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Perceptions of Tennessee Employees in Higher Education and K-12 working with Confucius  
Institutes

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A dissertation  
presented to  
the faculty of the Department of Educational Leadership and Policy Analysis  
East Tennessee State University  
In partial fulfillment  
of the requirements for the degree  
Doctor of Education in Educational Leadership

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by  
Michael Nicholas Novak  
August 2019

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Dr. Donald Good, Chair  
Dr. Hal Knight  
Dr. James Lampley  
Dr. Stacy Onks

Keywords: Confucius Institute, Bureaucracy, Academic Freedom, Local Control, Media  
Perceptions, Confucius Institute Programing

## ABSTRACT

Perceptions of Tennessee Employees in Higher Education and K-12 working with Confucius

Institutes

by

Michael Nicholas Novak

The Confucius Institute has recently become more prevalent in political discussions and news headlines. Questions regarding its operations, influence from the Chinese government, and programing are common topics in news reports about the institution. The rise of China in the global economy has caused demand for language and culture education and the Confucius Institute has attempted to fill this demand.

The purpose of this nonexperimental quantitative study was to investigate the perceptions of K-12 school and higher education employees that work closely with a Confucius Institute program in the state of Tennessee by exploring issues that have been presented in current research and reports, and to identify alignment and misalignment of these perceptions between higher education and K-12 settings in Tennessee.

The study surveyed 42 higher education personnel and 58 K-12 personnel from Tennessee educational institutions that work with Confucius Institute programing. The survey consisted of 18 items that centered around 10 research questions. Quantitative data for six of the research questions were analyzed using a one sample *t*-test. A 5 point Likert-type scale was used to measure responses with a 3 point neutrality rating. Two research questions data were analyzed

utilizing an independent samples *t*-test and two research questions were ranking questions that were coded in a point system to understand current perceptions.

The results indicated that personnel interacting with Confucius Institute programing in the state of Tennessee generally found it to be positive regarding adhering to academic freedom principles, local control principles, media perception, and meeting the needs of the local institution or school. Higher education personnel listed political environment, alignment with institutional or school needs, educational benefit to students, and national media coverage as challenges facing the Confucius Institute. K-12 participants listed Chinese teacher turnover, Chinese teacher training, and alignment with institutional or school needs as challenges. Higher education personnel listed educational benefit to students, programing quality, Chinese teacher training, and resources as benefits connected to Confucius Institute programing. K-12 participants listed educational benefit to students, alignment with institutional or school needs, curriculum, and programing quality as benefits.

## DEDICATION

I am thankful for the love, support, and guidance of my family, friends, and mentors throughout this doctoral process. As a child my parents, Nick and Linda Novak and my live-in grandfather, Nicholas Novak, all pushed me in my education. Coming from a working-class background and no higher education learning my parents and grandfather placed me in the best schools and pushed me to go to college to get a degree. I will be eternally grateful for the foundation that I was afforded. From there many great mentors have picked up the torch and joined me on my journey. Tom Furhman, an artist and glassblower, pushed me into the field of education, over an art degree, and allowed me to better understand real world opportunities. Janice Womble, my principal, mentored me as a young teacher, assistant principal, and principal and helped me establish myself in the world of K-12 education. Guanping Zheng, my higher education mentor, gave me a pathway from K-12 to higher education and guided me to enrolment in a doctorate program.

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Finally, my biggest dedication goes to my loving wife Jessica and my daughter Emma. Jessica and I began this process together. She started and finished her masters in curriculum and instruction with an English as a second language certification at the same time I began my

doctoral program. She went on to enroll in a Ed. D. program as well. Through this we have deepened our connection as spouses and have furthered our common bond to help and care for students. We have brain stormed, proof read, discussed, agreed, and disagreed and every second has given me the strength to continue. Emma has grown from a middle school student into a high school student and has been my second pillar. In the afternoons all three of us would work on homework and we built a culture of learning and exploration in our household. Through the process our knowledge and also our religious faith has grown. We have drawn closer as a family and I truly hope that these principles will continue to guide all of our lives and all of the lives we continue to touch in the future.

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## CHAPTER 1

### INTRODUCTION

The Confucius Institute is a global organization with headquarters in Beijing, China known as the Confucius Institute Headquarters and sometimes referred to as Hanban. It operates as an international non-profit entity and focuses on teaching Chinese language and cultural as well as the many components that combine to meet this goal such as teacher training, recruiting, and curriculum and material development (Confucius Institute Headquarters Hanban, 2014). The Confucius Institute was established in 2004 in response to China's growing economic exchanges and language teaching demands around the world. The first United States Confucius Institute was established at the University of Maryland in 2005; and since then organizational partnerships have developed in all but six states (GAO, U.S. Government Accountability Office, 2019). A Confucius Institute partnership typically consists of two universities, one Chinese and one in another country with oversight and budgeting assistance from the Confucius Institute Headquarters. The establishment of Confucius Institutes in the United States has been met with some controversy (Ning, 2017; Peterson, 2017a). Scholars and politicians have struggled with the basic questions, benefits, and drawbacks of having an international organization supported by China in an American college setting. To understand this better, scholars have examined the need that led to the establishment of the Confucius Institute (Zhao & Huang, 2010).

Zhao and Huang (2010) pointed out that at one time it was practical for the rest of the world to know and understand something of the English culture due to the prominence of the global position of the United Kingdom (U.K.) and the United States of America. They further stated that it is now reasonable to understand something of the Chinese culture due to their rise in

economic status. Zhang and Li (2010) followed this rise to importance in the U.K. from 2000 to 2010 as educational organizations started to present findings on the importance of language learning and cultural understanding in an ever changing and more global society. Zhang and Li stated, "...the development of Chinese learning... has been a result of market demand" (p. 92). With a growing Chinese economy and increased global trade, connections can be made to the importance of understanding Chinese culture leading to more successful commerce (Starr, 2009).

To accomplish a cultural understanding, a demand for secondary instruction arose, leading to an increased demand for materials, curriculum, and qualified teachers. Starr (2009) explained, in historical context, China's decision to fill this void and offer assistance in these areas of need to the rest of the world. Starr further examined the branding of the Confucius name and the elements of "soft power" that also acts as justification to the Chinese people on why it supports these organizations around the world. Furthermore, the concept of "soft power" from a Chinese perspective is to further cultural understanding to therefore avoid future conflicts and assist in peaceful resolutions (Starr, 2009). While this concept is acceptable to the Eastern perspective it can sometime cause issues in the West due to past perceptions of China and perceptions around Communism (Zhou & Luk, 2016).

While Confucius Institutes are normally housed in college settings their partnerships often extend beyond the college into the local community and K-12 schools (He, Zhang, & Zhou, 2017). He, Zhang, and Zhou explained that partnerships for American Confucius Institutes could include the addition of a Chinese teacher to a school's language programming. This can happen at all levels from Pre-Kindergarten through higher education (He et al. 2017). Zhou (2011) pointed out that even through financially tough times and budget cuts, K-12 Chinese programs were on the rise. Zhou attributed this to the university partnership with Confucius Institutes and

local school systems. Zhou highlighted the success of the Chicago public school system as they brought Chinese instruction into their schools and by the end of 2010, nearly 12,000 students were learning Chinese. This type of expansion naturally lead to other issues that must be solved by effective partnerships (He et al. 2017). Broadly, the issues involve teacher training and preparation, teacher turnover, curriculum development, and materials (Zhang & Li, 2010). Little research is currently available in regards to teacher training, effectiveness, and school satisfaction of Confucius Institute programing. However, He et al. (2017) outline and provide detail regarding the teacher selection process. He et al. also explain logistics and challenges in teacher training, rapid teacher turnover based on visa limits from both the U.S. and China, recognition of international teaching licensing in the US, curriculum development, and materials. Confucius Institutes in the United States are relatively young organizations and the research regarding their operation is emerging.

### Statement of the Problem

The world continues to progress into a global society with more interconnectedness in each generation. Mass media and instant access to information plays a large part in this interconnectedness. In some cases perceptions can be formed and changed simply based on reporting or the lack of reporting on specific topics and issues. Much of the current reporting on the United States Confucius Institutes is done from a national level and neglects to take specific state or local consideration into account. Research at the state and local level regarding Confucius Institutes and their partnerships is minimal.

Therefore the purpose of this study was to investigate the perceptions of school employees that work closely with a Confucius Institute program in the state of Tennessee by

exploring issues that have been presented in current research and reports, and to identify alignment and misalignment of these perceptions between higher education and K-12 settings in Tennessee. Additionally this study identified higher education and K-12 personnel perceptions of the Confucius Institute partnerships in the state of Tennessee that might be utilized to examine the Confucius Institutes interactions and planning in Tennessee.

### Research Questions

The research questions guiding this study were developed by studying the following dimensions: academic freedom in higher education or local control infringement in K-12, media portrayal of the Confucius Institutes, current partnership and programing ability to meet the needs of their school community.

Research Question 1: Is the mean of perceptions regarding Confucius Institute programing impacting principles of academic freedom from personnel in higher education institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Research Question 2: Is the mean of perceptions regarding Confucius Institute programing impacting principles of local control from K-12 personnel who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Research Question 3: Is the mean of perceptions regarding Confucius Institutes' portrayal in the media from personnel in higher education institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?



Research Question 4: Is the mean of perceptions regarding Confucius Institutes' portrayal in the media from personnel in K-12 institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Research Question 5: Is there a significant difference in participants' mean scores regarding perceptions about Confucius Institutes' portrayal in the media between personnel employed in higher education interacting with Confucius Institute programing and personnel employed in K-12 environments interacting with Confucius Institute programing?

Research Question 6: Is the mean of perceptions regarding Confucius Institute programing meeting the needs of their institution from personnel in higher education institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Research Question 7: Is the mean of perceptions regarding Confucius Institute programing meeting the needs of their institution from personnel in K-12 institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Research Question 8: Is there a significant difference in participants' mean scores regarding perceptions of the degree to which Confucius Institutes are meeting the needs of the school community through programing between personnel employed in higher education interacting with Confucius Institute programing and personnel employed in K-12 environments interacting in Confucius Institute programing?

Research Question 9: What are the challenges facing Confucius Institute programing that are perceived as most important to personnel of higher education and K-12 institutions?

Research Question 10: What are the benefits of Confucius Institute programing that are perceived as most important to personnel of higher education and K-12 institutions?

### Significance of the Study

The work of the Confucius Institute can be seen around the United States. It can be evidenced in local Chinese performances, celebrations, culture centers, class offerings or community projects and collaborations. The Confucius Institute as a global organization is just over 14 years old and the current research regarding its programing is emerging. In a congressional report to the Committee on Foreign Relations it was stated, "...that for the first time Asia has now overtaken Europe, by a wide margin, as the area of the world most important to Americans" (US Government Printing Office, 2011, p. v). This importance can be illustrated in the growth of Confucius Institutes in the United States. However, the Confucius Institute was met with controversy when the American Association of University Professors (AAUP) (2014) stated specific guidelines for American universities involved with foreign governments.

The AAUP joins CAUT [Canadian Association of University Teacher] in recommending that universities cease their involvement in Confucius Institutes unless the agreement between the university and Hanban is renegotiated so that (1) the university has unilateral control, consistent with principles articulated in the AAUP's *Statement on Government of Colleges and Universities*, over all academic matters, including recruitment of teachers, determination of curriculum, and choice of texts; (2) the university affords Confucius Institute teachers the same academic freedom rights, as defined in the 1940 *Statement of Principles on Academic Freedom and Tenure*, that it affords all other faculty in the

university; and (3) the university-Hanban agreement is made available to all members of the university community. (para. 4)

Six months after this report Congressman Christopher Smith convened a hearing to investigate if, "...academic freedom [is] threatened by China's influence on American universities" (Congressional Record, 2014, p. E1747). As of this writing this congressional hearing has not been concluded and remains open.

In 2017, the National Association of Scholars (NAS) produced a report that recommended Confucius Institutes be shut down at American universities (Peterson, 2017a). According to Peterson Confucius Institute infringement on academic freedom is directly connected to bureaucratic assumptions of control and power. Peterson connects the Confucius Institutes Headquarters bureaucracy to control and therefore the stifling of academic freedom. Peterson connects Confucius Institute bureaucracy to China's invasion of American universities through infringement of academic freedom and censorship. In response to the NAS report Redden (2017) reiterates that the AAUP offered specific recommendations to follow for universities dealing with Confucius Institutes and not just a blanket shut down. Redden also quoted people actually working in the Confucius Institutes and Universities that house them to further dispute the accusations and expose bias in Peterson's report. For example, Redden cited Qing Gao, the director of the Confucius Institute U.S. Center and assistant professor of arts management at George Mason University, as likening the Confucius Institute to any other grant that universities receive and further states that all incoming teachers undergo training upon their arrival regarding the importance of academic freedom. Furthermore, Redden (2017) reported that Gao brings up the fact that there is no evidence of Confucius Institutes interfering with academic freedom and that these claims have no factual basis. With the combination of

emerging research and the deep political and media controversy more research should be conducted to examine the perceptions of local people and to further explore if claims for or against Confucius Institutes are perceived as true. These perceptions could support positive or negative claims and offer further insight into what Confucius Institutes are doing here in the United States.

### Definitions of Terms

The following terms will be used throughout this dissertation. For the purpose of this research, the following terms will be defined as follows:

1. Academic Freedom – a principle applying to higher education as affirmed by the American Association of University Professors and the Association of American Colleges in 1940 that built upon principles and definitions first defined in 1915 that contains the following 3 basic tenants:
  - A. Teachers are entitled to full freedom in research and in the publication of the results, subject to the adequate performance of their other academic duties; but research for pecuniary return should be based upon an understanding with the authorities of the institution.
  - B. Teachers are entitled to freedom in the classroom in discussing their subject, but they should be careful not to introduce into their teaching controversial matter which has no relation to their subject. Limitations of academic freedom because of religious or other aims of the institution should be clearly stated in writing at the time of the appointment.

C. College and university teachers are citizens, members of a learned profession, and officers of an educational institution. When they speak or write as citizens, they should be free from institutional censorship or discipline, but their special position in the community imposes special obligations. As scholars and educational officers, they should remember that the public may judge their profession and their institution by their utterances. Hence they should at all times be accurate, should exercise appropriate restraint, should show respect for the opinions of others, and should make every effort to indicate that they are not speaking for the institution. (American Association of University Professors, 2018, para. 9)

2. Confucius Institute – an organization that represents a partnership with an educational agency and the Confucius Institute Headquarters in China (Confucius Institute Headquarters Hanban, 2014). Any reference to a Confucius Institute (CI) represents a physical office or institute located in a university in the United States, though there are Confucius Institutes in other nations and some not affiliated with universities. The basic mission of the Confucius Institute is Chinese language and culture teaching. Depending on the host university the mission can be tailored to the universities mission (ex. research or music) (Confucius Institute Headquarters Hanban, 2014).
3. Confucius Institute Headquarters - the Chinese non-profit organization that provides support and coordination to the Confucius Institute’s around the world.

“...According to the ‘Constitution and By-Laws of the Confucius Institutes’, the Confucius Institute Headquarters shall be governed by the Council. The Council shall consist of the Chair, the Vice Chairs, the Executive Council Members, and the

- Council Members. Among the fifteen Council Members, ten shall be the Heads of the Board of Directors of Confucius Institutes overseas” (Confucius Institute Headquarters Hanban, 2014). Confucius Institutes can write grants or project proposals to the Confucius Institute Headquarters for financial and physical support.
4. Hanban – Chinese word that refers to the organizing body that established the Confucius Institute Headquarters. “[国家汉办](#) Trad. [國家漢辦](#), [pinyin] Guó jiā Hàn bàn - Office of Chinese Language Council International (known colloquially as "Hanban"), an organ of the PRC government which develops Chinese language and culture teaching resources worldwide, and has established Confucius Institutes... internationally abbr. to [漢辦|汉办](#) [Hanban]” (Yabla, 2017).
  5. Local Control – a principle applying to K-12 education as most recently affirmed by the Every Student Succeeds Act of 2015 as it replaced the No Child Left behind legislation that contains the following tenants:
    - Returns responsibility for accountability and school improvement to state and local leaders by eliminating the federal accountability system, known as “Adequate Yearly Progress” or AYP.
    - Provides school districts more funding flexibility to help school leaders better address local priorities by repealing federal programs and replacing that maze of programs with the Student Support and Academic Enrichment Grant.
    - Protects the rights of states and school districts to determine what standards are best for their students by prohibiting any agent of the federal government from mandating, promoting, or incentivizing a particular set of standards such as Common Core.

- Protects the right of states to opt-out of federal education programs.
  - Provides eligible school districts the ability to have federal, state, and local funds follow students to the schools they attend, which will help encourage excellent schools to enroll students who are harder to serve.
  - Repeals ineffective mandates dictating teacher quality, known as the “Highly Qualified Teacher” definition. (National Conference of State Legislatures, 2015)
6. Soft Power – an aspect of a nation’s power that is not physically tangible or exerted by force. Nye (1990) described it as an, “aspect of power – which occurs when one country gets other countries to want what it wants... in contrast with hard or command power of ordering others to do what it wants” (p. 166).

#### Limitations and Delimitations

In alignment with the purpose of this study the subjects are delimited to personnel in the higher education setting as well as personnel in the K-12 setting. The participants are further delimited to being involved with a Confucius Institute program for relevance in their responses and do not include others outside of this direct interaction with Confucius Institute programming. In addition, these institutions are located in Tennessee. Therefore, the results may not be generalized to other higher education settings or to other K-12 settings.

A limitation is in relation to the overall responses of personnel. Although the survey was sent to personnel involved with Confucius Institute programing the analyses may not represent the perceptions of all personnel. Furthermore, the instrument is limited by its theoretical framework and is not all encompassing to every issue surrounding Confucius Institutes and their relationship to every perception of participants. The instrument cannot measure at the exact

same perception point and background knowledge or experience level of each participant and is further limited to the fact that the perception data gathered cannot represent similar populations' perceptions that were not included in the survey.

Another limitation relates to the variations in the perception of personnel towards China and their previous background knowledge, experience, or exposure. Therefore, the results may be based on more than the studied perceptions of the Confucius Institute. An additional delimitation is the period surrounding this studies' implementation. The instrument was administered one time and is not ongoing. Thus, delimitating this study to one point in history, and not examining ongoing perceptions or future understanding.

Another delimitation is connected to the validity of the survey used for this study. The assumption is that the instrument is valid and that the methodology used adequately addresses the research questions of the study. Another assumption, and therefore delimitation, is that the statistical tests chosen to analyze the results are appropriate and possess the power to detect various differences in the variables.

### Overview of the Study

Confucius Institute programing continues to grow and challenges are growing. Controversy surrounding this programing is also growing. Current media reports center on the bureaucratic models of higher education and K-12. The purpose of this study was to investigate the perceptions of school personnel that work closely with a Confucius Institute program in the state of Tennessee.

This study has been organized into five chapters. Chapter 1 includes a brief introduction, delimitations and limitations of the study, definition of terms, significance of the study, research



questions, and statement of the problem that is further explored in Chapter 2. Chapter 2 contains a review of the literature relevant to the study. Chapter 3 presents the study's methodology. Chapter 4 will report the findings of the data analyses. Chapter 5 will incorporate the summary, findings, conclusions, and further recommendations.

## CHAPTER 2

### REVIEW OF LITERATURE

The Confucius Institute is a global organization, with a headquarters in Beijing known as Hanban. It is a public institution affiliated with the Chinese Ministry of Education and operates as an international non-profit entity. The focus of the organization is Chinese language and cultural teaching, as well as the many components that combine to meet this goal such as teacher training, recruiting, and curriculum/material development (Confucius Institute Headquarters Hanban, 2014).

#### History of Confucius Institutes

To understand the Confucius Institute, a look at why Confucius Institutes are needed and in operation serves as a starting point. Zhao and Huang (2010) referenced the influence of the English language and culture on the rest of the world due to the prominence of the global position of the United Kingdom and the United States of America. Zhao and Huang also stated that it is now reasonable to understand something of the Chinese culture due to their rise in economic status. Zhang and Li (2010) examined the market demand for Chinese language learning in the United Kingdom from 2000 to 2010, as Chinese instruction grew due to educational organizations promoting language and cultural learning to compete and succeed in a global economy. With a growing Chinese economy and increased global trade, a connection can logically be made to the importance of understanding language and culture in an attempt to create more successful business relationships.

To accomplish a cultural understanding, a demand for secondary instruction arose. This then, logically, led to an increased demand for materials, curriculum, and qualified teachers. Starr (2009) explained the factors that came into consideration as China filled the void for language and culture teaching with the conception of the Confucius Institute. Starr delved into the Chinese perspective and justification for support with concepts of branding of the Confucius name and the elements of soft power. These concepts demonstrate the Chinese people's perceptions of the Confucius Institute and the impact they are making on the rest of the world (Wang & Adamson, 2015). Furthermore, the concept of soft power from an Eastern perspective and a Western perspective is different (Paradise, 2009). The Western perspective of soft power is often connected to past perceptions of China and perceptions around Communism (Hubbert, 2014).

### Perceptions of the Confucius Institute

A brief exploration into the political and media perceptions of the Confucius Institute illuminates some of the challenges and successes the institute may be facing. Wang and Adamson (2015) explore perceptions from China and the United States and illustrate the basic differences between the two countries regarding how Confucius Institutes enhance pride in the Chinese language and culture. Their research analyzed political and scholarly statements regarding the institutes to try to understand Chinese and American people's perceptions about the institutes operation.

## Political Perceptions of the Confucius Institute

Chinese political perceptions have been characterized into two views put forth by Wang and Adamson (2015). In their research, statements from politicians and academics were analyzed to arrive at leading views of why the Chinese population found worth in Confucius Institutes. They stated that China finds worth as Confucius Institutes work at, “showcasing China’s soft power for national and international prestige” (p. 228), and “enhancing pride in the Chinese language” (p. 229). A connection to language teaching and soft power is established through cultural understanding. Starr (2009) built a case on the presumption that, if foreigners understand China better, they will be more understanding to its interests. Therefore, this could also lead to peaceful negotiation as China’s economy grows and international trade expands.

In the West, the perception of economic expansion is also a consideration as described by Starr (2009). After the opening of China to the West in the early 1970s economic cooperation and trade has become a normal way of doing business. For younger generations of Americans, this trade has become a normal part of their life (Lien & Co, 2013). Furthermore, the US has recently pushed for more language learning in an effort of continued national security realizing the importance of cultural understanding to assist communications and prevention of future conflicts (Wang & Adamson, 2015). This push came in the form of the National Security Language Initiative (NSLI). The NSLI was introduced in 2006 under President George W. Bush with an aim to develop American language skills in critical world languages (Wang & Adamson). The Confucius Institute represents the opening of a pathway to increase exchange between China and the US. Conversely, with the growth of cultural exchange and opportunities also comes a fear of the growth of China’s soft power. Wang and Adamson pointed out that because Confucius Institutes normally are established and operate on American college

campuses, some concern arises regarding their role, and who is in ultimate control. Wang and Adamson also stated that, “as an ideological extension of the Chinese government, CIs [Confucius Institutes] in the USA have inevitably encountered doubts and resistance...” (p. 231). These doubts and questions are evident in the national media reports regarding the Confucius Institute (Lueck, Pippis, & Lin, 2014). Lueck, Pippis, and Lin (2014) state that, “in the wake of anti-immigration sentiment that was prevalent in the 1990s, the early 21<sup>st</sup> century was ripe for re-assertion of anti-Chinese sentiment in the United States and its media” (p. 330).

### Perceptions of the Confucius Institute in the Media

Lueck, Pippis, and Lin (2014) explored the American media coverage of China and stated, “U.S. press constructions of China and the Chinese people have used depictions of difference that reside in more than a century of stereotyping” (p. 328). This prevalence of old stereotyping can be traced to global economic conditions, anti-immigration ideology, and fear of future conflicts as we live in a post September 11<sup>th</sup> society. Lueck, Pippis, and Lin stated that the *New York Times* is commonly the first agency to report on stories regarding the Confucius Institute and that the other news agencies largely repeat the information without digging any further or offering additional perspectives or journalistic approaches. In contrast, Metzgar and Jing (2017) asserted that to date there has been no systematic study of how Confucius Institutes are portrayed in the American press and assert that there is a lack of connection reported on between the Confucius Institutes and the rationale of the Chinese government to put them in place.

From the Chinese perspective, the domestic media plays a role in considering how competing views of the Confucius Institute are portrayed and its role in producing a national identity (Fallon, 2014). Guo-Qiang (2015) draws a direct connection to Confucius Institutes

reshaping China's national identity. Guo-Qiang's connection supports the importance of the media in their reporting on the institutes both domestically and abroad. Conversely, the question is also raised about how and why China supports the Confucius Institute project when resources could be redirected to help China's disadvantaged groups (Fallon, 2014). Both on the Chinese and American media stage there are examples of the media playing a role in shaping culture and acceptance (Fallon, 2014; Lueck, Pippis, & Lin, 2014).

Zhao (2014) pointed out that the media plays a role in shaping perception especially where personal experience is lacking. The Confucius Institute could then play an important role in providing these personal experiences through language teaching, cultural exchanges, partnerships, and cultural activities. Zhao researched students involved with Confucius Institute programming and found that their perceptions of China were not negative regardless of what the media was portraying. However this personal connection may or may not apply at a state or national level.

An example of media coverage having a direct impact on Confucius Institutes was a statement put forth by the American Association of University Professors (AAUP) reaffirming correct operation guidelines. This statement was generally reported with a headline that Confucius Institutes were a threat to academic freedom (Peterson, 2017b; Redden, 2017). An example of a headline from the journal *Academic Questions* was, "Confucius Institutes on campus: A new threat to academic freedom" (Peterson, 2017b). The AAUP recommended that the universities have unilateral control, afforded Confucius Institute teachers academic freedom rights, and the university agreement with Hanban was available to the university community (Graham, 2014). At no point in the statement was it recommended that all Confucius Institutes be closed (American Association of University Professors, 2014). This statement, in conjunction

with the University of Chicago and Pennsylvania State University ending their contract with Hanban was a catalyst in a congressional hearing launched, in December of 2014, to examine if Confucius Institutes were inhibiting academic freedom (Peterson, 2017b).

Most recently, the National Association of Scholars reported on Confucius Institutes for violating academic freedom and pushed this connection forward (Peterson, 2017a). Peterson (2017a) compiled this report and it concluded that there were no “smoking guns” but still recommended the closing of Confucius Institutes. This perception leads directly into the discussion and research of Confucius Institutes infringement or control of academic freedom (Redden, 2017).

#### Academic Freedom Perceptions of the Confucius Institute

In 2017, the National Association of Scholars recommended the closure of Confucius Institutes due to infringement of academic freedom related to bureaucratic control (Peterson, 2017a). Peterson connected Hanban’s bureaucracy to control and therefore the stifling of academic freedom. Thus, Peterson connected the bureaucratic theory to China’s invasion of American universities.

To understand the connection of Confucius Institutes to academic freedom, the concept of soft power must first be understood. Multiple scholars have established that the Confucius Institutes are an extension of the Chinese government and their efforts to exert soft power (Hartig, 2012; Hubbert, 2014; Hughes, 2014). The problem is the connotation that different cultures bring to the meaning of soft power. In the East soft power pushes for cultural understanding through exchange and education and the Confucius Institute represents a way to shape China’s image on a global stage (Hartig, 2012). Confucius Institutes could be seen as

fulfilling a public relations void needed between China and the rest of the world (Ning, 2017). While in the West the Cold War rhetoric carries uncertainty, paranoia, and deception techniques (Hubbert, 2014). It is here where we locate the heart of the debate regarding academic freedom. Hughes (2014) described the clash of missions as a consequence of the Confucius Institutes doing business.

The conflict of Confucius Institutes soft power and academic freedom has been explored from the time the organization went global (Paradise, 2009). Paradise explored the setup of Confucius Institutes around the world as an effort to expand China's soft power and brought up the concern of the "Trojan horse" effect. With the current hearings in the United States Congress this has become an entry place for scholars when writing about the Confucius Institutes. Zhou and Luk (2016) explored the establishment of Confucius Institutes as an effort from China to expand soft power but conclude that it is not effective as many other countries now recognize this cultural expansion effort as a new China threat. Lahtinen (2015) agreed that Confucius Institutes may not be effectively spreading China's soft power. Not because other countries are aware, but rather that the Chinese culture may not have an automatic attraction to the host country (Lahtinen, 2015). Difficulties associated to utilizing soft power as an effective strategy have been noted repeatedly (Lo & Pan, 2016; Qili & Dong, 2016; Thung, 2017). It has also been noted that these relationships are at the beginning stages and that mutual feelings of trust are not fully developed (Du Cros, 2014).

Kulver (2014) described the strength of the Confucius Institutes not as a propaganda device but as the establishment of Confucian nodes set up as symbolic sites of Chinese culture to advance geopolitical influence. Weiming (2014) delved even deeper into the pedagogical approach of operations with cultural events where students become part of a community, forge



connection, and secure emotional ties. Li and Xiaohong (2016) advanced the Confucius Institute concept even further by asserting that the model promotes dialog and exchanges that promote peace, diversification, cooperation and development between different civilizations. This view of peace through thriving cultural vitality is also examined in the research of Zheyuan (2016). In direct contrast, Peterson (2017b) described the threat to academic freedom as so great that all institutes should be treated with high suspicion to their actual motives.

In addition to the research above, a small sample of international Confucius Institute research was examined. This exploration generally found that China's soft power was a constant theme for exploration in the establishment or purpose of Confucius Institutes from Peru to Cambodia (Hsin-Huang & Hao Yang, 2014; Kwan, 2014; Park, 2013; Van Chinh, 2014). To further digest the concept of soft power and academic freedom, an examination into the daily activities and local partnerships of the Confucius Institute is explored.

### Local Partnerships

The mission, vision, and goals of local Confucius Institutes differ depending on their university partners and the focus of their inception (He, Zhang, & Zhou, 2017). In general, there is a bridge built through their connection to their Chinese university partner and this often results in visiting scholars, or teachers, moving between China and the U.S. (Wayne, Xinggang, & Li, 2017). This exchange can go beyond this with cultural delegations in many forms and many fields traveling both ways to forge new partnerships (Ghosh, Lien, & Yamarik, 2017). Looking back to the mission of Hanban this commonly happens, but is not limited to, a delegation of educators traveling to promote language and cultural learning (Ying, 2016). Confucius Institutes offer scholarships to study in China, teaching opportunities for Chinese teachers to teach in the

US, summer camps in China, and administrative delegations (He et al., 2017). These partnerships can take many forms and could result in community cultural celebrations or hosting a Chinese teacher at a local public or private school (He et al., 2017). Ying (2016) explored the role Confucius Institutes play in the dissemination of Chinese culture and identified some of these pathways to try to quantify the effectiveness of the institutions. Not much research is available in the English language that quantifies the effectiveness of the Confucius Institutes cultural dissemination, so partnerships normally make an easier point of entry for exploration.

### Collaborations of Local Partnerships

Perhaps one of the best-known partnerships for American Confucius Institutes is the addition of a Chinese teacher to a school's language programming. This happens at all levels from Pre-Kindergarten through higher education. Zhou (2011) pointed out that even through financially tough times, and budget slashing, K-12 Chinese programs were growing. This can be attributed to the university partnership with Confucius Institutes and local school systems. Zhou highlighted the success of the Chicago public school system as they brought Chinese instruction into their schools and by the end of the 2010, nearly 12,000 students were learning Chinese. This expansion and other expansions like it naturally lead to other issues that must be solved by effective partnerships. Broadly, the issues involve teacher training/preparation, teacher turnover, curriculum development, and materials (He et al., 2017; Zhang & Li, 2010). Relatively little research is currently in the field in regards to teacher training, effectiveness, and school satisfaction. However, He et al. (2017) outlined Hanban's teacher requirements and selection process. In addition, He et al. discuss the onsite training and partnerships at the Confucius Institute at the University of Rhode Island after the teachers' arrival. They also explored teacher

turnover as inevitable based on visa limits and federal requirements from both the U.S. and China. The effectiveness of the programs is also a topic of limited research with some suggestions on different models of measurement (Caceres-Lorenzo, 2015; Song & Xu, 2017). Caceres-Lorenzo (2015) utilized a quantitative ANCOVA statistical analysis looking at test scores on a Chinese test and student demographics while Song and Xu (2017) utilized a multiple linear regression model to examine the relationship of funding to the number of students. However due to the limited visa terms of the classroom teachers, effectiveness may always be something of a moving target if not structured with strong training and materials that have established successful records of accomplishment (He et al., 2017). Hanban provides materials that school systems may or may not choose to use depending on local policies. However knowing what materials are available and how to use them also presents a challenge as every Confucius Institute is left to its own structures for cataloging and distribution (Ma, 2015).

### Materials

Hanban has a material donation process that can be initiated by a partner Confucius Institute. Ma (2015) concluded that an initial donation generally consists of 3,000 items ranging from books, CDs, and DVDs that can be renewed at the request of the Confucius Institute. This presents multiple challenges. The two obvious challenges are cataloging/tracking materials and the local school systems acceptance of the materials. Ma's research focused on the differences in Confucius Institute's systems of cataloging. Because Confucius Institutes can operate differently, there is no set way that the materials must be cataloged and accessed. Ma suggested this can pose a challenge regarding accessibility and availability of materials. To complicate this problem many K-12 systems have local and state policy that governs material selection and use

in the classroom environment. An example would be the Tennessee Education Finance Act of 1977 that outlines the responsibilities of providing textbooks to schoolchildren.

Any proposed textbooks in Tennessee go through a textbook adoption process at the state level and then again at the local level (Tenn. Code Ann., 2014a). In addition in Tennessee, there are also local procedures and policies in place for teachers to follow regarding bringing in and utilizing materials out of the adopted series (Tenn. Code Ann., 2014b). Thus, these policies provide local access and review to materials before implementing them into a classroom setting.

### Projects

In addition to providing teachers and materials, many Confucius Institutes also host cultural events that can range from festival like productions to bringing in performing arts groups from China to tour a community and display their talents. Li (2009) presented research covering the events of an internship opportunity at the Confucius Institute at Kennesaw State University. Li outlined the specific projects and provided a detailed list of resources and who was responsible for planning, application, and success of the projects. Through this project, the connection to the local community and the resources provided from the Confucius Institute were documented. Li's purpose was not to investigate the costs of the project; but, by offering specific detail of staffing responsibilities, Li demonstrated that even a simple community project involves a large amount of resources, either through specific funding and materials or through hidden cost such as employee's salaries. Li pointed out that, in the 2009 plan for the Confucius Institute at Kennesaw State, 18 projects were submitted that required resources in the areas of publicity, teaching, international travel, training, featured classes, and community cooperation.

Again, this documentation represents the planning for one Confucius Institute in a single financial year.

While many Confucius Institutes support local projects and community activities, some are set up with this as a focus. Guo and Li (2016) discussed the effectiveness of one such music Confucius Institute set up at the Royal Danish Academy of Music. They asserted that the music Confucius Institute brings the musical culture of China to participants and offers a platform of study that might otherwise be unattainable. Furthermore, they predict that more music Confucius Institutes will be established to meet the local needs. While Li (2009) and Guo and Li (2016) did not delve into specific dollar amounts in their research, they illustrated a large scope of work that requires funding to operate. This would then lead to questions regarding sustainability in future finances (Zeshun, 2012; Zhang & Li, 2010).

#### Economic Consideration

The topic of financial future is important to any organization. Financial stability is critical to growth, strength of programming, and future success. In many cases, the Confucius Institute fills a demand for Chinese language teaching that might not be attainable through traditional hiring and programming structures of the U.S. partner (Zhang & Li, 2010). Current funding from Hanban helps the Confucius Institutes fulfil their mission of cultural exchange and educational opportunities.

#### Financial Future

There is a marketable commodity in the services the Confucius Institute provides (Zeshun, 2012). Zeshun (2012) stated that, while the mission of the Confucius Institute is

educational in nature, the marketized discourse surrounding the institutions directly ties to commodification. Zeshun further noted, "...any discourse in the educational field nowadays cannot be fully immune from the invasion of marketized discourse" (p. 37). Zeshun suggested this may not be a bad thing. If the Confucius Institute is going to have long-term success, some commodification will need to take place, as communities are willing to support their need for the institutions services. Currently, funding from Hanban can help Confucius Institutes establish relationships and fill the gap in demand due to lack of local resources (Zhang & Li, 2010).

Zhang and Li (2010) identified five issues that were facing the expansion of Chinese teaching in the U.K. The problems they identified were a lack of syllabi or systems for teaching, lack of materials, lack of qualified and experienced teachers, lack of relevant research regarding the learning of Chinese, and lack of coordination and cooperation between various institutions resulting in duplicating work. While finance was not the focus of Zhang and Li's research they illustrated how these issues also have a financial underpinning that the U.K. may have not been able to solve without the help and coordination of the Confucius Institute. Again, Zhang and Li make the connection regarding demand and the support of the Confucius Institute. They further state that if the U.K. did not engage in trying to expand Chinese education the problems would not have arose resulting in little need for a Confucius Institute.

These financial points will work themselves out in some manner on the common market if Hanban was to reduce funding (Zeshun, 2012). However the initial result may be the reduction of Confucius Institute teachers and programs or even the closing of entire Confucius Institutes depending on the demand and local availability of funding again illustrating the marketization in education that Zeshun described.

## Economic Impact

In contrast to the above statements of financial reduction from Hanban, a look into why there is incentive for Hanban to continue its support of Confucius Institutes around the world has been explored. Lien and Co (2013) researched the effects that establishing a Confucius Institute had on a state's exports to China. From 2006 – 2010, they found that states generally grew their exports to China from 5 to 6% for each Confucius Institute branch that was established (Lien & Co, 2013). This clearly indicated economic benefit to the US economy but also eludes to more trade and benefit to the Chinese economy (Lien & Co).

A connection might be drawn to the increase of language learning and the increase of trade both ways. Lien (2013) connected an increase of Chinese learners, due to Confucius Institutes language programs, and a favorable impact to the host country even when Confucius Institutes draw students from local Chinese schools. The long-term effects of more students learning Chinese could only stand to increase partnerships for both countries in the future (Lien, 2013). Akhtaruzzaman, Berg, and Lien (2017) examined foreign direct investment in Africa to try to establish a link between Confucius Institutes and resource seeking. Their data indicated that Confucius Institutes and aid flows were not positive predictors of each other, but they concluded that Confucius Institutes were economically significant regarding information about future trade due to an increase in Chinese soft power (Akhtaruzzaman et al., 2017). In addition, Lien, Yao, and Zhang (2017) examined the Confucius Institute platform and its relationship to increasing tourism to China. A significant positive effect was found linking the Confucius Institute to inbound tourism to China (Lien et al., 2017). In a similar study, the presence of Confucius Institutes increased inbound tourism, exports, and foreign direct investments for

China (Ghosh, Lien, & Yamarik, 2017). These factors could play a role in the determination of where to place and grow Confucius Institutes.

Lien and Oh (2014) find that internationally, most Confucius Institutes are placed in areas that align with the conditions of English speaking ability, foreign direct investment connections, trade connections, and developing country status; while factors of population and gross domestic product are only marginally significant. This research again suggested the long-term benefits to further trade and relations from the initial investment of Hanban. In addition to financial consideration, politics also enters the equation for the placement of Confucius Institutes. The United States is a great example of a nation that has strong trade partnerships with China but is also a bit cautious in the Confucius Institute relationship as illustrated by the American Association of University Professors (2014) guidance and a congressional hearing (Congressional Record, 2014).

#### Current Political Actions

Confucius Institutes began operations in the United States in 2005. Roughly nine years later, they have become a focus of a congressional hearing that connects back to the protections of academic freedom (Congressional Record, 2014).

#### Congresses Actions

A 2011 congressional report to the Committee on Foreign Relations documented that Asia overtook Europe as an area of economic importance to Americans (US Government Printing Office, 2011, p. v). At the same time, more Confucius Institutes were being established in the United States (GAO, U.S. Government Accountability Office, 2019). This growth was



met with controversy when the American Association of University Professors (AAUP) (2014) stated specific guidelines for American universities involved with foreign governments.

The AAUP joins CAUT [Canadian Association of University Teachers] in recommending that universities cease their involvement in Confucius Institutes unless the agreement between the university and Hanban is renegotiated so that (1) the university has unilateral control, consistent with principles articulated in the AAUP's *Statement on Government of Colleges and Universities*, over all academic matters, including recruitment of teachers, determination of curriculum, and choice of texts; (2) the university affords Confucius Institute teachers the same academic freedom rights, as defined in the 1940 *Statement of Principles on Academic Freedom and Tenure*, that it affords all other faculty in the university; and (3) the university-Hanban agreement is made available to all members of the university community. (para. 4)

Six months after this report Congressman Christopher Smith convened a hearing to investigate if Confucius Institutes were infringing on academic freedom in American universities (Congressional Record, 2014). In the first hearing testimony was heard from Sophie Richardson of Human Rights Watch, Xia Yeliang of the Cato Institute, Perry Link of the University of California Riverside, and Thomas Cushman of Wellesley College with a focus of United States Universities operating in China (US Government Printing Office, 2014). At this hearing no representatives from the Confucius Institute were invited to speak (US Government Printing Office, 2014). This was followed up with another hearing roughly six months later. This hearing was framed on the concept of the United States maintaining access to the lucrative education market of China coming at a price (US Government Printing Office, 2015). Statements were given from Jeffrey Lehman, from New York University-Shanghai; Susan

Lawrence, a specialist in Asian affairs from the Congressional Research Service; Robert Daly, from the Kissinger Institute on China and the U.S. Woodrow Wilson International Center for Scholars; Mirta Martin, from Fort Hays State university; and Yaxue Cao, the founder and editor of China Change (US Government Printing Office). In the opening remarks, it was mentioned that about 275,000 Chinese students, representing 10 million dollars per year in tuition, were coming to the United States and again indirectly drew parallels to the Confucius Institute and access to these students (US Government Printing Office).

As of 2019, the investigation has not concluded and remains open. Pace University confirmed contact from Congressman Chris Smith of New Jersey in the fall of 2017 and by the Government Accountability Office in March of 2018 requesting specific information about their Confucius Institute (Pace University, 2018). In March 2018 Representatives Martin Daniel and Sheila Butt of Tennessee introduced a bill, HJR0955, to refuse money from the China United States Exchange Foundation (CUDEF) and further investigate anyone connected with Confucius Institutes (Tennessee General Assembly, 2018). By April 2018, the bill was taken off notice for the calendar in the delayed bill Committee (Tennessee General Assembly, 2018).

On December 13, 2017, a national congressional hearing was held to examine China's influence on operations intended to censor discussion on topics from history to human rights (Congressional Executive Commission on China, 2017). The hearing held opening statements from Senator Marco Rubio and Representative Christopher Smith (Congressional Executive Commission on China, 2017). In February 2018, Senator Marco Rubio sent a letter to all Florida universities that hosted Confucius Institutes and urged them to close and cut their ties (Rubio, 2018b). On March 8, 2018 the Government Accountability Office (GAO) sent an email letter to Middle Tennessee State University requesting information about the Confucius Institute

(Appendix A). The letter requests copies of the MOU with Hanban and the Chinese partner university and further defines the role of the GAO as a third party agency gathering information for Congress (see Appendix A). The GAO reported reviewing 90 agreements and conducting 10 case studies to learn how Confucius Institutes operate (GAO, U.S. Government Accountability Office, 2019).

Allen-Ebrahimian (2018) reported that Congressman Joe Wilson spearheaded a draft proposal targeting any foreign funding at American universities. Allen-Ebrahimian goes on to explain that the proposal if accepted would make all Confucius Institutes register with the Department of Justice through clarifying language in the Foreign Agents Registration Act. At the same time Senator Marco Rubio sent a letter to the chairman Senator Lamar Alexander and ranking member Senator Murray of the Congressional Committee of Health, Education, Labor, and Pensions requesting revisions of language in the Higher Education Reauthorization Act to lower the amount of reported gifts to higher education institutions from foreign institutions or persons from \$250,000.00 to \$50,000.00 (Rubio, 2018a). In the letter, Senator Rubio further urged all institutions of higher education to choose between federal funding and Confucius Institute related funding (Rubio, 2018b). Directly after Senator Rubio's letter Congressman Joe Wilson and Senator Marco Rubio introduced the Foreign Influence Transparency Act (Wilson, 2018). The proposed act if passed would follow the basic procedure described by Allen-Ebrahimian (2018). In addition, Redden (2018) stated that multiple news outlets have been reporting that the White House is considering limiting Chinese visas as part of a forthcoming package of tariffs.

In a 2018 Department of Justice document, Attorney General Jeff Sessions describes that Chinese economic espionage has been increasing and he goes on to outline the creation of a

China Initiative led by Assistant Attorney General John Demers with five other United States Attorneys and a senior FBI executive. The document goes on to list 10 components of the initiative with three components connecting back to higher education. These components are,

- Develop an enforcement strategy concerning non-traditional collectors (e.g., researchers in labs, universities, and the defense industrial base) that are being coopted into transferring technology contrary to U.S. interests;
- Educate colleges and universities about potential threats to academic freedom and open discourse from influence efforts on campus;
- Apply the Foreign Agents Registration Act to unregistered agents seeking to advance China’s political agenda, bringing enforcement actions when appropriate... (para. 9)

On February 13, 2019 the GAO presented a report to the Permanent Subcommittee on Investigations Committee on Homeland Security and Governmental Affairs, United States Senate and the Africa, Global Health, Global Human Rights and International Organizations Committee on Foreign Affairs, House of Representatives (GAO, U.S. Government Accountability Office). The report detailed the review of 90 Confucius Institute contracts and 10 case studies outlining operations regarding funding, management, and activities. The GAO identified 96 Confucius Institutes in operation in 44 states and the District of Columbia as of January of 2019. The report stated that US school officials, researchers, and others described the benefit of the Confucius Institute as the opportunity to expand relationships and increase funding and resources for China related programs. It also outlined various concerns from US school officials, researchers, and others regarding potential Chinese influence over events and activities, curriculum, hiring and qualifications of Confucius Institute teachers, and accepting funding from China. The report noted that school officials weighed the benefits and risks associated with

having a Confucius Institute on campus. It was stated that, "...some case study school officials noted that they did not think concerns and criticisms about Confucius Institutes applied to their institute... [and] such criticisms were not backed by evidence... but instead were rooted in a lack of understanding about Confucius Institutes" (p. 28). The end of the report outlined suggestions from school officials, researchers, and others that schools could take to ensure they protect against undue Chinese influence.

On February 28, 2019 the United States Senate Permanent Subcommittee on Investigations Committee on Homeland Security and Governmental Affairs held a hearing and released a staff report regarding China's impact on the US education system (United States Senate). The report included an executive summary, findings of fact and recommendations, history, operations, the US State Departments visa reviews, the US Department of Education reporting, and Chinese interference with US schools in China. Twelve recommendations were offered in the report:

1. Congress should require all US schools to publish any contracts with foreign governments, including all Confucius Institute contracts, online for students and faculty to review...
2. US schools should ensure that Hanban does not exercise line-item veto authority when approving annual Confucius Institute budgets...
3. US schools should ensure that Hanban's vetting, screening, and interview processes are aligned with their own hiring procedures and protocols...

4. Congress and state and local education officials should study the need and demand for Chinese language education programming in the United States and consider additional investments where necessary.
  5. The Department of Justice should determine if Confucius Institutes engage in activity to influence the U.S. government or public on behalf of foreign principles...
  6. The State Department should review all active Confucius Institutes and Confucius Classrooms for compliance with visa regulations, standards, and practices...
  7. U.S. schools must comply with the law and properly report foreign gifts to the Department of Education...
  8. The Department of Education should update its guidance requiring U.S. schools to report any funds provided by an institution owned or controlled by a foreign source, especially a foreign government...
  9. The State Department should demand reciprocal and fair treatment of its diplomats and employees in China...
  10. The State Department should remain in close contact with grantees in foreign countries and develop a formal system to collect information about interference, harassment, or questioning by foreign authorities...
  11. U.S. schools should continue to partner with Chinese universities...
  12. U.S. schools should demand that Hanban be fully transparent about Confucius Institute hiring practices and provide reciprocity to U.S. school programs at Chinese schools...
- (United States Senate, 2019, pp. 9-10)

After the hearing, on March 28, 2019 Senator John Kennedy from Louisiana introduced the *Concerns Over Nations Funding University Campus Institutes in the United States Act* referred to as the CONFUCIUS Act. The act was introduced to address concerns about direct Chinese government funding to promote Chinese studies on United States college campuses and will grant full managerial authority of Confucius Institute operations to the universities (Kennedy, 2019).

### State Level Actions

As of the time of this writing, Tennessee has supported Confucius Institutes by working with local universities and the State Department of Education to allow pathways for teachers to teach in K-12 classrooms as evidenced in out of state license procedures (Tennessee Department of Education, 2019). The procedure in Tennessee is outlined through the current international teacher exchange license that allows internationally certified teachers a pathway to gain a temporary license so that they can teach for credit language classes in accredited public schools. Licensing has been reported as a major issue and struggle for Confucius Institutes successful operation (He et al., 2017). To understand this licensing difficulty Tennessee's teacher license operation in accordance of federal guidance is examined.

The United States of America has an educational system that is unique to itself where many layers of policy, from many levels, shape educational decisions. The process of teacher licensing is an example of many policies from the national level to the state level working together to guide an acceptable process of granting a teacher a license to teach in the K-12 public sector. These policies and processes will differ from state to state. The nature of multiple policies and pathways for licensing differing between states creates a difficult puzzle regarding

international teacher licensing in many states (He et al., 2017). Jeng-Yi (2016) examined the development of Confucius Institutes and points to issues of collaboration with local communities as a major factor.

### Federal Connection

The United States has a unique educational system. Part of the uniqueness of the system can be found in the fact that the United States Constitution does not specifically identify education as a constitutional right. Pelsue (2017) explained that states assume the power over education by describing the 10<sup>th</sup> Amendment wording in, “the powers not delegated to the United States by the Constitution... are reserved to the States respectively” (para. 6). Thus, leaving public education unmentioned, and therefore, historically delegated to the local and state governments. The League of Women Voters (2011) goes on to explain federal involvement in education linked to Article I, Section 8 of the Constitution by stating that it, “granted Congress the power to lay and collect taxes to provide for the general welfare of the United States. It is under this ‘general welfare’ clause that the federal government has assumed the power to initiate educational activity in its own right and to participate jointly with states, agencies and individuals in educational activities” (para. 2). With this in mind, the connection between federal policy working with state and local policy is established. From early Land Grants to the National Defense Education Act of 1958, the federal government has made legislation that has shaped the trajectory of education in the states (League of Women Voters, 2011). In the first years of the 21<sup>st</sup> century, the federal No Child Left Behind (NCLB) legislation placed federal guidance on the teacher licensing process in the states (US Department of Education, 2009).



Prompted by studies that pointed to teachers being one of the most critical factors in student achievement NCLB includes provisions stating, “That all teachers in core academic areas must be highly qualified in the core academic subjects they teach by the end of the 2005-06 school year. It also requires that newly hired teachers in Title I programs or schools be highly qualified immediately” (US Department of Education, 2009, para. 3). However, the US Department of education does not mandate the definition of highly qualified but rather explains,

The law outlines a list of minimum requirements related to content knowledge and teaching skills that a highly qualified teacher would meet. The law, however, also recognizes the importance of state and local control of education and therefore provides the opportunity for each state to develop a definition of highly qualified that is consistent with NCLB as well as with the unique needs of the state. (para. 6)

The basic requirements from NCLB for a teacher to be considered highly qualified are, “a bachelor’s degree, full state certification, as defined by the state, and demonstrated competency, as defined by the state, in each core academic subject he or she teaches” (US Department of Education, 2009, para. 9). This reliance on the state to define their certification process and the demonstrated competency process leads to Tennessee’s direct implementation.

### Tennessee and the Tennessee Department of Education

Tennessee fully addressed the NCLB legislation in a plan for implementation (Tennessee Comptroller of the Treasury, 2019). In the plan, the Tennessee Department of Education (TDOE) explained the many facets of the definition of highly qualified, how to attain it, a timeline for school system implementation, and tools for teachers to utilize to attain highly qualified status (Tennessee Comptroller of the Treasury, 2019). An example of one of the

definitions in the TDOE plan that touched on certification and competency would be the statement on highly qualified teachers in the description that, "... all teachers had to obtain full state certification, with no requirements waived... hold at least a bachelor's degree... [and] pass an NTE or PRAXIS test in core curriculum areas" (Tennessee Comptroller of the Treasury, 2019, para. 5). Even while federal legislation changes or shifts in focus, these systems, such as the system built regarding teacher highly qualified status quality assurance, stay in place unless amended by new legislation. The Tennessee Comptroller of the Treasury describes this federal change and unchanged state system by explaining that the Every Student Succeeds Act (ESSA) completely repealed the highly qualified mandate of NCLB but that state licensing requirements remain the same.

#### Tennessee Teacher License Pathway

In September 2015 and modified in January 2017, Tennessee implemented changes to its license process as outlined in State Board of Education policy 5.502 (Tennessee State Board of Education, 2017a). The policy condensed many of the license pathways (Apprentice, transitional, Out-of-State, Interim D) and combined them into two basic categories, the practitioner and the professional. The Interim B was eliminated and the JROTC, the 3-Year International license, and Adjunct license remained the same (Tennessee State Board of Education, 2017a). The Tennessee Department of Education (2019a) now defines the requirements for the Practitioner License in the following manner, "...requirements must be met: ...at least 18 years old; ...bachelor's degree from a regionally-accredited college or university; ...enrolled in or have completed an approved educator preparation program and be

recommended for licensure by that provider; ...” (para. 2). An approved educator preparation program (EPP) directly connects to accreditation as an important part of the license process.

### Accreditation

Tennessee has mandated that to receive a teaching credential an applicant must complete training at an approved EPP. A searchable list of approved EPPs can be found at the TDOE website and as of May 2018, it lists 870 records of programs from providers (Tennessee Department of Education, 2019b). A quick perusal of the list indicates that these providers are accredited universities in the state of Tennessee. Further guidance on becoming an approved EPP can be found in Tennessee State Board policy 5.504. Highlights from the policy are the basic standards and requirements for approval and a footnote to accreditation. The footnote on page three clarifies the connection to accreditation and the approval process by stating,

Although eligibility requirements may vary, the expectations and standards will not. For example, all IHEs [Institutes of Higher Education] are required to achieve accreditation from the Southern Association of Colleges and Schools (SACS) as a part of the eligibility requirements. SACS accreditation is not available for EROs [Education-Related Organizations]; however, EROs will be required to provide additional information to demonstrate meeting eligibility requirements as stipulated by the Council for the Accreditation of Educator Preparation (CAEP) and required by Tennessee. (Tennessee Board of Education, 2017b, p. 3)

The knowledge of this policy and approval process outlines the basic ways that the state approves EPPs.

## International Teacher License Pathway in Tennessee

Currently the state of Tennessee does offer a pathway for international teachers to receive a temporary, non-renewable, three-year teacher license known as the Three-Year International Credential (Tennessee Department of Education, 2019). The pathway for this license is noted on the TDOE website where the application instructions may be retrieved (Tennessee Department of Education, 2019). The TDOE no longer accepts paper license application except for a few select licenses (G. Zheng, personal communication, July 3, 2017). Zheng explains that this procedure outlines the state procedure for working with Confucius Institutes to support K-12 Chinese teachers.

The detail of this partnership, through procedure, was outlined by Guanping Zheng, the Director of the Confucius Institute at Middle Tennessee State University in July of 2017. Teachers are invited to apply on the Chinese side (G. Zheng, personal communication, July 3, 2017). Zheng explained that after this the local Confucius Institute in Tennessee interviews them and after picking the candidates with strengths that align with local program needs, a small group of applicants are then sent for interviews to the local school and/or school district for final selection. The verification process begins with the Chinese verification of all college degrees, course credits, and teaching license these items are then directly sent to a third party US verification agency recognized by the TDOE (G. Zheng, personal communication, July 3, 2017). Zheng explained that all of this then goes to the international office at the local university for further verification and recommendation of a temporary license to teach in the K-12 environment. This is then sent to the local school system for their verification and acceptance of the teacher. The teacher will then arrive and have to demonstrate their ability on a recognized state approved PRAXIS test and upon the final verification and testing, the entire application,

with evidence of this entire process, is then sent to the TDOE for final consideration/verification and issuance of the temporary license (G. Zheng, personal communication, July 3, 2017). Zheng claimed this process normally takes six months if everything runs smoothly. The license process description contains the very brief outline of the bureaucratic process described above (Tennessee Department of Education, 2019).

### The Theory of Bureaucracy and the Confucius Institute

Manning (2013) described bureaucracy as a way, one of many, to organize human behavior and stated that, “bureaucratic principles are so inculcated into modern living that they are often considered inherent parts of daily life” (p. 112). Marion and Gonzales (2014) stated that, “the German sociologist, Max Weber, is indelibly associated with the development of bureaucracy theory” (p. 22). In addition, they explained that in the early decades of the 20<sup>th</sup> century bureaucracy became ingrained into western society as companies expanded past the point of a charismatic leader. Weber (1947) described three types of authority as traditional authority, rational-legal authority, and charismatic authority. Weber saw these authority structures apparent in government and industry. Marion and Gonzales (2014) link the relationship of these categories to Henry Ford’s evolution from a local charismatic leader to a rational-legal leader as his company grew. To understand the bureaucracy of the Confucius Institute global organization we will examine the structure of the Confucius Institute at Middle Tennessee State University.

### Confucius Institute Middle Tennessee State University (CIMTSU)

The Confucius Institute at Middle Tennessee State University is partnered with Hangzhou Normal University of China (Middle Tennessee State University, 2017a). The

mission of the CIMTSU, “is to enhance the understanding of Chinese language and culture, facilitate engagement with China and create opportunities for exchange and collaboration between communities in Tennessee and China” (Middle Tennessee State University, 2017a, para. 2). To achieve this mission, the institute hosts events, outreach programs, educational trips, music exchange, teacher and student exchange, presents news, facilitates teacher recruitment, and hosts classes (Middle Tennessee State University, 2017a). On March 17, 2016, the Confucius Institute and Middle Tennessee State University worked together to open the Center for Chinese Music and Culture that now encompasses, “a musical instrument gallery, library, archives, and classrooms. The Center’s activities include exhibiting Chinese musical instruments; hosting visiting scholars and artists; presenting concerts, lectures, and workshops; teaching Chinese musical instruments and ensemble performance; and offering outreach school and community programs” (Middle Tennessee State University, 2017b, para. 1). Currently, the CIMTSU facilitates the recruitment and grant support for Chinese teachers in Tennessee. These teachers come to Tennessee with sponsored visas from the Tennessee Department of Education and are placed in school districts that are trying to build Chinese programs (G. Zheng, personal communication, July 3, 2017). This process is similar to the process outlined by He et al. (2017) regarding the Confucius Institute in Rhode Island. The districts are responsible for curriculum in accordance with Tennessee Department of Education standards (Tennessee Department of Education, 2019c). The Confucius Institute at Middle Tennessee State University supports these teachers while direct instruction and supervision is overseen at the local level (G. Zheng, personal communication, July 3, 2017). There are no organizational charts for the internal working of the CIMTSU, but He et al. (2017) pointed out that university presidents and their

designees have great power to make decisions regarding the Confucius Institutes operation and function.

### Bureaucracy in Action

Confucius Institute teachers and staff have to follow many levels of bureaucratic procedure after arriving in the United State through the systems of their local schools, districts, and the Tennessee Department of Education (G. Zheng, personal communication, July 3, 2017). In addition, the Confucius Institute at Middle Tennessee State University must work with bureaucracy at many levels to insure its continued existence (G. Zheng, personal communication, July 3, 2017). All university policies must be strictly followed to insure compliance in operation and financial expenditures (G. Zheng, personal communication, July 3, 2017). These policies normally reflect federal and state statutes that keep the university and its units in compliance with the law (G. Zheng, personal communication, July 3, 2017). An example would be the Tennessee financial code. This can be seen in Middle Tennessee State University's Banner Financial System as well as a plethora of forms for spending at any level (Middle Tennessee State University, 2017c). In addition Hanban has its accountability measures with reports that must be filed demonstrating progress as well as budgeting for any grants received from China (G. Zheng, personal communication, July 3, 2017). Similar structures are noted from He et al. (2017) regarding operation at the University of Rhode Island. There is general overlap in financial reports, but coding for the US and the Chinese systems is completely different, not to mention that everything must be produced in two languages, English and Chinese (G. Zheng, personal communication, July 3, 2017).

## Challenges in the Bureaucratic Model

The National Association of Scholars, produced a report linking bureaucracy to Chinese control and the infiltration of U.S. college campuses (Peterson, 2017a). In the report Peterson (2017a) connects bureaucratic theory to control and power. A full heading is given to just this subject entitled, “How far does the arm of bureaucracy reach” (p. 49). Peterson connects Hanban’s bureaucracy to control and therefore the stifling of academic freedom. Peterson asserts that bureaucracy becomes the theory that allows direct connections to be made to China’s invasion of American universities. Redden (2017), pointed out that Peterson’s report echoes previous statements in 2014 from the American Association of University Professors for the university to have unilateral control, afford Chinese teachers the same academic freedoms as any other teacher, and that the agreements are made public to the university community. However, after summarizing the report, Redden (2017) concluded by interviewing people working in Confucius Institutes and universities that house them to dispute the accusations and expose bias in Peterson’s report. For example, Redden quotes Stephen Dunnett, Vice Provost for International Education at the State University of New York at Buffalo, stating, “Throughout this report there are... unsupported insinuations and allegations without concrete evidence” (para. 20). Redden’s interviewees describe the Confucius Institutes operating like any other grant and bring up the fact that no actual evidence of infringement on academic freedom has been offered by the National Association of Scholars.

Peterson (2017a) viewed the Confucius Institutes through a bureaucratic lens and illustrated how bureaucratic control accusations can be made. Zheng stated that due to the extremely complicated nature and combination of multiple bureaucratic systems power may flow from the top but it is quickly defused and redirected by several local bureaucratic systems; thus,



dramatically limiting the control and power of Hanban (G. Zheng, personal communication, July 3, 2017). He et al. (2017) gave an example of this diffusion of bureaucracy by claiming that culturally the bureaucratic system gives the university president a large amount of power. Combining the bureaucracies of Hanban, Middle Tennessee State University, the Confucius Institute at Middle Tennessee State University, the Tennessee Department of Education, the local education agency (school district), and the local school is difficult and control tends to lie in direct application from local levels giving them the most bureaucratic power (G. Zheng, personal communication, July 3, 2017).

### Chapter Summary

In summary, the exploration of the Confucius Institute shows limited research and provides many pathways where future research may be conducted. A closer examination of bureaucratic influence and the perception of these influences at local level would appear to be the most logical need for future research. This is demonstrated through media coverage about the ongoing debate regarding academic freedom and congresses open investigation. In addition research regarding Confucius Institute programing meeting school community needs emerging.

## CHAPTER 3

### RESEARCH METHOD

In light of the issues that have arisen since the Confucius Institutes international existence, this study examined current perceptions of problems facing Tennessee Confucius Institutes by surveying personnel in higher education institutions and K-12 institutions working with Confucius Institute programming. A quantitative analysis was conducted to determine the perceptions of current and future problems facing the Tennessee Confucius Institutes.

The purpose of this study was to investigate the perceptions of K-12 school and higher education employees that work closely with a Confucius Institute program in the state of Tennessee by exploring issues that have been presented in current research and reports, and to identify alignment and misalignment of these perceptions between higher education and K-12 settings in Tennessee. Additionally, this study identified higher education and K-12 perceptions of the Confucius Institute partnerships in the state of Tennessee that might be utilized to examine the Confucius Institutes interactions and planning in Tennessee.

#### Research Questions and Null Hypotheses

The research questions guiding this study were developed by examining the following dimensions: academic freedom or control infringement, media portrayal of the Confucius Institute, current partnership activities and programming ability to meet the needs of the community.

Research Question 1: Is the mean of perceptions regarding Confucius Institute programing impacting principles of academic freedom from personnel in higher education institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho1: The mean of perceptions regarding Confucius Institute programing impacting principles of academic freedom from personnel in higher education institutions who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

Research Question 2: Is the mean of perceptions regarding Confucius Institute programing impacting principles of local control from K-12 personnel who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho2: The mean of perceptions regarding Confucius Institute programing impacting principles of local control from K-12 personnel who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

Research Question 3: Is the mean of perceptions regarding Confucius Institutes' portrayal in the media from personnel in higher education institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho3: The mean of perceptions regarding Confucius Institutes' portrayal in the media from personnel in higher education institutions who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

Research Question 4: Is the mean of perceptions regarding Confucius Institutes' portrayal in the media from personnel in K-12 institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho4: The mean of perceptions regarding Confucius Institutes' portrayal in the media from personnel in K-12 institutions who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

Research Question 5: Is there a significant difference in participants' mean scores regarding perceptions about Confucius Institutes' portrayal in the media between personnel employed in higher education interacting with Confucius Institute programing and personnel employed in K-12 environments interacting with Confucius Institute programing?

Ho5: There is not a significant difference in participants' mean scores regarding perceptions about Confucius Institutes' portrayal in the media between personnel employed in higher education interacting with Confucius Institute programing and personnel employed in K-12 environments interacting with Confucius Institute programing.

Research Question 6: Is the mean of perceptions regarding Confucius Institute programing meeting the needs of their institution from personnel in higher education institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho6: The mean of perceptions regarding Confucius Institute programing meeting the needs of their institution from personnel in higher education institutions who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

Research Question 7: Is the mean of perceptions regarding Confucius Institute programing meeting the needs of their institution from personnel in K-12 institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho7: The mean of perceptions regarding Confucius Institute programing meeting the needs of their institution from personnel in K-12 institutions who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

Research Question 8: Is there a significant difference in participants' mean scores regarding perceptions of the degree to which Confucius Institutes are meeting the needs of the school community through programing between personnel employed in higher education interacting with Confucius Institute programing and personnel employed in K-12 environments interacting with Confucius Institute programing?

Ho8: There is not a significant difference in participants' mean scores regarding perceptions of the degree to which Confucius Institutes are meeting the needs of the school community through programing between personnel employed in higher education interacting with Confucius Institute programing and personnel employed in K-12 environments interacting with Confucius Institute programing.

Research Question 9: What are the challenges facing Confucius Institute programing that are perceived as most important to personnel of higher education and K-12 institutions?

Research Question 10: What are the benefits of Confucius Institute programing that are perceived as most important to personnel of higher education and K-12 institutions?

### Instrumentation

The instrument used for data collection was a survey created by the researcher to examine current perceptions about Confucius Institutes in the state of Tennessee. The survey consisted of 18 items. The first through fourth items were used to gather demographic information about the participants surveyed. Items 5 to 16 were used to gather information about participants'

perceptions regarding the Confucius Institutes in Tennessee. A Likert-type scale was used for those items to gather data that measure participants' perceptions about the interactions with Confucius Institute programming. The range of the scale was from "Strongly Disagree" to "Strongly Agree", with "1" representing "Strongly Agree", "3" representing "Neutral", and "5" representing "Strongly Disagree". A "U" column is provided in case the answer is unknown by the participant. The "U" will hold no statistical value.

Patterns and perceptions reported through the ranking questions, 17 and 18, were recorded in a point system. Participants were asked to rank the top three items by order of importance with one being most important, two being second most important, and three being the third most important. The items were then given reverse values so that the points could be calculated to determine what participants perceived as most important. The instrument can be found in Appendix C.

Data for Research Question 1 will be analyzed from responses given to survey items 5 to 7. Data for Research Question 2 will be analyzed from responses given to survey items 8 to 10. Data for Research Questions 3, 4 and 5 will be analyzed from responses given to survey items 11 to 13. Data for Research Questions 6, 7 and 8 will be analyzed from responses given to survey items 14 to 16. Data for Research Questions 9 and 10 will be analyzed from responses given to survey items 17 and 18.

For the purposes of validity and reliability, survey development discussions were conducted with colleagues first and then with the researcher's dissertation committee at East Tennessee State University. The development activities were conducted to identify areas of adjustment. The results of the activities allowed for revisions to be made to increase validity based on feedback from non-partial reviewers. In addition, conducting multiple discussions with

multiple people increased the reliability of the survey as it offered the researcher feedback from reviewers. The feedback from the responses given was taken into consideration and revisions were made.

### Population and Sample

The population of this study consisted of personnel who work with Confucius Institute programing, in Tennessee in a higher education or K-12 environment. The participants were employed either by higher education or K-12 institutions. The 42 participants in the higher education category included deans, provosts, presidents, vice presidents, other administrators, and faculty working in higher education environments. The 58 participants in K-12 category consisted of superintendents, central office personnel, principals, assistant principals, and teachers working in K-12 schools. The higher education institutions interacting with Confucius Institute programing that were part of the survey administration include; University of Memphis, Middle Tennessee State University, Volunteer State Community College, and the University of Tennessee Knoxville. The Confucius Institutes at University of Memphis, Middle Tennessee State University, and the University of Tennessee Knoxville provide about 30 Confucius Institute teachers at K-12 schools around Tennessee and another 20 Confucius Institute teachers in support roles for these teachers or working at the Confucius Institutes offices. The K-12 school systems that interact with Confucius Institute programing that were part of the survey administration were: Aurora Collegiate Academy (charter school), Dyersburg City Schools, Murfreesboro City Schools, Rutherford County Schools, Sumner County Schools, Bristol City Schools, and Kingsport City Schools. Overall, 268 surveys were delivered to personnel that are in contact with Confucius Institute programing in Tennessee. Confucius Institutes also support

local Chinese teachers and programs by offering access to testing, delegations, and summer camps to China. The study surveyed as many participants as possible who had direct contact with Confucius Institute programming. For the purposes of this study the participants were broken into two samples. One sample consisted of higher education personnel and the other sample consisted of K-12 personnel.

### Data Collection

Paper surveys were used to collect data. A participant list, including school addresses, for survey purposes was built with the help of all the Confucius Institutes in Tennessee and local K-12 school leaders. Before administering these surveys and collecting data, permission was obtained from directors of schools or their designees in each school district as well as appropriate administration at each institute of higher education. The Institutional Review Board of East Tennessee State University granted permission before formal contact was made with any school leader. A letter was sent to each institutional leader with a copy of the survey (see Appendix C).

After approval from all necessary entities was granted, 143 participants in K-12 and 125 participants in higher education were sent a letter explaining the entire study, its purpose, and requesting their cooperation. The instrument was attached. Participants were informed that their responses were confidential and voluntary and that they could skip any questions or opt out of the survey at any time. A self-addressed, stamped envelope was included to aid the participants in the return of the survey. The survey was administered between the dates of February 4, 2019 – February 25, 2019. 42 surveys were returned from higher education personnel and 58 surveys were returned from personnel in K-12 institutions. Responses were populated into a spreadsheet,



saved on a jump drive, and will be locked in a safe for five years. In addition, anonymity was maintained, as the survey did not require participants to disclose their names. This further increased the validity of the results as the researcher could not connect the surveys to the individual participants or institutions.

### Data Analysis

The study was a non-experimental quantitative survey research design that compared perceptions of different subgroups working with Confucius Institutes in the state of Tennessee. The perceptions were statistically analyzed utilizing IBM-SPSS. Survey items 5 to 16 were analyzed utilizing a one-sample t-test to determine if the responses were statistically larger from 3, the midpoint of the instrument representing neither a positive or negative perception. The data were utilized to address Research Questions 1, 2, 3, 4, 6, and 7. Survey items 11 to 13 and 14 to 16 were then analyzed utilizing a series of independent sample t-tests to determine if statistically significant differences exist in the dependent variable between the two groups of subjects (Research Questions 1 and 8). The dependent variable was the perceptions of the Confucius Institute between the different subgroup populations of higher education personnel and K-12 personnel interacting with the Confucius Institutes. The data were utilized to answer Research Questions 5 and 8. All data were analyzed at the .05 level of significance. Survey items 17 and 18 were reverse scored to obtain points to further understand participant perceptions regarding Research Questions 9 and 10.

## Chapter Summary

This study used a non-experimental quantitative design. The objective of this study was to examine the perceptions of participants working directly with Confucius Institute programing in the state of Tennessee and to explore differences and similarities of these perceptions between higher education and K-12. The data was organized and analyzed through statistical calculations using IBM-SPSS. A point system was also used to identify patterns and weight of perceptions.

This chapter describes the methodology used to implement this study. It presents the research questions and null hypotheses, sample description, related information pertaining to the instrument, procedures for data collection, and the manner the data was analyzed. Chapter 4 will display the findings of the research and will contain a report on each research question with narrative, figures, and tables.

## CHAPTER 4

### RESULTS

The purpose of this non-experimental quantitative design study was to investigate the perceptions of K-12 school and Higher Education employees that work closely with a Confucius Institute program in the state of Tennessee by exploring issues that have been presented in current research and reports, and to identify alignment and misalignment of these perceptions between higher education and K-12 settings in Tennessee. Survey data were acquired through a paper based survey administration to participants that are working with Confucius Institute programing in the state of Tennessee. The data were then analyzed using IBM-SPSS.

#### Demographics

Data were collected on higher education and K-12 personnel working with Confucius Institute programing in the state of Tennessee at the following institutions and school systems: University of Memphis, Middle Tennessee State University, Volunteer State Community College, University of Tennessee Knoxville, Aurora Collegiate Academy, Dyersburg City Schools, Murfreesboro City Schools, Rutherford County Schools, Sumner County Schools, Bristol City Schools, and Kingsport City Schools. The survey was administered between the dates of February 4, 2019 to February 25, 2019.

The following demographic information was requested from all participants: Educational institution type (higher education or K-12), connection to Confucius Institute programing, and years of experience as an educator. There were 42 participants from higher education institutions and 58 participants from K-12 institutions.

Connection to programing was reported in the following manner for higher education (participants could note multiple connections):

Nine participants work with a Confucius Institute Teacher, 21 participants have attended a Confucius Institute culture event, three participants have attended a Confucius Institute study abroad trip, two participants have students that have attended a Confucius Institute study abroad trip, three participants have attended a Confucius Institute Chinese class, and 16 participants have another connection to Confucius Institute programing.

Connection to programing was reported in the following manner for K-12 institutions (participants could note multiple connections):

43 participants work with a Confucius Institute Teacher, 6 participants have attended a Confucius Institute culture event, five participants have attended a Confucius Institute study abroad trip, two participants have students that have attended a Confucius Institute study abroad trip, and 13 participants have another connection to Confucius Institute programing.

Participants from higher education institutions reported their years of experience in the following manner: 13 participants had 0 to 5 years of experience, seven participants had 6 to 10 years of experience, one participant had 11 to 15 years of experience, three participants had 16 to 20 years of experience, four participants had 21 to 25 years of experience, and 12 participants had more than 25 years of experience. Two participants did not report.

Participants from K-12 institutions reported their years of experience in the following manner: four participants had 0 to 5 years of experience, 10 participants had 6 to 10 years of experience, 10 participants had 11 to 15 years of experience, 15 participants had 16 to 20 years of experience, 10 participants had 21 to 25 years of experience, and eight participants had more than 25 years of experience. One participant did not report.

## Research Question 1

Research Question 1: Is the mean of perceptions regarding Confucius Institute programing impacting principles of academic freedom from personnel in higher education institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho1: The mean of perceptions regarding Confucius Institute programing impacting principles of academic freedom from personnel in higher education institutions who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

A one-sample *t* test was conducted on the participants' scores from the Academic Freedom Infringement Set (survey items 5 to 7) to evaluate whether the mean was significantly larger than 3 the midpoint of the scale. The sample mean of 4.24 (SD = 1.07) was significantly larger than 3,  $t(29) = 6.34, p < .01$ . The 95% confidence interval for the participants perceptions mean ranged from .84 to 1.63. The effect size *d* of = 1.16 indicates large effect. Figure 1 shows the distribution of participants' perception scores. The null hypothesis was rejected. The results support the conclusion that participants perceive that Confucius Institute programing does have a significantly positive impact on the principles of academic freedom.

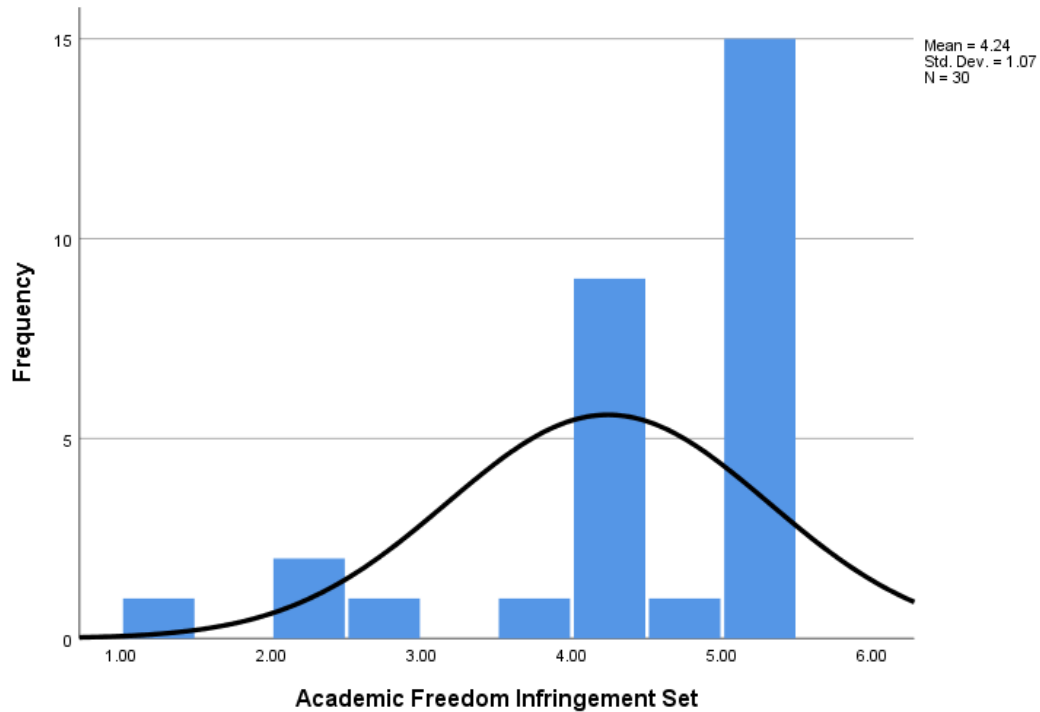


Figure 1. Academic freedom infringement set

### Research Question 2

Research Question 2: Is the mean of perceptions regarding Confucius Institute programing impacting principles of local control from K-12 personnel who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho2: The mean of perceptions regarding Confucius Institute programing impacting principles of local control from K-12 personnel who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

A one-sample *t* test was conducted on the participants perception scores on the Local Control Infringement Set (survey items 8 to 10) to evaluate whether the mean was significantly larger than 3, the midpoint of the scale. The sample mean of 4.10 (SD = .94) was significantly

larger than 3,  $t(53) = 8.60, p < .01$ . Therefore the null hypothesis was rejected. The 95% confidence interval for the participants perceptions mean ranged from .85 to 1.36. The effect size  $d$  of = 1.17 indicates a large effect. Figure 2 shows the distribution of participants' perception scores on the Local Control Infringement Set. The results support the conclusion that participants perceive that Confucius Institute programing has a significantly positive impact on the principles of local control.

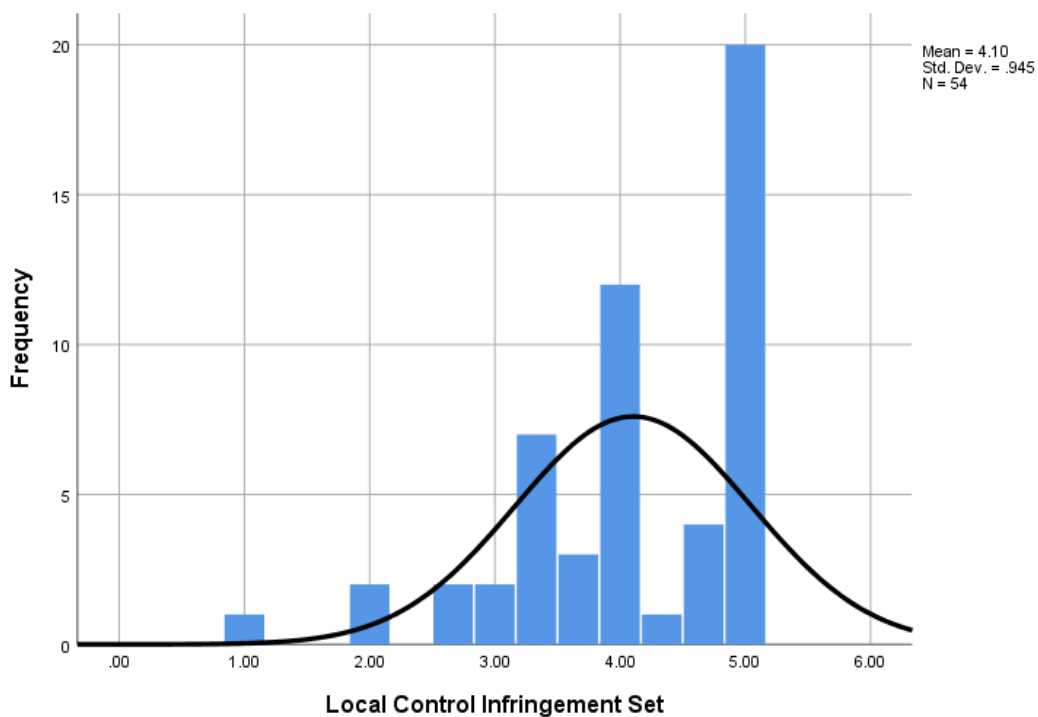


Figure 2. Local control infringement set

### Research Question 3

Research Question 3: Is the mean of perceptions regarding Confucius Institutes' portrayal in the media from personnel in higher education institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho3: The mean of perceptions regarding Confucius Institutes' portrayal in the media from personnel in higher education institutions who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

A one-sample *t* test was conducted on the Media Perception Set scores (survey items 11 to 13) to evaluate whether the mean was significantly larger than 3, the midpoint of the scale. The sample mean of 3.67 (SD = 1.06) was significantly larger than 3,  $t(37) = 3.89, p < .01$ . Therefore, the null hypothesis was rejected. The 95% confidence interval for the participants perceptions mean ranged from .32 to 1.01. The effect size *d* of = .63 indicates medium effect. Figure 3 shows the distribution of participants' perception scores. The results support the conclusion that higher education participants perceive that Confucius Institute programing is positively portrayed in the media.

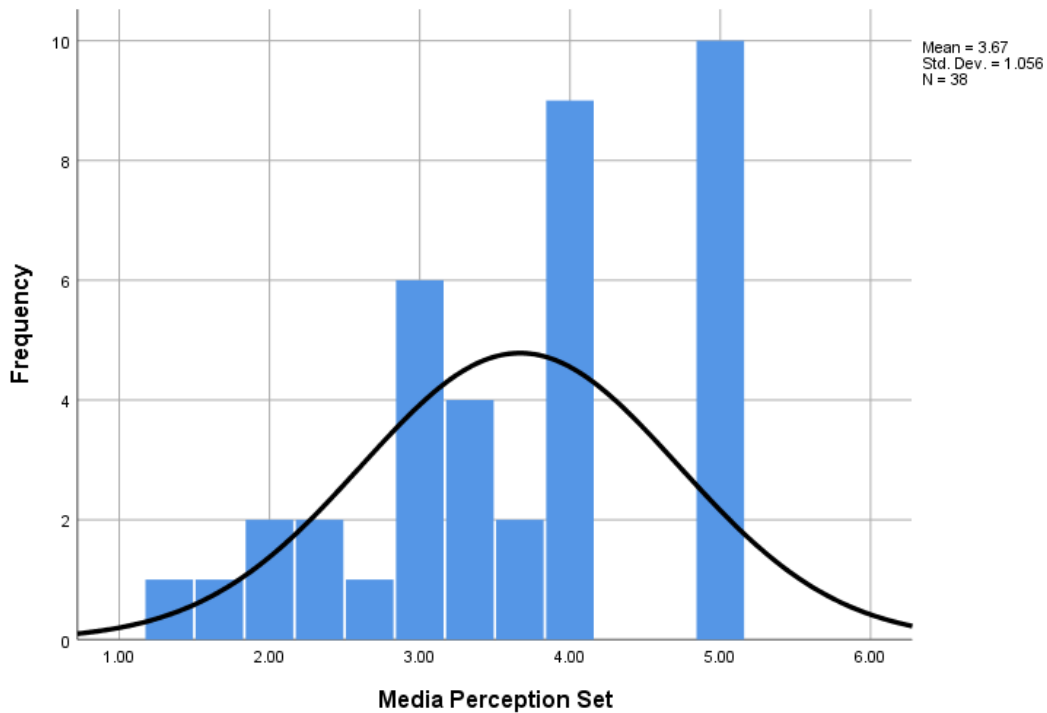


Figure 3. Higher education media perception set



#### Research Question 4

Research Question 4: Is the mean of perceptions regarding Confucius Institutes' portrayal in the media from personnel in K-12 institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho4: The mean of perceptions regarding Confucius Institutes' portrayal in the media from personnel in K-12 institutions who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

A one-sample *t* test was conducted on the Media Perception Set scores (survey items 11 to 13) to evaluate whether the mean was significantly larger than 3, the midpoint of the scale. The sample mean of 4.16 (SD = .85) was significantly larger than 3,  $t(35) = 8.2, p < .01$ . Therefore, the null hypothesis was rejected. The 95% confidence interval for the participants perceptions mean ranged from .87 to 1.45. The effect size *d* of = 1.36 indicates large effect. Figure 4 shows the distribution of participants' perception scores. The results support the conclusion that K-12 participants perceive that Confucius Institute programing is positively portrayed in the media.

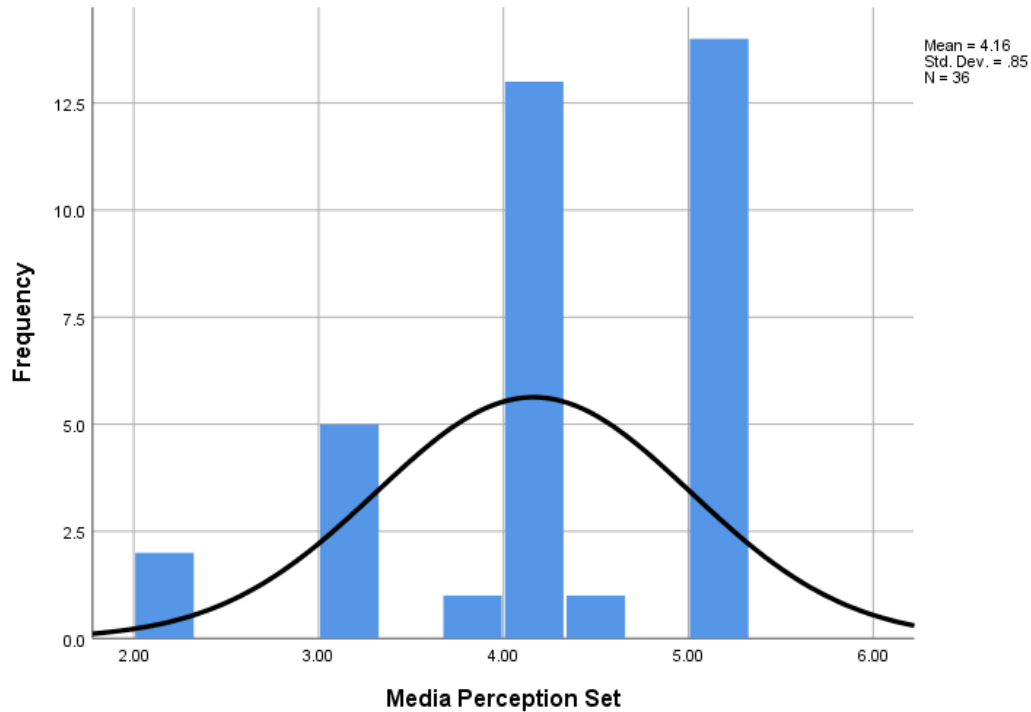


Figure 4. K-12 media perception set

#### Research Question 5

Research Question 5: Is there a significant difference in participants' mean scores regarding perceptions about Confucius Institutes' portrayal in the media between personnel employed in higher education interacting with Confucius Institute programing and personnel employed in K-12 environments interacting with Confucius Institute programing?

Ho5: There is not a significant difference in participants' mean scores regarding perceptions about Confucius Institutes' portrayal in the media between personnel employed in higher education interacting with Confucius Institute programing and personnel employed in K-12 environments interacting with Confucius Institute programing.

An independent-samples *t* test was conducted to evaluate the hypothesis that there is a significant difference between perceptions of personnel employed in higher education institutions and personnel employed in K-12 institutions mean scores regarding Confucius Institute programming portrayal in the media. The test was significant,  $t(72) = 2.22, p = .03$ . Therefore, the null hypothesis was rejected. Personnel employed in a higher education institution ( $M = 3.67, SD = 1.06$ ) perceived Confucius Institute programming was portrayed less positively in the media than personnel in K-12 institutions ( $M = 4.16, SD = .085$ ). The 95% confidence interval for the difference in means was -.5 to .22. The effect size *d* of = .48 indicates medium effect. Figure 5 shows the distribution for the two groups. Both groups perceived Confucius Institute programming to be portrayed positively in the media but the K-12 group perceived it to be significantly more positive than the higher education group.

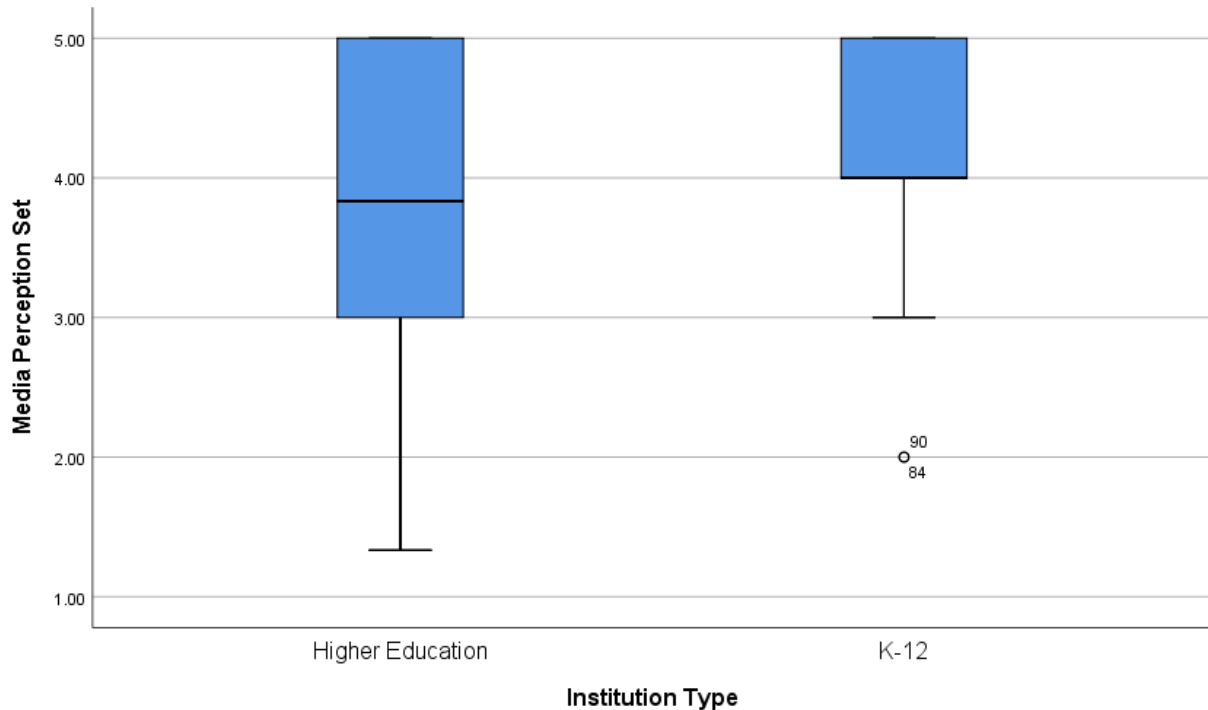


Figure 5. Media perception set: K-12 and higher education

### Research Question 6

Research Question 6: Is the mean of perceptions regarding Confucius Institute programing meeting the needs of their institution from personnel in higher education institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho6: The mean of perceptions regarding Confucius Institute programing meeting the needs of their institution from personnel in higher education institutions who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

A one-sample  $t$  test was conducted on the higher education Programing Perception Set (survey items 14 to 16) to evaluate whether the mean was significantly larger than 3, the midpoint of the scale. The sample mean of 4.32 (SD = .68) was significantly larger than 3,  $t(39) = 12.23, p < .01$ . Therefore, the null hypothesis was rejected. The 95% confidence interval for the participants perceptions mean ranged from 1.10 to 1.54. The effect size  $d$  of = 1.94 indicates large effect. Figure 6 shows the distribution of participants' perception scores. The results support the conclusion that participants perceive that Confucius Institute programing is meeting the needs of their institution.

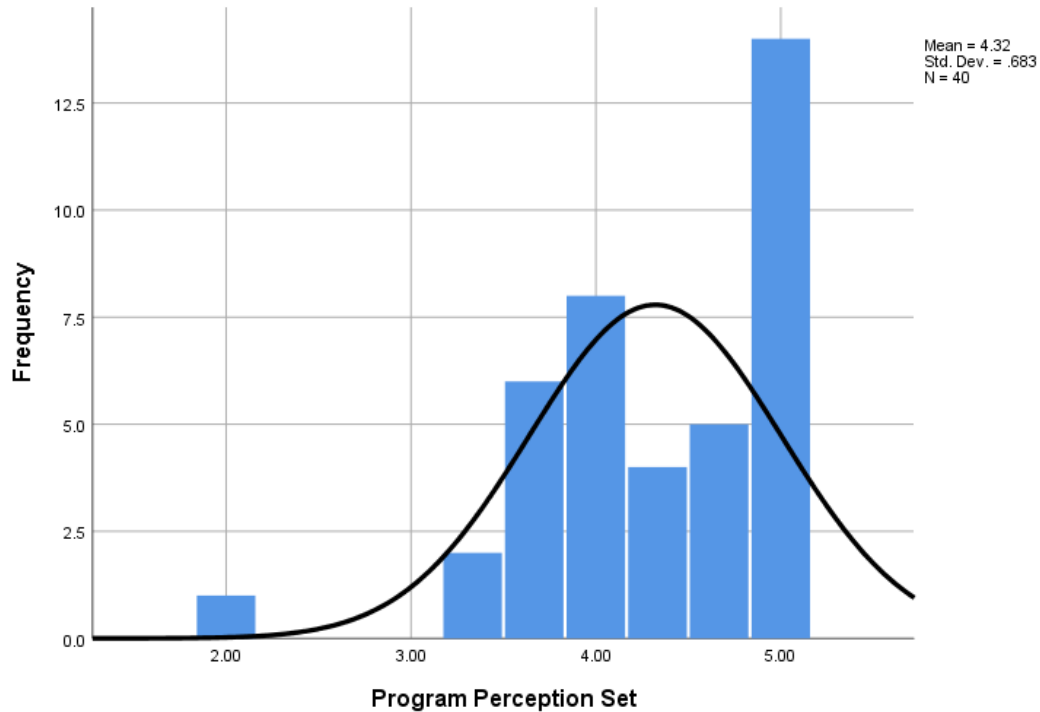


Figure 6. Higher education program perception set

### Research Question 7

Research Question 7: Is the mean of perceptions regarding Confucius Institute programing meeting the needs of their institution from personnel in K-12 institutions who work with Confucius Institute programing significantly larger than the midpoint of 3 which represents neutrality?

Ho7: The mean of perceptions regarding Confucius Institute programing meeting the needs of their institution from personnel in K-12 institutions who work with Confucius Institute programing is not significantly larger than the midpoint of 3 which represents neutrality?

A one-sample *t* test was conducted on the K-12 Program Perception Set (survey items 14 to 16) to evaluate whether the mean was significantly larger than 3, the midpoint of the scale.

The sample mean of 4.3 (SD = .76) was significantly larger than 3,  $t(54) = 12.77, p < .01$ . Therefore, the null hypothesis was rejected. The 95% confidence interval for the participants perceptions mean ranged from 1.1 to 1.5. The effect size  $d$  of = 1.71 indicates large effect. Figure 7 shows the distribution of participants' perception scores. The results support the conclusion that K-12 participants perceive that Confucius Institute programing is meeting the needs of their institution.

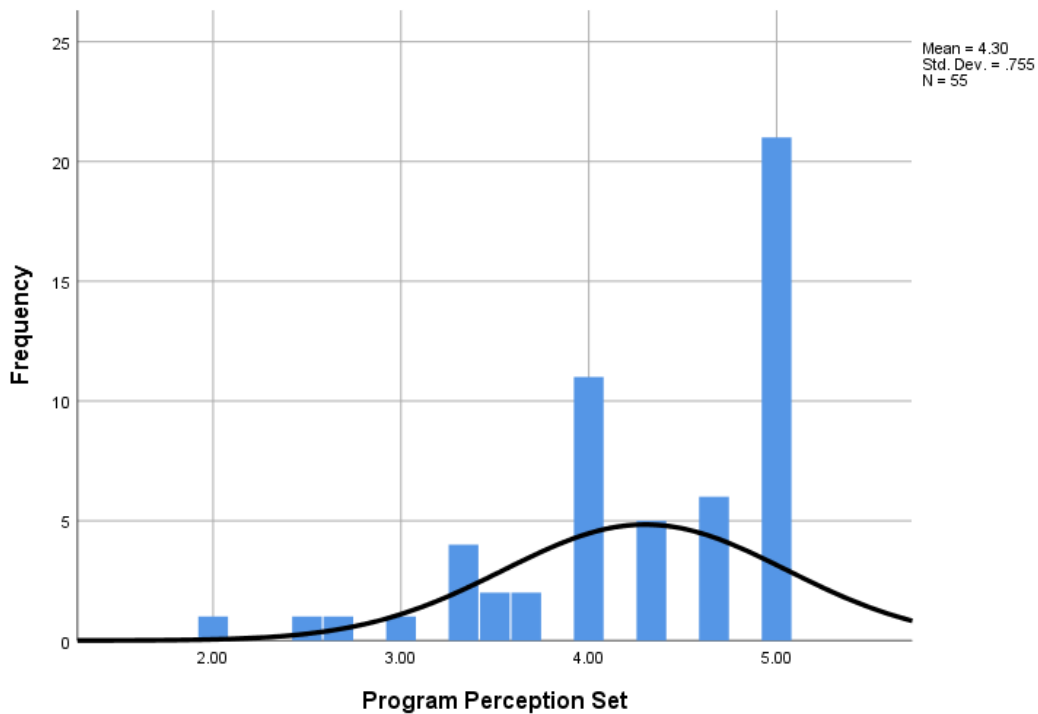


Figure 7. K-12 Program perception set

### Research Question 8

Research Question 8: Is there a significant difference in participants' mean scores regarding perceptions of the degree to which Confucius Institutes are meeting the needs of the school community through programing between personnel employed in higher education

interacting with Confucius Institute programing and personnel employed in K-12 environments interacting with Confucius Institute programing?

Ho8: There is not a significant difference in participants' mean scores regarding perceptions of the degree to which Confucius Institutes are meeting the needs of the school community through programing between personnel employed in higher education interacting with Confucius Institute programing and personnel employed in K-12 environments interacting with Confucius Institute programing.

An independent-samples *t* test was conducted to evaluate the hypothesis that there is a significant difference between perceptions of personnel employed in higher education institutions and personnel employed in K-12 institutions mean scores regarding Confucius Institute programming meeting the needs of their institution. The test was not significant,  $t(88.6) = .14, p = .89$ . Therefore, the null hypothesis was retained. Personnel employed in a higher education institution ( $M = 4.32, SD = .68$ ) perceived Confucius Institute programing was meeting the needs of their institution at about the same level as personnel in K-12 institutions ( $M = 4.30, SD = .76$ ). The 95% confidence interval for the difference in means was  $-.27$  to  $.32$ . The effect size  $d$  of  $= .03$  indicates small effect. Figure 8 shows the distribution for the two groups. Both the higher education and K-12 group perceived Confucius Institute programing to be positively meeting the needs of their institutions.

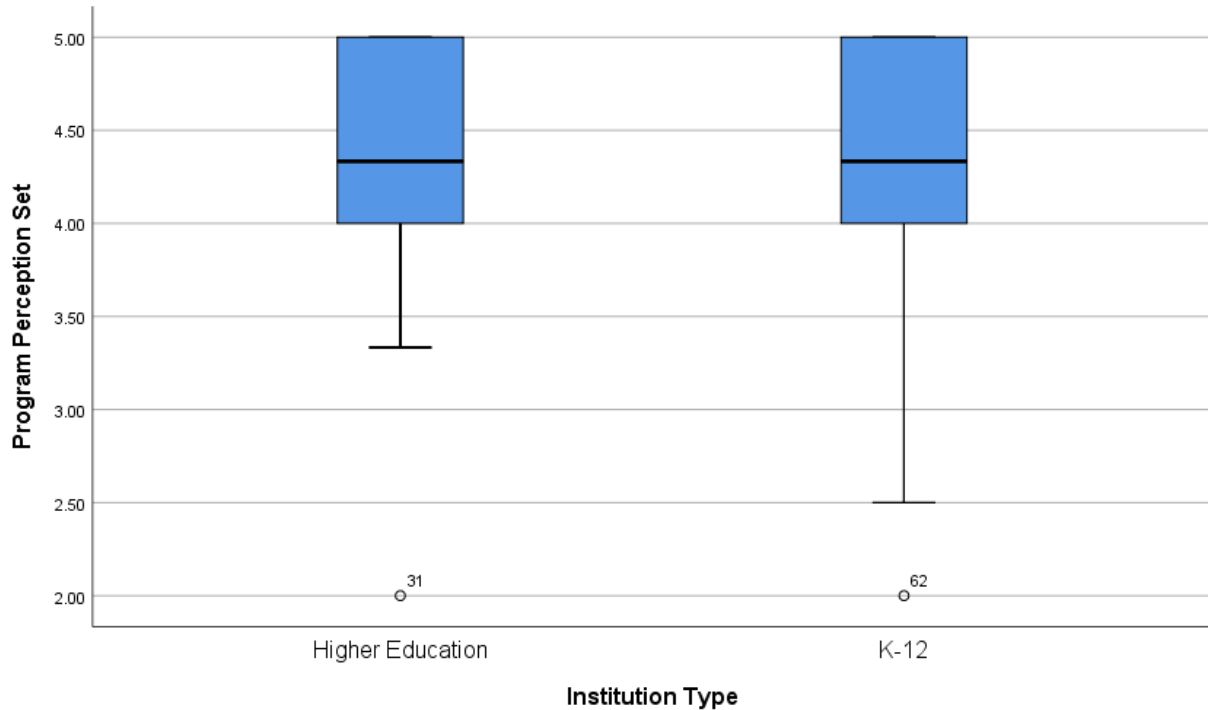


Figure 8. Program perception set: K-12 and higher education

### Research Question 9

Research Question 9: What are the challenges facing Confucius Institute programing that are perceived as most important to personnel of higher education and K-12 institutions?

The instrument contained ranking data regarding perceptions regarding the three most important challenges facing Confucius Institute programing. This data were weighted in a point system and higher education and K-12 perceptions are reported.

Higher education personnel reported political environment as the most important challenge, alignment with institutional or school needs as the second most important challenge, and educational benefit to student and national media coverage tied as the third most important challenge facing Confucius Institute programing. Participants were allowed to write in their own



response in the other category but there was no consistency noted in these responses. Full responses to three biggest challenges are represented in Table 1.

Table 1

*Higher Education Personnel Perceptions of the Most Important Challenges Facing Confucius Institute Programming*

Defining Term	Points
Political environment	49
Alignment with institutional or school needs	26
Educational benefit to student	21
National media coverage	21
Academic freedom infringement (higher ed)	20
Programing continuity	19
Chinese teacher training	10
Chinese teacher turnover	10
Lack of resources	10
Programing quality	10
Chinese teacher transitioning	8
Curriculum	8
Local media coverage	8
State media coverage	8
Other	4
Foreign teachers adhering to institutional or school policy	1
Local control of programming (K-12)	1

K-12 personnel reported Chinese teacher turnover as the most important challenge, Chinese teacher training as the second most important challenge, and Alignment with

institutional or school needs as the third most important challenge facing Confucius Institute programming. Participants were allowed to write in their own response in the other category but there was no consistency noted in these responses. Full responses to three biggest challenges are represented in Table 2.

Table 2

*K-12 Personnel Perceptions of the Most Important Challenges Facing Confucius Institute Programming*

Defining Term	Points
Chinese teacher turnover	50
Chinese teacher training	41
Alignment with institutional or school needs	40
Chinese teacher transitioning	32
Programming continuity	29
Curriculum	21
Lack of resources	21
Other	17
Foreign teachers adhering to institutional or school policy	9
Educational benefit to student	8
Local media coverage	7
Political environment	5
Programming quality	5
Local control of programming (K-12)	4
Academic freedom infringement (higher ed)	2
State media coverage	1
National media coverage	0

Research Question 10

Research Question 10: What are the benefits of Confucius Institute programing that are perceived as most important to personnel of higher education and K-12 institutions?

The instrument contained ranking data regarding perceptions regarding the three most important benefits of Confucius Institute programing. This data was weighted in a point system and higher education and K-12 perceptions are reported.

Higher education personnel reported educational benefit to students as the most important benefit, program quality as the second most important benefit, and Chinese teacher training and resources, tied, as the third most important benefit regarding Confucius Institute programing. Participants were allowed to write in their own response in the other category but there was no consistency noted in these responses. Full responses to the three most important benefit are represented in Table 3.

Table 3

*Higher Education Personnel Perceptions of the Most Important Benefit of Confucius Institute Programming*

Defining Term	Points
Educational benefit to student	100
Programing quality	33
Chinese teacher training	21
Resources	21
Alignment with institutional or school needs	20
Curriculum	12
Programing continuity	9
Chinese teacher transitioning	6

Local media coverage	4
Political environment	4
Other	4
Foreign teachers adhering to institutional or school policy	3
Academic freedom infringement (higher ed)	2
National media coverage	1
Chinese teacher turnover	0
Local control of programming (K-12)	0
State media coverage	0

K-12 personnel reported educational benefit to students as the most important benefit, alignment with institutional or school needs and curriculum, tied, as the second most important benefit, and programming quality as the third most important benefit regarding Confucius Institute programming. Participants were allowed to write in their own response in the other category but there was no consistency noted in these responses. Full responses to the three most important benefit are represented in Table 4.

Table 4

*K-12 Personnel Perceptions of the Most Important Benefit of Confucius Institute Programming*

Defining Term	Points
Educational benefit to student	127
Alignment with institutional or school needs	38
Curriculum	38
Programming quality	25
Chinese teacher training	21
Programming continuity	17

Foreign teachers adhering to institutional or school policy	12
Resources	11
Other	10
Chinese teacher transitioning	6
Local control of programming (K-12)	4
Local media coverage	1
Political environment	1
Academic freedom infringement (higher ed)	0
Chinese teacher turnover	0
National media coverage	0
State media coverage	0

## CHAPTER 5

### SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Chapter 5 contains the findings, conclusions, and recommendations for readers interested in the perceptions of employees of higher education and K-12 institutions that are working with Confucius Institutes in Tennessee. At the time of this writing Confucius Institutes are under federal examination and a topic of news headlines. A quantitative nonexperimental research study was developed to investigate current perceptions of personnel in higher education and K-12 institutions that work with Tennessee Confucius Institute programing. The paper-based survey provided the quantitative perceptions of higher education and K-12 personnel along with two ranking questions to understand perceptions of challenges and the benefits of Confucius Institute programing. IBM-SPSS was used for data analysis. Perceptions gathered through the ranking questions were reverse scored to establish a point system to understand the order of importance.

#### Summary

The statistical analyses reported in this study reflect data gathered to address the 10 research questions presented in Chapter 1 and in Chapter 3. In Chapter 3 each of the 10 research questions along with the related null hypotheses were presented for this study. Research questions 1, 2, 3, 4, 6, and 7 were addressed with a series of a one sample *t*-tests. Perceptions of higher education and K-12 personnel working with Confucius Institute programing regarding academic infringement (higher education), local control (K-12), media perception, and

programming meeting the institutions needs were examined compared to a test value of 3 representing a neutral midpoint. Research questions 5 and 8 were addressed with a series of independent samples *t*-tests. The relationship of similarities and differences of perceptions of Confucius Institute programming between personnel at institutions of higher education and personnel at K-12 institutions was examined. Research questions 9 and 10 were reverse coded to establish a point system to understand perceived ranking order of items. This ranking order detailed perceived challenges and benefits from personnel in higher education and K-12 institutions.

#### Research Question 1

The mean of perceptions regarding Confucius Institute programming impacting principles of academic freedom from personnel in higher education institutions who work with Confucius Institute programming was significantly larger ( $M = 4.24$ ) than the midpoint of 3 which represents neutrality. Therefore, personnel in higher education institutions working with Confucius Institute programming perceive it to work positively with principles of academic freedom.

#### Research Question 2

The mean of perceptions regarding Confucius Institute programming impacting principles of local control from K-12 personnel who work with Confucius Institute programming was significantly larger ( $M = 4.10$ ) than the midpoint of 3 which represents neutrality. Therefore,

personnel in K-12 institutions working with Confucius Institute programming perceive it to work positively with principles of local control.

### Research Question 3

The mean of perceptions regarding Confucius Institute portrayal in the media from personnel in higher education institutions who work with Confucius Institute programming was significantly larger ( $M = 3.67$ ) than the midpoint of 3 which represents neutrality. Therefore, personnel in higher education institutions working with Confucius Institute programming perceive it to be positively portrayed in the media.

### Research Question 4

The mean of perceptions regarding Confucius Institute portrayal in the media from personnel in K-12 institutions who work with Confucius Institute programming was significantly larger ( $M = 4.16$ ) than the midpoint of 3 which represents neutrality. Therefore, personnel in K-12 institutions working with Confucius Institute programming perceive it to be positively portrayed in the media.

### Research Question 5

There was a significant difference in participants' mean scores regarding perceptions about Confucius Institutes' portrayal in the media between personnel employed in higher education interacting with Confucius Institute programming with a mean of 3.67 and personnel employed in K-12 environments interacting with Confucius Institute programming with a mean of 4.16. Both groups perceived Confucius Institutes to be portrayed positively in the media but the



K-12 personnel group perceived it to be portrayed more positively than the higher education personnel group.

#### Research Question 6

The mean of perceptions regarding Confucius Institute programming meeting the needs of their institution from personnel in higher education institutions who work with Confucius Institute programming was significantly larger ( $M = 4.32$ ) than the midpoint of 3 which represents neutrality. Therefore, personnel in higher education institutions working with Confucius Institute programming perceive it to be positively meeting the needs of their institution.

#### Research Question 7

The mean of perceptions regarding Confucius Institute programming meeting the needs of their institution from personnel in K-12 institutions who work with Confucius Institute programming was significantly larger ( $M = 4.30$ ) than the midpoint of 3 which represents neutrality. Therefore, personnel in K-12 institutions working with Confucius Institute programming perceive it to be positively meeting the needs of their institution.

#### Research Question 8

There was not a significant difference in participants' mean scores regarding perceptions about Confucius Institutes meeting the needs of the school community between personnel employed in higher education interacting with Confucius Institute programming with a mean of 4.32 and personnel employed in K-12 environments interacting with Confucius Institute programming with a mean of 4.30. Both groups perceived Confucius Institutes to be positively

meeting the needs of their institutions and there was only a .02 difference in the means between the two groups.

#### Research Question 9

Research participants were asked to rank the top three challenges facing Confucius Institute programing in order of importance. The rankings were then reverse coded to determine the top three perceived challenges facing Confucius Institute programing from personnel in higher education institutions and personnel in K-12 institutions that work with Confucius Institute programing. Personnel in higher education institutions perceived political environment as the most important challenge, alignment with institutional or school needs as the second most important challenge, and educational benefit to student and national media coverage tied as the third most important challenge facing Confucius Institute programing. Personnel in K-12 institutions perceived Chinese teacher turnover as the most important challenge, Chinese teacher training as the second most important challenge, and Alignment with institutional or school needs as the third most important challenge facing Confucius Institute programing.

#### Research Question 10

Research participants were asked to rank the top three benefits of Confucius Institute programing in order of importance. The rankings were then reverse coded to determine the top three perceived benefits of Confucius Institute programing from personnel in higher education institutions and personnel in K-12 institutions that work with Confucius Institute programing. Personnel in higher education institutions perceived educational benefit to students as the most important benefit, program quality as the second most important benefit, and Chinese teacher

training and resources, tied, as the third most important benefit regarding Confucius Institute programing. Personnel in K-12 institutions perceived the educational benefit to students as the most important benefit, alignment with institutional or school needs and curriculum, tied, as the second most important benefit, and programming quality as the third most important benefit regarding Confucius Institute programing.

### Conclusions

Research participants were asked to report their perceptions regarding Confucius Institutes in the state of Tennessee. The researcher found positive perceptions from both participant groups regarding Confucius Institute programing in support of principles of academic freedom (higher education), local control (K-12), media portrayal, and meeting the needs of the participants' institutions. In the higher education group 86.67% of participants reported Confucius Institute programing to positively support principles of academic freedom. In the K-12 group 87.03% of participants reported Confucius Institute programing to positively support principles of local control. In the higher education group 65.79% of participants reported Confucius Institutes' positively portrayed in the media. In the K-12 group 94.44% of participants reported Confucius Institutes' positively portrayed in the media. While both participant groups perceived Confucius Institutes to be positively perceived in the media the higher education group had 34.21% of participants that were neutral or thought there was a negative portrayal of Confucius Institutes in the media. This was in contrast to the K-12 group where only had 5.56% of participants perceived a neutral or negative portrayal of Confucius Institutes in the media. The higher education group had 97.5% of participants report that

Confucius Institute programing was positively meeting the needs of their institution. The K-12 group had 92.73% of participants report that Confucius Institute programing was positively meeting the needs of their institution. Both the higher education group with 2.5% of participants and K-12 group with 7.27% of participants had less than 8% of participants reporting that Confucius Institute programing did not meet their institutional needs.

All participants were working with Confucius Institute programing in some manner and this connection to the programming and the reporting of positive perceptions supports the theory put forth by Zhao (2014) that Confucius Institute programing provides a personal experience that could cast perceptions in a positive manner regardless of what the media is portraying. While Zhao looked at students who were involved with Confucius Institute programing perceptions this study looked at higher education and K-12 personnel involved with Confucius Institute programing perceptions. This also reinforces statements from practitioners that were reported to the GAO, US Government Accountability Office (2019) where they thought criticisms of the Confucius Institute must refer to another Confucius Institute at another institution and not their own.

Top challenges facing the Confucius Institute according to higher education participants were the political environment, alignment with institutional or school needs, educational benefit to students, and national media coverage. Top challenges facing the Confucius Institute according to K-12 participants were Chinese teacher turnover, Chinese teacher training, and alignment with institutional or school needs. In both groups alignment to school needs was listed as a challenge facing the Confucius Institute. Higher Education personnel noted the political environment as a challenge and K-12 personnel did not. This could be due to the current

political discussion centering around the institutes being housed on campuses of higher education.

Top benefits of Confucius Institute programing according to higher education participants were the educational benefit to students, programing quality, Chinese teacher training, and resources. Top benefits of Confucius Institute programing according to K-12 participants were the educational benefit to students, alignment with institutional or school needs, curriculum, and programing quality. In both groups educational benefit to students was ranked as the number one benefit. Both groups also perceived programing quality to be a benefit of Confucius Institute programing. In addition, alignment with school needs was listed as a challenge and a benefit regarding Confucius Institute programing according to K-12 participants.

### Recommendations for Practice

The study found positive perceptions of higher education and K-12 personnel that work with Confucius Institutes regarding adherence to principles of academic freedom, adherence to principles of local control, media portrayal, and programming meeting the needs of the school or institution with an average response of agree or strongly agree. However, participants of both higher education and K-12 institutions also ranked alignment with school or institutional needs as a challenge facing Confucius Institutes. Confucius Institutes must be aware of local school and institutional needs as they plan programing to meet these needs. Facilitating programing with school needs in mind would insure local support. This is further supported by K-12 participants also noting the alignment with school or institutional needs as a perceived benefit. Both K-12 and higher education participants reported that educational benefit to students was the

greatest benefit to Confucius Institute programing. This suggests keeping the students' needs at the center of all programing decisions and examining institutional and school needs through the lens of the students' educational benefit. Programing quality was also a perceived benefit from K-12 and higher education participants. Confucius Institutes should focus on strategies that insure program quality to meet the needs of the students and the institution or school. Teacher training and teacher turn over planning are examples of strategies to insure program quality. K-12 participants noted both areas as perceived challenges and this should be addressed in planning for trainings that meet the local needs of the local institutions and schools. Due to short visa terms teacher turn over is a constant issue. Trainings must be rigorous and based on state and local expectations for best teaching practices. These trainings must take teacher turnover into consideration and have enough repetition to introduce new comers to content while having opportunities for experienced teachers to dig deeper into the learning and share their experiences. Newly arriving teachers should have time to observe as many classrooms and teaching styles as possible to observe the practical applications of their training.

Confucius Institutes should do a better job letting their local partners know about national media concerns. Higher education participants had some awareness of a negative media perception, but still overwhelmingly indicated that the media was positive to Confucius Institutes. K-12 participants almost all thought the media was positive to Confucius Institutes. This positive perception could reflect positive local stories in the media, and this too should continue to be fostered by Confucius Institutes to continue to highlight programing and relationships between higher education institutions and K-12 schools.

All Confucius Institute programing should adhere to principles of academic freedom for higher education institutions and local control principles for K-12 institutions. Confucius Institute personnel in higher education and K-12 education should be afforded the exact same rights as U.S. personnel in the same institutions. At no point should academic freedom or local control be infringed upon or dismissed. It appears that Confucius Institutes in Tennessee are upholding the principles of academic freedom and local control and this should continue. Peterson (2017a) concluded that there was no national evidence of infringement on academic freedom principles but this should continue to be a focus of all Confucius Institutes in the state of Tennessee.

In connection to the current political hearings and writings on the Confucius Institute, the Confucius Institute should continue to tell its story utilizing success of local partners to help politicians and constituents become aware of what is happening in their local Confucius Institute (Congressional Executive Commission on China, 2017; Department of Justice, 2018; GAO, US Government Accountability Office, 2019). In addition, the researcher recommends that Confucius Institutes reach out to and invite local stakeholders into their institutions to build person to person connections and show evidence of the educational benefit offered to Tennessee students.

#### Recommendations for Further Research

Based on the findings of this study, the following recommendations for further research are suggested:

1. Expand the study to student perceptions about Confucius Institute programming in both higher education and K-12 institutions. This would add another layer of data and could further offer insight into alignment or miss alignment of perceived issues, challenges, and benefits.
2. Replicate the study to other states to gather a larger perspective of perceptions and add to the national dialog that is emerging. This could also help identify states where Confucius Institutes are not meeting the needs of their local community.
3. Replicate the study to a regional perspective that would include perspectives from multiple states. This could offer insight into how Confucius Institutes are perceived in various regions of the U.S.
4. A quantitative study should be performed to examine student benefit. Data from the Chinese language proficiency test as well as enrollment numbers of students studying Chinese could be examined. Connection to students pursuing Chinese in college or the workforce should also be included.
5. A qualitative study should be performed to gain more depth of insight as to why Confucius Institute programming is positively perceived by personnel working with Confucius Institute programming in higher education and K-12 institutions in Tennessee.

Confucius Institute programming continues in Tennessee and in the US and should work to the benefit of its students. Evidence must be gathered to ensure that an educational benefit is available to students and institutions. Future Confucius Institute programming must gather as



much evidence as possible to base actions to meet the needs of their local community and continue the improvement process.

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## APPENDICES

### Appendix A

#### Letter from the Government Accountability Office to Middle Tennessee State University

Hello—this message is intended for any appropriate officials at the Confucius Institute and Middle Tennessee State University:

The U.S. Government Accountability Office (GAO) is reviewing Confucius Institutes in the United States at the request of the Congress, and I am writing to request your school's assistance. Specifically, we plan to review (1) U.S. government funding and other federal support, if any, to Confucius Institutes, (2) agreements between U.S. colleges/universities and their Chinese partners concerning the operations of Confucius Institutes, and (3) the perspectives of school officials regarding Confucius Institutes.

I appreciate that you may be somewhat unfamiliar with our agency. GAO is an independent, nonpartisan agency that works for Congress. We provide Congress and the public with timely information that is objective, fact-based, nonpartisan, and non-ideological, and conduct our work by our core values of accountability, integrity, and reliability. You can learn more at [www.gao.gov](http://www.gao.gov). We are conducting this review at the request of Chairman Chris Smith of the House Foreign Affairs Committee's Subcommittee on Africa, Global Health, Global Human Rights, and International Organizations; and Chairman Dana Rohrabacher of the House Foreign Affairs Committee's Subcommittee on Europe, Eurasia, and Emerging Threats. While we have not previously reviewed Confucius Institutes, in September 2016 we issued a related report on U.S. universities in China which is publicly available at <https://www.gao.gov/products/GAO-16-757>.

As part of this review, we are contacting the U.S. Departments of Education and State, and higher education associations that may offer perspective on the topic. We also hope to obtain certain information directly from colleges and universities that host Confucius Institutes. We want to make clear that we are not conducting a compliance audit at your or any school. But we believe that schools may be able to provide valuable information and insights to the Congress concerning the establishment and operations of the institutes, offering a more informed perspective on the institutes' role on college and university campuses.

Specifically, we request that you please provide a copy of the formal contract(s)/MOU(s) and/or any other documents constituting the agreement between your school and your Chinese partner(s)—including any documents signed with the Hanban and/or your Chinese partner university—concerning the operation of your Confucius Institute. We make this request as we were unable to locate these documents online. If, however, these documents are publicly available online, we would appreciate if you could direct us to where we can find them. We understand that you may have already received a similar request from Chairman Smith. While we are coordinating with his office on this review, we would still appreciate if you could provide a copy of such documents directly to us, and, if possible, by **March 22**. Please note that in our public report we will not attribute specific language, details, or other characteristics of any agreement we obtain to any school by name.

Your cooperation with us is of course voluntary, but we greatly appreciate your assistance and value learning about your school's perspective. We recognize that schools vary in their mission and approach. Our goal is to gain a better understanding of our topic by incorporating information from as many schools as possible so that we can present our findings to the Congress in proper context. Since we are still planning our work and may need to obtain additional information, we may reach out to you again to follow up on this request. But if you would like to speak with us directly about your Confucius Institute, please let us know. We would appreciate hearing from you and would be happy to arrange a discussion.

Please do not hesitate to contact me if you have any questions or concerns—my contact information is below. You can also contact my colleague, Joyce Kang, at 202 512 7836 or [kangy@gao.gov](mailto:kangy@gao.gov). Thanks very much, and we look forward to hearing from you.

Joe Carney

Senior Analyst  
Government Accountability Office, International Affairs and Trade Team  
441 G. Street, NW | Washington, D.C. 20548  
[carneyj@gao.gov](mailto:carneyj@gao.gov)  
202 512 5605

## Appendix B

### **Letter to Institutional Leaders Requesting Permission to Administer the Instrument Email, meeting or phone call script with Confucius Institute directors for the purpose of school identification:**

Hello, my name is Michael Novak, and I am a graduate student at East Tennessee State University. I am working on my doctor's degree in Educational Leadership and Policy Analysis. In order to finish my studies, I need to complete a research project. The name of my research study is Perceptions of Tennessee Employees in Higher Education and K-12 working with Confucius Institutes.

The purpose of this study is to gather perception data through a survey regarding how personnel of K-12 and Higher Education perceive their interactions with Confucius Institute programing. I would like to give a brief survey questionnaire to personnel in higher education and K-12 institutions interacting with Confucius Institute programing. I am requesting your help to identify higher education and K-12 institutions that currently have employees that interact with Confucius Institute programing. Please think about any and all types of programing offered through your Confucius Institute when considering the institution. Please do not provide me with individual names of personnel. Identifying the school itself is the only thing needed. After the school is identified I will make contact and request the institutional office personnel to place survey material in their appropriate employee's campus mail box. I will gladly provide you with a copy of the survey material for your consideration in this matter. Thank you for your help in this process.

### **Email, meeting or phone call script with institutional office personnel for recruitment purposes:**

Hello, my name is Michael Novak, and I am a graduate student at East Tennessee State University. I am working on my doctor's degree in Educational Leadership and Policy Analysis. In order to finish my studies, I need to complete a research project. The name of my research study is Perceptions of Tennessee Employees in Higher Education and K-12 working with Confucius Institutes.

The purpose of this study is to gather perception data through a survey regarding how personnel of K-12 and Higher Education perceive their interactions with Confucius Institute programing. I would like to give a brief survey questionnaire to personnel in higher education and K-12 institutions interacting with Confucius Institute programing. It should only take about 10-15 minutes to complete.

Your institution was identified as one that has some employees interacting with Confucius Institute programing. Confucius Institute programing could range from having a Confucius Institute in your building, materials collected from Confucius Institutes, Teachers or administrators that have participated in a Confucius Institute study abroad trip, cultural celebrations that the Confucius Institute sponsored or supported, or any other type of programing that was sponsored or supported by a Confucius Institute.

Please think about any employees (faculty, staff, or administration) that have worked in some way with Confucius Institute programing in the last year. Once identified, please place the survey materials (Informed Consent document, survey and self-addressed stamped envelope) in the employees institutional mail box. Please feel free to fully examine all survey materials before dissemination. Your cooperation in this matter is greatly appreciated!

Appendix C  
Instrument

The survey below involves research and will be used to examine K-12 and higher education personnel perceptions of the Confucius Institutes in the State of Tennessee. Please contribute to the survey by answering all of the following questions or statements. If you are unaware of the answer to any question please circle the “U”. Please be aware that all responses are confidential and voluntary. Although perceptions may differ, there is no right or wrong answer. Completion of this survey grants permission for the researcher to use the results within the findings of the study. If needed, please refer to my contact information below.

Michael Novak

[novakmn@mail.etsu.edu](mailto:novakmn@mail.etsu.edu)

Please mark the appropriate response regarding your experience:

1. What is your type of educational institution?
  - a. K-12
  - b. Higher Education
  
2. Are you a Confucius Institute teacher or volunteer teacher?
  - a. yes
  - b. no
  
3. How are you connected to Confucius Institute programing?
  - a. I work with a Confucius Institute teacher.
  - b. I have attended Confucius Institute culture events.
  - c. I have attended a Confucius Institute study abroad trip.
  - d. My students have attended a Confucius Institute study abroad trip.
  - e. I have attended a Confucius Institute Chinese class.
  - f. Other, please explain \_\_\_\_\_

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4. How many years of experience do you have as an educator? \_\_\_\_\_

For items 5-16, please circle the number in the box to share your perception for the following statements.

- 1- Strongly Agree
- 2- Agree
- 3- Neutral
- 4- Disagree
- 5- Strongly Disagree
- U- Unknown

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Unknown
<b>Higher Education participants please respond to items 5-7</b>						
5. Confucius Institute programing upholds the US principles of academic freedom by allowing free speech regarding all topics in the subject matter.	1	2	3	4	5	U
6. Confucius Institute programing upholds the US principles of academic freedom by allowing Confucius teachers to teach with no fear of repression.	1	2	3	4	5	U
7. Confucius Institute programing upholds the US principles of academic freedom by allowing Confucius teachers the ability to control their own syllabus.	1	2	3	4	5	U
<b>K-12 participants please respond to items 8-10</b>						
8. Confucius Institute programing is in alignment with all K-12 local policy regarding the teaching of language standards.	1	2	3	4	5	U
9. Confucius Institute programing is aligned with Tennessee State Curriculum Standards.	1	2	3	4	5	U
10. My local school system has bureaucratic control over all Confucius Institute programing.	1	2	3	4	5	U

<b>Higher Ed. and K-12 participants please respond to items 11-16</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Unknown
11. Local media coverage is generally positive pertaining to the Confucius Institute.	1	2	3	4	5	U
12. State wide Confucius Institute media coverage is generally positive.	1	2	3	4	5	U
13. National Confucius Institute media coverage is generally positive.	1	2	3	4	5	U
14. Confucius Institute programing is a worthwhile addition at my institution.	1	2	3	4	5	U
15. Confucius Institute programing offers educational opportunities to the students of my educational institution that they might otherwise not have.	1	2	3	4	5	U
16. Confucius Institute programing is valued by stakeholders at my educational institution.	1	2	3	4	5	U

17. In your opinion, what are the 3 most important challenges facing Confucius Institute programing? Please rank your top 3 most important challenges with 1 being the most important, 2 being the next most important, and 3 being the next most important.

- Academic freedom infringement (Higher Ed.)
- Alignment with institutional or school needs
- Chinese teacher training
- Chinese teacher transitioning
- Chinese teacher turnover
- Curriculum
- Educational benefit to students
- Foreign teachers adhering to institutional or school policy and procedure
- Lack of resources
- Local control of programing (K-12)
- Local media coverage
- National media coverage
- Political environment
- Programing continuity
- Programming quality
- State media coverage
- Other, please explain: \_\_\_\_\_



18. In your opinion, what are the 3 most important benefits regarding Confucius Institute programming? Please rank your top 3 most important benefits with 1 being the most important, 2 being the next most important, and 3 being the next most important.

- Academic freedom adherence (Higher Ed.)
- Alignment with institutional or school needs
- Chinese teacher training
- Chinese teacher transitioning
- Chinese teacher turnover
- Curriculum
- Educational benefit to students
- Foreign teachers adhering to institutional or school policy and procedure
- Local control of programming (K-12)
- Local media coverage
- National media coverage
- Political environment
- Programming continuity
- Programming quality
- Resources
- State media coverage
- Other, please explain: \_\_\_\_\_

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VITA

MICHAEL NICHOLAS NOVAK

Personal Data: Date of Birth: October 10, 1979  
Place of Birth: Nashville, Tennessee

Education: Ed. D., Educational Leadership  
East Tennessee State University, Johnson City, TN 2019  
Masters in Education, Administration and Supervision K-12  
Middle Tennessee State University, Murfreesboro, TN 2006  
Bachelor of Science, Art Ed. K-12 Minor in Secondary Ed.  
Middle Tennessee State University, Murfreesboro, TN 2003

Professional  
Experience: Director of the Confucius Institute at Middle Tennessee State University,  
Murfreesboro, TN, March 2019-present  
Assistant Director of the Confucius Institute at Middle Tennessee State  
University, Murfreesboro, TN June 2014-February 2019  
Consultant, Trainer for the Tennessee Department of Education  
Summer 2012 - Summer 2014  
Tennessee Department of Education, Common Core Principal  
Coach/Facilitator – Leadership 202, Spring 2014  
Tennessee Department of Education, Common Core Leadership Council  
member representing the South Central Region, Jan. 2013-2014  
Tennessee Department of Education, Common Core Principal Course  
Early Reading Literacy co-facilitator, Summer 2013  
Tennessee Department of Education, Site Lead for Common Core teacher  
training in South Central Region, Summer 2013  
Tennessee Department of Education, Common Core Superintendent  
Summit Facilitator Middle TN, Spring 2013  
Tennessee Department of Education Common Core Principal  
Coach/Facilitator – Leadership 101, Spring 2013

Tennessee Department of Education, Common Core Principal  
Coach/Facilitator – Leadership, Summer 2012  
Principal Liberty Elementary School K-8, Bedford County,  
Shelbyville TN, June 2009-June 2014  
Assistant Principal Eakin Primary School K-3, Bedford County,  
Shelbyville, TN, August 2008-May 2009  
Assistant Principal Eakin Primary School K-3 1/2 Time, Bedford County,  
Shelbyville, TN, September 2006-August 2008  
Reading and Math Intervention Teacher Thomas Intermediate 4<sup>th</sup> and 5<sup>th</sup>  
grade ½ Time, Bedford County, Shelbyville, TN, September 2006-  
August 2008  
Art Teacher Eakin Primary School K-3, Bedford County, Shelbyville, TN  
August 2003-September 2006

Civic Organizations

and Accolades:

One of Ten United States Principals on the National Assessment of  
Educational Progress Principals Advisory Panel  
January 2014-2015  
Tennessee State School Board: Advisory Council on TN Education and  
Certification October 2013-2014  
Vice President of the Fly Cultural Arts Center of Bedford County  
June 2010-2013  
President of the Fly Cultural Arts Center of Bedford County  
June 2008-2010  
Wrote and illustrated an educational cartoon for the local news paper  
(Shelbyville Times-Gazette) 2004-2006  
Founded the Eakin Primary Art Club, Bedford County, Shelbyville, TN  
August 2004  
Co-Founder of the National Art Education Association student chapter at  
Middle Tennessee State University August 2001