all Chinese international students can experience American culture in a family setting. The conversational program should try to provide as many opportunities to learn about American culture including the social norm information (Chang, 2011). The social norm information orientation may help the Chinese international students explore city or campus rules for securing their safe academic and social environment in the academic semesters and/or year.

Lastly, the conversational partnership programs must provide a table summary of potential and cultural differences (to new conversational partners) the American

conversation partners might encounter during an orientation (Mason & Eva, 2014). In order to develop the trust relationships or friendships with the Chinese international students, one of the key components of the conversational programs was to raise the American conversation partners' awareness of other international cultures (Mason & Eva, 2014). Some American colleges and universities require all students to enroll in social justice and diversity courses, faculty must better engage all students in the conversation partnership opportunities in order to understand others' unique cultural identity and linguistic heritages differences (Hall & Closson, 2005). Informed dialog during the conversational practices, intercultural retreats, and special events (e.g., global education and heritage festivals) may be included as a part of the course requirements for all students (Sato et al., 2011).

To better support American conversational partnership programs, we encourage faculty, global education office staff, and all students to respect, value, and embrace the languages and cultures of Chinese international students. This will contribute to a greater appreciation for the richness of diversity and to provide meaningful academic, athletic, and social experiences available at U.S. college and university campuses for all students.

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Article

The Politics of Education Reform: Practices That Militate Against Change in a Developing Country

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Abstract

Utilizing a conceptual approach, this study explores several political factors that coalesced to paralyze secondary education reform initiatives in Trinidad and Tobago. It discusses how changes in government impact reform priorities, and examines key strategies for overcoming political obstacles. One such strategy is the application of incremental rather than synoptic approaches to education reform. While most education reforms occur as a result of political action, the paper concludes that politicians are the ones largely responsible for presenting political challenges that often result in aborted reform policies, which negatively impact the general quality of education in a developing country.

Keywords

education reform, politics, change

Introduction

The twin-island republic of Trinidad and Tobago is situated in the southernmost part of the Caribbean archipelago, with a population of approximately 1.3 million. Although Trinidad and Tobago gained independence from Britain in 1962, and subsequently acquired republican status in 1976, it has remained a Commonwealth country with a largely centralized education system modeled after the British system. The Trinidad

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and Tobago Education Act, 1966 (with its subsequent amendments), guides the process of education for approximately 250, 000 students and 13, 000 teachers in over 600 primary and secondary schools in the twin-island state. Under the technical control of the permanent secretary and the chief education officer, the Ministry of Education is responsible for the overall management of the sector. This includes establishing and disestablishing schools; regulation and monitoring of private schools; selection, allocation and placement of students; prescribing the curriculum; as well as discipline and conduct of students and teachers (UNESCO-IBE). However, the Education Act also vested considerable power in the Minister of Education who plays a critical role in ensuring that government policy directives are carried out. One such directive was the establishment of the secondary education modernization programme which came in response to growing concerns about issues of equity and quality and the need for a new education system capable of responding to the changing needs of society (Education Policy Paper, 1993–2003).

In an attempt to address these and other problems, the government of Trinidad and Tobago secured a US$150 million loan from the Inter-American Development Bank (IDB) to overhaul the entire secondary education system. Key areas of reform included curriculum; assessment, testing and evaluation; professional development of teachers and school administrators; teaching and learning strategies (Secondary Education Modernization Programme Implementation Manual, 1999). The reform agenda also included construction of new schools as well as rehabilitation and upgrade of existing school infrastructure. In addition, attempts were made to strengthen the institutional capacity of the Ministry of Education to accommodate and support the robust reforms taking place in the wider secondary school system (Joseph, 2010).

One of the biggest tragedies of the Trinidad and Tobago secondary education reform project was that notwithstanding its initial success, several political factors coalesced to paralyze the reform initiative. These factors came largely as a result of changes in government and the corresponding changes in priorities and the revision if not reversal of existing policies. However, this did not have to be the fate of education reform in the Trinidad and Tobago secondary education sector. In the 1990s and beyond, many countries including Argentina, Australia, El Salvador, Chile, Jordan, New Zealand, South Korea, and Uruguay made significant strides towards implementation of quality education reforms in their respective education systems (Corrales, 1999). These countries were not all democratic governments. One can assume, therefore, that it is possible for all types of governments to demonstrate a deep commitment to reform and that systemic, quality-oriented reforms are politically feasible (Corrales, 1999). However, this was not the case of the Trinidad and Tobago secondary education reform during the period 1999 to 2009.

Purpose of the Study

The purpose of this paper is to examine the politics of education reform and explore the following strategies for overcoming political obstacles to reform:

- incremental versus synoptic approach to reform
- co-opting support from professional associations
- strong leadership at the level of government ministries

While the study focusses largely on major developments in the Secondary Education Reform during the period 1999 to 2009, an attempt is made also to examine the extent to which changes in government in 2010 and 2015 resulted in corresponding changes in reform priorities and the revision of existing policies.

Methodology

This study utilizes a conceptual approach aimed at applying the theory of education reform politics to a Caribbean context. Unlike empirical data-based research, this conceptual research focusses on abstract ideas for the purpose of re-interpreting existing concepts of education reform conducted within the context of an education system heavily influenced by socio-political needs and aspirations. In this paper, I examined the concepts of quality education reform and political decision-making to interpret government's action regarding education reform initiatives at the secondary school system. To further assist in the analysis, I used public documentary sources such as the Education Policy Paper (1993, 2003); Secondary Education Modernization Programme Implementation Manual (1999); and Final Reports of consultants associated with the secondary education reform initiative.

Physical evidence found within the study setting was also used to assist in content analysis. Examples of physical evidence or artifacts include meeting agendas, minutes of meetings, and workshop training proposals. Data analysis also consisted of examining, categorizing and tabulating evidence in keeping with the purpose of the study. This was done after careful, focussed reading and re-reading of data sources. Bowen (2009) endorses this process of document analysis as it facilitates empirical knowledge and develops understanding of a given phenomenon.

Conceptual Framework for the Study

This paper utilizes a framework based on Benjamin Levin's work (as cited in Connelly et al., 2008) on curriculum policy and the politics of what should be learned in schools. Levin supports the view that public policy is about the rules and procedures governing public sector activity. He argues that politics governs almost every aspect of education in relation to what schooling is provided, how, to whom, in what form, by whom, and with what resources.

Lasswell's (1958) study on politics also provides a sound theoretical foundation for the study of politics of education reform. His definition of politics as "who gets what" can be applied to every setting including the distribution of resources associated with education reform. The study also employs Wilson's (1973) matrix of access versus quality reforms to analyze the suitability of utilizing certain strategies for overcoming

political obstacles to reform in the context of the Trinidad and Tobago secondary education system. Examples from the local context are also employed to support the discussion on various practices that militate against change in the Trinidad and Tobago secondary education sector.

Wilson's (1973) matrix identifies access reforms and quality reforms as two major educational reforms in existence. He posits that access reforms require increasing the availability of educational programmes and opportunities. These reforms usually involve large scale capital investment to increase the number of schools, classrooms, teachers, and teaching/learning supplies. Access reforms, therefore, relate to the various efforts that governments undertake to expand the coverage of the education system. Quality reforms, according to Wilson (1973), focus primarily on improving the efficiency of government's investment and aim at improving students' academic performance, increasing teacher productivity, reducing student drop-out or repetition rates, achieving optimum teacher/student ratios, and granting greater autonomy to school boards (World Bank, 1995).

Applying Wilson's (1973) matrix, an attempt is made to examine the suitability of utilizing the following intervention strategies for overcoming political obstacles to established reform initiatives:

- an incremental (step-by-step) approach rather than a synoptic (all encompassing) approach to education reform
- co-opting support of professional associations
- strong leadership at the level of government ministries

Impact of a Change in Government on Reform Priorities and Existing Policies

It is widely believed that quality education reforms do not provide immediate, tangible, political gains to governments (Corrales, 1999). In analyzing the clash between traditional political interests and the drive for modernizing reforms, Geddes (1994) argues that incumbent politicians are more likely to embrace projects that yield immediate political results rather than long-term political rewards. Such politicians prefer to invest their time and efforts in macroeconomic activities than in education reform. Given the tendency to embrace projects mainly for political expediency, some politicians steer clear of long-term commitments to projects such as quality educational reforms.

This was precisely the case when the Trinidad and Tobago government changed hands in the years following the Secondary Education Modernization Programme (SEMP). The SEMP initiative addressed both access and quality education reforms. The change of government came at a time when access reforms were already completed and quality reforms were about to take off. The impact of a change in government at this critical juncture meant a radical shift in reform priorities and existing policies regarding decentralization and school-based management; quality education

standards for all schools; effective methods of testing, assessment, and evaluation; reading remediation for secondary school students; policy framework for teacher professional development; and magnet school programme for secondary schools.

Aborted Reform Policies and Priorities

Upon assuming office, all new governments are expected to re-examine existing policies, make appropriate adjustments if necessary, and establish new priorities in the interest of continuous national development. But new governments should not abuse their political authority by abandoning existing projects aimed at strengthening the growth and development of the nation. Some educationists are increasingly becoming concerned about the growing trend of aborted reform policies and the corresponding debilitating effect on the general quality of education in the country.

Decentralization and School-Based Management

One of the quality reform priorities was a change in the locus of control from the central Ministry of Education to local schools through a system of decentralization and school-based management. The general thinking at the time was that there was a greater likelihood for principals, teachers and parents to feel a sense of ownership of the school if they were given the necessary decision-making authority over school operations. These school operations range from budget allocation, procurement of educational materials, infrastructure improvement, to monitoring teacher performance and student learning outcomes. Khan and Mirza (2011), agree that decentralization can contribute to improvement in service delivery and efficiency of resource utilization. But successful implementation requires improvement in the other intervening variables such as leadership, teacher training, parent support, availability of resources, students' and teachers' motivation.

In support of these initiatives, plans were made to introduce an Education Management Information System (EMIS) to facilitate the exchange of education-related data throughout the administrative offices of the Ministry of Education and secondary schools in the country. By giving voice to key stakeholders such as parents, teachers and principals, school-based management was poised to improve education outcomes as well as increase client satisfaction. However, a change in government saw the end of school-based management and a return to the familiar centralized system of school governance where politicians at the Ministry of Education set a new agenda for the delivery of educational services.

Government's response to decentralization and school-based management is not unique to Trinidad and Tobago. Weiler (1990) argues that since the late 1970s, many governments which attempt to decentralize educational services often encounter political problems largely because school-based management requires the transfer of decision-making authority from central authorities to local school boards. This redistribution of power conflicts sharply with the inherent interest of governments to

centralize authority. In the Trinidad and Tobago situation, decentralization threatened the status quo of some senior public servants who either resisted it completely, or gave lukewarm commitment to the implementation of such school-based activities. These and other reasons gave rise to what Corrales (1999) describes as the unexpected pathology in the implementation of decentralization.

Quality Education Standards for All Schools

Government's decision to establish a Quality Management Unit was also another reform priority aimed at setting up organizational structures and systems to monitor and ensure that quality standards are maintained in all schools. The general thinking was that quality education standards should pervade every aspect of the education system including management, operations, physical infrastructure, use of resources, the work environment, personnel, and teacher and student performances. These standards were supposed to represent the highest principles with which the Ministry of Education, school districts, service providers, and educators were expected to function in order to produce quality learners. Moreover, the establishment of quality education standards was intended to transform the leadership and management of the education system and foster a climate of quality. When fully established, the quality management system was expected to fill the gap between the way the education system currently operates and the way it will be anticipated to perform to produce quality learners.

While the 2010 change in government did not immediately halt long-term quality goals, the Ministry of Education did very little during the period 2010–2015 to operationalize the quality management plan initiated by the former regime. Another change in government came in 2015 which saw the reins of power returning to the pre - 2010 political directorate. However, 4 years later in 2019, no meaningful attempts had been made to address the issue of quality assurance for all schools in the education system.

Effective Methods of Testing, Assessment and Evaluation

The reform also saw the development of more appropriate and effective methods and systems of testing, assessment and evaluation. One of the most significant developments was a decision to establish an Examinations and Assessment Authority to achieve the following objectives:

- ensure continuous alignment between assessments and examinations and the various curricula of the education system
- ensure assessment of competencies and certification for the varying aptitudes, abilities and interests of the different population groups
- ensure quality assessments and examinations to support a quality education system

- promote the harmonization of activities, approaches and standards in the education system
- establish legislative and regulatory framework for assessment and examinations issues in Trinidad and Tobago
- cater for a wide range of assessments and examinations (both internal and external)
- ensure integrity and public confidence in our national examinations, and
- ensure harmonization of efforts between teachers and examiners (Joseph, 2010).

Legislation for the Assessment and Examinations Authority was developed and the final step in the process of implementation was to obtain Cabinet approval for the initiative. Then came a change in government; and like other projects before, the establishment of the Assessment and Examinations Authority never materialized.

Reading Remediation for Secondary School Students

During the Secondary Education Modernization Programme, a reading remediation unit was established to address the acute reading problem that existed at the secondary school level. The unit was also set up to provide a supportive administrative structure for coaching and mentoring master teachers, remedial teachers, administrators and reading specialists, in strategies of reading instruction, brain-based learning, diagnostic testing and stakeholder partnering. This measure was regarded as a temporary one to redress the existing problem of literacy within the secondary education system.

As a precursor to this initiative, the government had initiated the Centre for Excellence in Teacher Training (CETT) programme to assist primary school students with special needs. This measure was deemed successful in so far as it equipped primary school children with the requisite reading facility to function optimally at the secondary school level. To further strengthen this initiative, scholarships were awarded to ninety (90) teachers to pursue a Master of Education degree in Reading at the University of the West Indies. It was envisioned that upon completion of the 2-year programme, these graduates would be deployed throughout the secondary school system as reading specialists. It was believed that the combined interventions at the primary and secondary levels would go a long way in solving the acute reading problem that currently exists in the school system. The advent of a new government saw new priorities that eclipsed the reading intervention plan. While the majority of scholarship awardees successfully completed the Master of Education degree in Reading, the deployment of reading specialists throughout the secondary school system never materialized.

Policy Framework for Teacher Professional Development

Another important innovation was the establishment of a Teacher Professional Unit within the Ministry of Education. Part of its mandate was to develop a comprehensive

policy framework for teacher development in the context of a reformed education system. An important feature of this policy framework was the establishment of systems to facilitate proper coordination of activities related to teacher preparation and development across all levels of the education system (Joseph, 2010). During the period of the Secondary Education Modernization Programme, policy guidelines were developed for the recruitment, selection, certification, and licensing of teachers at the primary and secondary school levels. While there was much more work to be done in terms of establishing a more permanent mechanism to look after the continuous professional development of teachers within the education sector, a structure was set up to address professional development needs of teachers.

The structure was severely fractured by the imminent return of a new government into power. Not only was the unit disbanded, but existing policies regarding teacher training and upgrade were also ignored. A case in point was government's decision to upgrade all teachers by providing training opportunities at the university level. The policy decision was that all teachers should obtain a Bachelor of Education degree as a prerequisite for teaching at the primary and secondary levels of the school system. By 2010, over seven hundred teachers (700) obtained Bachelor of Education degrees from the University of Trinidad and Tobago. Four years later in 2014, many of these individuals were still in the school system awaiting the promise of upgrade. Elmore (1997) puts it nicely when he says that if we want educators to do their work differently, we have to reward them for doing the right things. Successfully pursuing higher education to better serve the needs of the nation's children was, indeed, the right thing to do. Threatened by mounting dis-satisfaction and impending trade union action, the new government took a decision in 2015 to begin the process of upgrading teachers who successfully completed their professional development training in 2010.

Magnet School Programme for Secondary Schools

As part of the quality reform agenda, a magnet school programme was established to support accelerated learning within the schools and to cater for students with varying interests and aptitudes. This programme was built on two models: (i) the Dedicated School Model which requires the construction of new school buildings to accommodate a whole school magnet curriculum and (ii) the School-within-a-School Model, which utilizes existing school plants to facilitate the specialized curriculum. After careful consultation with local, regional, and international professionals, the Ministry decided to adopt the School-within-a-School Model as a pilot for seventeen schools offering magnet programmes in Business Studies, Visual and Performing Arts, Technology, Physical Education and Science.

These magnet programmes were designed to offer high quality and special programming that improve student achievement by providing unique curriculum and instruction. They were also designed to attract students based on their interest and ability. The vision was that learners who showed aptitude or proclivity for specific subject areas were to be provided the opportunity to develop their interest while

pursuing a general education. Also, these students were expected to be prepared for national and international certification, while completing their high school requirements. Students in these specialized programmes were therefore prepared for either advanced studies, the world of work or self-employment (see Joseph, 2010). Like so many of the other quality reform initiatives, the idea of a magnet school experiment was aborted under the new political administration.

Strategies for Overcoming Political Obstacles

Given the obvious political challenges to systemic quality education reforms, an attempt is made to examine a few strategies for overcoming political obstacles to reform. While these strategies cannot guarantee success, they certainly point to the possibility of exploring a more coherent approach to education reform in a developing nation such as Trinidad and Tobago.

Incremental vs. Synoptic Approach to Reform

Since quality education reforms generally take a long time to yield tangible results, there is a tendency for some new governments to be apathetic towards reform priorities and existing policies of the former regime. Such was the case of Trinidad and Tobago. In analyzing the situation, Haddad and Demsky (1994) argue that education reforms that follow a more incremental approach tend to encounter fewer political difficulties than more comprehensive, synoptic reforms. They posit that a piecemeal approach avoids the national spotlight and keeps to a minimum the number of cost-bearers. Comparing and contrasting reforms in Jordan (1970s) and Thailand (1960s) with those in Peru in the early 1970s, Haddad and Demsky argue that Peru encountered more implementation difficulties largely because it adopted a synoptic approach rather than a more incremental one.

In the case of Trinidad and Tobago, both access and quality reforms were undertaken almost simultaneously. While one understands that access and quality reforms go hand in hand, consideration must be given to the magnitude of the task. Kemp (2004) believes that by trying to do too much, a project runs the risk of collapsing under its own weight. When the new government assumed office, politicians were faced with the challenge of continuing a very ambitious quality reform agenda of the former regime. Motivated by the need for more immediate rather than long-term political rewards, the new government chose to develop a reform agenda that some may consider more politically expedient. As a result, the secondary education quality reform agenda was replaced by a more incremental approach to reform in the primary education sector. While it is uncertain that any new government will necessarily honour the existing reform policies of another, it seems likely that politicians will favour a more incremental approach with quick wins than long-term projects that cannot be measured for success in the short-term.

The decision to offer laptops to every child entering secondary school was government's attempt to establish quick wins in its new quality reform agenda. But it was also an attempt to fulfill a campaign promise that if elected into power, government would provide laptops to every child entering secondary school for the first time. At the time of its implementation, little thought was given to training teachers in the use of the laptop as an educational tool; nor was any serious consideration given to the availability of high speed connectivity in schools to support the teaching and learning process. While one may find many things wrong with this approach, the laptop experiment did yield immediate short-term results albeit political rather than educational.

Co-Opting Support of Professional Associations

Perhaps political barriers to reform can be minimized by the involvement of professional associations and other support groups in the reform effort. Consider for example, the role of the National Parent-Teachers Association (NPTA) of Trinidad and Tobago or the Trinidad and Tobago Unified Teachers' Association (TTUTA). While these associations are largely concerned with matters relating to student/teacher welfare and development, they have not made any substantial input in the secondary education reform initiative. Whether invited or not, the NPTA and TTUTA should assume their rightful place as major stakeholders in the education reform. They should be in the forefront of public consultations on issues relating to decentralization and school-based management and the establishment of quality standards for the nation's schools. They should act as the collective voice of parents and teachers on the feasibility of certain education projects such as the introduction of magnet schools, the establishment of a teacher professional unit, an assessment authority as well as a reading remediation unit to address the acute reading problem existing in the school system. Anderson (1999) supports the idea of participatory reforms in public education among constituents such as teachers, parents, students, community leaders, social service agencies, and business. At a time when the general tendency is for new political parties to abort existing reform policies and veer into new directions, professional associations like the NPTA and TTUTA can assist in promoting systemic reform as opposed to shifting political priorities that sometimes work against sustained national development.

Equally useful is the idea of appointing an independent education task force to advise the Ministry of Education, debate and propose policy reforms and monitor the general implementation process. Gordon (1992) cites the Picot Commission in New Zealand as a good example. In 1987, this independent task force comprized two educators, two business people and various politicians whose mandate was to propose reforms. Corrales (1999) argues that one advantage of engaging independent groups as reform advocates is to galvanize existing commitment, give it direction, prevent it from waning during the implementation period, and exercise stronger links between the state and the society. And if such an independent task force is appointed for long terms, then there is greater likelihood that it will foster continuity in reforms despite

ministerial adjustments due to changes in governments. In other words, an independent task force may contribute to facilitating greater stability and continuity in the reform policies and priorities.

Strong Leadership at the Level of Government Ministries

Strong leadership in government ministries can also minimize political obstacles to education reform. But this can only be accomplished if permanent secretaries and other senior public officials possess the courage to perform their duties as custodians of the public purse. Ideally, these officers should be the ones to manage and lead the education reform. As the client organization, the Ministry of Education has the responsibility of guiding and managing the reform effort to ensure the successful completion of reform goals. However, if such strong leadership ever existed, it was quickly frustrated by political interference and manipulation. Fuhrman (1994) argues that there is a tendency for politicians to focus attention on doing things for re-election rather than working towards institutional improvement goals. This was the case of Trinidad and Tobago secondary education reform. With the advent of a new government, long-term quality reform priorities were replaced by what Fuhrman (1994) describes as the type of short-term policies that are most easily used as campaign issues: simple, easily explained policies that can be featured in a "sound bite." She cautions that careful developmental efforts can lose out to quick pushes that have less chance of success because the developmental groundwork was lacking. In the Trinidad and Tobago scenario, it is evident that senior public officials who lacked the fortitude to withstand such political pressure also contributed to the pathology in the secondary education reform.

Concluding Comments

While it is customary for educators to lament the repeated interference of politicians in matters relating to education, one cannot ignore the fact that most education reforms occur as a result of some type of political action (Garda, 2011; Hu & Verdugo, 2015). Indeed, the idea of secondary education reform came largely in response to growing concerns about issues of quality, equality and the overall development of a new Trinidad and Tobago education system capable of responding to the changing demands of society (Joseph, 2010; Education Policy Paper, 1993–2003). The incumbent politicians were the ones who facilitated funding through the Inter-American Development Bank (IDB) to make this venture possible. While politicians can be credited for their role in initiating the Trinidad and Tobago education reform, the point must be made that ironically those very individuals are often the ones largely responsible for presenting political challenges to systemic and quality reforms initiatives.

This paper discussed some of the political practices that militate against change in the Trinidad and Tobago education system. It proposed an incremental, step-by-step, approach rather than a synoptic (all-encompassing) approach to reform. The idea of

strong leadership in government ministries along with the involvement of independent professional associations was also considered as possible strategies for overcoming obstacles to education reform. Still, it is uncertain the extent to which these approaches can really make a difference in the context of a fragmented political system which currently exists in Trinidad and Tobago. There is an urgent need, therefore, for politicians and policy entrepreneurs to focus more on nation building and less on parochial political ambitions. Only then can a developing nation as Trinidad and Tobago have a fighting chance of effecting systemic education reform.

Policy Recommendations

The following recommendations are made to assist a developing country like Trinidad and Tobago mitigate challenges to systemic quality education reforms:

- establish an independent education task force to advise the Ministry of Education, debate and propose policy reforms and monitor the general implementation of education reform projects. This will facilitate greater stability and continuity in education reform policies and priorities despite changes in government.
- develop a robust quality management system to monitor and ensure that quality standards are maintained in all schools
- implement a system of decentralization and school-based management to facilitate improvement in service delivery and efficiency in resource utilization
- design a comprehensive framework for teacher development aimed at facilitating proper coordination of teacher preparation and development initiatives across all levels of the education system
- adopt an incremental rather than a synoptic approach to future education reform initiatives.

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