EXCHANGE TEACHERS’ PROFESSIONAL DEVELOPMENT

AND HOW THEIR EXPERIENCES IN THE USA AND CHINA INFLUENCE THEIR

GLOBAL TEACHER IDENTITY

A Dissertation in
Adult Education & Comparative and International Education

by

Jinjie Wang

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The dissertation of Jinjie Wang was reviewed and approved* by the following:

Ladislaus M. Semali
Professor of Education
Dissertation Advisor
Chair of Committee

Davin Carr-Chellman
Assistant Professor of Education
Adult Education

Jamie M. Myers
Professor of Education
Curriculum and Instruction

Wei-Fan Chen
Associate Professor and Program Chair
Information Sciences and Technology
Affiliate Graduate Faculty
Learning Design and Technology

Susan M. Land
Associate Professor
Director of Graduate Studies for the Department of Learning and Performance Systems

*Signatures are on file in the Graduate School
ABSTRACT

This comparative dissertation explores exchange teachers’ professional development and how their experiences in the USA and China influence their global teacher identity. When viewing teachers as adult and lifelong learners, their professional development is regarded as adult education. The importance of teacher’s identity in understanding teaching as an occupation has been valued in existing literature. However, few connections have been made between teachers learning and how that affects their identity development, especially in cross-cultural settings. Although there has been an intuitive acceptance of the worth of the cross-cultural experience to individuals, professional development and teacher identity have not yet been well understood in a cross-cultural environment.

This study addresses three research questions: What is the relationship between exchange teachers’ PDE and their global teacher identity? What are the tensions and conflicts that exchange teachers face in foreign countries and how is their PDE influenced by the tensions and conflicts? What are the differences and similarities between American and Chinese teachers’ PDE in foreign countries? Based on the analysis of interviews, focus groups, and observation, the results of this comparative research study reveals that, through reflection and practice in a cross-cultural context that provokes tensions to challenge their identities, teachers were able to question themselves and their beliefs. This study shows that teacher identity reconstruction is a difficult and sometimes painful process. When emphasizing teachers as adult learners in cross-cultural exchange programs, informal learning experiences, such as classroom observation and interaction with local teachers and students, can impact teachers’ understanding about who they are as teachers and how to better practice in teaching.

By investigating teacher’s global identity formation closely, this study sheds light on
understanding how overseas learning experiences can influence exchange teachers as lifelong learners and guide their future professional learning options. This study also underlines the importance of culture and diversity in teaching and offers the possibility of helping exchange teachers to understand effectively the teaching profession at a time of globalization. The study results highlight core concepts (comparison of educational differences, cross-cultural learning, pursuit of lifelong learning, conceptualization and reflection of a good teacher/teaching, job motivation, future perspectives of professional learning, and so on) that constitute the formation of global teacher identity of Chinese and American exchange teachers.

Through learning in a cross-cultural setting, teachers have been provided opportunities to be immersed in different cultural, social, and educational contexts. When studying teachers as adult and lifelong learners, this research suggests that the impetus for promoting and guiding their lifelong professional development is their knowledge and experiences through which their understanding and reflection about their professional identity are strengthened.
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ABBREVIATIONS

COP: Community of Practice
CPD: Continuing Professional Development
PD: Professional Development
In 2002, I took my first job at Beijing New Oriental School to teach English to adults. Since then, I have always been interested in how learning helps adults develop personally and professionally. Later, this passion led me to study teachers’ adult and lifelong learning experience and how they construct knowledge during this process to understand themselves as teachers and how they help their students engage in learning. I believe that teachers teach what they know as well as who they are. For this reason, a study of international exchange program is a good case to explore how overseas learning affects teachers and their identity.

I have been extremely lucky to meet many wonderful people who have helped me understand myself and my learning. Without their guidance and support, I would never have moved this far in my academic pursuits. I wish to extend my gratitude to the following key people:

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DEDICATION
This work is dedicated to the K-12 teacher communities in the USA and China.
Chapter 1

Introduction

In the field of professional development, researchers (e.g., Billett, 2001; Cranton & King, 2003; Smith, et al., 2003) draw our attention to understanding the process of professional development as adult learning. When viewing teachers as adult and lifelong learners and their professional development as adult education, the goal of adult education and professional development is regarded as change and growth so that teachers are empowered by opportunities and strategies (Lawler, 2003).

Education systems in a majority of countries in the world have undergone continuous, rapid, and multiple changes (Craft, 2000). As a response to these complex and global changes, many teachers are motivated to pursue continuing professional development (CPD). Participating in in-service teaching training programs is one option teachers have to enhance their CPD. Teachers are not confined to their local learning environment but increasingly have opportunities to travel internationally to learn in other countries (Yan, 2008a). However, along with the successes, drawbacks have also generated a pessimistic picture of teacher education (Yan, 2008b). Teachers often believe that professional development (PD) has little impact on their daily work and, in turn, cause teachers’ negative feelings (Cooley, 1997; Guskey, 2000). Some teachers even consider it a waste of their professional time (Yan, 2008a). Guskey’s study (2000) noted that for decades researchers had tried unsuccessfully to determine the true impact of professional development in education. He observed that, although in-service education and staff development endeavors in their various forms continue to be enormously popular and highly valued, we still know relatively little about what difference they make in the lives of teachers and their identity.
In the 21st century, providing professional development to teachers in order to foster their global perspectives has become a priority in teacher education programs (Choi, Y. & Choi, M., 2012, & Roskell, 2013). Cross-cultural transition from a familiar working setting to a new environment is widely regarded as a potentially distressing life event (Cushner, 2004; Wilson, 1982). The process of going through cultural, social, and psychological adjustment can be painful (Yan, 2008a). It is not hard to imagine that teachers’ learning and professional development related to this process could challenge their identities as teachers. Olsen (2008) explained that “teacher identity” is a useful research frame because “it treats teachers as whole persons in and across social contexts who continually reconstruct their views of themselves in relation to others, workplace characteristics, professional purposes, and cultures of teaching” (p. 5). In a cross-cultural setting, teachers not only need to cope with tensions and stress from culture shock, they also have to fulfill their mission of coming to a foreign country to gain professional development. Morgan (2004) argued that “how a teacher’s experiences of identity both shape and are shaped by the processes of instruction and interaction that evolve within specific sites” (e.g., Amin, 1999; Duff & Uchida, 1997, as cited in Morgan, 2004, p. 173). Morgan (2004) supported this view stating that teachers’ identities regulate and ascribe social and cultural values to “all forms of their activities within particular institutions” (p. 173).

Since the 1970s, educational exchanges and study-abroad programs involving teachers from the USA to China and from China to the USA have grown exponentially as a result of China's normalizing diplomatic relations with the United States (Laughlin, 2008; Li, 2005; & Reed, 1988). This new era of relations opened up opportunities for teachers interested in experiencing overseas cultures and learning how teachers in other countries teach. Such opportunities are understood to help teachers to grow personally and professionally (Li, 2005; & Reed, 1988). Researchers (e.g.,
Tucker & Cistone, 1991; & Wilson, 1982) recommended that teachers should be educated in a way that would raise the level of their awareness of what is happening to mankind in the world’s contemporary circumstances. This means that those who are becoming teachers should have a chance to cross borders through their studies and their personal experience to a culture different from the one in which they were born and raised. Through entering other lives, they begin to enter the world—an experience that provides them with something to which to compare themselves, and, by comparison to learn to look at people from a broader perspective.

Although many studies have explored how cultural differences affected teachers’ overseas experiences (Alban, 2013; Alred et al., 2003; Gu, 2005; Roskell, 2013; Yan, 2008), few connections have been made between teachers’ cross-cultural experiences and how the experiences affected them in seeing teaching as a profession. Such “a multifaceted rationale for cross-cultural experience, or more precisely cross-cultural experiential learning, as a critical part of teachers’ education” (Wilson, 1982, p. 182) has not been fully developed. In addition, although there has been extensive discussion of teachers’ intercultural experience and cultural transformation in cross-cultural settings (Holliday, 2001; Markee, 2001; Leach, 1999; Nieto, 1999), most work of this kind is particularly relevant to language teachers, and little work is focused on examining the formation of teacher identity to study their cross-cultural learning experiences as their CPD regardless of their teaching subjects.

Other than the literature gap that has nudged me into doing this research, my own international work and study experience as a teacher naturally led me to become more interested in this topic. My personal observations echoed those found in current studies such as Griffith, Winstanley, and Gabriel (2005) who discovered that living between cultures can create conflict for individuals as they confront their established morals and values and compare them with those in
their new milieu. As a teacher and student living and working in North America for more than ten years, I had left a familiar world and placed myself in unfamiliar contexts, and then I realized that significant differences existed between my previous surroundings in China and those in the USA. I encountered changes, conflicts, struggles, differences, and challenges in life and work place which naturally led me to reflect consciously and unconsciously on my identity as a student and teacher. As I reflected on my previous adjustment to the work situation in another country, I began to wonder how the process of learning in a different culture influenced teachers and their understanding of themselves as teachers when they were encountering emotional, social, cultural, and professional challenges. I also started to think about who I had become and what it meant to be that person in a new environment. This awareness of my own identity formation motivated me to investigate teachers’ professional identities closely. This research is about the exchange teachers’ global professional identities and how their experiences can help them reflect on themselves by looking back and narrating their life experiences. Through listening to these teachers, I hope to come to understand their life experiences.

My research interest, therefore, focuses on addressing the issue related to teachers’ professional development experiences (PDE) in foreign cultures and examines whether the experiences could stimulate them to rethink what a good teacher should be and, particularly, whether their professional identities would be reshaped. Since an underlying assumption is that such teachers will unavoidably experience culture shock, I will look specifically at the area that has to do with the tensions and challenges caused by the emotional, cultural, and social differences they experienced in overseas environments and the PDE which teachers sought as adult and lifelong learners.
As for exchange teachers, they could face two layers of culture challenges—one from their social/daily lives, and another from the different education systems. Therefore, this study aims to capture teachers’ international exchange experiences at school and in life and how their professional learning adventure unfolds. To achieve this goal, teachers’ perceptions about how their experiences influence their professional identity are utilized as the lens in the study. Through this lens, teachers’ cross-cultural experiences and professional learning outcomes are revealed and analyzed. More specifically, the participants in this qualitative study were in-service high school teachers who participated in China-USA teacher exchange programs. Four exchange teachers came from China to the USA, and four exchange teachers from the USA went to China. By closely studying the eight teachers’ overseas learning and living experiences, this comparative study conducted a deep exploration about how teachers as adult and lifelong learners constructed and re-constructed their teacher identity during the learning journey in a foreign land, and how the new identity influenced their future PDE choices.

Comparing the local CPD, the international training is more complicated due to the cultural differences. With the development of globalization, teachers’ local training urgently needs to be systemized with the globalization of CPD (Yan, 2008b). By examining the exchange teachers who had cross-cultural experiences, this study hopes to contribute to teacher education, particularly international teacher education. Equally, an understanding of these experiences may provide valuable insights which may be significant in the design of future teacher preparation and lifelong learning programs as well as help professionals who aspire to work in cross-cultural settings.

Background of the Study

Statement of Problem
The context in this research focuses on both Chinese and American teachers who were three-to-four-months, short-term visitors when participating in China-USA exchange programs. Taking time off from one’s regular teaching in one’s own country and traveling overseas is not without tensions and it rarely goes entirely smoothly. Studies on teachers traveling to a foreign country for professional development have identified several challenges.

Firstly, in a cross-cultural setting, teachers not only needed to cope with tensions and stress from fulfilling the mission of their professional development tours, but they also had to deal with cultural, social, and psychological adjustments (Roskell, 2013). This challenge is emerging from issues of culture shock that can radically alter teachers’ dreams of overseas professional development (Davis, 2005; Roskell, 2013; & Wilson, 2001).

Secondly, since the understanding of being a teacher and the teaching profession is socially and culturally defined, tensions are known to arise due to a clash of cultures between host and home countries. Some teachers tended to develop “cognitive dissonance” (Festinger, 1957) between their previous beliefs about teaching in their home country and the ways that they observe teaching taking place in the new country. This challenge is the dissonance of different understanding of good teaching practices between host and home countries (See Figure 1-1). The cognitive dissonance experience might cause teachers to doubt, question, rethink, and challenge their old paradigm of who they are as teachers, what is the better way to teach, what a good teacher means, and so on. These experiences might generate cognitive dissonance between their beliefs about the teaching profession in their home country and the way it begins to unfold in a foreign culture.

Figure 1-1. Cognitive Dissonance Caused by Culture Clash

Thirdly, a possible challenge might arise from a cross-cultural experience that could draw forth a change or a transformation. Since going through cultural differences parallels the stages of
transformational learning (Feyen, 2007; Choi, Slaubaugh, & Kim, 2012; Tolliver & Tisdell, 2002; & Oravecz, 2005), the change of teachers’ perspectives related to their identities and professional development could cause tremendous inner self-reflection, which could lead to life-changing experiences. “By becoming critically aware of the context—biographical, historical, cultural—of their beliefs and feelings about themselves and their role in society”, learners could “effect a change in the way they had tacitly structured their assumptions and expectations” (Mezirow, 2000, p. xii).

The life-changing experience of working and living in a new culture might bring about a comprehensive and significant transformation that could very possibly be painful and tormenting.

**Context of the Study**

To put this in context, my own observations of teachers in an exchange program that I worked in a few years ago revealed the coping mechanisms teachers used to adjust and overcome their fears. I saw the clash of social and cultural norms teachers experienced, which led them to doubt and question if they were inadequate. Some of them were confused and could no longer trust themselves to teach the ways they were taught in their teachers’ colleges. Other teachers chose to go with the flow: they modified their ways of thinking and were more open to new ideas. By the end, it seemed as though the second group tended to have successful learning outcomes—they borrowed ideas from their global community, brought them back to their home country with handouts, books, charts, and videos, and hopefully thought these would benefit their local students. Teachers who resisted the changes felt de-professionalized or de-skilled after their international visits. Their experiences were overtaken by their negative emotions and feelings. These anecdotal stories
prompted me to investigate the central question: what happens to exchange teachers’ PDE when they encounter global perspectives on teaching?

This comparative study examined Chinese and American teachers’ PDE following a short-term visit and participation in China-USA teachers exchange programs. The focus was on a China-USA teacher exchange program in a public high school in northeastern United States. This exchange program aims to enhance teachers’ informal learning experiences as they observe classes, interact with local teachers, students, and parents, as well as participate in school activities and community events.

**Research Focus and Purpose**

In this comparative case study, the purpose was to understand and compare exchange teachers’ PDE in the USA and China. More specifically, this study explored the relationship between teachers’ PDE and their global identity formation during their stay and participation in international teacher exchange programs. This comparative study sought to uncover how exchange teachers from two countries made meaning of their international PDE, such as what tensions and conflicts they faced, how their experiences influenced them to reflect on their understandings, beliefs, and pedagogical practices as a teacher, and how such understanding contributed to their professional identity formation in a global community.

Although much literature has explored how teachers learn as adults in their home countries (e.g., Darling-Hammond, 2010; Glickman, 2002) and through international teaching experiences (e.g., Huang, 2009; Roskell, 2013), few studies have investigated teachers’ cross-cultural learning experiences and how those experiences impacted their global identity and professional goals. This study seeks to illuminate this relationship.

**Comparative Case Study**
By conducting this comparative case study, this research explored and compared the US and Chinese teachers’ PDE in each other’s country and how their identities were reshaped during this learning process.

People compare constantly, and for those who travel abroad or live with foreigners, international comparison can be an everyday experience (Reischmann, 2008). For Postlethwaite (1988), to compare “means to examine two or more entities by putting them side by side and looking for similarities and differences between or among them” (p. xvii). In the field of comparative and international education, international comparison involves various types of relationships including “intellectual, cultural, and educational among individuals and groups from two or more nations” (Fraser & Brickman, 1968, as cited in Zelditch, 1973, p. 101). Reischmann further explained that, although comparison might happen “in a single country (intra-national)”, the term “international comparative” means “the comparison between countries” based on “methodically gained data and identifies similarities and differences between the aspects under study” (p. 20). Charter and Siddiqui (1989) also supported this position stating that “an intra-national study is the comparison of a topic in two or more situations within one country and an international study is the comparison of a topic in two or more countries” (p. 3).

To define “comparative and international education” has been a challenging issue for comparative theorists. Rosselló (1993) asserted that, although comparative education is often defined as the application of comparative strategies to educational problems, many studies do not make any comparisons at all. He defined comparative education as “the application of the technique of comparison to the study of certain educations problems” (p. 103). Raivola (1985) echoed Rosselló’s definition:
Many simply present a particular country’s education system or educational problem and leave the reader to make the comparison. It is assumed that a comparison is made between the situation described and the reader’s own educational context (p. 362).

Bereday (1964) regarded comparative education as an analytical investigation of educational systems in other countries in which the main goal of international comparison is to learn lessons from the educational practices in various countries. Although Raivola (1985) posited that Bereday is one of the few who has taken seriously the use of a methodological approach to solve the problem of comparison, he criticized Bereday’s definition stating that “Bereday does not consider in more depth what comparison is, what possible dimensions are involved, or what kind of mental operation it is” (p. 363). And he asserted that “in general, comparative education theorists have assumed that the concept of comparison needs no definition” (p. 363).

Kelly, Altbach, and Arno (1982) developed a definition that emphasized comparative education as a field that has been developed to conduct studies related to the educational systems of other countries. They incorporated the importance of “other countries” into comparative and international studies which separated comparative education (focusing on comparison which can be either an intra- or inter-national work) from comparative international education (focusing on comparison across countries). This explains why the field of international comparison always involves travelling researchers and scholars who write systematic and in-depth stories of their visits to other countries hoping to encourage the “borrowing and copying” of the good ideas and practices they experienced (Ginsburg & Price-Rom, 2009). This cross-cultural borrowing and copying is also called “isomorphism” in the work of LeTendre and his colleagues (2001).

**Comparative and International Adult Education**

International comparison has been an indispensable research tool for satisfying curiosity, attaining knowledge, and promoting cross-cultural understanding in the adult education
field (Reischmann, 2008), which helps “satisfy an interest in how human beings live and learn … to become better informed about adult education systems of other countries” (Kidd, 1975, p. 10). Charters (1999) argued that international comparison is conducted to promote efficient and effective international developments, and as a result, useful theory and practice of adult education can be developed as well (as cited in Reischman, 2008). Reischmann (2008) also argued that comparative and international adult education can transform people to create peace and “overcome one’s own ethnocentric blindness” (p. 22). Therefore, international visits, travel, and exchange have become an important way to shape adults’ understanding, enhance international borrowing/copying, and benefit the cross-cultural communication, through which the andragogy, “the science and art of helping adults to learn” (Knowles, 1980, p. 43), develops and prospers (as cited in Reischmann, 2008, p. 22). Charters and Hilton (1989) also pointed out the importance of travelling and doing international comparison in two or more countries:

A study in comparative international adult education…must include one or more aspects of adult education in two or more countries or regions. Comparative study is not the mere placing side by side of data…such juxtaposition is only the prerequisite for comparison. At the next stage, one attempts to identify the similarities and differences between the aspects under study….The real value of comparative study emerges only from…the attempt to understand why the differences and similarities occur and what their significance is for adult education in the countries under examination. (p. 3)

Charters and Hilton’s explanation puts a strict requirement on comparative and international adult education in which comparison must be reported from two or more countries and “offer an explicit comparison making the similarities and differences understandable” (Reischmann, 2008, p. 27). In this study, I compare exchange teachers from two countries and hope to understand their travel and short-visit experiences. I hope this study will help add more traits and evidence in understanding cross-nation andragogy.
However, difficulties and problems of international comparative work do exist. Reischmann (2008) listed some possible challenges that cross-national researchers might face, such as discontinuity of scholarly work as scattered knowledge, the high cost of conducting international projects, different cultures between nations, language barriers, and so on. Although difficulties are unavoidable in conducting international comparison, cross-cultural and cross-national studies continue to attract more and more scholars because “learning from each other is an essential, basic necessity” from a global perspective (Reischmann, 2008, p. 32).

From a historical perspective, the purpose of comparative and international education has been associated with an approach to solving a problem, such as the projects conducted by the UN (e.g., UNESCO, UNICEF, & UNDP) (Ginsburg & Price-Rom, 2009). Holmes (1965) and Meyer & Hannan (1979) characterized their comparative education work as meeting the challenges of problem analysis, policy formulation, problem identification and description, and evaluating and monitoring the outcomes of policies. In recent work, comparative and international researchers (e.g., Arnove & Torres, 1999; Burbules & Torres, 2000; Stromquist & Monkman, 2000) have switched their focus from local problems to the world system and globalization when conducting international comparison. They were interested in addressing globalization issues related to economy, politics, technology, and culture, and raised questions regarding whether local educational models and systems are responding effectively to globalization. These researchers also focused on studying whether the globalization of educational policies and practices leads to a convergent and/or divergent process. Gradually, “globalization” has found its popular way into comparative and international education, and become an important research direction in international education practitioners and researchers’ work (Ginsburg & Price-Rom, 2009). As a
result, the recognition of common problems that schools and societies confront is not limited at a local or national level but manifested in a global arena (Altbach & Kelly, 1986).

From a methodological perspective, researchers who regarded themselves as practitioners of the social science in comparative education (e.g., Bereday, 1965; Noah & Eckstein, 1969) conducted international comparison with the intent of meeting their purpose of developing law-like, quantitative outcomes about the relationships among different variables related to education. Their perspectives were often described as structural functionalism with its tradition of applying empirical research and scientific methods to the study of education (Ginsburg & Price-Rom, 2009). However, Raivola (1985) argued that “comparison is not always used for the purpose of constructing an explanatory theory” (p. 363), and he offered an insight into the concept of comparison by advocating that the purpose of comparison is for bracketing references to which varying observations relate to each other. He further explained:

Not all comparative research…seeks general explanations, but all research that seeks to offer general explanations must be comparative. Comparison is always involved in inductive reasoning. Research workers cannot be content with ascertaining the existence of a dependency relationship; they must also define the extent and conditions of its occurrence. (p. 363)

On this view, in order to generate a theory, Warwick and Osherson (1973) provided a list of requirements that a theory must fulfill in an international comparison:

1. A theory has to be built on clearly defined concepts; 2. the theory has to cover the whole of the area of reality to be explained; 3. all claims included in the theory must be general; 4. the theory must be economical, which means it should be as comprehensive as possible using a minimum of concepts. (As cited in Raivola, 1985, p. 364)

In order to help researchers accomplish their research mission, regardless whether they are interested in discovering generalization or interested in discovering the relationships between a phenomenon and cross-cultural differences, Raivola (1985) recommended that they have to be clear
about what “comparability” and “equivalence” are so that they will neither be confused by “the comparable” and “the same” nor by “the convergence” and “the divergence” through which “a causal relationship” is established (Raivola, 1985, p. 364).

**Comparability between China and the USA**

Postlethwaite (1988) stated that “when well done, comparative education can deepen our understanding of our own education and society, it can be of assistance to policy makers and administrators, and it can be a valuable component of teacher education programs” (p. xix). It would be an ideal that comparison would naturally generate an analysis of the similarities and differences appearing not only in the issues compared but also in the “underlying determinative factors” (Rosselló, 1963). However, much comparative work just reveals the problem and does not make the comparison. Rosselló (1963) referred to it as a comparison in an author’s mind, and “the reader himself will compare with the situation in his own country the one described to him” (p. 103). Good (1959) suggested that, in order to conduct a sound comparative and international educational research, “the condition existing when two measures are expressed in the same units, thus making possible direct comparison” (as cited in Raivola 1985, p. 362). Raivola (1985) further explained that comparison is “a method and a logical tool in the solution of research problems” (p. 362).

Therefore, questions such as what comparison is, what possible strategies are involved, or what kind of thinking process should be included, deserves consideration in more depth (Raivola, 1985). To help answer these questions, Raivola (1985) emphasized the importance of comparability in international comparison, and he firmly believed that without comparability, the international comparison would lead to methodological and philosophical disasters. Zelditch (1973) defined comparability as “two or more instances of phenomenon [that] may be compared if and only if there
exists some variable, say $V$, common to each instance” (p. 267). In order to make the fundamental condition for comparison to be met (being comparable), “a point of reference” should be established, which is called a “*tertium comparationis*” (means “the third element”) (Raivola, 1985, p. 363). With the guidance of this third element named by Raivola (1985) as “equivalence”, “all the units to be compared can be examined in the light of a common variable, the meaning of which is constant for all units under comparison” (p. 363).

However, Warwick and Osherson (1973) warned us that comparison has different dimensions and to conduct a cross-cultural research will pose many problems to be solved. They proposed three questions related to three types of problems. The first question is: “Do the concepts under comparison correspond?” This question draws our attention to a condition in which a term might have identical definitions but with different meanings in different contexts. In the area of education, since the content of a definition relies on the researcher’s view, it becomes extremely important to set up a basis of comparison, a third element, on which the concepts to be compared cannot be ambivalent (Edwards, 1970). For example, “compulsory education” might be interpreted differently in different countries (Raivola, 1985). The second question is: “How is the correspondence of measurements to be assessed?” On this view, researchers are directed to question the valid indicators or variables for concepts since most concepts often connect with specific cultures. Even for the most authoritative data source, such as *UNESCO Statistical Yearbook*, Raivola (1985) reminded researchers to adopt them with extreme care because with limited understanding of local cultures UNESCO researchers might put their studies together for purposes of administration, not research. The third question is: “Can the problem of how concepts are linguistically expressed be resolved?” This question suggests researchers should be careful when they intend to translate international questionnaires into different languages. Raivola (1985)
suggested that researchers use bilingual and multilingual experts to conduct repeated translation until unclear understanding disappears. These three questions are closely related to the term of “equivalence” which will be discussed next.

The Concept of Equivalence

Vijver & Leung (1997) defined equivalence as “a function of characteristics of an instrument and of the cultural groups involved” (p. 9). Raivola (1985) suggested that researchers who work in the international comparison field should be very careful about their assumptions, beliefs, values, and expectations because they could cause a cultural bias in the collecting and analyzing data. On this view, Honko (1976) also asserted that “it can be difficult without comparison to learn to see and appreciate the special characteristics of one’s own culture, simply because one is accustomed to react automatically to them” (as cited in Raivola, 1985, p. 366).

Therefore, the equivalence in a comparative study becomes “a common element” and “a basis for the comparison of phenomena” so that researchers can avoid mistakes that are caused by “seeing comparability as a unidimensional property” (Raivola, 1985, p. 366).

Nowak (1977) categorized “equivalence” in five types of relation that form a solid foundation for the comparison of issues or phenomena in comparative educational research. These types “rely on the concept of equivalence, or correspondence” (Raivola, 1985, p. 366). Nowak’s five types are:

1. Phenomena are observed or judged in the same way in different cultures (cultural equivalence). Compare the same concept in different cultural settings. Cultural equivalence suggests that “a comparative analysis should focus attention on the isomorphism of the elements of the systems” (Raivola, 1985, p. 366). Thus as the two units converge towards uniformity, the comparative analysis should focus on the process of isomorphism through analogy (similarities), homology (a
relationship between two concepts based on ancestry and historicity) and explanation (rules and norms that lead towards the ideal).

(2) The objects of comparison (people or institutions) are part of a higher level of systems that have earlier been defined as equivalents (contextual/structural equivalence). Zelditch (1973) emphasized that, if what we compare depends on the context, the context must be taken into account in making the comparison. Cross-cultural phenomena often involve people from different social, cultural, and language backgrounds which are interwoven with contextual or local meanings. To ensure comparability, Zelditch (1973) further explained that the equivalence of comparison should be described at the same concept level.

(3) The objects have the same role in the functioning of the system (functional equivalence). Functional equivalence reflects a comparison between people or institutions. For instance, in different countries, teachers participate in different professional development activities to meet their urgent learning needs (e.g., learning a new technology or new curriculum development). In this situation, a similar problem is an urgent learning requirement, which generates a behavior with a similar response (e.g., teachers’ participation in learning activities). Another example that presents functional equivalence is “the expansion of education (in South America) and restriction of civil rights (in Poland) may both be seen as institutional responses to political pressure” (Raivola, 1985, p. 368). These examples indicate that the objects of comparison act in a similar role in the systems to achieve functional equivalence.

(4) Phenomena correlate empirically in the same way with the criteria of variables (correlative equivalence). Normally, this kind of study is conducted by using statistical data. Therefore, reliability and validity become key concepts in the measurement process. Understanding the relationship of reliability and validity is crucial in correlative equivalence. Reliability refers to the
stability of a test measure or protocol, while validity is the degree to which a measuring instrument measures what it is said to measure (Kimberlin & Winterstein, 2008). Nowak (1977) suggested that, in order to establish correlative equivalence, researchers must establish both reliability and validity in their comparative study because “to establish reliability does not yet mean that validity is established” (Raivola, 1985, p. 368).

(5) The phenomena under comparison derive from the same source—namely, the same conceptual class (genetic equivalence). Raivola (1985) discussed “genetic equivalence” that refers to the same source which establishes a phenomenon or concept. He provided a perfect example that falls into this kind of equivalence when he referred to the education throughout Europe which has a common heritage of a classical and Christian tradition. By using equivalence classes formed on this basis, education in different European countries can be examined.

Implications of “Comparability” and “Equivalence” for the Current Study

My current study pays close attention to teachers’ professional learning. As described in previous sections, teachers both in China and the USA face the challenge of improving professional quality, and they tend to learn from each other (Preus, 2007). It would be interesting to compare and contrast teachers from different countries and examine how their international professional learning experiences influence their understanding about teaching and about themselves as globally-involved professionals. Therefore, the concepts of “comparability” and “equivalence” become fundamental to assist me in conducting this comparative and international study.

As for this study, an exploration of comparison of exchange teachers’ professional development and how their experiences in the USA and China influence their global identities will be the focus. The purpose of the current study is to explore Chinese teachers and American teachers’ PDE in each other’s country. The study falls into a category of comparative study because
of its involvement of two teacher groups, one from China and one from the USA. In this study, the situation is comparable, one in which what is compared are teachers who leave their home country to another country to learn professionally.

Among many types of equivalence in international comparison, Nowak (1977) regarded contextual equivalence as the objects of comparison (people or institution) as part of a higher level of systems. This research is a qualitative case study, which specifically focuses on an international teacher exchange program. The teachers I compare are participants from the same program—the same higher system following the same professional development goals, activities, and agendas. Hence, contextual equivalence is a common element that I utilize in this comparative study.

Functional equivalence, as described by Nowak (1977), is the presence of a similar problem that generates behavior with a similar purpose, and it refers to the concept that the same function may be performed by different groups of people or institutions. In another words, functional equivalence is the presence of a similar problem that establishes behavior with a similar purpose. When they participate in the exchange, two groups of teachers all need to participate in a set of similar informal learning activities in order to meet their professional development goals. Also, when they live and study in a context that is historically, socially, and culturally different from their home country, they unavoidably face similar problems (e.g., culture shock) at both personal and organizational/community levels. Therefore, in this study, functional equivalence can be applied to support the comparison. When regarding teachers’ PDE as an equivalence, I utilize it as an analytical common element to discover how teachers function in an international exchange program, how they make meaning of their experiences, and how the meaning they make influences their global teacher identities. Table 1-1 summarizes the two equivalences—contextual and functional—that I link to this current study.
Table 1-1. Two Equivalences in this Study

<table>
<thead>
<tr>
<th>Exchange Teachers</th>
<th>Contextual Equivalence: USA-China Teacher Exchange Program (TEP)</th>
<th>Functional Equivalence: PDE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese Teachers</td>
<td>Participate in TEP in the USA</td>
<td>PDE in the USA</td>
</tr>
<tr>
<td>American Teachers</td>
<td>Participate in TEP in China</td>
<td>PDE in China</td>
</tr>
</tbody>
</table>

Comparability and equivalence are significantly important for this comparative study that considers understanding teachers’ cross-cultural professional learning experiences. These concepts assisted me in conducting this comparative study in a more methodologically and philosophically informed way. By comparing and contrasting the similarities and differences of teachers’ professional learning experiences in two countries, I hoped possible findings could be beneficial to different stakeholders and could help them improve teacher education dynamics and strengthen the development of communities of teacher practice.

**Significance of the Study**

Researchers discover that teachers frequently believe that professional development has little impact on benefitting their teaching in the classroom (Cooley, 1997; Fullan, 2007; and Guskey, 2000). Studying teachers’ professional learning experiences in another country provided insights which would contribute to international teacher education. Addressing identity as a lens to understand teacher’s profession development is important, and the shifts and creations in identity are an acknowledged part of being a teacher. Overt attention to these shifts within teacher education programs has not always been evident (Beauchamp & Thomas, 2009). The recognition of this importance can translate into concrete action in the form of international teacher training and
development program design and activities, just as Hammerness, Darling-Hammond and Bransford (2005) concluded:

Developing an identity as a teacher is an important part of securing teachers’ commitment to their work and adherence to professional norms… the identities teachers develop shape their dispositions, where they place their effort, whether and how they seek out professional development opportunities, and what obligations they see as intrinsic to their role. (Hammerness, Darling-Hammond, & Bransford, 2005, pp. 383–384)

Although the notion that identity formation is central to the development of a teacher is apparent in their statement, finding ways to make this attention to identity more overt was a challenge. There are complexities inherent in the formation of identity teachers must undergo as they prepare for teaching practice. Within a global context, teachers strive to make sense and act as agents in the teacher’s world. Indeed, much of their time is taken up with negotiating, constructing, and consenting to their identity as a teacher.

In addition, many studies have been conducted on teachers’ identity in their home country, while very few studies explore teachers’ identity formation through learning in a foreign context. Since identity is very contextual, it is challenging to determine whether the learning from the overseas context would apply to the local community. This study has proved that global learning experience does reshape or re-construct teachers’ identity. When our world becomes more and more connected, teachers can never be isolated from the rest of the world. The combination of local and global knowledge leads to a new formation of global identity. The worldwide connectedness of teaching profession requires a bigger and broader understanding about the teaching profession, which becomes an urgent calling for all teachers in different countries.

As a heuristic tool in social sciences, Collier (1993) lays out the significance of conducting comparative research:
Comparison is a fundamental tool of analysis. It sharpens our power of description, and plays a central role in concept-formation by bringing into focus suggestive similarities and contrasts among cases. Comparison is routinely used in testing hypotheses, and it can contribute to the inductive discovery of new hypotheses and to theory-building. (p. 105)

By comparing and contrasting the similarities and differences of teachers’ professional experiences in two countries, this study can enhance the relationships of two countries in education, and it promotes cross-nation teachers’ lifelong learning and fosters an international learning community of teacher practice. It is necessary and significant because, by understanding cross-cultural learning and PDE of expatriate teachers, exchange or study-abroad programs can better foster teachers’ critical thinking on globalization, help them acquire world-mindedness, broaden their perspectives to reflect professional, cultural, national, and global identification, and heighten their confidence in teaching multicultural and global education as the result of participating in the exchange or study-abroad programs. The findings of this research could be beneficial to future program planners and policy makers of international educational exchanges and partnership programs and help them improve teacher education dynamics and strengthen inter-group relations.

As well, the educational gaps between the USA and China can be filled through international exchange. In the USA, the changes including reforms in curriculum that require more authentic activities and assessment, integrating state standards into the curricula, preparing students for standardized assessment, and other innovations (Gregson & Sturko, 2007). In China, its educational system has been criticized by parents, students, and government officials for focusing too much on rote learning. China’s recent educational reform has put tremendous stress on teachers and teacher's professional development program in terms of fostering students' creativity and less emphasis on exams (Waldermeir, 2013). Just as Americans are admiring the Chinese system of education (such as Confucius philosophy, respect for teachers, fewer discipline issues, high test
performance, and so on), China is concerned about its limits, especially in regard to how it tends to quash creativity and individuality in favor of what is often rote learning (Li, 2008). The knowledge gap between two countries attracts teachers from two countries to cross the Pacific to learn from each other.

**Limitations of the Study**

This study focused on a small group of Chinese teachers with homogenous subject field—English language teaching (English language teachers from China have the bilingual advantages and they are privileged to be chosen by school leaders for the international study opportunity). However the American teachers are drawn from various different subject areas. Therefore, the comparison between two small groups of teachers does not clearly address the detailed teaching techniques but concentrates more on similarities and differences between their exchange experiences in terms of coping with social, psychological, cultural differences in and outside of the classrooms and how those experiences influenced their understanding about teaching and themselves.

In addition, a lack of prior research and reference data means that the findings of this comparative research is at an exploratory stage. Further research that includes a greater number exchange teachers from different international teacher education programs is required. The fact that there were only four participants from each country limited a full understanding to the deep meaning that both American and Chinese teachers associated with the research questions.

And last, most of my participants had finished the PD program and gone back to their home countries. It is difficult for me to do field observations with all of them to collect ethnographic data. One of the ways that made up for this weakness was to encourage my participants to give stories as detailed as possible so that I could understand their PD experiences in depth. Only two exchange
teachers (one of each from two countries) participated in my on-site observations. Due to my tight travel schedule, I could not stay at the site for very long. It would be ideal if I could have spent a month or two on site, but unfortunately I only could offer one to two weeks at each site.

Summary

This comparative study investigates teachers’ professional development and how their international learning experiences influenced their teacher identity. More specifically, this chapter focuses on introducing how teachers as adult and lifelong learners learn at the time of globalization, and investigates how cultural differences inside and outside of the classroom influenced teachers’ perspectives of understanding who they were as teachers and how to teach. In addition, this chapter highlights implications of comparability and equivalence. The research background, purpose, significance, and limitations are also included.
Chapter 2
Theoretical Framework

Theories and concepts drawn from a review of the current literature in teachers’ professional development will be used to formulate a detailed description of a conceptual framework that I have created for this study. More specifically, I will explain how these concepts and theories help frame my understanding of a comparative study on exchange teachers’ professional learning. In this section, I adopt Wenger’s (1998) notion of the community of practice and his social theory of learning, which is discussed popularly as a model for professional development and learning, as a foundation and scaffold for this conceptual framework.

Community of Practice and a Social Theory of Learning

Feiman-Nemser (2001) reminded us that “what students learn depends on what and how teachers teach; and what and how teachers teach depends on the knowledge, skills, and commitments they bring to their teaching and the opportunities they have to continue learning in and from their practice” (p. 1015). However, the top-down imposition of knowledge (Smaller, 2005), the banking concept of education (Freire, 1970), and contextual irrelevance (Gulston, 2010) could destroy teachers’ authentic teaching and learning. In order to improve teacher quality, professional development activities and resources increasingly focus on communities of teacher practice (Cobb, et al., 2003; Hager & Halliday, 2007; Kolenc, 2010; Prestine & Nelson, 2005; Printy, 2008; Shapiro, 2003; Stein & Spillane, 2005; Sparks, 2002; Tsui, 2007).

Community of Practice

Lave and Wenger (1991) first used the term “community of practice” (CoP) to describe learning through practice and participation, which they called “situated learning.” Situated learning theory explains how learning happens as individuals move from the periphery of the community in
order to gain membership as a full participant. Based on this idea, Wenger’s work evolved by focusing on informal learning as social participation through which the individuals construct their identities in CoP (Wenger, 1998, Wenger et al., 2002). CoP has greatly influenced scholars and researchers to employ a practical and informal strategy to conduct professional development (e.g., Boud & Middleton, 2003; Hager & Halliday, 2007; Hord & Tobia, 2012; Printy, 2008; Tsui, 2007; Ying, 2012). As Wenger (1998) explained:

[CoP] presents a theory of learning that starts with this assumption: engagement in social practice is the fundamental process by which we learn and so become who we are…. In order to give a social account of learning, the theory explores in a systematic way the intersection of issues of community, social practice, meaning, and identity. (para. 1)

According to Wenger (1998), three elements are crucial in distinguishing a CoP from other kinds of communities: 1) the domain: people in a CoP have an identity (membership) defined by a shared domain of interest; 2) the community: when pursuing their interest in the domain, members engage in activities together and build relationships that induce them to learn from each other; and 3) the practice: members are practitioners and they develop a shared practice.

A Social Theory of Learning

The conceptualization of social learning focuses on individual learning taking place in a social context and influenced by social and cultural norms (Bandura, 1977, 2002). Bandura (1977) stated that learning is social in that people learn from each other by observation, imitation, and modeling. Vygotsky’s theory (1978) is complementary to Bandura’s work on social learning by emphasizing that learning is sociocultural rather than simply a cognitive phenomenon. Social learning theory following Vygotsky’s tradition relies on analyzing the cultural and social aspects of human actions and rejects the isolated individuals as an insufficient unit of analysis (Bertelsen & Bødker, 2003). Although culture is an important aspect in this study—the culture shock that exchange teachers encounter, I am more interested in individual teachers’ learning experiences and
personal stories rather than treating them as a cultural or social group. So I hesitate to adopt Vygotsky’s sociocultural theory.

Based on the concept of situated learning which is related to Vygotsky’s notion of learning through social development, Wenger (1998) developed his social learning model following a direction of professional and workplace learning and this meets my research interest. In this theory, Wenger (1998) explained learning in a systematic way by intersecting community, social practice, meaning, and identity: 1) meaning: a way of making meaning of experiences; 2) practice: a way of engagement in action; 3) community: social configurations through which people participate; and 4) identity: a way of knowing who we are and personal histories of becoming (p. 4; see Figure 2-1).

Figure 2-1. Wenger’s Social Learning Theory (1998, p. 5)

Wenger (1998) posited that these four components are “deeply interconnected and mutually defining”, and learners “could switch any of the four peripheral components with learning, place it in the center as the primary focus, and the figure would still make sense” (p. 5). When meaningful social learning happens in a CoP, it can shape “not only what we do, but also who we are, and how we interpret what we do” (Wenger, 2009, p. 211). Wenger (2009) emphasized that any CoP produces its own unique “congealed form” based on members’ shared interest (p. 59). This statement suggests that no outside method or philosophy can be mandated into a CoP. Wenger’s
argument makes me wonder how teachers learn in a global community which is totally different from the one they are familiar with, and how teachers can modify the new knowledge in their own way so that their learning will take a new local form. Wenger (1998) reminded us that this “modification” would not happen automatically and it has to be through negotiation in “the community that conditions, resources, and demands shape the practice” (p. 80). This provoked me to find out how teachers learn in a different community through negotiation and how global knowledge and pedagogy can benefit teachers at a local context.

Conceptual Framework

Although Wenger’s social learning theory has been influential in the field of adult learning and professional development, its framework has been criticized (e.g., Davies, 2005; Handley, et al., 2006). For example, it was criticized for not succinctly addressing the power relations and equality issue which could cause members’ stress, resistance, tension, and/or conflict in a community. As well, how these issues affect participants’ involvement and the development of a community is not explained in Wenger’s model, just as Handley et al. (2006) claimed that “participation brings the possibility of mutual recognition and the ability to negotiate meaning, but does not necessarily entail equality or respect or even collaboration” (p.643). Engeström and Miettinen (1999) also criticized Wenger’s theory for being a one-way movement of learning. They argued:

… [CoP] depicts learning and development primarily as a one-way movement from the periphery, occupied by novices, to the center, inhabited by experienced masters of the given practice. What seems to be missing is movement outward and in unexpected directions: of authority, criticism, innovation, initiation of change. Instability and inner contradictions of practice are all but missing. (p. 12)

Wenger’s theory acts as a foundation and scaffold for this study. However, in order to fill the gap between his theory and the phenomenon I planned to investigate, my conceptual framework (see Figure 2-2) adds theories and concepts that tend to visually guide me to explain “the key factors
and concepts” of teachers as adult learners and “the presumed relationships among them” (Miles and Huberman, 1994, p. 18).

**Figure 2-2. The Conceptual Framework of Teachers as Adult Learners**

In this spiral model, teachers start their learning as adults. When they enter into a community which can be either local or global, teachers learn as members of it. Different from learning in a local setting, teachers face challenges to adjust culturally and socially in a global community. Through practice and reflection, teachers learn by engaging in action. In order to make meaning of their learning, teachers negotiate and reflect on their experiences either individually or...
collectively. Theories, such as cognitive dissonance, transformative learning, and experiential learning, can help me understand and explain individual teachers’ tension and resistance in the learning processes. Through practice, reflection, and making meaning of their experiences, teachers learn to form a sense of self, or an identity. During this process, teachers could form multiple identities depending on where, what, and how they learn (Wenger, 1998). In order to explain that learning is not necessarily a one-way spiral movement but can start at any stage, four double-headed arrows are drawn to connect teachers as adult learners directly with four components of learning (community, practice, meaning, and identity). In this conceptual framework, teachers’ learning can be ongoing, spiral, or multi-directional. The following section explains this conceptual framework in detail.

**Practice and Reflection in the Community: Learning as Belonging and Doing**

The first and second key elements of this conceptual framework involve learning as belonging and doing through practice and reflection in the community. Since these two key concepts, practice and community, are connected, I discuss them together.

Learning at work is a common engagement in which teachers participate daily (Smaller, 2005) through which teachers can “sustain mutual harmonious or conflictual relationships, share ways of engaging in doing things together, quickly set up a problem to be discussed… even mutually define identities” (Wenger, 1998, pp. 125-126). Since nowadays teachers involve themselves in a transition from local to global societies, Wenger (1998) explained that “the local and the global are not different historical moments in an expanding world… they are related levels of participation that always coexist and shape each other” (p. 131). He believed that the relevance of communities of practice is not diminished by the formation of broader global contacts but strengthened. As he suggested, if people allow themselves to cross boundaries of practice recklessly
enough by creating a tension between experience and competence, their learning can either be potentially enhanced or impaired.

Many researchers (e.g., Anderson-Levitt, 2003; Douglass; 2005; Schröttner, 2010) supported Wenger’s argument and argued that to be globally involved, local knowledge is indispensable. Tong and Cheung (2011) suggested considering Robertson’s (1995) concept of “glocalization”, a term which combines “global” with “localization.” Regarding the impact of the glocalization phenomena on teacher education, Paine and Feng (2006) used China as an example and explained that its teacher education and professional development has formed a hybridized model that relies on insider and outsider expertise. Tudhall (2012) also commented that more and more teacher education programs have recognized the value of global knowledge and have moved beyond a local view that just prepares teachers in their home nations.

However, the challenge of culture shock from learning in a global community cannot be ignored. Cross-cultural transition from a familiar working setting to a new environment is widely regarded as a potentially distressing life event and often times it rarely goes entirely smoothly (Choi, Y. & Choi, M., 2012; Roskell, 2013). Culture shock can radically alter teachers’ dreams of their overseas experiences (Davis, 2005). Lysgaard (1955) and Oberg (1960) discovered that the “culture shock” customarily follows a U-shape hypothesis (see Figure 2-3).

*Figure 2-3. U-Shape Cultural Adjustment Hypothesis (Lysgaard, 1955 & Oberg, 1960)*
In this cultural-transition model, the first stage is characterized by positive *honeymoon* feelings and is expected to be followed by a period full of *crisis*, such as homesickness, loss, and depression. The next stage is “*recovery*”, during which the individual begins to adjust to the new cultural environment, followed by the fourth stage—“*adjustment*” (Lysgaard, 1955; Oberg, 1960).

In the pilot study that investigated Chinese and American teachers’ experiences when they participated in an exchange program, I found an interesting phenomenon related to culture shock. Although teachers from both sides all faced culture shock, the degrees and types of culture shock they faced were very different. In another words, the culture shock they faced in each other’s country had different manifestations and created an inequality in this exchange. I noticed that American teachers were shocked when their American culture with a sense of superiority meets the Chinese culture which worships western culture and is under the shadow of its influence. Chinese teachers, students, and parents treated them as distinguished guests or celebrities. Also American teachers rarely met language barriers in China because English is a compulsory course that all students learn in schools. By contrast, Chinese teachers in the USA were automatically put into an inferior position. They were not very fluent in English and very few people around them spoke Chinese. American culture, especially with its individualism, made them feel that American people were cold, indifferent, and disrespectful to them. This pilot study moves me to ask, having little “geographical relations of proximity” (Wenger, 1998, p. 127), how can exchange teachers in another country get along with their new community? How do they reflect on their experiences? And what kind of challenges they might encounter? These questions interested me greatly.

**Meaning: Learning as Experience**

The third key component of this conceptual framework is to understand how teachers make meaning of their learning experiences. Wenger (1998) stated that in order to engage in practice one
should negotiate and reflect on the meaning in the process, since “the experience of meaning is not produced out of thin air” (p. 52). He asserted that negotiation and reflection constantly change the situations to which it gives meaning and affects all participants. In order to better understand the process of making meaning through negotiation and reflection, three theories—transformative learning, experiential learning, and cognitive dissonance—need to be explored.

**Transformative learning.** Freire (1970) argued that education “should foster freedom among learners by enabling them to reflect on their world, and thereby, change it” (as cited in Dirkx, 1998, p. 3). Freire’s work on transformative learning focused more on the relationship between education and social transformation. Since this study is about a teacher’s transformation at an individual level, Mezirow’s work (1991) becomes my emphasis. Mezirow (2000) claimed that transformative learning takes place when a certain process leads people to give up a habit of mind, see alternatives, and thereby act differently in the world, which is also regarded as perspective transformation. He argued that perspective transformation means changes in the learner’s meaning schemes (changes in frame of reference)—for example, specific beliefs, attitudes, and ways of thinking. He stated that “by becoming critically aware of the context—biographical, historical, cultural—of their beliefs and feelings about themselves and their role in society”, learners could “effect a change in the way they had tacitly structured their assumptions and expectations” (p. xii). Mezirow (1995) further explained that perspective transformation could happen through “a series of phases that begin with the disorienting dilemma”, followed by self-examination, sense of alienation, relating discontent to others, explaining options of new behavior, building confidence in new ways, planning a course of action, knowing how to implement plans, experimenting with new roles, and reintegration (as cited in Imel, 1998, p. 3).
An effective way to foster transformative learning is to engage learners in experience-based learning through which they are directly stimulated to reflect upon experiences (Feinstein 2004). Since international learning experiences may result in a consequence of a disorientating situation that causes exchange teachers to critically reflect on the assumptions that underpin their meaning structures (Choi, et al., 2012; Feyen, 2007; Roskell, 2013), their reflection may make them to realize the discontent which leads them to adopt a new perspective, or generate new knowledge and relationships (Mezirow, 1991). As a result, instead of teaching and learning as old mindsets, teachers can begin to look at their habits of mind and work with new possibilities, questions, views, and changes (Cranton & King, 2003). However, Brookfield (2000) reminded us that learning cannot be considered transformative if essential questioning, rethinking, or acts do not happen, which means that reflection itself does not contribute to transformative learning.

Although Mezirow’s transformative theory has been popularly applied to study the phenomena of adult learning, it has been challenged and criticized. For example, Taylor (1998) argued that Mezirow granted rational critical reflection too much importance, and Sawchuk (2003) also challenged Mezirow’s theory by criticizing his focus on “the lofty heights of high abstraction over the real, concrete circumstances of learning life” (p. 33).

**Experiential learning.** Freire (1970) claimed that nobody is born fully-formed, and people become what they are through self-experience. I cannot agree more. The approaches for experiential learning theories are fundamentally based on John Dewey’s (1916) philosophy. His theory emphasizes the role of experience in overcoming the challenge of traditional education which focuses on knowledge delivering and has little connection with experience. According to Kolb (1984), “learning is a continuous process grounded in experience” and “knowledge is continuously derived and tested out in the experiences of the learner” (p. 27). Kolb’s learning cycle (1984; see
Figure 2-4) is a circular continuum comprised of four levels of interaction: reflective observation (watching), abstract conceptualization (thinking), active experimentation (doing), and concrete experience (feeling).

**Figure 2-4. Experiential Learning Theory (Kolb, 1984)**

Through the lens of experiential learning theory, we can understand a good example of how a Chinese exchange teacher learned by observing an American teacher’s teaching in a classroom. During the observation, this Chinese teacher paid attention to what the curriculum content was, how it was delivered to students, what pedagogy this American teacher used, how students participated in learning, and so on. Comparing and contrasting the learning from her real experience with how she taught in China, a knowledge gap or confirmation might occur. She completed the observation and synthesized knowledge and engaged in reflective practice and then tried to make meaning of her experience. Reflective opportunities constantly occurred even when she had returned to her own country and had resumed teaching. She might learn abstract ideas and concepts in the USA through this concrete experience; later on, she very possibly tested what she learned and decided whether a
certain teaching practice worked for her class or not. Through this process, this experience provided meaning to this teacher’s teaching practice.

Although the experiential learning theory does not sufficiently explain how learning is derived from experiences and places more emphasis on cognitive or individual dimensions of learning (Fenwick, 2000), it is indeed one of the widely used informal learning approaches for teachers who teach and learn at the same time within school settings (Hager & Halliday, 2007; Hoekstra, et al., 2009; Richter, et al., 2011; Shapiro, 2003; Small 2005; Zhong & Wu, 2004).

**Cognitive Dissonance Theory.** “Cognitive dissonance,” first investigated by Festinger (1957), is a psychological term which refers to the discomfort felt at a discrepancy between what people already believe and new information or interpretation. This concept of dissonance was once enormously controversial, but support for it through five decades of research has made it one of the most accepted concepts in social psychology, and it is regarded as fundamental to the process to learning (Cooper & Goren, 2007; Harmon-Jones, 2009). Cooper and Goren (2007) explained that people tend to think of themselves as psychologically consistent human beings, which means they act in ways that are consistent with their attitudes and their attitudes are typically consistent with each other. When facing an uncomfortable state of tension caused by experiencing dissonance, people do not live with the tension but take action to reduce it (Festinger, 1957). In their effort to reduce dissonance, they modify their choices to make them look better, they come to like what they suffered, and/or they change their behaviors to fit into a conflicted condition (Cooper & Goren, 2007).

In terms of how people deal with stress or tension caused by dissonance, Wenger (1998) proposed the concept of “broker” which he believed could reduce this kind of discomfort. Brokering is the “use of multi-membership to transfer some elements of one practice into another” (p. 105).
Canagarajah (2012) provided an example of how brokering works when he studied teachers’ development in a new community. He posited that instead of fighting for insider identities in a new community, teachers can “resolve to skirt the boundaries of their profession and serve as an effective broker who challenges the dominant assumptions by bringing new thinking, values, and practices from the outside” (p. 271). However, neither Wenger (1998) nor Canagarajah (2012) offered enough strategies on how to cope with resistance and tension in order to adapt to new communities.

On this view, cognitive dissonance theorists (e.g., Cooper & Goren, 2007; Harmon-Jones, 2009) bridged the gap between theory and practice which exists in Wenger and Canagarajah’s studies when he suggested that individuals could think and/or act in the following four ways to reduce the dissonance: 1) add consonant cognitions; 2) subtract dissonant cognitions; 3) increase the importance of consonant cognitions; or 4) decrease the importance of dissonant cognitions (Harmon-Jones, 2009). Based on these principles, it would be interesting to find out when a teacher encounters a dissonance generated from seeing a different teaching practice, how she would think or act in order to reduce the dissonance.

**Teacher Identity: Learning as Being**

Teacher identity is the last but the most important key element of this conceptual framework. Wenger (1998) proposed that meaningful learning leads to identity (re)construction. Within a teacher’s professional learning paradigm, “teacher identity” is the most important topic that has attracted attention of many researchers (e.g., Beauchamp & Thomas, 2009; Beijaard, et al., 2000; Sachs, 2005). In the study of teacher education, “teacher identity” acts not only as an analytic frame drawing attention to the “holistic, dynamic, situated nature of teacher development” but also a “methodological lens” through which researchers are able to study teacher development (Olsen,
Summary

Wenger (1998) concluded that learning is a fact of social life and communities are important places of negotiating, learning, making meaning, and forming identities. With the support from both local and global communities, teachers are provided great opportunities to learn as lifelong learners. Focusing on teachers’ professional learning in another country is not to glorify the global over the local, but to see these processes as the development of practice and the formation of identity when teachers are situated in complex interactions between the local and the global. Wenger’s social learning theory has inspired me to develop a spiral and multi-directional teacher learning framework which will facilitate this study to investigate and understand a constructive relationship between different communities in teachers’ professional development and their identity formation. The framework developed in this chapter will facilitate an investigation into the constructive relationship between different communities in teachers’ professional development and their identity formation.
Chapter 3

Literature Review

In this chapter, firstly, I introduce the definitions of key terms and concepts that relate to the present study. Secondly, I explain how teachers learn as adult and lifelong learners and the importance of participating in their professional learning communities. Thirdly, I discuss how learning takes place in different cultural contexts from a moral-cultivation perspective and a Confucian–Socratic perspective. Fourthly, by using China and the USA as examples to compare and contrast how teachers learn in different countries, I discuss three types of learning—formal, non-formal, and informal—as contributions to teachers’ professional development. And then I explore the topic of teachers’ professional identity formation in order to understand teachers’ professional learning. The last part covers the related literature on methodology which sheds light on my study.

Definitions of Key Terms and Concepts

Culture

Culture has broad meanings in English, and is considered to “be one of the most important influences on formation and maintenance of personal value and belief systems” (Zhu, 2007, p. 20). Kluckhohn (1962) argued that there should be universal categories of culture:

In principle ... there is a generalized framework that underlies the more apparent and striking facts of cultural relativity. All cultures constitute so many somewhat distinct answers to essentially the same questions posed by human biology and by the generalities of the human situation. ... Every society’s patterns for living must provide approved and sanctioned ways for dealing with such universal circumstances as the existence of two sexes; the helplessness of infants; the need for satisfaction of the elementary biological requirements such as food, warmth, and sex; the presence of individuals of different ages and of differing physical and other capacities. (pp. 317-18)

The culture guru, Hofstede (1997, 2011), described culture as the collective programming of the mind that distinguishes the members of one group or category of people from others, which is
the reference point for identity formation. Zhu (2007) further explained that “the sets of behaviors and shared understandings within a culture function as the means by which insiders distinguish themselves from outsiders” (p. 20). Hofstede (2011) claims that culture can be understood in six dimensions that measure different cultural behaviors. The six dimensions are labelled as 1) Power Distance; 2) Uncertainty Avoidance; 3) Individualism versus Collectivism; 4) Masculinity versus Femininity; 5) Long-Term versus Short-Term Orientation; and 6) Indulgence versus Restraint.

*Power Distance* is “related to the different solutions to the basic problem of human inequality” (Hofstede, 2011, p. 7) and is defined as “the extent to which the less powerful members of organizations and institutions (like the family) accept and expect that power is distributed unequally” (Hofstede, 2011, p. 9). Hofstede (2011) suggests that

...a society’s level of inequality is endorsed by the followers as much as by the leaders. Power and inequality... are extremely fundamental facts of any society. All societies are unequal, but some are more unequal than others. (p.10)

*Uncertainty Avoidance* “deals with a society’s tolerance for ambiguity” (Hofstede, 2011, p. 10) in which people embrace or avert an event of something unexpected, unknown, or away from the status quo. Hofstede (2011) further explains that:

[Uncertainty Avoidance] indicates to what extent a culture programs its members to feel either uncomfortable or comfortable in unstructured situations. Unstructured situations are novel, unknown, surprising, and different from usual. Uncertainty avoiding cultures try to minimize the possibility of such situations by strict behavioral codes, laws and rules, disapproval of deviant opinions, and a belief in absolute Truth. (p. 10)

*Individualism vs. Collectivism* “is the degree to which people in a society are integrated into groups” (Hofstede, 2011, p. 11). Hofstede (2011) claims that:

On the individualist side, we find cultures in which the ties between individuals are loose: everyone is expected to look after him/herself and his/her immediate family. On the collectivist side, we find cultures in which people from birth onwards are integrated into strong, cohesive in-groups, often extended families (with uncles, aunts and grandparents) that continue protecting them in exchange for unquestioning loyalty.... (p. 11)
Masculinity vs. Femininity “refers to the distribution of values between the genders” (Hofstede, 2011, p. 12). In this dimension, Hofstede (2011) reveals that “women’s values differ less among societies than men’s values”, and “men’s values from one country to another contain a dimension from very assertive and competitive and maximally different from women’s values on the one side, to modest and caring and similar to women’s values on the other” (p. 12). For example, in more masculine societies, women are more emphatic and competitive, but notably less emphatic than men.

Long-term Orientation vs. Short-term Orientation describes a society that either adopts a long-term (future-focused) or a short-term (present-focused) orientation to life. Hofstede (2011) explains that “values found at [long-term orientation] were perseverance, thrift, ordering relationships by status, and having a sense of shame; values at the opposite, short-term pole were reciprocating social obligations, respect for tradition, protecting one’s ‘face’, and personal steadiness and stability” (p. 13). People from China or other Asian countries tend to take a long-term orientation.

Indulgence vs. Restraint measures happiness whether or not simple joys are fulfilled. Indulgence is defined by Hofstede (2011) as “a society that allows relatively free gratification of basic and natural human desires related to enjoying life and having fun” (p. 15), and Restraint is defined as “a society that controls gratification of needs and regulates it by means of strict social norms” (p. 15). Indulgent societies value the controlling of their own lives and emotions; restrained societies believe other factors (such as religion or politics) decide their lives and emotions.

Hofstede’s cultural dimension theory (2011) has gained its popularity in cultural studies but may lack some accuracy (Zhu, 2007). Kwek (2003) criticized Hofstede’s way of conceiving culture as a too simplistic and hasty a view belonging at one or the other of the ends of a continuum. Zhu further commented that “the truth is that all cultures contain elements of all the dimensions to a
greater or lesser degree at all points in their evolution” (p. 20). Zhu (2007) also claims that Hosfestede’s research “did not provide any specific information about the interconnections” between different cultural dimensions (p. 27).

**Culture Shock**

Much of the literature sees culture shock as related to the psychological results of a person being exposed to unfamiliar environments (Furnham & Bochner, 1986; Hofstede, 1997; Ticho, 1971). Shock brought on by the cross-cultural contact can be affected by the motivation for travel, duration of sojourns, and the anticipated and unanticipated outcomes of geographical displacement on both the traveler and the host (Furnham & Bochner, 1986). The studies reveal that travelers normally suffer more physical and psychological distress from unfamiliarity between the traveler’s culture and that of the host caused by the traveler’s lack skill in understanding the conventions of the host culture. Furnham & Bochner (1986) also suggested that culture shock could be attenuated by becoming active participants in the new culture such as having a “culture friend.”

Although culture shock embraces numerous phenomena caused by the impact between a person of a certain background and a new culture, Garza-Guerrero (1974) provided three relatively clear characterizations of “culture shock”:

1. Culture shock is a stressful, anxiety-provoking situation, a violent encounter—one which puts the newcomer’s personality functioning to the test, thus challenging the stability of his or her psychic organization. When this crisis is resolved, further emotional growth may emerge; if it is not resolved successfully, diverse degrees of stagnation and even pathological regression may occur.

2. Culture shock is accompanied by a process of mourning brought about by the individual’s gigantic loss of a variety of his or his love objects in the abandoned culture.
Among others, these losses are outstanding: family, friends, language, music, food, and culturally-determined values, customs, and attitudes.

(3) The coexistence in this emergency situation consisting of two factors, i.e., cultural encounter plus painful mourning which follows the massive object loss—the forsaken culture—can cause a serious threat to the newcomer’s identity. (Garza-Guerrero, 1974, p. 410)

In terms of mourning and threats to a person’s identity in culture shock, Garza-Guerrero (1974) described a sequential schema of the process of culture shock which follows three stages (Figure 3-1). Phase I is Cultural Encounter which brings out “a sense of suddenness, acuteness, abruptness” and “a stage of exploring cultural differences and similarities” (Garza-Guerrero, 1974, p. 418). During this process, the newcomer tests the accuracy of his/her old perceptions regarding the new culture. Trying to fit into the new situation, disconnections or discrepancies between his/her new world and the old one become obvious. During this process, a mixture of feelings of “anxiety, sadness, hostility, desperation, [and] a yearning to recover” were observed (Garza-Guerrero, 1974, p. 418); therefore, there is “a growing sensation of discontinuity of identity emerges.” As a result, the newcomer develops a mechanism of defense—“an identification reminiscent of the identification related to the mourning” of his/her familiar self (p. 418).

Phase II is Reorganization. During this stage, once the initial shock of cultural encounter has passed, a gradual acceptance of the new culture develops. Garza-Guerrero (1974) explained that carefully trying to embrace a new culture might be followed by disappointment or successful interactions. The yearning for the initial confusion of identity decreases; therefore, “the previous identity is not only reaffirmed but reintegrated under the influence of the new culture” (p. 422). During this stage, the loss of a foreigner’s past identity could be recovered; meanwhile, a more
accurate and realistic concept of the old culture is developed. This will provide a more realistic evaluation of the new culture, which Garza-Guerrero (1974) named as identity “reshaping” or “reintegration”, and proposed that these selective identifications promote transformation. On the other hand, failed transformations may lead to “severe maladjustments” (p.423), as when Ticho (1971) concluded that “culture shock is a self-limiting crisis” (p. 313).

Phase III is New Identity. Garza-Guerrero (1974) explained that “a new identity will reflect the final consolidation into a remodeled…identity of those selective identifications with the new culture which were harmoniously integrated or fitted in with the past cultural heritage” (p. 425). This phase could generate a continuous feeling of “belonging” to the new culture. As a result, “a comfortable growing sensation of fitness [is] reflected in interpersonal interaction with the new culture” (p. 425). This does not mean that a residue of the intense yearning for the home culture will disappear, but it will no longer resist the merging with the new culture. Also, the new identity does not refer to a static achievement but a transitional period in the constantly ongoing process of human growth (p. 427).

*Figure 3-1. The Phases of Culture Shock*

**Teacher’s professional development.** Professional development (PD) has several related terms that appear in the literature including staff development, professional learning/growth, education and training, career development, human resource development, and continuing education
These terms often have similar meanings as they are defined by different authors. This study adopts Day’s definition (1999):

[Teachers’] professional development consists of all natural learning experiences and those conscious and planned activities which are intended to be of direct benefit to the individual, group or school and which contribute, through these, to the quality of education in the classroom. It is the process by which, alone and with others, teachers review, renew and extend their commitment as change agents to the moral purposes of teaching; and by which they acquire and develop critically the knowledge, skills and emotional intelligence essential to good professional thinking, planning and practice with children, young people and colleagues through each phase of their teaching lives. (p. 4)

Identity

The early researchers (e.g., Cooley, 1902; Freud, 1909) discussed “identity” as the individualized self-image with a relatively stable essence. Later, social psychologists (e.g., Erikson, 1959; Vygotsky, 1978) defined identity as “a situated and dynamic process of individuals developing conceptions of themselves as rational beings over time” (Olsen, 2008b, p. 4). Wenger’s account (1998) resembled these social psychologists’ definition of identity. He believed that there is a close connection between identity and practice—through learning in the community, identity forms and develops. He defined identity as: 1) negotiated experience (we define who we are through participation and negotiation); 2) community membership (we define who we are by the familiar and the unfamiliar); 3) learning trajectory (we define who we are by where we have been and where we are going); 4) nexus of multi-membership (people reconcile various forms of membership into one identity); 5) a relation between the local and the global (we define who we are by negotiating local ways of belonging to broader world/constellations) (p. 150). Since this definition just emphasizes the social influence on identity transformation, it has received criticism. For example, Jenkins (2014) argued that Wenger’s understanding of identity focuses too much on the engagement in the community. Since people have multiple aspects of identity and ways of
connecting themselves with the outside world, Wenger did not make a distinction between self and
other possible characteristics of an individual’s professional identity.

**Teacher identity**

Teacher identity is a holistic outcome involving teachers, teaching, and teacher development (Olsen, 2008b). Researchers replaced it with different names such as teacher’s professional image of self (Beijaard et al., 2000), teacher’s role (Ben-Peretz, et al., 2003), and teacher’s professional characteristics (Burden, 1980). Sachs’ (2005) definition of teacher identity offers a relatively complete statement showing the essence of the concept of teaching and revealing the dynamic features of teacher identity:

[Teacher identity] stands at the core of the teaching profession. It provides a framework for teachers to construct their own ideas of ‘how to be’, ‘how to act’ and ‘how to understand’ their work and their place in society. Importantly, teacher identity is not something that is fixed, nor is it imposed; rather, it is negotiated through experience and the sense that is made of that experience. (Sachs, 2005, p. 15)

This definition points out the importance of teacher identity in its profession by listing three dimensions of teacher identity including “how to be”, “how to act”, and “how to understand.” This view has both the personal and professional components of identity, and also explores identity as a fluid concept that is negotiated and shaped by the experience. Kelchtermans (1993) developed a more systematic model on teacher identity that has guided me to investigate Sachs’ three dimensions in depth. Therefore, I have chosen to adopt Kelchtermans’ model (see Figure 3-2) as the analytical and methodological lens to study the relationship between teachers’ professional learning and their identity formation.

*Figure 3-2. Teacher Professional Identity (Kelchtermans, 1993, p. 448)*
Kelchtermans’ (1993) explanation of the teachers’ professional identity evolves over time (Day, Kington, Stobart, & Sammons, 2006) and consists of five interrelated parts (Kelchtermans, 1993, p. 448):

1. **Self-image**: how teachers describe themselves through their career stories (how to be & how to act);
2. **Self-esteem**: the evolution of self as a teacher, how good or otherwise as defined by self or others (how to be & how to understand);
3. **Job-motivation**: what makes teachers choose, remain committed to, or leave the job (how to act & how to understand);
4. **Task perception**: how teachers define their jobs (how to be & how to understand);
5. **Future perspective**: teachers’ expectations for the future development of their jobs (how to understand).

A main topic of teacher identity in the literature is about its narrative aspect. The narratives of teachers about themselves and their work give researchers opportunities for studying teachers’ professional selves (Beauchamp & Thomas, 2009). The effect of teacher narrative to articulate identity in “a changing professional knowledge landscape” is described in significant work on teachers’ stories (Connelly & Clandinin, 1999, p. 120). During the process of telling stories, “reflection is recognized as a key means by which teachers can become more in tune with their sense of self and with a deep understanding of how this self fits into a larger context which involves
others” (Beauchamp & Thomas, 2009, p. 182). Many studies (e.g., Conway, 2001; Jay, 2003; Larrivée, 2000; Korthagen, et al.; 2001; Rodgers, 2002) also discovered that reflection is recognized as the center of effective teaching, and it needs teachers to look back on their perspectives, practice, experience, value, and beliefs. Meanwhile, it allows teachers to visualize their ways of teaching that might influence their future development. While reflection is linked to teachers’ future practices, it provides a way of shaping the teacher identity so that teachers could establish their prospective identity or an ideal self (Urzúa & Vásquez, 2008).

Another issue that has been frequently mentioned in the literature is the influence of context on the shaping of identity. For example, Luk-Fong (2013) stated that “teachers’ stories show that their identities and life choices are hardly free choices at all but are often part and parcel of the culture and contexts in which they were embedded” (p. vii). Taking this study on exchange teachers as an example, the context change could very possibly shape teachers’ identity.

**Global Teacher Identity**

Researchers (e.g., Pike, et al., 1988) started to study the “global teacher” back at least to the early 1970s. However, this topic now attracts more and more attention (Luk-Fong, 2005; Maguire, 2010; Tudhsall, 2012). Steiner (1996) defined “global teachers” as teachers who incorporate a global perspective and encourage cooperation, critical thinking, and democratic values and practices. Maguire (2010) argued that because of the tendency toward reconstructing a global teacher to fit the needs of the world economy, teachers become technical “risk managers” who make “learning outcomes more visible, calculable, and thus more accountable” in different contexts (Maguire, 2010, p. 62). These explanations show that the global teacher is not defined by the location but by the thoughts, perspectives, competence, knowledge, and skills that teachers should have. In this study, I adopt “global teacher identity” as an analytical term to study teachers’
international learning experiences, which is opposed to “local teacher identity” that just connects with the local knowledge and relevance. As any identity, global teacher identity is fluid and changing depending on how long teachers stay abroad, how constantly or frequently they reflect on their roles, and what their back-to-home experiences look like. The fluid feature of global teacher identity is presented in Figure 3-3. This figure reveals a thinking process of looking at who they are as a person (personal identity), who they are as a local teacher by reflecting on the local knowledge and pedagogy, and how they make meaning of their global experiences and contacts through interacting with people from different cultural and social backgrounds.

Figure 3-3. The Formation of Global Teacher Identity through Ongoing Reflection

This figure illustrates how teachers’ understanding about teaching and learning expands through combining both global and local knowledge. This expanded or reconstructed identity is “global teacher identity” which is a professional identity that grows based on one’s local identity and reflection of global experiences and contacts. Wenger (1998) defined this phenomenon as “nexus of multi-membership”, which is “all the subtle ways in which our various forms of participation, no matter how distinct, can interact, influence each other, and require coordination”
As Wenger (1998) predicted, although a community can foster and construct one’s professional identity as “the cradle of the self”, it also can act like “the potential cage of the soul” (p. 85). Therefore, gaining a more complete understanding of teacher global identity might enhance the ways how we understand teacher identity formation in different contexts and understand what kind of learning might or might not benefit our teachers.

**The Formation of Teacher’s Professional Identity**

Teachers’ understanding about who they are as a teacher and how to teach has been well studied (Alsup, 2006; Beijaard, Verloop, & Vermunt, 2000; Levin & He, 2008; Lim, 2011; Liu, 2013; Mora, Trejo, & Roux, 2014; Olsen, 2008b). A relatively large number of studies suggests that teaching is a learning profession, and teachers’ professional identity is (re)constructed by their learning through the continuum of professional development (Darling-Hammond, & Sykes, 1999; Guskey, 1989,2000; Lim, 2011; Munby, Russell, Martin, 2001; Richardson, 2003; Ross, 1987; Schwille, Dembélé, & Schubert, 2007). This underscores the necessity for the researcher to understand teachers’ beliefs and perceptions about themselves as teachers in an effort to provide adequate evidence and analysis for understanding their professional learning process and outcomes.

Professional identity formation is regarded as an ongoing process of identification and negotiation of self-images (Beijaard et al., 2000, 2004; Lim, 2013; Tsui, 2007; Volkmann & Anderson, 1998; Wenger, 2009; Wenger, McDermott, & Snyder, 2002). This identity formation process often causes confusion, struggles, and tensions from which teachers have to face conflicting notions, challenges, and dissonance (Beijaard et al., 2000, 2004; Golombek, 1998; Lim, 2011; Tsui, 2007). As Lim (2011) commented:

[T]eachers have built up personal and practical knowledge about teaching and being a teacher based on their prior experiences as learners, teachers, and participants in their teacher education programs. Then, they rely on their personal and practical knowledge as an interpretive framework through which they make sense of their classroom practices, which
in turn guide the teachers to reinterpret and reformulate their personal and practical knowledge. (p. 970)

Wenger (2009) suggests that professional communities play a significant role in shaping one’s identification. By focusing specifically on teacher’s education, Tsui (2007) also contends that the developmental trajectory of a teacher’s professional identity illustrates that a teacher’s membership in a professional community, historical and sociocultural contexts around a person, what other people and institutions expect from the person, and what a person perceives as his/her role as a teacher all influence the teacher’s identity formation.

**Teachers as Adult and Lifelong Learners in Professional Development**

In the field of professional development, researchers (e.g., Billett, 2001; Cranton & King, 2003; Smith, et al., 2003) draw our attention to understanding the process of professional development as adult learning. To analyze how professional development manifests itself through different types of adult learning, I turn to my own academic and professional experiences, and focus my research interest on teachers’ professional development. Through analyzing how teachers as adult learners conduct their professional learning within their local and global learning communities, I compare different learning types and explain why informal learning has emerged as an area of interest to scholars and teacher educators.

When viewing teachers as adult and lifelong learners and their professional development as adult education, the goal of adult education and professional development is regarded as change and growth so that teachers are empowered by opportunities and strategies (Lawler, 2003). Gregson and Sturko (2007) pointed out that having teachers respond to various educational reforms has been a global issue. In the USA, the changes include reforms in Common Core Curriculum that require more authentic activities and assessment, integrating state standards into the curricula, preparing students for standardized assessment, and other innovations (Gregson & Sturko, 2007). In China,
the educational system has been criticized by parents, students, and government officials for focusing too much on rote learning. China's recent educational reform has put tremendous pressure on teachers and teacher's professional development program to foster students’ creativity and to place less emphasis on exams (Waldermeir, 2013). These complex changes require teachers to rethink their beliefs about good teaching and practices in the classroom. Both domestic and overseas professional development programs provide teachers with opportunities to investigate, experiment, reflect, discuss, and collaborate with other teachers (Gregson & Sturko, 2007).

Since the 1970s, educational exchanges and study-abroad programs involving teachers from the USA to China and from China to the USA have grown exponentially as a result of China's normalizing diplomatic relations with the United States (Laughlin, 2008; Li, 2005, & Reed, 1988). This new era of relations opened up opportunities for teachers interested in experiencing overseas cultures and learning how teachers in other countries teach. Such opportunities help teachers to grow personally and professionally (Li, 2005 & Reed, 1988).

Researchers (e.g., Tucker & Cistone, 1991; & Wilson, 1982) recommended that teachers should be educated in a way that would raise the level of their awareness of what is happening to mankind in the world’s contemporary circumstances. This means that those who are becoming teachers should have a chance to cross over, through their studies, and their personal experience, to a culture different from their own. Through entering other lives, they begin to enter a wider world, and so provide them with something to which to compare themselves to, and by comparison to learn to look at people in a broader perspective. However, “a multifaceted rationale for cross-cultural experience, or more precisely cross-cultural experiential learning as a critical part of teachers’ education” (Wilson, 1982, p. 182) has not been well developed. Although there has been an intuitive acceptance of the worth of cross-cultural experience to individuals, few connections have
been made between the teachers’ cross-cultural experience and how that influences his or her later experience as a teacher.

The process of going through cultural, social, and psychological adjustment can be painful. It is not hard to imagine that teachers’ learning and professional development related to this process could challenge their identities as teachers. Olsen (2008) explained that ‘teacher identity’ is a useful research frame because “it treats teachers as whole persons in and across social contexts who continually reconstruct their views of themselves in relation to others, workplace characteristics, professional purposes, and cultures of teaching” (p. 5). In a cross-cultural setting, teachers not only needed to cope with tensions and stress from culture shock, they also have to fulfill their mission of coming or going to a foreign country to gain professional development. Morgan (2004) argued that “how a teacher’s experiences of identity both shape and are shaped by the processes of instruction and interaction that evolve within specific sites” (e.g., Amin, 1999; Duff & Uchida, 1997, as cited in Morgan, 2004, p. 173). Morgan (2004) supported this view stating that teachers’ identities regulate and ascribe social and cultural values to “all forms of their activities within particular institutions” (p. 173).

Among issues and influences on teachers’ professional development, teachers as adult and lifelong learners and their professional development through adult education have been frequently discussed in the literature (Billett, 2001; Cranton, 1996; Cranton & King, 2003; King & Lawler, 2003; Lawler, 2003a, 2003b; Smith, et al., 2003). According to Merriam and Brockett (2007) (as cited in Kasworm, Rose, & Rose-Gordon, 2010), adult and continuing education can be defined as “[activities] designed for the purpose of bringing about learning among those whose age, social roles, or self-perception, define them as adults” (p.1). This definition reminds us that adults learn differently according to their learning needs, objectives, intentions, and social-cultural backgrounds.
These factors can shape teachers’ perspectives, needs, and motivation in learning (Gregson, & Sturko, 2007; Lawler, 2003b). For example, in Li’s study (2012) which compared the Chinese and American cultural foundations of adult learning, she discovered that culture plays an important role in shaping adult learners’ perspectives toward learning and their learning styles. The top twenty learning-related terms that were nominated and rated by participants in Li’s study show that American adult learners value learning as a critical thinking and discovering process based on practical application and communication, but only one such term appears on the Chinese list (see Table 3-1). Chinese adults tend to learn from authorities and experts (e.g., by using Confucius’ indoctrination as their learning guidance) or reading extensively, and they believe learning is a painstaking and constant process. Chinese learners also regard studying abroad as a great learning opportunity, but their American counterparts value library knowledge more.

Table 3-1. Top twenty learning-related terms nominated and rated by USA and Chinese Adults (Li, 2012, p. 80)

<table>
<thead>
<tr>
<th>Top 20</th>
<th>USA Adults</th>
<th>Chinese Adults</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Study</td>
<td>Keep on learning as long as you live (lifelong learning) (活到老，学到老)</td>
</tr>
<tr>
<td>2</td>
<td>Thinking</td>
<td>Read extensively (博览群书)</td>
</tr>
<tr>
<td>3</td>
<td>Teaching</td>
<td>Learn assiduously (刻苦学习)</td>
</tr>
<tr>
<td>4</td>
<td>School</td>
<td>Read books (看书)</td>
</tr>
<tr>
<td>5</td>
<td>Education</td>
<td>Diligent (in one’s learning) (勤奋（学习）)</td>
</tr>
<tr>
<td>6</td>
<td>Reading</td>
<td>Extensive knowledge and multifaceted ability (博学多才)</td>
</tr>
<tr>
<td>7</td>
<td>Teacher</td>
<td>Study (读书)</td>
</tr>
<tr>
<td>8</td>
<td>Books</td>
<td>Make a firm resolution to study (发奋读书)</td>
</tr>
<tr>
<td>9</td>
<td>Critical thinking</td>
<td>Study as if thirsting or hungering (如饥似渴地学习)</td>
</tr>
<tr>
<td>10</td>
<td>Brain</td>
<td>There is no boundary to learning (学无止境)</td>
</tr>
<tr>
<td>11</td>
<td>Discovery</td>
<td>Concentrate on learning (专心学习)</td>
</tr>
</tbody>
</table>
When two groups of adult learners with different cultural backgrounds cross borders to interact together, it is not hard to imagine the clashes and negotiation they need to go through in order to involve themselves in a global learning community. Therefore, how to facilitate these learners in such settings can be a challenging but interesting issue to examine.

In terms of facilitating adults to learn, Knowles and his colleagues (2005) listed several characteristics of adult learners. Firstly, adults should learn what they need to know. In this matter, teachers must be voluntarily involved in planning their own professional learning and are responsible for their own learning according to what they think they should learn. There should be a match between teachers’ learning needs and the school’s requirement and expectation (Hawley & Valli, 1999). If teachers have no control over the content or delivery of learning, this situation will turn them into passive learners (Smaller, 2005). Secondly, Knowles, et al. (2005) proposed that adults should learn in order to solve problems. Teachers will be motivated to learn if they can immediately apply the new knowledge to their work. Thirdly, adult learners respond more to...
internal than external motivation (Knowles et al., 2005). Payment incentives or job titles might be powerful in encouraging teachers’ learning, but job satisfaction, the willingness and desire to improve, or increased confidence and self-esteem are more important to teachers (Gregson, & Sturko).

When informal adult learning becomes more acceptable in teacher education (Hager & Halliday, 2007; Kolenc, 2010; Printy, 2008; Shapiro, 2003), facilitating teachers’ learning in a professional community can greatly motivate teachers and meet their needs as adult learners (Wlodkowski, 2003). Hord and Tobia (2012) suggested that teachers should work as collaborative workers in which they work together and serve “as a bridge to the possibility of their participation in professional learning communities” (p. 20). Five dimensions of teachers’ professional learning community are analyzed by Hord (2004) including 1) supportive and shared leadership, 2) shared values and vision, 3) intentional collective learning and application of learning, 4) supportive conditions, and 5) shared practice. These dimensions are interrelated and influence one another and have been proven to be effective in teachers’ learning (Hord & Tobia, 2012).

The concept of professional learning community (DuFour, et al., 2006; Hord & Tobia, 2012) can be further understood in a more detailed and theoretical way through Wenger’s theory of community of practice (CoP) (1998). CoP has been influential in the professional learning fields as it systematically analyzes how learning happens in social settings. In a later section on concepts and theories related to professional development, I will explain specifically how I utilize Wenger’s CoP and his social learning theory as a theoretical scaffold to develop the conceptual framework related to teachers’ professional learning.

**Different Types of Teacher Learning**
Teachers’ learning proceeds throughout the teacher preparation stage to their teaching careers. Researchers utilized this process to understand how teachers obtain and improve their capability to teach (Schwille, Dembélé, & Schubert, 2007). Day (1999) suggests that teachers’ PD includes different learning activities and it is a lifelong work that every teacher should engage in. Researchers discovered that teachers’ learning experiences can consist of three types of learning activities—formal, non-formal, and informal (Richter, et al., 2011; Smaller, 2005; Melber & Cox-Petersen, 2005; OECD, 2005, 2009; Paine & Fang, 2006). Figure 3-4 provides a concept map of three types of learning that are related to teachers’ professional development. The categorization of formal, non-formal, and informal learning might not always be precise since these learning activities can be mixed and interrelated (Lave, 2011).

*Figure 3-4. Concept Map of Teachers’ Different Ways of Learning*
Formal Learning

Formal learning represents a main component of the “training model” (Little, 1993, p. 129). It “is always organized and structured, and has learning objectives. From the learner’s standpoint, it is always intentional—that is, the learner’s explicit objective is to gain knowledge, skills and/or competences” (OECD, n.d.). Pre-service teachers are usually trained as professionals in this way (OECD, 2005). In the USA, pre-service teachers can receive a teaching certificate by attending traditional teacher education programs for four to five years. During this time, they study education courses and do a teaching internship toward the end of their programs (Tanase & Leavitt, 2011). Compared with American pre-service teachers, student teachers in China are required to pass a national entrance examination before being admitted into a four-year normal university (Liu & Qi,
2006; Zhu & Han, 2006). They study in a subject department (e.g., the department of chemistry) by taking courses related to subject teaching methodology, psychology, and pedagogy. Then they attend a teaching internship for three months (Tanase & Leavitt, 2011). American teacher program graduates are only licensed to teach in the state and their credentials are not automatically recognized in other states of the USA. Unlike their American counterparts, Chinese student teachers’ teaching qualifications are recognized not only in their province (equivalent to a state) but also nationwide (Liu & Qi, 2006).

Another type of formal learning for novice teachers is induction programs. Many countries offer mandatory teacher induction programs to support and guide new teachers which can range from seven months to two years (OECD, 2005). The induction program varies by school districts in the USA (most school district offer one mentor) (OECD, 2005). In China, the induction program is also mandatory in which novice teachers are required to participate in formal training courses (e.g., curriculum training during the summer vacation (Jiang, 2014)), and they are also matched with experienced mentors at work (Ballard, 2011).

**Non-Formal Learning**

In many studies, researchers did not separate non-formal learning from formal learning—both of them are called “the traditional view” (Lieberman, 1995, p. 591). As Figure 1 shows, teachers’ non-formal learning could happen at conferences, workshops, seminars, or through mentorship with experienced teachers. It is hard to separate formal learning from non-formal learning because they both involve organized learning, and the only difference is that one is a certification-based approach while the other is not necessarily so.

Many countries require their in-service teachers to attend such organized non-formal activities regularly. According to Hill (2007), teachers in most American states need to complete
120 PD hours per five-year period. In China, teachers need more PD hours ranging from 240 to 540 hours per five-year period (China Shanghai Government Report, 2010). There are many critics of this kind of “one-size-for-all” training for teachers. Little (1993) claimed that this approach “requires little in the way of intellectual struggle or emotional engagement, and takes only superficial account of teachers’ histories or circumstances” (p. 22). Wilson and Berne (1999) also argued that “teachers are loathe to participate in … workshops offered by outside ‘experts’ who know (and care) little about the particular and specific contexts of a given school” (p. 197).

**Informal Learning**

Livingstone (1999) defined informal learning as “any activity involving the pursuit of understanding, knowledge or skill which occurs outside the curricula of institutions providing educational programs, courses, or workshops” (p. 3). Researchers (e.g., Desimone, 2009; Shapiro, 2003; Smaller, 2005) stated that informal learning has emerged as an area of interest to scholars and researchers. For example, Smaller’s study (2005) showed that in a nationwide study in Canada a majority of elementary and secondary school teachers were highly engaged in ongoing learning through intentioned and spontaneous informal activities. Smaller (2005) stated that through informal learning teachers are not just recipients of knowledge but they independently plan and organize their learning. As Figure 1 illustrates, informal learning can take place in four distinct locations—workplace, home, community, and other places (e.g., recreational activities such as doing sports or visiting museums) (Smaller, 2005).

This study on exchange teachers’ informal learning is influenced by teachers’ more and more frequent communication with different communities. For example, teachers’ informal learning can be extended through travelling abroad (Cushner, 2004; Li, 2005). In a pilot study I conducted, during discussions with Chinese teachers about their professional learning in the USA, many were
intent on describing their stories distinctively related to their informal learning experiences, such as
classroom observation or social interaction with local teachers. The primary data from this pilot
study strongly suggest that teachers’ informal learning activities play an important role in their
overseas PD experiences.

Although a great body of literature suggests that teachers’ informal learning is a vital part of
teachers’ professional lives, due to the lack of systematic study, more research is needed to develop
a complete understanding of teachers’ informal learning in various contexts. This discovery fostered
my strong interest in looking at teachers’ PDE through informal learning, especially under the
influence of globalization on teaching as a profession. I was motivated to discover what are
considered to be the best ways to stimulate individual teachers to invest in their own lifelong
learning and, more importantly, to see and reflect on themselves as a part of a bigger global teacher
community with different cultural norms.

**Teachers’ Lifelong Learning as a Global Trend**

In a time of globalization, the roles and functions of schools are changing, and so, what is
expected and required of teachers (OECD, 2009). Teachers play a critical role in making
educational changes and helping each nation create and maintain its competitiveness (Maguire,
2010). In China, for example, recent reform is designed to move Chinese education toward
decentralization and learner-centered methods with a focus on a “quality-oriented” rather than a
“test-oriented” system (Preus, 2007). Pre-service and in-service teacher education in China tends to
depend on both local and global knowledge (Paine & Fang, 2006). In the USA, the reforms move in
an opposite direction. The policy, *No Child Left Behind (NCLB)*, has been leading American
schools to centralization and a more test-oriented system, and the requirement of professional
preparation for teacher certification has decreased but has placed more emphasis on subject matter
Researchers (e.g., Darling-Hammond, 2010; Eslinger, 2014; Whitenack & Swanson, 2013) discovered that NCLB has caused teacher stress, burnout, and attrition because of high-stakes testing, curriculum requirements, and scripted pedagogy.

As can be seen from the examples of educational reforms in China and USA, teachers have to tackle demanding challenges and must be constantly developing their competence, knowledge, and skills. Since educational improvement is based on students’ achievement (Cohen & Hill, 2000), teachers in different countries face the same challenge to raise well-prepared and knowledgeable future employees “who can synthesize information, identify and solve problems, create the next innovations in their given fields, work in teams, and make positive contributions to civil society” (Sclafani, 2011, p. 1). However, teachers’ original four-year college education cannot provide them with all the competence, knowledge, and skills that they will need throughout their professional lives (Day, 1999; Kolenc, 2010; OECD, 2005). In order to maintain the high standard of teaching and the high-quality teacher workforce, educational leaders and policy makers who seek to offer teachers with in-service professional development reported (OECD, 2009):

> Effective professional development is on-going, includes training, practice and feedback, and provides adequate time and follow-up support. Successful programs involve teachers in learning activities that are similar to ones they will use with their students, and encourage the development of teachers’ learning communities. (p. 49)

These views assume that professional learning is not a short-term intervention but a long-term investment (Gregson & Sturko, 2007; Shapiro, 2003), and such lifelong learning is regarded as an important way to increase teacher quality and enhance their identities (Beijaard, Verloop, & Vermunt, 2000; de Vries, et al., 2013). Longworth and Davies (1996) defined “lifelong learning” as

> … the development of human potential through a continuously supportive process which stimulates and empowers individuals to acquire all the knowledge, values, skills, and understanding they will require throughout their lifetimes and to apply them with confidence, creativity and enjoyment in all roles, circumstances, and
environments. (p. 22)

This definition reveals several basic but important characteristics of lifelong learning, such as the emphasis on the human potential of realizing lifelong learning, required effort to learn, multiple ways of learning, and the importance of offering sustainable support for learning (Maehl, 2002).

Since lifelong learning is so important for teachers’ improvement of knowledge and skills, a key question must be asked: What kind of teacher knowledge is the most important and necessary in the 21st century? Researchers (e.g., Mitchell & Laski, 2013; Pierson, et al., 2009) in technology and teacher education have spoken broadly about the benefit of technology in teachers’ learning. Indeed, due to students’ extensive use of technology, they are fundamentally different from students in the past. So digital and information literacy has become a skill that is necessary and important for teachers (Kereluik, et al., 2013). Following this train of thought, teacher education has focused on learning through technology and been appraised for its effectiveness. However, when we take a look at the integral knowledge system that a teacher should have (Kereluik, et al., 2013; see Figure 3-5), the aspect of digital/information literacy is just one small subcategory.

_Figure 3-5. The 21st Century Learning Frameworks (Kereluik, et al., 2013, p. 130)_
This framework is based on Kereluik and his colleagues’ work (2013) on identifying common themes and knowledge from fifteen reports, books, and articles that described the knowledge that was stated as integral and important for success in the 21st century. As Figure 1 illustrates, the integral knowledge system includes foundational knowledge (e.g., digital/information technology, core content knowledge, and cross-disciplinary knowledge), humanistic knowledge (e.g., life/job skills, ethical/emotional awareness, and cultural competence, and meta-knowledge (e.g., creativity and innovation, problem solving and critical thinking, and communication and collaboration). When teacher educators focus on fostering teachers’ learning through technology, certain aspects of knowledge—for example, the development of humanistic skill that requires face-to-face social interaction—could be fatally missed. Kereluik et al. (2013) reminded us that “technological advances of the 21st century have brought us closer together and at the same time further apart” (p. 133). Therefore, other than using technology in learning, teachers must be provided with more first-hand and real life experiences through their on-site learning at their workplace and in their communities so that their integral knowledge system can be enhanced.
On this view, China has set up a good model for facilitating teachers’ lifelong learning at work. For example, in Shandong Province, novice teachers are not only supported in visits to their mentors’ classes to learn and observe, but also they have opportunities to travel abroad for short-term visits or exchanges to schools in different countries (Ballard, 2011). By drawing on “both Chinese classic philosophy of teaching/learning and international experiences” (Paine & Fang, 2006, p. 287), teacher education in China has set out on an entirely new journey. The USA also has a long history of valuing teachers’ international learning experiences, such as through the Fulbright Teacher Exchange Program. By focusing on teachers’ first-hand experiences and practice through international travel and exchange, this kind of teacher education program helps teachers escape from the limitation of virtual/local contexts and move them to a bigger world (Li, 2005).

**Learning in Different Cultural Contexts**

While teachers are learning in a global community, they not only need to go through the process of adjusting to a foreign culture, but they also must face another important adjustment process in their professional lives: the differences in learning and teaching in a different country compared with their home country (Zhu, 2007). As Mascolo (2013) has claimed that “We are not ordinarily aware of the role of culture in creating who we are until we have occasion to confront the other” (p. 253). Much literature suggests that students from different cultural backgrounds have different learning styles and habits according to their cultural influences (Brookfield, 2011; Givvin, et. al, 2005; Hill & Torres, 2010; Hofer, 2008; Norenzayan, et. al, 2002; & Shiraev & Levy, 2015).

**A Moral-Cultivation Perspective**

According to the Chinese cross-culture expert Li (2003 & 2012), the Western learning tradition is organized around principles such as “knowing the world”, “the individual mind”, “the certainty of knowledge”, and “the examined life.” Mascolo (2013) also commented that “prizing the
rational individual mind, the Socratic ideal casts the learner in the role of inherently curious inquisitor, interrogating nature in order to master it” (p. 253). By contrast, Li (2003 & 2012) analyzed the Chinese ways of learning as influenced by Confucian philosophy, which has dominated the Chinese ways of thinking and doing for more than 2500 years. Li (2003 & 2012) concluded the Chinese traditions of learning are oriented by the “moral self-perfection”, “learning as a moral virtue”, and “the primacy of action over thought.”

Unlike the Western values which regard learning “as a kind of practical activity or means to attain particular outcomes” (Mascolo, 2013, p. 253), learning is central to the process of moral self-cultivation in Chinese traditions. Mascolo (2013) offers a further explanation:

Moral self-perfection refers to the effortful, life-long process of continuously working to cultivate moral virtues in the self. This occurs within a hierarchical society in which parents commit to caring for and protecting their children, while, in return, children show filial piety (the virtue of obedience) to parents, ancestors and moral traditions. Children express filial piety by cultivating behavior that brings honor to parents, teachers, family, in-groups, and nation. The highest virtue consists of the [Ren] (human goodness or benevolence). The [Ren] person commits himself to the life-long process of becoming the most genuine, humane, and sincere person possible. (p. 253)

How do Chinese and Western parents and teachers perceive learning in different cultural contexts? Li (2012) examined the content of the discourse used by European–American and Taiwanese parents when discussing success and failure about their children. When analyzing the intellectual aspects of learning, European–American parents tended to discuss “inner mental origins of learning” whereas Taiwanese parents focus on “virtue-based origins of learning.” When explaining the emotional aspects of learning, European–American parents mentioned “fun”, “intrinsic interest” and “pride”; by contrast, Taiwanese parents prefer the need to persevere through the hard work to a future success.

Chinese teachers teach students to foster “(a) a sense of modesty and humility about accomplishments, (b) gratitude to and deep respect for parents and teachers for their role in
fostering success, and (c) a celebratory attitude toward virtuous and hardworking peers” (Mascolo, 2013, p. 253). Failing to cultivate such virtues causes a sense of familial shame. In contrast, the shame concept is not the same in the Western context where “shame reflects the personal failure of the self” (Mascolo, 2013, p. 253). The Confucian understanding of shame includes “nagging conscience, therefore a discretional capacity for one to recognize his own wrongdoing” (Li, 2012, p. 40). In Chinese culture, being shameful is the impetus to push one to become a better self.

Mascolo (2013) concluded that “Chinese students outperform American students because they are socialized to identify with a very different conception of what it means to be a person” (p. 254). In Chinese society, people must be perfected through the ongoing cultivation and improvement of moral virtues (ren, filial piety, learning, modesty, effort, perseverance, celebration of achievement, and so on) (Li, 2003 & 2012; Liu, 2014; Zhu, 2007). However, American people value the primacy of individual, which involves independence, self-expression, and the pursuit of happiness (Hofstede, 1999& 2011; Li, 2003 & 2012). Therefore, for American children, learning is not a moral “must.” Damon (2008) claimed that American students do not regard learning as a channel for fostering perfecting characters. Mascolo (2013) further added to this point:

… [American students] tend to view learning as a practical activity performed to attain more discrete, socially sanctioned outcomes (e.g., grades, credentials, jobs, income, status, etc.). This is, perhaps, why it is so difficult to motivate deep learning in American students. We learn in order to get the prize; we do not approach learning as an endeavor to cultivate a worthy self (p. 254).

Mascolo’s (2013) discussion might not be completely accurate. When China is rapidly changing as it adjusts to an increasingly global world and to the influence of the Western countries, the face of Chinese culture is changing as well. Zhu (2007) described that with the “unquestioning acceptance of Westernization started within businesses in China”, the “old China” values have begun to erode (p. 29). The “Open Market” policy has encouraged the Chinese people to think of how personal
achievement can allow them to fulfil personal desire which often connects to the purchase of consumption (Zhu, 2007). The changing of Chinese values inevitably influences how Chinese teachers and students think of learning and the way how to learn. But, fundamentally, Chinese negative aspects [of schooling] that Westerners often criticize have not changed: large class-size, a standardized test and curriculum, teacher-centered learning, and so on. Also, the cultivation of moral perfection is not all new to Western people. The Aristotelian concept of happiness is the eventual goal of human activities. Therefore, the Chinese notion of self-cultivation and the Western concept of self-improvement cannot be simply dichotomized (Mascolo, 2013).

**A Confucian–Socratic Framework**

Many studies have utilized a Confucian–Socratic framework to discuss culture’s influence on academic learning (Nisbett, 2010; Nisbett, et. al, 2001; Peng, & Nisbett, 1999; Tweed & Lehman, 2002; Tweed, White, & Lehman, 2004). Tweed and Lehman (2002) argued that, although learning is culturally influenced, such influences are underappreciated by teachers and students. Tweed & Lehman (2002) have suggested that in this Confucian–Socratic framework Socratic ways of learning emphasize the “tendency of questions”, “tendency to evaluate”, “esteem for self-generated knowledge”, “focus on error to evoke doubts”, and “search for knowledge, not true belief”, whereas in a Confucian way, people value “effortful learning”, “behavioral reform”, “pragmatic learning”, “acquisition of essential knowledge”, and “respectful learning” (pp. 90-92).

Influenced by this framework, most research comparing culturally-Chinese and culturally-Western learners examined deep versus surface learning. In the former, students try to understand the issue or try to infer the main meaning of the argument; in the latter, students try to use memorization as the main learning tool (Marton & Salijo, 1976). Many western researchers believe that Chinese students take a shallow approach to learning instead of thinking deeply (Barker, et al.,
1991; Samuelowicz, 1987). However, Westerners often misperceive Chinese ways of learning. Chinese students “often use memorization not as an end in itself but as a path to understanding” (Tweed & Lehman, 2002), and they often combine strategies for rote learning with skills in understanding (Marton, Dall’Alba, & Kun; 1996; Li, 2003 & 2012; Pratt & Wong, 1999).

Tweed and Lehman (2002) summarized the Confucian-Socratic framework from both a modern and ancient views:

In the modern context, Confucian-oriented learning as defined within our framework involves effort-focused conceptions of learning, pragmatic orientations to learning, and acceptance of behavioral reform as an academic goal. Socratic-oriented learning as defined within our framework involves overt and private questioning, expression of personal hypotheses, and a desire for self-directed tasks. In the ancient world, examples of Socratic and Confucian learning could be seen in both the East and the West. For example, Aristotle preached the value of acquiring the fundamentals. Likewise, in the modern world, Socratic and Confucian ideals for learning can be seen in both the East and the West. (p. 93)

Although culture casts a great influence on learning and teaching, Tweed and Lehman (2002) also pointed out that “any framework, such as our Confucian–Socratic one, that describes cultural differences inevitably must oversimplify in some ways the rich cultural interplay” (p. 89).

**The Related Literature on Methodology**

Most existing literature on teacher professional development focuses on narrative inquiry as a qualitative research approach to explore teachers’ stories and to understand their experiences. These researchers (e.g., Alsup, 2006; Beijaard et al., 2000, 2004; Day et al. 2006; Connelly & Clandinin, 1999) believe that, because teachers live their lives as stories, understanding teachers’ development is best suited to a storied approach. The significance of narrative is outlined by Johnson and Golombek (2002):

We believe narrative inquiry, conducted by teachers individually or collaboratively, tells the stories of teachers’ professional development within their own professional worlds. Such inquiry is driven by teachers’ inner desire to understand that experience, to reconcile what is known with that which is hidden, to confirm and affirm, and to construct and reconstruct
understanding of themselves as teachers and of their own teaching. (p. 6)

Based on Dewey’s theory of experience, “narrative inquiry is a way of understanding experience” (Clandinin & Connelly, 2000, p. 20). Through telling and living, retelling and reliving the stories of experiences, narrative inquirers “reorganize, reconstruct, and transform their life experiences” (Dewey, 1916, p. 18).

Teachers’ stories and talk about their experiences of professional development, such as identity negotiation and reconstruction, are crucial to their beliefs, values, and practices which guide their performance inside and outside of the classroom (Day et al., 2006). Much literature on teacher development emphasizes the importance of identity development (e.g., Freese, 2006; Hoban, 2007; Korthagen, et al., 2001; Olsen, 2008b; Sachs, 2005) by using narrative approaches. This can be seen not only in qualitative research but in studies using mixed methods. Although some researchers (e.g., Day, Stobart, Sammons, & Kington, 2006) employed larger-scale quantitative methods to study teachers’ development, they cannot give up the qualitative analysis of teachers’ narratives as an important part of understanding teachers’ professional growth. Researchers (e.g., Clandinin et al., 2006; Coldron & Smith, 1999) who focused on teacher narratives and storytelling have developed a key understanding of the features of teachers’ professional learning through which their identity is (re)constructed.

Summary

This chapter focused on discussing the literature on teachers as adult and lifelong learners at a time of globalization, and illustrated the importance of exploring teacher’s identity formation as a lens to study teacher’s professional development. The clarification of key terms and concepts, such as, “culture shock”, “teacher professional development”, “teacher identity”, and “teacher identity construction”, and so on, have provided me with the criteria to understand similar phenomena when
conducting this research. In addition, the discussion of teacher’s learning types, teachers’ global learning trends, and how learning varies in different contexts is crucial to helping me conceptualize the status quos of teachers’ professional development in a global community. More specifically, the comparison between American and Chinese adults has strengthened my understanding of how adults learn similarly and differently across borders. And last, the introduction of related literature on methodology in the field of teacher’s professional development provides a solid foundation to guide me to design and plan this present study.
Chapter 4
Research Design and Research Methods

This chapter begins with a description of the methodological approach that most researchers employ in the field of teachers’ professional development. Then I introduce the research questions followed by a discussion of research design. In addition, this chapter introduces the research sampling, data collection, data analysis procedures, and validity issues.

Research Questions

This comparative case study focuses on teachers’ professional development and how their international learning experiences influenced their identity (re)shaping in a global arena. When teachers left a familiar working and living environment for a foreign country in order to learn in a different context and achieve their goal of international education, they inevitably encountered unfamiliarity, conflict, and many different kinds of dissonances (Cushner, 2004; Yan, 2008a). My own observations of exchange teachers at my previous workplace echoes this phenomenon. I saw the tensions and conflicts that teachers experienced, which brought them to doubt who they were as teachers and how to teach. These observations prompted me to explore the relationship between exchange teachers’ PDE and their identity formation. In the course of a pilot study I conducted with exchange teachers, I became more interested in discovering what specific challenges and troubles exchange teachers encountered so that possible solutions might help these teachers better adjust in cross-cultural educational settings. What is more, since teaching is a learning profession (Darling-Hammond, & Sykes, 1999; Guskey, 2000), I have been intrigued to discover what kind of teacher knowledge is the most important and necessary at a time of globalization. Through comparing and contrasting the PDE of American and Chinese teachers, it was my hope to achieve this research purpose. Therefore, this study addressed the following three research questions:
1) What is the relationship between exchange teachers’ PDE and their global teacher identity?

2) What are the tensions and conflicts that exchange teachers face in foreign countries and how is their PDE influenced by the tensions and conflicts?

3) What are the differences and similarities between American and Chinese teachers’ PDE in foreign countries?

**Researcher Design**

This case study is a qualitative research study which is based on a cross-cultural, comparative, grounded theory approach. The strength of the qualitative method is its ability to provide detailed information regarding a small group of people (Patton, 2002). The aim of qualitative research is to understand the ways in which people create and give significance to occurrences they have experienced in their lives (Patton, 2002; Rossman & Rallis, 2003). This research employs this tradition because it resonates with my goals to privilege individual participant experiences through which I can listen to their personal stories.

I concur with Bryant and Charmaz’s (2007) comments on qualitative research: “No approach is a more preferred or superior, but simply a different methodology, a distinct paradigm with its own principles and procedures for what constitutes valid research within this paradigm” (p. 266). Hence, researchers have to make perceptive decisions on their research design and choice.

In a qualitative study, the researcher is the key to a successful study. It is important for researchers to make their epistemological point of view and preferences clear (Baptiste, 2014). So I started with an in-depth exploration on myself as a researcher, such as my outlook on life, philosophical assumptions, ways of learning, and belief system about how learning happens. These considerations are crucial for understanding her choice of research approach and analysis strategies.
Through the literature review and self-reflection, I discovered that my deep understanding about learning is rooted in social constructivism (Creswell, 2013), which echoes with my experience of how I have learned during the past ten years of travelling and living in different countries. Through interacting with different people from different social and cultural backgrounds, I constantly compared my previous experience with new information and knowledge so that my world views were gradually (re)constructed and (re)shaped. More specifically, through my international learning journey, I started to reflect on my previous “banking ways of teaching and learning” (Freire, 1970), and I had to struggle to redefine my knowledge system and explore who I was as a learner and a teacher. Having overseas learning experiences did not guarantee that I would become a perfect teacher, but I was given a chance to learn, compare, and contrast so that I could form my own ways of understanding the world. That is why I can never return to teaching in the traditional manner by simply delivering knowledge to students. That also explains why I have become an advocate for teachers’ cross-cultural and experiential learning. I firmly believe that experiencing diversity and difference can greatly enhance teachers’ reflection on their teaching practice, and help them form their own understanding of what a teacher is and how learning and teaching should happen.

When I reflected on my ways of learning and teaching, my research method choice became clearer. Most literature on teachers’ development relies on narrative inquiry, but I found that using a qualitative case study with a grounded-theory data analysis approach to understand narrative data better completed my research purpose. In this study, teachers were encouraged to discover their own version of the truth as influenced by their social and cultural backgrounds. Since they came up with subjective data of their experiences, I was led to look for the complexity of their views rather than narrowing them into a few categories or ideas.
By utilizing a qualitative approach, rich narrative data with detail and insight into participants’ experiences of the world were discovered, which may resonate with the reader’s experience. McMillan and Schumacher (2001) state: “Qualitative techniques collect data primarily in the form of words rather than numbers. The study provided a detailed narrative description, analysis, and interpretation of phenomena” (p. 40).

Focus group interviews and one-on-one interviews consist of oral questions asked by interviewers and oral responses by the interviewees. Fontana and Frey (1994) state that “the interview is one of the most common and most powerful ways we use to try to understand our fellow human beings” (p. 361). Gall, Gall, and Borg (2003) underline this value of this approach:

Skilled interviewers can follow up a respondent’s answers to obtain more information and clarify vague statements. They also can build up trust and rapport with respondents, thus making it possible to obtain information that the individual probably would not reveal by any other data-collection method. (p. 247)

Qualitative researchers are finding that interaction among participants stimulates them to express feelings, perspectives, and thoughts, and it also help interviewees take major responsibility for stating their views and drawing out the understandings of others in the group (Gall, Gall, & Borg, 2003). Focus group interviews were used in this research. Given that the research questions were related to conflict and stress, I feared that interviewees would be reluctant to share their perspectives with other interviewees in the group discussion. In order to obtain more personal experience related to cross-cultural issues, the researcher also carried out one-on-one interviews. In the one-on-one interviews, the interviewer collected data from individuals who had interest and related experience and, so, would provide richer data for this research. The interview utilized a predetermined sequence and wording of the same set of questions that were asked of each respondent in order to maximize the emergence of consistent themes. In the interviews, besides
asking a series of structured questions, I also probed more deeply using follow-up questions to obtain additional information.

This qualitative research design process is illustrated in the Figure 4-1: Z-Model (Maxwell, 2012).

Figure 4-1. Z-Model (Maxwell, 2012)

The above figure assisted the research process of this comparative case study. Creswell (1998) defined case study research as “a qualitative approach in which the investigator explores a
bounded system (a case) or multiple bounded systems (cases) over time, through detailed, in-depth data collection involving multiple sources of information” (p. 73). Stake (1995) further highlighted the “uniqueness and complexity of a case, its embeddedness and interaction with its contexts” (p. 16). By conducting a case study, it allowed me to collect data by multiple means to understand teachers’ professional learning experiences in defined contexts. Eisemhardt (1989) agreed and suggested that “case studies typically combine data collection methods such as archives, interviews, questionnaires, and observations” (p. 534). Eisemhardt (1989) expanded on the value of the case study approach:

The case study is a research strategy which focuses on understanding the dynamics present within single settings....[C]ase studies can be used to accomplish various aims: to provide description (Kidder, 1982), test theory (Pinfield, 1986; Anderson, 1983), or generate theory (e.g., Gersick, 1988; Harris & Sutton, 1986). (pp. 534-535).

The interest of this study is for the first purpose—to understand and provide description of exchange teachers’ international professional learning experience.

Depending on the stated purpose of the research, Stake (1995) divided the types of case studies in a more conceptual way: 1) intrinsic case study; 2) instrumental case study; and 3) collective case study. For the intrinsic case, Stake (1995) explained that “we are interested in [the case study], not because of studying it we learn about other cases or about some general problem, but because we need to learn about that particular case” (p. 3). About instrumental case study, Stake (1995) explained that a “case study...is instrumental to accomplishing something other than understanding this particular [individual]” (p. 3). A collective case study involves multiple coordinated instrumental cases in order to offer deeper understandings about general questions (Stake, 1995).

This case study specifically focused on an international exchange program between a
Chinese high school and an American high school, and my interest was to understand and explore the uniqueness and complexities of each case. In addition, this study relied on continuous comparison of data collected between two countries. Therefore, the intrinsic case study was chosen for my research.

**Site Selection**

Teacher exchanges have become a common practice in the era of globalization (Reed, 1988; Laughlin, 2008; Li, 2005) of which the most widely recognized and prestigious international exchange program in the world is the US Fulbright Teacher Exchange Program. Different from the Fulbright program which involves US government-organized, country-based activities, this study focuses on a non-governmental, school-to-school teacher exchange program at a civic level. But its goals are similar to the Fulbright teachers exchange in that it aims to improve cultural understanding, learning from different school systems, and teacher professional development.

This study specifically examines a China-USA teacher exchange program at Waterfront High School (pseudonym) in a large northeastern city in the USA. This program had been running for nine years since 2007. I worked there as a Chinese language teacher from 2009 to 2011. The program was initiated by Waterfront High School (WHS) administrators in 2007 and it has been funded by a grant from the Freeman Education Foundation co-sponsored by WHS and its sister school, Yang High School (YHS) in China. Every fall semester since 2007, a group of Chinese teachers has come to WHS, and stayed for three to four months. During their stay, they observe classes and participate in WHS activities and community events. As part of the exchange, American teachers from WHS visit her sister school, YHS, in China from April to July. Participants in my study were chosen from this international teacher exchange program.

**Selection of Participants**
After receiving a formal permission from the Independent Review Board (IRB) at the Pennsylvania State University, I proceeded with the recruitment and sampling strategy. Purposeful sampling is a technique commonly used in qualitative research for the identification and selection of information-rich cases (Patton 2002), which involves identifying and selecting individuals or groups of individuals that are particularly knowledgeable about or experienced with a phenomenon of interest (Cresswell, 2013). By contrast, random sampling is led to “the generalizability of findings by minimizing the potential for bias in selection and to control for the potential influence of known and unknown confounders” (Palinkas, et al., 2015, p. 534). Because of the nature of this study, purposeful sampling strategy was used. All participants were attendees of the same international teacher exchange program although they did not necessarily attend the program at the same time. Exchange teachers who were chosen to participate in this study were invited to talk about their experiences and opinions in a relatively articulate, expressive, and reflective manner (Bernard, 2002; Spradley, 1979).

For the recruiting and sampling strategy, I first contacted the exchange teacher at YHS in China, Ms. Zhang (pseudonym), with whom I had worked before, and then started to recruit Chinese participants with her connections. She helped me talk with eleven colleagues. With my follow-up phone conversation, Skype meeting, and face-to-face talk, three of them were recruited for this study. Including Ms. Zhang, there were four Chinese participants in total. For the American side, I directly emailed my former employer, the coordinator of China-US teacher exchange program, Dr. Dolet (pseudonym), for her help in finding the email addresses of ten teachers at WHS. After a round of emails and phone calls, five of them were willing to participate in my study. Later, one of them withdrew because her job had changed. Therefore, four American teachers were involved in this study.
Through purposeful snowballing sampling, eight participants were involved in this study (Pseudonyms, see table 4-1). Four of them were American teachers who went to China and four of them were Chinese teachers who came to the USA. Two groups of participants (one American teacher group, and one Chinese teacher group; all of them had a master’s degree.) were selected. Each group contained 4 participants. Two sets of data were collected respectively from two groups of teachers. By comparing similarities and contrasting differences in the exchange teachers' PDE, I discussed the findings in terms of how they went through cross-cultural transition and if their professional development goals were met. Both informal and formal focused group interviews and individual interviews were utilized as the major data collection methods. Site visits was also included.

Table 4-1. Demographic profile of participants (Pseudonyms)

<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Age</th>
<th>Gender</th>
<th>Nationality</th>
<th>Subject of Teaching</th>
<th>Total years of Teaching</th>
<th>Time in the Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Jenny</td>
<td>53</td>
<td>Female</td>
<td>USA</td>
<td>Social Studies</td>
<td>25</td>
<td>04-07, 2010</td>
</tr>
<tr>
<td>2. Tanya</td>
<td>40</td>
<td>Female</td>
<td>USA</td>
<td>Chemistry</td>
<td>18</td>
<td>04-07, 2011</td>
</tr>
<tr>
<td>4. Rose</td>
<td>53</td>
<td>Female</td>
<td>USA</td>
<td>World History</td>
<td>27</td>
<td>04-07, 2015</td>
</tr>
<tr>
<td>5. Zhang</td>
<td>40</td>
<td>Female</td>
<td>China</td>
<td>English</td>
<td>15</td>
<td>08-12, 2010</td>
</tr>
<tr>
<td>6. Xing</td>
<td>38</td>
<td>Male</td>
<td>China</td>
<td>English</td>
<td>15</td>
<td>08-12, 2012</td>
</tr>
<tr>
<td>7. Li</td>
<td>36</td>
<td>Female</td>
<td>China</td>
<td>English</td>
<td>11</td>
<td>08-12, 2013</td>
</tr>
<tr>
<td>8. Qiao</td>
<td>34</td>
<td>Female</td>
<td>China</td>
<td>English</td>
<td>10</td>
<td>08-12, 2015</td>
</tr>
</tbody>
</table>

American Teacher: Jenny

Jenny is a social studies teacher with 25 years of work experience. She is strongly opinionated and talks very fast. She joined the exchange program because her classes have students from Asian
countries and she had always been fascinated by their languages and cultures. She was from a teacher family. Influenced by her mother, she had wanted to be a teacher since she was a little girl. She is against rote learning, and in her classes, she loves to use all sorts of different kinds of games and activities to engage students. She is also a guitar coach and badminton coach for two after-school programs.

**American Teacher: Tanya**

Tanya is 40 years old, and is a chemistry teacher. She had become a new mother before she left the US for the exchange program, so her experience in China was extremely difficult at the very beginning because she was nostalgic. She never thought she would become a teacher because she was extremely shy and did not like to talk in front of people. Being around different kids, she learned to change and grow during her work. Going to China made her step out of her comfort zone, too. In her class, she is willing to guide her students to enjoy the process of doing chemistry experiments instead of memorizing chemical equations.

**American Teacher: James**

James is 55 years old and is one of the most reflective teachers among all my participants. He has been teaching chemistry for 30 years. Before becoming a teacher, he worked as a school counsellor. During my interviews with him, he constantly compared his China experience with his teaching life in the US. He is very expressive and always self-guided in our conversations. He asked me questions during our talk, and was keen to learn about my experience as a teacher working in two different cultures. He knew he wanted to be a teacher from a young age. He thinks there is no better job in this world than being a teacher. He wanted to go back to China again when his Mandarin language improved. He was amazed how advanced Chinese students’ math skills were,
but admitted that he would never drown his students in “the sea of math assignments”—a new term he learned from his Chinese counterpart.

**American Teacher: Rose**

Rose is 53 years old with 25 years of teaching experience in world history. She is very expressive and always wears a friendly smile. When she was 17 years old, she went to Sicily as an exchange student. Since then, she has always been fascinated by foreign cultures. She loves to travel to different countries, and enjoys exotic food and meeting different people. She describes herself as a constructivist, and believes that knowledge is constructed through experiential learning and first-hand exploration. Her motivation for being a teacher comes from a fundamental belief about life: she thinks that life is a process of constantly engaging in the world, and being a teacher provides this opportunity.

In her class, she is a traditional teacher who respects discipline but also encourages students to be creative. Using stimulation to let students experience learning and using modelling to ask students to connect knowledge with examples are two main teaching strategies she uses quite often in her class.

Rose was the only American participant who was then attending the exchange program when I interviewed and observed her in YHS in China. All the other American participants had completed their exchange program when I studied them.

**Chinese Teacher: Zhang**

Zhang and the other three Chinese participants were all English language teachers. The Chinese participants were all so subject-clustered is because the Chinese high school, YHS, only allows English-proficient teachers to apply for these exchange programs. Therefore, all Chinese teachers in this exchange program were English language teachers. Zhang was the first exchange
teacher I knew. When she was an exchange teacher at WHS in the US, I worked there as a Chinese language teacher and we shared the same classroom. I witnessed all of her cross-cultural experiences and accompanied her through her difficult period of adjusting to cultural shock during her stay in the US. When I interviewed her again, I found that, although her stories were familiar to me, there were more layers to her stories than I had previously known.

Zhang is a very experienced English teacher, and she was very proud of her students’ academic performance on the College Entrance Exam. She believes that “hardworking” is the only way to success in school. She defines “success” in terms of test scores and students’ moral standards.

**Chinese Teacher: Xing**

Xing is 38 years old, and he has been teaching English for 15 years. He is a curious learner and he regarded his exchange experience as a rewarding adventure. He reported that he had learned so much from this international professional trip. During our interviews, he constantly compared the differences and similarities between American schools and Chinese ones. During his four-month stay in the US, Xing actively participated in different school activities and community events and made many friends. He integrated what he had learned in WHS in the US to his class in China, and he commented that his students were excited and motivated by his new approaches of teaching.

**Chinese Teacher: Li**

Li is 36 years old and she had been teaching English for 11 years. When I recruited her into this study, she was relatively quiet. She just used “yes” or “no” when responding to my interview questions, and did not want to share much about her experiences. After a round of focus group interviews, she started to open up during my third attempt to interview. I realized that she had very bitter stories. Never able to adjust to culture shock, she had been traumatized, and her quietness was
just a defense. There is no doubt that she is a responsible and hard-working teacher; however, I was almost fooled by her indifference toward my questions about her learning experience in the US. Her stories provided rich data for me to understand the huge influence of culture in an exchange program.

**Chinese Teacher: Qiao**

Qiao is 34 years old who had had 10 years of teaching experience. She is the youngest among all participants. When I was on a work trip to the US in October 2015, I interviewed Qiao while she was then attending the exchange program in WHS. All the other Chinese participants had completed their exchange program when I studied them. With a young and active mind, she was very critical of her experience in WHS. Different from other teachers, she was never neutral about a question or a problem. Her analysis and comparison of different school systems and teaching strategies were rather deep. In her classes, she also encouraged her students to think critically. When I asked her if she was like this in general in her classes, she answered proudly that she was, but became more critical after her trip to the USA.

**Data Collection and Data Verification**

**Background of the Researcher**

My trip to collect data in China and the US was an interesting adventure. Since the exchange program happens only during certain times of the year, I had to plan strategically in order to meet the participants while they were in the exchange programs while balancing my own work schedule.

In April 2015, I went to YHS in China for two weeks in order to meet Rose who was participating in the exchange program. During the stay in YHS, I observed Rose’s teaching in the classroom, her interaction with Chinese faculty in their weekly meeting, her participation in school activities and community events, and so on. In order to make a close study of Rose, I received her
permission to share her two bedroom apartment with her which was provided by YHS for exchange teachers. My observation with her provided very rich data for understanding American exchange teachers’ learning experience in another country. My total observation time with her came to more than 112 hours, and my informal interviews with her were all embedded in the observation. During my time staying in YHS, I also conducted one-on-one interviews with three other Chinese participants—Zhang, Li, and Xing—who were in the exchange program respectively in 2010, 2012, and 2013. With each of them, I had two one-hour intensive interviews (Charmaz, 2006) when I was in YHS and two phone interviews for the follow-up questions after I had left YHS. On April 20th before I left YHS, I conducted a focus-group interview with Zhang, Li, and Xing followed by a Skype video group conversation on May 10th when I returned to Beijing. At that time, Qiao, my last interviewee, had not yet participated in the exchange program so I did not include her in the individual interview and focus-group interview.

In October 2015, as a program coordinator working at Peking University (PKU), I led a group of Executive MBA students to visit the US. This provided a great opportunity for me to visit my participants without having to pay my round-trip airplane fare. But every coin has two sides. Since I was in the USA for reasons of work, I could not control how long I stayed with my participants. My director in PKU only allowed me to stay for one week and, since I had to return to Beijing for an important meeting, my visit to WHS was short, intense, and stressful. After seeing off my students at the airport, I went directly to WHS to meet my American participants. One participant withdrew from the study at the last minute due to a serious illness, and so, I had to recruit a new one in a very short time. Luckily, another American exchange teacher filled in the spot immediately, but since we had not known each other before, it took a much longer time to set up trust and amity for the discussion. During my stay in WHS, Qiao, the Chinese exchange teacher,
was in WHS. I conducted an observation with her for about 30 hours plus two intensive formal interviews—each interview lasting about an hour. Meanwhile, I interviewed my American participants James, Jenny, Tanya, and Rose who were respectively in the program in 2010, 2011, 2013, and 2015. With each of them, I had two one-hour interviews followed by one Skype interview (30 minutes) after my return to Beijing. Unfortunately, I did not find a good time to conduct a group interview with all my participants because of their conflicting schedules. Only Rose and Jenny participated in a group interview with me for an hour. After I returned to China, we conducted a Skype video group talk for a follow-up conversation with these two focus-group interviewees.

Conducting a cross-nation study was truly not an easy task. I had to plan in advance to meet my participants’ schedules. As a full-time employee, my demanding job meant that the time I had to spend on my data collection process was very tight. I worked extra hours on my job during the weekends and after work so that I could negotiate more days off to spend with my participants. My director was very supportive, and I cannot imagine how I could have finished the data collection process without the accommodation of my employer.

**Data Collection Matrix**

Multiple resources of data (individual interviews, focus group interviews, and site visits) were employed in this study. The data collection process is presented in the following table of data collection matrix (Table 4-2).

<table>
<thead>
<tr>
<th>Research Questions</th>
<th>Research Purpose</th>
<th>Methods Used</th>
<th>Data Sources</th>
</tr>
</thead>
</table>

| What is the relationship between exchange teachers’ PDE and their global teacher identity? | To explore the relationship between exchange teachers’ PDE and their global teacher identity | 1) In-depth semi-structured, open-ended individual interviews; 2) In-depth semi-structured, open-ended focus group interviews; 3) Note taking; 4) Audio recording. | 1) Face-to-face individual interviews; 2) Individual Skype video interviews; 3) Individual Phone interviews; 4) Face-to-face focus group interviews |
| What are the tensions and conflicts that exchange teachers face in foreign countries and how are their PDE influenced by the tensions and conflicts? | To understand the tensions and conflicts that exchange teachers face in foreign countries, and to understand how the tensions and conflicts influence their PDE | 1) In-depth semi-structured, open-ended individual interviews; 2) In-depth semi-structured, open-ended focus group interviews; 3) Note taking; 4) Audio recording. | 1) Face-to-face individual interviews; 2) Individual Skype video interviews; 3) Individual Phone interviews; 4) Face-to-face focus group interviews |
| What are the differences and similarities of American and Chinese teachers’ PDE in foreign countries? | To compare American and Chinese teachers’ PDE in foreign countries | 1) In-depth semi-structured, open-ended individual interviews; 2) In-depth semi-structured, open-ended focus group interviews; 3) Note taking; 4) Audio recording. | 1) Face-to-face individual interviews; 2) Individual Skype video interviews; 3) Individual Phone interviews; 4) Face-to-face focus group interviews 5) Participants observation. |

**Interviews**

Since the data collected in this study were analyzed by a grounded theory approach, mundane data and routine reports could not yield rich data for attaining the purpose of this study. Qualitative research heavily relies on the researchers who should not be passive receptacles (Glaser & Strauss, 1967; Glaser, 1978). Qualitative researchers are interested in the perspectives and views of the participants they study (Hammersley, 1992), and these researchers seek a deep understanding of social phenomena in certain environments and interpret the phenomena according to the
meanings participants provide to them (Denzin and Lincoln, 2003). Conducting interviews is a common method in qualitative studies to understand people (Bryman, 2004). Burgess (1984) defined interviewing as “conversation with a purpose” (p. 102).

Charmaz and Mitchell (1996) reminded researchers to keep a keen eye, open mind, discerning ear, and steady hand in order to help bring them closer to what they study. Therefore, researchers are obligated to be reflective about what they bring to the scene, what they see, and how they see it (Charmaz, 2006).

In order to help researchers collect rich and sufficient data, Charmaz (2006) suggested researchers to ask themselves the following questions:

- Have I collected enough background data about persons, processes, and settings to have ready recall and to understand and portray the full range of contexts of the study?
- Have I gained detailed descriptions of a range of participants' views and actions?
- Do the data reveal what lies beneath the surface?
- Are the data sufficient to reveal changes over time?
- Have I gained multiple views of the participants' range of actions?
- Have I gathered data that enable me to develop analytic categories?
- What kinds of comparisons can I make between data? How do these comparisons generate and inform my ideas? (pp. 18-19)

An interview is a directed conversation (Lofland & Lofland, 1995) and, in order to generate rich data, Charmaz (2006) suggested that the interviews should be intensive. She explained that “an intensive interview permits an in-depth exploration of a particular topic with a person who has had the relevant experiences” (p. 25), and this kind of in-depth characteristic of interview conversations “fosters eliciting each participant’s interpretation of his or her experience” (p. 25). The job of
interviewers is “to listen, to observe with sensitivity, and to encourage the person to respond” (pp.25-26). By devising broad, open-ended and non-judgmental questions, the researchers encourage unexpected stories and descriptions to happen (Charmaz, 2006).

Since an interview is contextual and negotiated, Charmaz (2006) also asked us to pay attention to “the dynamics of power and professional status, gender, race, and age” which may “affect the direction and content of interviews” (p. 27). When the male exchange teachers were asked to reveal their experiences in a culture-shock situation, I noticed that they tended to hide their emotions behind a wall and polished their stories with “there were no problems at all” or wove around the questions instead of addressing them directly. Compared to my male participants, my female participants were more open and revealed their frustrated feelings and emotions much more easily.

When conducting an interview, Charmaz (2006) suggested that researchers should choose questions carefully and ask participants slowly to foster their reflections. She also pointed out (2006) that in order to increase researchers’ confidence and permit them to concentrate on what the participant is saying, researchers should have “an interview guide with well-planned open-ended questions” (p. 29). Charmaz (2002) suggested that ‘tell me about’, ‘how’, ‘what’, and ‘when’ questions yield rich data. She (2006) provided four principles to help researchers conduct a successful interview:

First, I assume that participants' comfort level has higher priority than obtaining juicy data. Second, I pay close attention as to when to probe. Often, I just listen, particularly when the participant appears to be re-experiencing feelings in the described incident. Third, I try to understand the experience from the participant's view and to validate its significance to this person. Fourth, I slant ending questions toward positive responses to bring the interview to closure at a positive level. No interview should end abruptly after an interviewer has asked the most searching questions or when the participant is distressed. The rhythm and pace of the interview should bring the participant back to a normal conversational level before ending. (p. 30)
In this study, in order to attain a deep understanding about exchange teachers’ overseas learning experiences, semi-structured interviews with open-ended questions were employed. Both semi-structured one-on-one interviews and focus-group interviews were also used in this study. The number of participants in my focus group interviews was small. Each group interview consisted of three participants and, so, questions were asked in a group setting where interviewees were free to discuss and communicate with other group members.

I employed Charmaz’s (2006, pp. 30-31) well-thought-out list of open-ended questions to inform the design and protocol for my individual and focus-group interviews:

<table>
<thead>
<tr>
<th>Initial Open-ended Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tell me about what happened [or how you came to--].</td>
</tr>
<tr>
<td>2. When, if at all, did you first experience-- [or notice--]?</td>
</tr>
<tr>
<td>3. [If so,] what was it like? What did you think then? How did you happen to --? Who, if anyone, influenced your actions? Tell me about how he/she or they influenced you.</td>
</tr>
<tr>
<td>4. Could you describe the events that led up to -- [or preceded--]?</td>
</tr>
<tr>
<td>5. What contributed to --?</td>
</tr>
<tr>
<td>6. What was going on in your life then? How would you describe how you viewed--before--happened? How, if at all, has your view of-- changed?</td>
</tr>
<tr>
<td>7. How would you describe the person you were then?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Intermediate Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What, if anything, did you know about --?</td>
</tr>
<tr>
<td>2. Tell me about your thoughts and feelings when you learned about--.</td>
</tr>
<tr>
<td>3. What happened next?</td>
</tr>
<tr>
<td>4. Who, if anyone, was involved? When was that? How were they involved?</td>
</tr>
<tr>
<td>5. Tell me about how you learned to handle --.</td>
</tr>
<tr>
<td>6. How, if at all, have your thoughts and feelings about-- changed since --?</td>
</tr>
<tr>
<td>7. What positive changes have occurred in your life [or--] since--?</td>
</tr>
<tr>
<td>8. What negative changes, if any, have occurred in your life [or--] since --?</td>
</tr>
<tr>
<td>9. Tell me how you go about --. What do you do?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ending Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What do you think are the most important ways to --? How did you discover [or create] them? How has your experience before-- affected how you handled--?</td>
</tr>
<tr>
<td>2. Tell me about how your views…</td>
</tr>
<tr>
<td>3. How have you grown as a person since --? Tell me about your strengths that you discovered or developed through --. [If appropriate] What do you most value about yourself now? What do others most value in you?</td>
</tr>
</tbody>
</table>
4. After having these experiences, what advice would you give to someone who has just discovered that he or she --?
5. Is there anything that you might not have thought about before that occurred to you during this interview?

The interviews were either audio or video recorded with the participants’ permission. These recordings made it easier for me to see when my questions did not work. This allowed me to conduct the follow-up interviews with a much more focused topic or direction.

The face-to-face individual meetings were held either in my hotel room or teachers’ homeroom towards the end of the day after all students had left towards. In either case, the interview environment was very quiet, spacious, and well-ventilated. The face-to-face group discussions were conducted in the teachers’ faculty lounge which was pleasant and quiet, too. The participants provided a comfortable and amiable climate and exhibited extraordinary kindness. During our interview conversations, we sometimes erupted into laughter which provided comic relief to otherwise serious discussions. As I alluded to earlier, the rapport between interviewees and me moved from our being strangers to friends, and then to one of close trust. Some of the interviewees asked for my e-mail address, and hoped that we meet again either in China or the USA in the future. For my part, I was deeply impressed by my interviewees’ openness in sharing their interesting stories with me, and the whole interview process had a profound impact on me as a researcher and a teacher. From these interviewees, I can feel a strong dynamic in both American and Chinese teachers in terms of learning and improving themselves to become better teachers. I am compelled to present the interview data as accurately as I can in next chapter. And I put myself into each interview with the faith that it could lead me to understand the perspective(s) of the each participant on their learning journey.
In this study, other than face-to-face interviews, different mediums were employed, including interviews over the phone, and interviews with Skype video calls. Although the traditional face-to-face interview is one of the most common and powerful methods which qualitative researchers employ, replying on a different medium can also facilitate the success of interviews when face-to-face interviews become difficult to undertake.

**Face-to-face.** In-person interviews in this study lasted from a half hour to a full day (e.g., interviews with Rose when I was sharing an apartment with her in YHS in China) helping me collect data either by one-on-one interviews or by a group conversation. In *Figure 4-2*, I was having a face-to-face group interview with my Chinese participants.

*Figure 4-2. Picture of Focus Group Interview*

**Phone.** Phone interviews were fast and convenient, especially for the follow-up interviews in this study. They usually lasted about a half hour after on-site, in-person interviews if I needed the participants to clarify some points or find more information about their feedback. But phone interviews were filled with challenges. For instance, I could not see the interviewees, so I might
lose some of the cues which I could find from body language and facial expressions. Also, it was
difficult to judge the meaning of silences over the phone. Nevertheless, in terms of conducting a
cross-nation study, because I was not allowed to stay in the studied country until the dissertation
was complete, a phone interview was the best option for collecting necessary further data in this
study.

Skype video calls. Since I could not afford to travel between two countries in the study to
collect all my data, an interview via Skype video conferencing calls largely resembled the face-to-
face interviews. The biggest advantage was that I could see the participants though I was not
physically present at the sites. For my participants, they were either at home or at work in a familiar
and non-threatening setting, which might be relatively stress free and more convenient for them.
The disadvantage is that participants might not keep their body language and facial expressions
natural and relaxed. Although we were looking at a screen, trying to maintain eye contact by
looking at participants’ profile icons or the cameras was not the same as in-person eye contact.
Sometimes, unstable internet speed cut off the conversation or result in delays between the voice
and visual transmissions. When this happened and our video call resumed, the moment was gone
and we sometimes had to start the topic all over again. I had to speak slowly and try to limit rapid
movements to avoid blurry transmission on the screen. The Figure 4-3 contains pictures I took
when I was having one-on-one Skype interviews with my participant in the USA (left) and with
another participant in China (Right).

Figure: 4-3. Picture of Skype Interviews
Observation

Observation is a methodology for exploring the social world, and is “considered in situations where detailed descriptions of a setting and the meanings and values of its inhabitants” are explored (Fox, 1998, p. 25). Fox (1998) stated that people spend much time of their life observing the world in which they live, and he also reminded us that:

…it we should note that ‘observation’ does not just involve vision: it includes all our senses, although in practice sight and sound will be those which predominate in most research….it also involves the interpretation of that sense data. (Fox, 1998, p. 2)

Fox’s remarks remind us that observation is not just recording data from the setting. When researchers observe, they should be active unlike an audio or video recorder. Fox (1998) suggested that the researcher should engage not only with their brains but also with their eyes and ears so that they can organize data to make sense of them. Hammersley and Atkinson (1989) provided good the reasons why researchers should use observation:

…and in order to understand people’s behavior we must use an approach that gives us access to the meanings that guide that behavior. Fortunately the capacities we have developed as social actors can give us such access. As participant observers, we can learn the culture or subculture of the people we are studying. We can come to interpret the world in the same way that they do. (p. 7)
As for researchers’ role in field observation, Denzin and Lincoln (2005) categorized three types of roles: participant observation, reactive observation, and unobtrusive observation. Researchers have two roles as both observer and participant in participant observation. In reactive observation, participants are aware of being observed but with limited interaction with the researcher, which Fox (1998) called “non-participant observation”; and in unobtrusive observation, participants are unaware of being observed (Denzin & Lincoln, 2005). In this study, I employed non-participant observation.

In terms of the methods of observation, Fox (1998) reminded us to pay attention to three details. The first is to decide when to do the observation. Second, researchers need to decide how often and how long they observe. Third, researchers should record what they observe in an as unobtrusive way as possible. When recording the observation, note-taking is key (Fox, 1998).

However, “taking notes may seem quite daunting because of the richness of a setting” (Fox, 1998, p.12). Spradley (1980) suggested the following checklist to help researchers better collect observation data:

| Space: the physical place or places. |
| Actor: the people involved |
| Activity: a set of related acts people do |
| Object: the physical things which are present |
| Act: single actions that people do. |
| Event: a set of related activities that people carry out. |
| Time: the sequencing that takes place over time. |
| Goal: the things people are trying to accomplish. |
| Feelings: the emotions felt and expressed. (p. 78) |

Fox (1998, p. 12) added another item to make Spradley’s (1980) list more complete:
Reflection: your personal response to any of the above.

Fox (1998) also reminded researchers that “observational research must be conducted with one’s eyes open” (p. 23), which means that researchers should be aware of “the assumptions about how [they] try to know the world and give it meaning in the research process” (p. 23). Therefore, reflexivity becomes a need for researchers who use observation in research. Fox (1998) explained “reflexivity” as “a capacity to think about one’s own part in creating the setting one is observing (both as a person there who is present, and in the work of interpretation, which follows observation)” (p. 23).

Marshall and Rossman (1995) has noted that the process of observation is closed by observational notes. Following Emerson et al.’s (2011) field note protocol when collecting observational notes, I employed various field note types including “jotting (brief written records)”, “journal/reflection diary (a personal record of how you feel and perceive your relationship with others)”, “logbook (a running account of how time is going to be spent)”, and “analytic memo book (a series of elaborations on discrete phenomena, topics, or categories)” (p. 19).

**Data Analysis**

In this study, I employed the grounded-theory data analysis approach. Charmaz (2006) suggested that “we do not force preconceived ideas and theories directly upon our data. Rather, we follow leads that we define in the data, or design another way of collecting data to pursue our initial interests” (p. 17). In order to make analytical interpretations, coding is the initial stage in “moving beyond concrete statements” (Charmaz, 2006, p. 43). Charmaz (2006) defined coding in the following way:
Coding means categorizing segments of data with a short name that simultaneously summarizes and accounts for each piece of data. Your codes show how you select, separate, and sort data to begin an analytic accounting of them. (p. 43).

This means that through coding, researchers define what happens in data and explain their meanings. In this study, I utilized the techniques of Charmaz’s (2006) three phases of data analysis approach including initial coding (open coding) (Charmaz, 2006, pp. 47-57), focused coding (categories) (Charmaz, 2006, pp. 57-63), and theoretical coding (conceptual categories) (Charmaz, 2006, pp. 63-66). In this study, the unit of analysis is individual Chinese and American teachers who participated in an international professional development program in the USA and China. The unit of observation includes the transcript from interviewing the individual Chinese and American teachers, the observation notes, and team members’ reflection on the transcript.

**Initial Coding (Open Coding)**

Initial coding is the first step to move researchers toward further decision on data analysis. Charmaz (2006) explained:

> Initial codes are provisional, comparative, and grounded in the data. They are provisional because you aim to remain open to other analytic possibilities and create codes that best fit the data you have. You progressively follow up on codes that indicate that they fit the data. Then you gather data to explore and fill out these codes. (p. 48)

Along with this process, Charmaz (2006) recommended that researchers stick closely to the data, which means trying to “see actions in each segment of data rather than applying preexisting categories to the data…and attempt to code with words that reflect action” (p. 47). Glaser (1978) also commented that coding with gerunds helps researchers detect process and stick to the data. Charmaz (2006) reminded researchers to make their codes fit the data rather than forcing the data to fit the codes. Therefore, she (2006, p. 49) provided a code for coding:
• Remain open
• Stay close to the data
• Keep your codes simple and precise
• Construct short codes
• Preserve actions
• Compare data with data
• Move quickly through the data.

In this study, I employed the technique of “line-by-line coding” (Charmazm 2006, p. 50). Glaser (1978) explained that line-by-line coding means naming each line of the data. Although coding each line might be a rather long and painstaking process, line-by-line coding “works well with detailed data about fundamental empirical problems or processes whether these data consist of interviews, observations, documents, or ethnographies and autobiographies” (Charmaz, 2006, p. 50). Charmaz (2006, p. 50) suggested the following flexible strategies help researchers do line-by-line initial coding:

• Breaking the data up into their component parts or properties
• Defining the actions on which they rest
• Looking for tacit assumptions
• Explicating implicit actions and meanings
• Crystallizing the significance of the points
• Comparing data with data
• Identifying gaps in the data.

The first step in data analysis, initial coding, helped me separate data into categories, and freed me from becoming very immersed in the big pool of data sets. Through initial coding with line-by-line
approach, I gained basic insights for categorizing the data. Other than line-by-line coding, this study also utilized an incident-to-incident approach. Charmaz (2006) explained that this approach compares incident with incident, then as researcher’s ideas take hold, compares incidents to their conceptualization of incidents coded earlier. By doing so, researchers can “identity properties of the emerging concepts” (p. 53). This comparative approach helps researchers “see and make sense of observation in new, analytical ways” (p. 53) in which incidents can be better holistically compared and conceptualized than a line-by-line method. As this study included open-ended interviews and on-site observations, both line-by-line and incident-to-incident methods were employed.

**Focused Coding (Categories)**

Focused coding is the second step in the process of this study’s data analysis, which is more directed, selective, and conceptual than initial coding. Charmaz (2006) explained:

> Focused coding means using the most significant and/or frequent earlier codes to sift through large amounts of data. Focused coding requires decisions about which initial codes make the most analytic sense to categorize your data incisively and completely. (p. 57)

During this process, I kept the codes active and close to the data, and the codes condensed the data. But this was not a linear process. Sometimes I was urged to study the earlier data and explore the topics that may have been overlooked. Through comparing data to data, “new threads for analysis become apparent”; therefore, “events, interaction, and perspectives came into analytic purview” that I had not thought of before (p. 59).

**Theoretical Coding (Conceptual Categories)**

Theoretical coding is the last stage of data analysis in this study, which is a more sophisticated process of coding compared to the first two phases. Theoretical coding clarifies the possible relationships between categories that researchers developed in focused coding (Glaser, 1978). Charmaz (2006) added that theoretical coding “not only conceptualizes how your
substantive codes are related but also move your analytic story in a theoretical direction” (p. 63).

She also provided a word of caution to researchers:

> When your analysis indicates, use theoretical codes to help you clarify and sharpen your analysis but avoid imposing a forced framework on it with them. It helps to interrogate yourself about whether these theoretical codes interpret all the data. (Charmaz, 2006, p. 66)

The following charts provided an example of how three phases of grounded-theory data analysis conducted based on the interview excerpts from this study.

**Phase One Example: Initial Coding Example**

<table>
<thead>
<tr>
<th>Transcript</th>
<th>Line-by-Line Coding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excerpt 1:</td>
<td>Observing differences</td>
</tr>
<tr>
<td>There are many major differences between being a teacher in China and America. In China, teachers are authority figures. They are highly respected by both students and parents and face far fewer behavior problems in class. As a help teacher for a Chinese class, I was upset because I did not feel valued here as a teacher. You know, I was a good teacher back in my home country, but here, when I shared my teaching experience with a group of American teachers and students, I heard someone called me a ‘dictator’. I am not, you know. Students at home love me a lot. I miss my students so much (a long pause)... Also, I found that much of my class time was spent on discipline rather than instruction [in the USA]. Another difficulty I faced...as I have said... that American cultures are so different from Chinese ones. My English is not good enough, so I found it is hard to...</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Comparing teachers in China and the U.S</td>
</tr>
<tr>
<td></td>
<td>Describing Chinese teachers’ image</td>
</tr>
<tr>
<td></td>
<td>Describing teachers/students/parents relationship in China</td>
</tr>
<tr>
<td></td>
<td>Feeling less valued as a teacher here</td>
</tr>
<tr>
<td></td>
<td>Viewing self as a GOOD teacher in China</td>
</tr>
<tr>
<td></td>
<td>Being called a ‘dictator’ here</td>
</tr>
<tr>
<td></td>
<td>missing Chinese students</td>
</tr>
<tr>
<td></td>
<td>Spending more time on discipline in the USA</td>
</tr>
<tr>
<td></td>
<td>Facing difficulty with American cultures</td>
</tr>
<tr>
<td></td>
<td>Having hard time communicating with American teachers</td>
</tr>
</tbody>
</table>
communicate with American teachers. Sometimes, they were so cold to me and did not have patience with me. I felt discouraged in learning from them. Or...maybe they are so busy. I do not know.

Excerpt 2:
After visiting American schools, as I said before, I become more confident in teaching, and trying to apply my creativity, sensitivity, experience to my teaching styles, and I am more open to new ideas. I would never be who I am now as a teacher if I never had been abroad to learn. As I said, I can read and write well as an English teacher in my country, but my speaking and listening were weak. If my speaking and listening were weak, how could I expect my students to speak and listen well? The four-month of stay in here gave me a great opportunity to overcome my fear of learning, and I could put myself in my students’ shoes to think and learn because I was a student in there. Of course, I can speak much better English with a more standard pronunciation now because of the PD experience in America. I definitely see myself as a better…more qualified…teacher. Also, my PD experience in this American high school helped me to figure out what I can reasonably give voice to my students and I have begun to teaching my own students to advocate for themselves, negotiate, and provide input on lessons. We might not have met all our goals, but we had fun with the lessons and still learned quite a bit.

<table>
<thead>
<tr>
<th>Feeling American teachers being cold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing American teachers not having patience</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Becoming more confident</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applying new learning</td>
</tr>
<tr>
<td>Becoming more open</td>
</tr>
<tr>
<td>Becoming a changed teacher</td>
</tr>
<tr>
<td>Speaking weak English</td>
</tr>
<tr>
<td>Having new expectations of students</td>
</tr>
<tr>
<td>Seeing it as an opportunity</td>
</tr>
<tr>
<td>Overcoming fear of learning</td>
</tr>
<tr>
<td>Being able to put self in students’ shoes</td>
</tr>
<tr>
<td>Can speak better English</td>
</tr>
<tr>
<td>Becoming a more qualified teacher</td>
</tr>
<tr>
<td>Willing to give voice to students</td>
</tr>
<tr>
<td>Teaching students and giving input</td>
</tr>
<tr>
<td>Realizing not all goals would be met</td>
</tr>
<tr>
<td>Having fun with learning and teaching</td>
</tr>
</tbody>
</table>
**Phase Two Example: Focused Coding (Categories)**

<table>
<thead>
<tr>
<th>Categories</th>
<th>Definitions</th>
<th>Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Noticing the differences of being a teacher in different educational systems</td>
<td>is the ability to recognize that teachers act differently in school systems</td>
<td>By comparing teachers in China and the U.S</td>
</tr>
<tr>
<td></td>
<td></td>
<td>By describing Chinese teachers’ image</td>
</tr>
<tr>
<td></td>
<td></td>
<td>By describing teachers/students/parents relationship in China</td>
</tr>
<tr>
<td>Encountering identity crisis related to seeing teaching as a profession</td>
<td>is the experience of feeling confused of and questioning who they are as teachers</td>
<td>Feeling less valued as a teacher in the USA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Viewing self as a good teacher in China</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Feeling disrespected in the USA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Defending her understanding of being a teacher</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Feeling upset when being called a ‘dictator’</td>
</tr>
<tr>
<td>Facing emotional crisis related to seeing teaching as a profession</td>
<td>is the negative feeling generated from witnessing the differences of being a teacher in two countries</td>
<td>Feeling being treated in rude ways</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Feeling discouraged in learning from American peers</td>
</tr>
<tr>
<td>Confronting emotional crisis related to experiencing culture shock</td>
<td>is the negative feeling generated from witnessing the cultural differences in two countries</td>
<td>Facing difficulty with American cultures</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Having hard time to communicating with American teachers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Feeling homesick</td>
</tr>
<tr>
<td>Feeling confused in dealing with her American peers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working on discipline in the USA rather than instruction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Becoming a better teacher</td>
<td>is the development of awareness and understanding of improving teaching quality</td>
<td></td>
</tr>
<tr>
<td>Becoming more confident applying new learning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overcoming fear of learning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speaking better English</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seeing herself becoming a better teacher</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Valuing PD in the USA as an opportunity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementing different approaches to teaching</td>
<td>is the ability to explore, discover, and try new ways of teaching</td>
<td></td>
</tr>
<tr>
<td>Involving students in learning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Giving voice to students’</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Starting to give voice to students</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Realize learning can be fun</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Realizing not all goals would be met</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Phase Three Example: Theoretical Coding (Conceptual Categories)

<table>
<thead>
<tr>
<th>Conceptual Category</th>
<th>Definition</th>
<th>Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shaped global teacher identity</td>
<td>is the process of changing the views of how to be or act as a teacher</td>
<td>Modified ways of teaching</td>
</tr>
<tr>
<td></td>
<td></td>
<td>New ways of thinking</td>
</tr>
<tr>
<td>Perceiving different teaching practices</td>
<td>is the ability to recognize the differences and similarities of teaching practices</td>
<td>Through classroom observation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Through interaction with American teachers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Through being a help teacher</td>
</tr>
<tr>
<td>Perceiving cultural differences</td>
<td>is the experience and the ability to identify the cultural differences and similarities</td>
<td>Through moving to a new environment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Through observing and interacting with American teachers, students, and parents</td>
</tr>
<tr>
<td>Experiencing cultural shock</td>
<td>is generated by the clash of two different institutional norms/cultures in a new setting</td>
<td>Through experiencing the different norms/cultures in the USA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Through the treatment of American teachers with her</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Through the language barriers</td>
</tr>
<tr>
<td>Developing future perspectives in learning</td>
<td>is the increased desire in continuing the professional developmental learning experience</td>
<td>Growing interest in learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Willingness to apply the learning</td>
</tr>
</tbody>
</table>

### Ethical Consideration
Extreme care needed to be taken to avoid any harm to participants (Fontana & Frey, 1994). As an ethical consideration, the participants in this study remained anonymous. The locations of research also used pseudonyms (Fox, 1998, p. 15). Participants were made aware of the purpose and nature of the study and how the findings would be used and documented. It was also made clear that participation was voluntary and that they could withdraw from the study at any time. Nothing was done to oblige them to engage in the research.

Prior to the focus group and individual interviews, a copy of the university’s ethical approval letter and consent form (Appendix D) was given to each participant to read and to sign. After the interview, the transcript and transcript consent forms were sent to the participants to allow them to review the transcript and to make any changes they wanted. Fox (1998) suggested that field notes and interview transcripts “could contain much that could be seriously embarrassing to our subjects: they should be treated as confidential documents, and care taken to ensure they are not read by others” (p. 15).

**Trustworthiness**

To maintain the trustworthiness of this study, researchers should attempt to conduct research in ways which maximize its validity and reliability. Fox (1998) explained:

> The reliability and validity of a piece of research indicate its trustworthiness, in other words, the extent to which study findings reflect the world that we are seeking to explore in our observation. Reliability is concerned with the measuring tools we use in research, and whether they are consistent. Validity is an indicator of the accuracy of research - whether a study gives a true picture of what it is exploring. Reliability is a pre-requisite of validity, but does not guarantee it. (pp. 19-21)

Researchers commonly adopted Creswell and Clark’s (2007) “validation strategies” (p. 208), such as triangulation of different data sources, peer-review, member checking, and cultural expert. First, in this study, triangulation verified the validity and reliability by comparing different interpretations
from different data sources by gathering data through one-on-one interviews, focus group interviews, and observations. Second, peers’ reviews checked data accuracy and consistency. I contacted professors and doctoral students in academia who are bilingual in both Chinese and English, and discussed with them verifying the data (Marshall & Rossman, 1995) and received their useful expertise in cross-cultural studies. Third, member checking (Creswell & Clark, 2007; Marshall & Rossman, 1995) is another effect way to verify data and ensure the data accuracy. By using member checking, my participants had the chance to return to the review reports and to provide clarification and corrections. Last, the practice of continuously discussing with cultural experts in both China and the USA in order to avoid cultural bias and misunderstanding was also a key for this kind of cross-cultural research.

Translation

Since I am fluent in both Chinese and English, the interviews were conducted in English when I interacted with American teachers. When I was with Chinese participants, I used Chinese to conduct interviews. Although they all speak English, they felt more comfortable and natural communicating with me in their mother tongue. The field notes and interview transcripts from Chinese participants were originally in Chinese, and later I translated them into English. Then I asked a doctoral student in my department who is also bilingually fluent to help me check the translated interview transcripts. Bilingual proficiency provided me with a great opportunity to have close contact with my participants. As Borchgrevink (2003) stated: “[T]he more you know of the language of the people you are studying, the better access you will have to information, the deeper understanding you will get, and the higher the overall quality of your fieldwork” (p. 106-107). The translated transcripts and field notes from Chinese to English were peer reviewed by doctoral researchers who speak both Chinese and English to ensure data accuracy.
Summary

This chapter outlined the research design and research methods utilized in this qualitative cross-cultural case study. It started by introducing the background of the researcher, and then it explained the research questions. In addition, it focused on discussing the research design details, including site and population selections, methods of data collection and analysis, trustworthiness, issues related to translations, and related matters.
Chapter 5

Research Findings—Cultural Influence on Professional Learning

This chapter reports the research findings based on studying the American and Chinese exchange teachers’ cross-cultural learning experiences in each other’s country. In particular, this chapter presents the findings related to cultural influence on teachers’ professional learning. The research findings are based on the main conclusions that were finalized from a grounded-theory data analysis. In terms of cultural influence, data from one-on-one interviews, focus group interviews, and observations were summarized into three main categories: 1) culture shock; 2) different education systems; and 3) teachers’ cultural adaptation. Each main category has several subcategories.

Culture Shock

Culture shock first occurs for many different reasons when one arrives in a new country (Griffiths et. al., 2005) for many different reasons. For example, it could happen when an individual feels a loss of control over ordinary issues in life such as unfamiliar food, difficulties with local bank system, and more commonly, being cut off from communicating due to a limited understanding of the local language. Culture shock may start also because of the personality of the newcomer who could feel isolated from membership in a community (Griffiths, 2005). If newcomers do not achieve a sense of inclusion in the environment, they are likely to develop negative emotions, reject the new culture, and suffer homesickness (Zhu, 2007).

One way to achieve a rewarding cross-cultural experience in a new country is to avoid or minimize the period of culture shock (Griffiths, Winstanley, & Gabriel, 2005). Griffiths et al. (2005) describe the culture shock phase as a process of getting used to the prevailing way of life in
the adopted environment. However, culture shock is more than just adapting to the new system because it also influences how people see themselves (Zhu, 2007).

Although culture shock is hard to prevent entirely, various techniques might minimize its effects. People who experience culture shock have difficulties controlling the practice of their ordinary routines (Hofstede, 1997). Therefore, Ball (2005) suggests that people focus on events that they can control to regain confidence. While facing problems that cannot be resolved in one stage, individuals need to develop the ability to be self-controlled, reinvesting their energy into things that are worth the struggle (Ball, 2005). Zhu (2007) suggests that instead of carrying out a solo fight in a new environment, a new arrival could ask for help and receive appropriate assistance so that problems can be resolved.

In this study, all interviewees agreed that they encountered culture shock although at different levels. The common negative feelings caused by culture shock include four subcategories: 1) being disoriented, 2) feeling like an outsider, 3) feeling homesick, and 4) encountering language barriers.

### Being Disoriented

Both Chinese teachers and American teachers felt a great sense of being disoriented especially shortly after their arrival. One interviewee, Rose shared her experience:

…when I [had] just arrived, I had no idea what was going on. Who was the person that picked me up at the airport? He did not speak much English, and I had no idea where he was taking me to, but you know…it seemed that I had no choice.

Chinese teacher, Li, had the similar comments:

When I first arrived at Waterfront High School, I expected there would be some sort of orientation sessions. But, there is nothing. We were left there to explore by ourselves, so confused and disoriented, not knowing where is where….They [the host school] assumed that we were teachers in China so we were supposed to know the schools in the USA [Frowning].
Compared to Chinese teachers, the level of American teachers’ disorientation was mitigated because each American teacher was assigned a mentor who spoke relatively fluent English.

**Feeling like an “Outsider”**

The most difficult part that the participants in my study reported about their exchange experience was that they felt “isolated” and remained “an outsider” to a new culture. This feeling severely impaired their learning motivation. Zhang, the Chinese teacher, reported: “[At the cafeteria,] the moment when I sat down, people became awkward at the table. The dynamic changed immediately. I thought I could join their conversation, but it was hard.”

James, the American teacher, also mentioned:

No matter where I go, people were staring at me. At the faculty meeting, I wanted to observe how Chinese teachers were discussing their course together and wanted to join them. But they were shy and started to look at me instead of focusing on their discussion. I felt really difficult to be a part of the teaching cohort.

The “outsider” feeling could remain for as short as a week (such as for the American teacher, Rose) or as long as the entire exchange program (such as for the Chinese teacher, Li). For the eight participants in this study, overcoming the “outsider feeling” might have been related to the teachers’ personalities. For example, friendly and outgoing Rose took a relatively short period of time to overcome this negative feeling, but quiet Li never had a deep social connection with people from the host country.

**Feeling Homesick**

The feeling of missing family and friends back in their home countries were related to teachers’ “outsider” feelings. The more “outsider” feelings they shared, the more homesick they felt. Different weather, food, and local customs all contributed to teachers’ homesick syndromes. Compared with the American teachers, the Chinese teachers in general showed a deeper degree in
homesickness. They disliked American food. As Li said, “This was not food at all.” The American teachers were more willing to try new food and meet new people. By contrast, the Chinese teachers were more conservative and did not want to try to new food. As Zhang commented: “I just cannot accept people who eat raw broccoli or celery. At home, we always steam or stir-fry them.”

**Encountering Language Barriers**

Another issue that made the cross-culture crisis problem even worse was the language. Language problems were mitigated for American teachers because it was not necessary for them to learn the local language in order to interact effectively. The Chinese students and teachers spoke some English. But this language problem was worsened for the Chinese teachers in the USA because so few American teachers speak Chinese. Also, although all Chinese exchange teachers taught English in their home country, their English proficiency was not good enough to help them interact and communicate with local people effectively. This might explain why American teachers had a less bitter tone when describing the challenges and tension they experienced due to more efficient social interaction with local people for they did not experience much of a language barrier.

**Different Education Systems**

The teachers in this study faced two layers of culture shock. The first was from the daily lives dimension which has already been discussed. The second was from the local teaching/work community to which I will now turn. The data from interviews and observations in this study showed teachers’ class culture shock was caused mainly by the differences between Chinese and American education systems.

The education system as a whole in China has many similarities to that of the United States; however, there are also some notable differences, which seem to stem mainly from the large population difference and the culture of the respective countries. In both countries, elementary
school and high school last a total of twelve years, but in China, it is split up slightly differently.

After six years of elementary school, there are three years of middle school (equivalent to the usual two years of junior high in the USA) and then three more years of high school. The biggest difference between the two countries’ school systems is that in China, the system as a whole is much more rigid with more stringent guidelines. By contrast, in the USA, just as the American teacher, James, has commented:

There is significantly more freedom and fewer restrictions, for example, ah...ah...a student having the freedom to select his or her own classes is unheard of in China, as all the way through college, all the classes that a student must take are predetermined.

In general, education in China has a teacher-centered, subject-focused national curriculum based on the hierarchically-oriented traditions that have influenced Chinese education for many centuries (Deng, 2000). However, the style of teaching in China has been transformed from purely knowledge-based learning to focusing also on students’ learning interests and capabilities. The change in emphasis is due to the educational reforms in China in the late 1990s (Zhu, 2007). Zhu (2007) has characterized this transformation from a textbook-based paradigm to a more practical model as one that has challenged Chinese teachers to be more capable of dealing with reform. By contrast, education in the USA is more student-centered and teachers have more flexibility in deciding the teaching content in their classes. But in recent years, like teachers in China who follow the standards of the State Education Commission People’s Republic of China (SEDC) (Zhu, 2007), the Common Core State Standards in the USA are reshaping the education in the United States (DeMonte, 2013). The standards, developed by a coalition of the National Governors Association and the Council of Chief State School Officers, tended to be based on best practices in education nationally and internationally, and were designed to ensure that American students would be ready for college, careers, and to compete in the global economy (NGA, 2010).
Different from the Chinese standards which have strict curriculum requirements, the Common Core State Standards allow all educators to share goals for instruction but without standard curriculum or pedagogy (DeMonte, 2015). While Chinese teachers were eager to learn “innovation”, “creativity”, and “fun learning” from American teachers, American teachers at the same time were wanting to know the secret of what Chinese teachers do to ensure all students can meet state requirements. Because teachers in both countries were having to adjust to education reforms, they were all naturally drawn to each other wanting to be each other’s apprentices through their global professional learning community. Jenny, the American teacher, put it this way:

…our exchange experience in each other’s country presented a powerful opportunity to bring varied, organized aspects of schooling together into what could be complementing one another perfectly….it leads to greater student learning across the countries, which means that high-quality resources for teaching and learning can truly be shared globally.

Zhang, the Chinese teachers, added this:

Learning across countries was an opportunity coming with enormous challenges as well. If the ultimate intention of the exchange is to raise the level of learning and achievement among students, then the interim goal must be to improve the quality of instruction to help students boost achievement…. However, the first thing we need to overcome during the cross-cultural learning was to face with the classroom culture differences ….uh ... uh...the first thing we needed to do was to understand why and what the differences were and then to decide if we could or could not learn from it…. This process could be tormenting and confusing.

In the following session, classroom culture shock and differences are analyzed based on the various subcategories such as classroom climate, classroom participation and setting, the exam format, textbooks, class size, and so on.

**Classroom Climate**

Both Chinese and American teachers noticed that the climate of classroom in each other’s country was different, which they believed was decided by the relationship between students and the teacher. In China, teaching is a respected career, and students obey their teachers (Zhu, 2007), as
is noted in the American teacher Tanya’s observation: “It is amazing to see that the Chinese students nod or bow when saying LaoShiHao (how are you, teacher) to their teachers every time they meet on campus.” In a typical Chinese classroom, students rarely object to teachers’ opinions especially if they are drawn from the content of the textbooks (Li, 2003; Li, 2010). James, like other American in the interviews, observed that, although students are allowed to have a different opinion in the class, “the teacher gives the student a chance to share it in the classroom, but after that, [the teacher] still asks everyone to write down exactly what he or she taught….the teacher is the absolute authority in a classroom.”

In the Chinese participants’ experience, their observations were quite different because they felt that American students do not respect their teachers as they should. Zhang, the Chinese teacher, had some very bitter experience when she was in the USA. She recalled:

There are many major differences between being a teacher in China and America.... In China, teachers are authority figures, you know…uh…They are highly respected by both students and parents and face far fewer behavior problems in class…. As a help teacher for a Chinese class, I was upset (a long pause)… because I did not feel valued here as a teacher…. You know I was a good teacher back at my home country, but in here, when I shared my teaching experience with a group of American teachers and students, I heard someone called me a ‘dictator’. I am not, you know…. Students at home love me a lot…. I miss my students so much (a long pause)… Also, I found that much of my class time was spent on discipline rather than instruction [in the USA] which never happened in China.

Li also had similar feedback: “The relationship between American students and teachers is too casual…I often heard students called their teachers by their first names, and you know to call a teacher by his or her first name is considered rude and inappropriate in China.”

The Examination System

The examination system is deeply rooted in Chinese culture. From 621 AD until the end of the Qing dynasty in 1905 (the last dynasty in China), Chinese people had relied on an examination
process called “Ke Ju” (Civil Service Examination System) to select their government officials (Jin, 1990; He, 1983; Zhu, 2007). Passing the Ke Ju examination was the only way for low social-status people to reposition themselves within the society (Zhu, 2007). Surowski (2000) explained that all test takers had to display a deep understanding on six subjects including rites, music, archery, chariot-riding, history, and mathematics. Around 1910, this imperial “Ku Ju” exam was terminated toward the end of Qing Dynasty (Liu, 2014).

By 1950 with the establishment of People’ Republic of China, the College Entrance Exam was developed (Liu, 2014). This examination system is now used to determine which university students will be able to attend. In James’ words, the college entrance examination is of great significance for Chinese families:

…it seems that all Chinese students’ schooling was just for a final test lasting for two days, and they call it “Gao Kao”, which means the college entrance exams. I do not remember much Chinese, but I remember this word clearly since it is a huge deal for Chinese teachers, students, and parents…. I could tell that all of them were under great pressure. Uh…I witnessed that the parents filled the street in front of the school anxiously waiting for students coming from the test sites and wanted to know how their child had done. You know… police were on the street as well in case there was chaos... I would never have believed it if I had never been there.

Rose, the American teacher, compared SAT with Gao Kao with the following comment: “My students can take SAT for a couple of times during a year, but Chinese students have to wait for a whole year for a second try.” The pressure that Chinese students face when applying to the college is more severe than American students, as Jenny, the American teacher, stated:

During their last high school year, Chinese students spent seven days at school, and 12 hours every day until June when the Gao Kao is done. One thing that I could not understand is that the Gao Kao score is the only measurement for which college a student go to—no recommendation letters, no essay, no extracurricular.... But in the USA, high school students have many more fun activities such as proms and graduation ceremonies, but in our [Chinese] school we do not have these kinds of events or ceremonies…uh…but I think we should have them because they show how much we care about our students’ achievements and growth.
Rose also compared Chinese Gao Kao with American SAT based with the following observation:

There is a difference in how students get into their colleges [between two countries]. Uh… Chinese students have to take Gao Kao and their scores help determine the school they get into like American students’ SAT. Students in China pick their major by writing down a list of possible majors on a piece of paper… Then the universities pick the students based on their grades. Uh… in America, the schools let the student know if they were accepted or not and then the student picks from the schools that have accepted them….

However, Chinese teachers had different observations. Qiao recalled that, in American exams, she saw a lot of exams with open answers and there was never an exact answer for the questions (excluding the multiple choice or the true and false questions). As a language teacher, Qiao valued American teachers’ short answer questions and essays. She believed that these formats check how much students understand the text and also their own meaningful thoughts about the things they have learned in this class.

All American teachers reported that exams in China are equal to memory tests, but due to the pressure from the Common Core Standards, they had to change their teaching techniques. Since the standards have set expectations, teachers must determine the best way to prepare the class of students with the goal of meeting the educational requirements in order to meet the needs of every child and help the class keep up with the changing educational requirements. In Qiao’s view, different from the Chinese ways of teaching to pass standardized tests, American teachers have the freedom to make changes that allow students to understand the material, which is what she cannot do in her class. Xing also stated that

American teachers’ goal is to provide the appropriate lessons for the age group based on the Common Core State Standards for the subject…uh… they are able to determine the best way to keep students’ attention, teach the material, and ensure the class understands the required material… but in China, we do not have much choice at all but must…uh…must follow the nation-wide textbooks and help students get ready for the national exams.
As Xing mentioned, the curriculum in China is standard nation-wide and students have few elective choices. Chinese schools have the same national learning goals, curriculum, expectations, exercises, and even a national class schedule that are based on centuries of tradition. However, “in America, education is primarily the responsibility of the state governments”, Rose commented, “Counting Washington D.C., there are 51 separate governments that have their own autonomy and give direction to public schools which have different teacher contracts, salary schedules, and sets of working conditions.”

Due to the huge pressure from Gao Kao, rich Chinese parents choose to send their children to overseas universities for higher education in order to avoid Gao Kao— before 2007, each year there were about 9,000 Chinese students who went to the USA for undergraduate studies, and in the fall of 2007 this number rose to 16,000. In 2010, this number increased even further to 130,000 (Liu, 2014).

**Textbook**

“Each year, Chinese students purchase their textbooks which are thin, soft covered, and cost about 25 yuan, which is about four dollars”, recounted Chinese teacher, Li, and students make heavy use of highlighters and annotations in their books. American teacher, Rose, noticed that, the Chinese textbooks often have moral lessons built into them. Jenny, the American teacher, also discovered this characteristic. She said: “When a particular historical person is introduced, aspects of his life that are exemplary are always extolled, such as hard work, being honest, and overcoming obstacles.” On the other hand, as the American teacher James observed, textbooks are hard covered, updated every six years in his school, and are rented to students. “American students are not allowed to mark in their textbooks, and their textbooks are too expensive to be purchased by each student”, noted Chinese teacher Zhang.
Classroom Participation and Settings

The Chinese teacher, Xing, said: “In China, my students must raise hands to answer or ask a question, and they cannot speak unless picked by me. But American students did not have to.” Qiao, the Chinese teacher, also commented, “When being picked by me to answer or ask a question, my students must stand up straightly to show their respect to me.” American teachers discovered that Chinese students do not always participate in the classroom, and this is because the learning purpose is to sit in the classroom to copy and memorize all the material the teacher teaches them, then copy it onto the exam paper to receive a good grade (Li, 2003; Li, 2012). The American teacher, Tanya, also mentioned that: “I see all the Chinese students in classroom remaining quiet through the whole class, because they have been trained not to speak their minds or not to raise any point that is different from their teacher’s views.”

When observing the Chinese teacher Xing’s classroom (see Figure 5-1), I noticed that Xing’s students were all silent and listened to his instruction very carefully. Xing told me that he typically teaches two to three times in an eight-period day with a class of 60 students. Compared with the classroom at YHS in China, Zhang mentioned that American classroom had many posters and charts on the wall, and students were more enjoyable and seemed happier when they interacted with the teacher in class.

Figure 5-1. An Example of a Typical Classroom in China
The American teachers also mentioned that Chinese students stay in the same classroom for their main classes and their teachers come to them while American students change rooms every period and the room belongs to the teacher. Thus, Chinese students do not have hallway lockers, and they sit in the same seats for each subject and keep their materials in a shelf under their desk top.

The classroom setting is another difference between two schools (see Figure 5-2). The Chinese teacher, Zhang, concluded that in a typical Chinese classroom, the desks and chairs were lined up row by row, but American schools have different desk and chair layouts—for example, the “double U shape” in the right picture in Figure 5-2.

*Figure 5-2. Classroom Setting: Chinese Classroom vs. American Classroom*
Rose pointed out that, in America, it was very unusual for teachers to move with their students from one grade level to the next at the middle school or high school level. By contrast, Xing, the Chinese teacher, commented that, “My students begin in their first year at high school with me and stay with me every year they are in high school until they graduate from high school.”

American teachers, on the other hand, tend to specialize in the curriculum and content for a particular grade level and then stay at that level.

**Cohort System (Banji)**

While most American teachers thought the “cohort” (Banji) concept was innovative, China has been using it for decades. Chinese teachers, Qiao, explained that, throughout China, students beginning in a school were put into classes and they stayed in the same classes with one another for their entire time in high school, and each class had a class monitor who is selected by the whole class. It is understood in the Chinese system that this group of students learn all of their subjects together. However, compared with the Chinese system, Rose explained:

In America, our kids are not grouped into such [cohort] classes. Well…instead, for example, the 20 students who are together for English class will be randomly split up into other groupings for other subjects for the next period and the period after that, and so on. The next year, the students are totally mixed up again into different classes.
“The highly bonded class culture rarely faded even though after many years’ of graduation”, Zhang added.

**The Cooperating Teacher (Banzhuren)**

Another significant structural difference between American and Chinese schools is the concept of the cooperating teacher or “banzhuren” in Chinese. The banzhuren takes additional responsibility in delivering instruction, supervising their specific class of students, and in knowing their students and the families of the students and communicating with those families. Li, the Chinese teacher, told me that the banzhuren normally arrived at school prior to 7:00 a.m. to prepare for the day and to work with students who arrive early. But she noticed that American school day ends around 2:00 to 3:00 p.m. and it did not have the Banzhuren system.

Li reported that she is like a mother to those students but also admitted that only the good teacher can be a banzhuren. It was an honor for her to be a banzhuren. After three years, the banzhuren can receive a bonus based on the academic improvement of her class. In America, reported by American teachers, the individual teacher is expected to make parent contact when a student misbehaves or is not performing satisfactorily. In American secondary schools, a guidance counsellor assists with parent contact. However, the guidance counsellor has a case load of a hundred to two hundred students and he or she often must resort to group counselling sessions, commented by Tanya who used to be a guidance counsellor.

**Discipline**

With the banzhuren’s supervision and Chinese culture’s respect for their teachers, discipline in Chinese schools is an easier issue than in American schools. In a Chinese classroom, “You rarely see a discipline problem, and students follow the teachers’ lead, and students all focus on learning”,
James explained. In America, the time between classes is as short as five to ten minutes. Students are expected to move from their classroom, go to their lockers to get materials for their next class, and then move to that class. Since Chinese students do not need to move from classroom to classroom, the time between classes is relatively quiet and the hallway is less crowded. However, the American teachers are expected to be in the hallways in between periods because that is when fighting and other misbehavior often occurs.

In addition, “Chinese students are very respectful”, James commented: “They all stand up straight when they answer questions, and hand in a paper to their teachers with both hands.” In interviewing Qiao, she commented it was her duty to teach students how to do well in both school and life, which explained why her students respected her so much. But in the USA, student-teacher relationship is more equal and the degree of being respectful to teachers is lower.

**On-duty System**

American teachers were quite amazed by how active and important roles Chinese students play in being class monitors, sweeping the classrooms, and helping teachers, which is called “Zhisheng” which means “On-duty Student.” Student monitors wear special armbands in the hallway, watching other students’ doing their eye exercises properly (to relax tiring eyes), providing leadership on the play field, supervising students doing morning exercises, watering plants, empty trash bins, cleaning windows, and so on. American teacher, Rose, said that “Chinese students always seemed to be carrying out their tasks very seriously”, and Tanya also pointed out that “most Chinese schools are operated on the “Zhisheng” system to maintain clean classrooms and schools.” Chinese teacher, Li, commented that in the USA she witnessed that maintenance people clean the school and principal and vice-principal supervise order in the school which is so different from her school in China.
Teachers’ Cultural Adaptation

Lysgaard (1955) proposed that people travelling to a new culture inevitably encounter different stages of psychological and social adjustment. With the stay in a new setting, Lysgaard (1955) and Oberg (1960) explained that people unavoidably go through a honeymoon stage accompanied by positive feelings followed by a period full of crisis, such as homesickness, loss, and depression. The next stage is “recovery”, during which the individual begins to adjust to the new cultural environment, followed by the fourth stage—“adjustment” (Lysgaard, 1955; Oberg, 1960). When interviewing the participants, they all more or less experienced the cultural adaptation process. In general, Chinese teachers experienced a longer period of crisis/culture shock than American teachers, although eventually all Chinese participants reported that they recovered from the crisis, but only half of Chinese participants believed that they adjusted to American culture. For American teachers, they experienced a relatively longer time of honeymoon, and compared with their Chinese counterparts, they adjusted faster and the recovery was more complete. The reasons for the differences between two groups of teachers in terms of adjustment to the new culture can be subsumed under three categories: 1) personality, 2) previous international travel experiences, and 3) lifelong learning goals.

Personality

How well teachers adjusted to a new culture depends highly on their personality. The Chinese teacher, Li, described herself as a “quiet” type of person. She recalled that her experience in the USA was not so pleasant in general, especially during the first two to three weeks. She said:

…you know… I am not a people person, so living with a new host family was challenging. Well… I never really enjoyed eating pizza because the cheese in it hurt my stomach... My host family offered pizza all the time, and I kept quiet and ate it... It would be rude to tell them that I did not like pizza. Uh… although I did learn quite a lot from American teachers during my stay in WHS….uh… I never felt I enjoyed my life of staying there, and did not think I adjusted to American life....
Li, another Chinese teacher, Xing, had different reactions. He described himself as a curious person, and also he spoke relatively more fluent English, so he liked to communicate with his host family, discuss his concerns with WHS teachers after school, and even chat with local students. He mentioned that he overcame the discomfort brought on from food, weather, and social matters. Since he enjoyed talking with different kinds of people, his English became much more fluent. He also made his American friends more aware about China and Chinese education. As he reported:

…American people do not really know much about what a real China looks like. They have a stereotype toward China and Chinese people. Through our communication, I helped them understand China better… they were amazed how different China was than they thought… I am very proud that I could do that. American people are no different from our Chinese people, but we just need to more communication to understand each other better. I like to…like to… be around by American people, and they are more frank and genuine compared with a lot of Chinese people. You know, you know… Chinese people are more conservative and so [there are] many rules in terms of social communication.

The American teachers reported that they were treated like celebrities in China. They were always accompanied by local mentor teachers, and were taken to different nice restaurants and tourist places. All American teachers reported that they would love to visit China again in the near future. Different from Chinese teachers who felt that they were not treated hospitably (American individualism left Chinese teachers to explore by themselves), American teachers felt more welcomed and taken good care of. James recalled that “[Chinese people] they were so hospitable such as taking me to fancy restaurants or showing me around the city.” But in general, Chinese teachers felt difficult to get used to the life in the USA. Zhang reported that:

…one day after I observed an American teacher’s class, I came up to her and asked a question, but…but (a long pause) she told me that she was busy. You know, in China, we never tell our guests that we are too busy to help them...

The warm and hospitable Chinese culture made American teachers feel that they were treated very nicely so that their crisis stage in cultural adaptation was quite minor, and they tended
to adjust their overseas life much easily compared with the Chinese teachers. The Chinese teachers knew little about American culture and could not get used to the American ways of thinking, especially their value of individualism and the comfortable distance between people. So they felt that American people were cold and the exchange school did not cater to them well. The Chinese teachers gradually realized that there might be a cultural reason for this less hospitable environment instead of personal choice. Unfortunately, they had already wasted plenty of time in struggling and dealing with their negative feelings. As Xing commented: “I know American teachers did not mean to treat me badly, and I should not have taken it personally. It is their culture that made them very independent and treat me in the same way.”

**International Experience**

Compared with the American teachers, none of the Chinese teachers had been abroad before, so their American exchange experiences were much more intense and challenging than for their American peers. Among four American exchange teachers, three of them had travelled to different countries. Still, they were surprised to experience some cultural shock when they arrived in China. Fortunately, their negative feeling did not linger too long—normally, lasting from one week to two weeks. They could cope internally with the negative feeling caused by the difference, discomfort, clash, or stress. Their emotional crisis stage was briefer when compared with the Chinese teachers who needed at least three weeks to a month to get used to American life.

One of them, Li, reported that her discomfort of living in the USA lasted for more than two months. Only in the last month of her stay in the USA, which was the fourth month of her exchange, was she able to open up to and accept the differences, but by then she was ready for home. When asked if she could do things differently if she returned to the USA, Li answered that:

…I would be tolerant to the difference… the USA exchange experience had a huge impact on me in terms of my acceptance of differences…. What I have learned from the USA made
me a better teacher… uh… especially in accepting the differences between students.

**Lifelong Learning Goals**

Regardless of their country of origin, teachers who had a clear learning goal for their professional development tended to adjust better and faster in a cross-cultural setting. In the view of the American teacher, Tanya’s view, although she evaluated herself as a shy and introvert person, she was willing to make effort to learn about different Chinese people and their education. According to her, “being a teacher is to be a lifelong learner, and whenever we decided to learn, we had to go through different stages of discomfort.” Chinese teachers such as Qiao, who described herself as a curious learner, offered this observation:

> I always wanted to learn about American education such as how American teachers teach and how American students learn, so…so I can bear all the differences while I was living there. When I did not make a big deal about these differences, they seemed not to bother me that much as the other Chinese teachers experienced….

When teachers were not so clear about their ultimate goal of participating in this exchange program, they tended to be bothered by the momentary cultural differences and shock, and allowed their negative feeling to take over. As Chinese teacher, Li, reported:

> I was not sure why I was there for the exchange, especially during the first month after I arrived in WHS. I thought American education and Chinese education [system] were so different, and there were not much we could learn or borrow… I was disappointed….

**Summary**

In this chapter, three categories of teachers’ exchange experiences were discussed including how general culture shock (e.g., different food, weather, customs, and so on) affected teachers’ perspectives toward seeing themselves and others, how classroom culture shock led teacher to think differently and comparatively in an educational domain, and what teachers’ cultural adaptation processes were.
The finding shows that culture shock is an inevitable process that teachers had to experience in a foreign country. From the interviews, teachers reported that they had been disoriented, felt like an outsider, been homesick, and had to struggle with the language barriers. Although Chinese teachers and American teachers experienced culture shock to different degrees, they had to struggle between new and old ways of thinking habits (where learning happens quickly) although it might not always be pleasant one. The general culture shock helped the teachers grow and learn at a more personal level.

At their workplace, the classroom culture shock was another important issue that exchange teachers needed to cope with, which helped teachers grow and learn at a more professional level. Teachers from the two countries observed quite a few differences between two their educational systems including the student-teacher relationship, the examination system, the classroom participation and settings, cohort culture, discipline issues, and so on. Through observation and reflection upon these differences, teachers from the two countries might not necessarily accept all the differences (some of them might even confuse them), but it opened up a new channel to help them look at education from a different angle, and provided more options for them to see themselves as teachers and become more tolerant of difference at their work settings.

Learning happened more completely when cultural adaption moved teachers from “being in discomfort” to “getting used to it.” How well a teacher adjusted to the new culture either in daily life or in the workplace was highly related to teachers' personality, their international travel experiences, and whether they had a clear professional learning goal. The better adjusted teachers in this study were those who believed that they learned quite a lot and benefited from the exchange experience, and they were willing to take another opportunity to travel to a new country to learn again. But for those who relatively did not adjust well, which might be due to their introverted
personality, unclear learning goal, or first-time international travelers, their real learning might have happened either at a rather later stage of their exchange stay or else their bitter cross-cultural memories greatly overwhelmed their positive learning experiences.
Chapter 6

Research Findings—Global Teacher Identity

Chapter 6 presents findings that help to illuminate a teacher’s identity. Through “learning as being” and “learning as belonging” in a global community (Wenger, 1998), exchange teachers reflected on their identity and compared their local professional identity with the new understanding about how to be a teacher, how to act as a teacher, and how to understand themselves as a teacher. Through on-going reflection of their global experiences and local practice, teachers from both countries consciously or unconsciously underwent a process of forming a mixed type of professional identity that was somewhat different from their previous local teacher identity.

Reflection on Personal Identity

In this category, personal identity means the non-professional identity, which, in general, aims to understand how teachers saw themselves as persons. The social psychologists (e.g., Erikson, 1959; Vygotsky, 1978) define identity as “a situated and dynamic process of individuals developing conceptions of themselves as rational beings over time” (Olsen, 2008b, p. 4). How teachers evaluated themselves as persons was influenced by their international experiences and contacts. In different situations such as in a cross-cultural setting, exchange teachers tended to review themselves from a new and comparative perspective, and their reviewing of who they were as a person was an on-going reflective process at the time when they were in another country and this process continued after they returned to their home country.

When asked how they thought of themselves as a person in general, most American teachers reported that they described themselves as being “patient”, “sharing”, “nurturing”, or “willingness to raise up others.” Chinese teachers used different terms to describe themselves as human beings such as being “role models”, “highly ethical”, “with good moral standards”, and “self-disciplined.”
In traditional Chinese culture, teachers represented the best kind of exemplary model in the society, just as the Chinese teacher, Qiao, reported:

…I always need to be careful of what I say or do as a person…. it does not matter whether I am in or out of school. Whenever people know that I am a teacher, they immediately respect me, you know... My students look up to me as a role model… I work hard to prove that I deserve their respect.

All four Chinese teachers discussed their personal identity related to being a teacher, even though I had reminded them not to talk about themselves as a teacher but who they are as a person in a general way. But for American teachers, their personal lives and work lives could be separated from each other, which means that American teachers’ social roles are not defined simply by their teaching job. This was so different from how Chinese teachers viewed themselves on this issue. The American teacher, Jenny, shared this observation:

…I do not need to be perfect to become a teacher, but… in China, I noticed that Chinese teachers seem like a perfect icon in the society…. They not only need to be a good teacher but also a good mother, a good wife or a husband…uh… a good daughter or a son…. High moral requirements are placed on them…. the society expects them to be perfect in every way….

The Chinese teachers did not separate their personal identity from their professional identity, and they carried their teacher identity both at work and after work. Personal identity and professional identity were highly bound together and influenced each other. By contrast, the American participants could easily distinguish a general self from their professional self.

**Professional Identity Crisis**

The interview data indicated that both American and Chinese teachers experienced a rethinking of professional identity. However, at different levels, they all doubted, questioned, and challenged their previous understanding about who they were as teachers, how good teachers should be/act, and what they should do to cope with teaching as a profession. The findings showed that
professional identity crisis did exist, and was common for exchange teachers in both countries when their familiar cultural and social patterns were ineffective in a new environment. They were confused about their roles as a teacher. Li, a Chinese teacher, questioned her teaching skills when she helped teach a Chinese language class at WHS in the USA. She commented: “I am not sure I am a teacher any more in the American classroom although the language being taught was Chinese. Students called me Ms. Li instead of Teacher Li. I feel being a teacher in the USA is not as well respected as it is in China.” Similarly, American teachers in China also encountered tensions, as Rose remarked:

… Chinese students and teachers are nice to me, but… sometimes, I feel they are too nice. I was being called “teacher” all the time… none of them might even know my real name…. I also felt that I did not have any personal space because no matter where I went, I felt people were staring at me. They looked at me as I was some sort of celebrity…. But you know…uh… I am just a teacher…. I just wanted to be treated like a teacher. I wanted to be treated equally as any other teachers at school so that I can learn and observe what a real Chinese classroom looks like…. But the moment I entered the class, I felt the dynamics changed immediately. All eyes were on me, which I did not like at all. Because all I wanted was to see how Chinese teachers teach and how Chinese students learn. Unfortunately, uh, I did not get much of that during my visit in China, especially during my first two weeks in YHS.

The American teachers were shocked at the heavy workload that Chinese teachers put on students by focusing on examination taking. As well, they were more open-minded, tolerant, and they generally adjusted better than Chinese teachers. James commented that he liked to meet different people and experience different school systems. And he also acknowledged that exchange teachers needed to have flexibility but also that his experience increased his flexibility. They felt their goal of professional development was met and what they observed in China helped them understand education systems in general. But due to the dramatic difference between two education systems, most American teachers did not believe that what they experienced and observed could be directly applied in their teaching in their home country. As the American teacher, Jenny,
commented: “There is no doubt that learning for examinations might increase students’ test scores, which shows the good learning outcome. Although monitoring the learning outcome is important, students’ independent thinking and creative minds are more important.” James also shared this observation:

… Chinese teachers work so hard every day to prepare for their classes… they prepared hundreds of PowerPoints for their classes. Their working hours are from 7a.m. to 6p.m. … after they are back at home, they continue to grade assignments for another two hours… I can hardly imagine they would have any personal lives.

Only one American teacher, Rose, believed that what she learned from China would have practical application (such as using practice test stories to modify students’ learning result). All the other American teachers reported that they were open to new ways of teaching and learning in China, but they can hardly incorporate any of them into their teaching because the Chinese education system is so examination-oriented.

However, their Chinese counterparts had different opinions in terms of professional crisis adjustment. After one month, one of the four Chinese participants, Li, thought about terminating her contract with the exchange program and returning to her home country right away. Although she eventually chose to stay, her learning experience was extremely painful at the beginning of her exchange and this slowed down her rate of learning. Two Chinese participants, Qiao and Xing, provided positive comments about their overseas learning experiences and believed they adjusted quite well to American school culture. They felt that their visits to American schools were worthwhile and they learned how to teach differently with creative and innovative ideas. They enjoyed a much freer learning atmosphere and believed that teachers should be a good facilitator of learning instead of being a dominant knowledge authority. As Qiao reported, she is now more seeing herself as a good mentor for students’ learning and she cares more about each individual
student’s learning needs instead of treating them all the same. She believed that her change of perspectives on how to be a qualified teacher was fostered. She coped well with her professional identity crisis as a teacher and her teacher identity was reshaped through reflective thinking and active learning experiences in the USA. The other two Chinese teachers, Li and Zhang, reported that it took them a much longer time to finally open up their minds to embrace the differences compared with other Chinese exchange teachers, which means that their learning took place at a rather later time during their stay in the USA.

Still, a majority of Chinese teachers’ comments on adjustments indicated that they felt a barrier and tension in communicating and interacting with local teachers, and they pointed out that American schools were too “loose” on formal assessments and “classes with too much fun do not guarantee students’ “learning quality.” Zhang’s experiences were painfully recalled:

…in China, teachers are authority figures. They are highly respected by both students [and] parents and face far fewer behavior problems in class. As a help teacher for a Chinese class, I was upset (a long pause)… because I did not feel valued here as a teacher... You know, uh, I was a good teacher back at my home country, but here…. when I shared my teaching experience with a group of American teachers and students, I heard someone called me a ‘dictator’. Uh, I am not, you know. Students at home love me a lot....

From the interviews and observations in this study, an interesting discovery is that, although most Chinese teachers reported that they experienced a hard time adjusting professionally in the American school, they believed that they learned quite a lot from American teachers. They reported that the fact that they did not adjust professionally smoothly does not mean their learning failed. On the contrary, after going through the hard professional adjustment processes, the Chinese teachers adopted many teaching materials, strategies, and skills from their American peers, such as how to inspire students’ learning interests by using questions to support students’ creative and critical thinking. They reported that they attained a better sense on how to organize group activities, how to utilize role play to understand the teaching content, how to use game activities to engage students,
how to embed visual and audio aids into their teaching, and so on. Chinese teachers also purchased many textbooks and reference books and took them back to China. Also, they gathered hundreds of copies of curriculum outlines, game sheets, and observation notes and took them back to China.

The Chinese teachers underwent a much more intensive professional crisis stage compared with the American teachers during their stay in each other’s country. The professional identity crisis related highly to teachers’ encountering a different cultural and social shock both inside and outside of the classroom. In general, the Chinese teachers were more emotionally challenged in coping with the difference, discomfort, and confusion. By contrast, although American teachers also encountered challenges in Chinese classrooms, they were relatively more tolerant to new ideas and different ways of doing things, and it took them a much shorter time to familiarize and mingle with local teachers and students. However, most of them did not believe they could adopt what they had learned in China into practice at home in contrast with the views of the Chinese teachers. Of the four Chinese teachers, two of them reported that they felt they had become a part of the WHS teaching community, while the other two did not think they fully engaged in the community. However, they firmly believed their experiences were beneficial to their personal growth and professional improvement. All of the Chinese reported they could more or less adopt American teaching techniques and skills and directly or indirectly in their teaching, which is different from most of the American teachers whose learning was limited simply to experiencing and/or understanding the differences.

Global Teacher Identity

In this study, “global teacher identity” is a teacher identity that combines both the local knowledge with global borrowings (Luk-Fong, 2005; Maguire, 2010; Tudhsall, 2012; Steiner, 1996). Forming a global teacher identity is fluid and changing process depending on teachers’
constant and frequent reflection on their roles both in the exchange program and after they returned home. Wenger (1998) defined this phenomenon as “nexus of multi-membership”, which is “all the subtle ways in which our various forms of participation, no matter how distinct, can interact, influence each other, and require coordination” (p. 159). Ginsburg et al. (1990) explain the importance of both global and local knowledge:

One cannot adequately understand the dynamics in nation-states or localities without taking into considerations developments in the world system....We need to investigate how the global structural and ideological contexts constrain and enable group actors’ transactions concerning education.... [However, this] does not require that we ignore national-regional- and local-level cultural, economic and political dynamics. (pp. 493-494)

Teachers’ reflections on their global teacher identity were analyzed based on Kelchtermans’ (1993) teacher identity structure including teacher’s self-image, self-esteem, job motivation, task perception, and future perspectives, based on which the understanding of global teacher identity is developed and analyzed. Kelchtermans (1993) explained that teacher’s self-image is how teachers describe themselves through their career stories, through which teachers reflected on how to be a teacher and how to act as a teacher (Sachs, 2005). Self-esteem is the evolution of self as a teacher, how good or otherwise as defined by self or others (Kelchtermans, 1993). Job motivation explains what makes teachers choose, remain committed to, or leave the job. Task perception is how teachers define their jobs, such as how they teach and how they understand teaching as a job.

Most teachers believed that, in order to reduce the discomfort, they were “forced” to rethink and reflect upon teacher identity in order to overcome the crisis stage (such as, how to be a good teacher, how to act as a good teacher, and how to understand their work and their place in society (Sachs, 2005)), and some of them formed a new understanding of how to be or act as a teacher. Here, I call this new understanding of teacher identity “global teacher identity”, which means teachers who voluntarily adopted the perspectives and/or knowledge related to their professions
from another country and combined them into their own teaching practice back to their home
countries. Even though most American teachers did not think they could directly apply Chinese
teachers’ teaching skills into their classroom, they became more open and tolerant to difference and
new ways of thinking. The perspective change, as important as the behavior or attitude change, also
contributed to teachers’ global teacher identity development.

Self-Image

Teacher’s self-image describes how teachers think about themselves as a teacher through
their exchange stories, through which they reflected on how to be a teacher and how to act as a
teacher. For example, what consistently came through the research is that the American teachers
discovered that Chinese teachers’ role was to cultivate not only their students’ cognitive
development but also to promote positive attitudes to society and responsible moral behavior. By
contrast, the American teachers saw their major responsibility as limited to teaching the curriculum
inside the classroom. American teachers regard their job as teaching combined with sharing and
learning together with students, just as Rose described that her role as a teacher is to construct
knowledge in the classroom with students. As well, she did not believe that the teacher is the
knowledge source or authority which is different from how Chinese teachers thought of their roles.

Chinese teachers typically espoused a view which extended far beyond the classroom—they
not only regarded themselves as the knowledge authority but also a role model in all aspects inside
and outside of the classroom. These traditional dual roles require them not only to focus on
delivering knowledge and increasing students’ test scores but also on cultivating positive attitudes
and good citizenship which is consistent with the Chinese cultural value “Jiao Shu Yu Ren” (which
means “teaching involves developing a good person”) (Watkins, 2003). However, after the
exchange program to the USA, most Chinese teachers became aware of that their previous roles should be expanded.

The Chinese teacher, Li, shared her stories:

…I was extremely surprised to hear an American teacher said to a student that she did not know the answer of her questions. You know, uh, I would never say “I do not know the answer” in my class; [it] would destroy my teacher dignity…. But my American experience taught me that our teacher dignity is not as important as students’ authentic learning… I guess it is OK that we teachers do not know everything… Suggesting to students that they find the answer through reference book or with the internet will definitely help all of us.

What American teachers observed in China also helped them rethink how to be a good teacher. The American teacher, Tanya, commented:

Good teaching should involve far more than knowledge delivery…. It should include educating and cultivating students. In my country, we leave the psychological or moral part to our guidance counselors…However, to help student to learn how to be a person is every teacher’s job. This should be more important than other things. On this issue, Chinese teachers have done a much better job than us. This is definitely something we can learn from them…. Although I do not think we can totally borrow this “role model” idea from China, we American teachers at least can set up a good example in being a person for our students.

Another American teacher, James, echoed:

…the Chinese teacher is expected not only to have good instructional skills but also to be a good moral role model in all areas of life. The Chinese society has put much value on teaching as a job… it is different from where I come from…. I was told that, although teaching is not a well-paid job in China, teachers there receive more respect in general. I wish it was the same in my country.

When asked what witnessing this difference would possibly do to their teaching, two American participants welcomed the Chinese perspective of teacher’s role, and believed they were provided new understanding about how to be a good teacher, especially for one of them who had to encounter some Chinese students and parents at his home school. He believed that understanding and respecting students’ home culture helped him better interact with Chinese parents and encourage their children to learn.
In terms of evaluating self-image, although the fundamental roles of both Chinese teachers and American teachers remain unshaken after the exchange program, observing the differences in each other’s country did make them rethink who they are and what might be helpful to their students’ learning. Some of them—but not all—were willing to borrow each other’s good ideas to help themselves become more qualified teachers. The following table describes the difference of Chinese teachers’ and American teachers’ understanding about their global identity in a teacher’s self-image (see Table 6-1).

Table 6-1. Global Teacher Identity in Self-image

<table>
<thead>
<tr>
<th>Global Teacher Identity</th>
<th>Chinese Teachers</th>
<th>American Teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-image</td>
<td>1) knowledge authority; 2) ethical/moral role model; 3) willing to try to construct knowledge with students</td>
<td>1) sharing knowledge; 2) learning through teaching; 3) responsible for students’ growth; 4) set a good example of being a good person</td>
</tr>
</tbody>
</table>

**Self-esteem**

When asked how good they think they are defined by others or self, Chinese teachers and American teacher both had some very similar answers, such as that they believed parents and students regarded them as responsible and hardworking teachers. But the definition for what good teacher looks like is different between the two countries. In China, as the Chinese teacher, Zhang, mentioned:

A good teacher is not only hard working and responsible, but he or she must be strict… we cannot act like American teachers who are more like friends to students. Although we want to, we cannot… If students did not have a good test score, we failed as a teacher. So we have to be very strict with them.

Xing also had the similar comments:
I love my students, but I know they are afraid of me because they think I am a highly demanding teacher…. I must take responsibility for their learning, so I have to show the “poker face” to let them know learning is a very serious thing…. Since I came back from the USA, my students told me that I smile a lot more than I used to be... I guess I have learned that from American teachers who always wear this kind and warm smile on their faces…. I guess being strict and being nice does not need to conflict.

By contrast, since American teachers had much less pressure from the test scores, they believed that students should take responsibility for their own learning, and their job is to facilitate them and guide them to learn well. Their feedback about how others think about them was more pleasant, such as what Jenny described:

My kids think I am a creative teacher, because I always try to add new games and fun learning activities into learning…..Parents think I am loving and caring. You know, I love teaching and I am happy being around with my kids, and I like to share and give back.

The following table describes the difference between Chinese teachers’ and American teachers’ understanding about their global identity in teacher’s self-esteem (see Table 6-2).

<table>
<thead>
<tr>
<th>Global Teacher Identity</th>
<th>Chinese Teachers</th>
<th>American Teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-esteem</td>
<td>1) responsible;</td>
<td>1) hard working;</td>
</tr>
<tr>
<td></td>
<td>2) hard working;</td>
<td>2) creative;</td>
</tr>
<tr>
<td></td>
<td>3) strict;</td>
<td>3) loving and caring;</td>
</tr>
<tr>
<td></td>
<td>4) demanding</td>
<td>4) giving back</td>
</tr>
<tr>
<td></td>
<td>5) willing to try to smile more in class</td>
<td>5) being a facilitator and guide student to learn</td>
</tr>
</tbody>
</table>

Job Motivation

Job motivation explains what makes teachers choose, remain committed to, or leave the profession (Kelchtermans, 1993). For teachers from both countries, the main reason for remaining in a teaching career is that they have great enthusiasm for teaching which helped them survive
burnouts. In addition, either coming from a family having relatives who work in the teaching field (two Chinese teachers and one American teacher) or influenced by a great teacher they met when they were young (one Chinese teacher and two American teachers), teachers in this study had been wanting to become a teacher since they were in elementary schools. Their childhood dreams and passion that have been driving them to pursue their teaching career are the second main source job motivation them, although in both countries, teaching is not a well-paid job.

After participating in the exchange program, some American teachers like Tanya and Rose reported that they has become more motivated to learn more about China and Chinese education because they had Asian students in their classes and they had become more understanding about Asian parents. For Chinese teachers, they mentioned that they used to believe that the goal for their teaching and students’ learning was to attain good test scores, but the exchange experiences motivated them to think how they could make learning fun and foster real learning. As the Chinese teacher, Xing, commented: “I want to create a learning environment that helps students learn the knowledge that they feel will be useful for the rest of their lives instead of some rote learning that they could forget right after the test.”

Different from American teachers who do not receive any merit pay, Chinese teachers receive merit pay which is determined by an evaluation of their students’ test scores. For example, when the senior graders leave high school, they are tested to see which university they are qualified to attend. Since the same teachers have had those students for three years, they compare their entry scores to their exit scores. The classes that showed the most academic gain results in that teacher receiving a bonus that ranges from 3000 Chinese dollars to 10,000 Chinese dollars (one month or two months’ pay). On the other hand, a teacher whose students did not show growth will be evaluated accordingly. At YHS, the English faculty team won first place in the province college
entrance examination test scores. As a reward, each of the teachers in the English department received a 10,000 Chinese dollars merit pay. The teachers I interviewed reported that the merit pay system does encourage them and rewards their efforts. The following table describes the difference between Chinese teachers’ and American teachers’ understanding about their global identity in a teacher’s job motivation (see Table 6-3).

Table 6-3. Global Teacher Identity in Job Motivation

<table>
<thead>
<tr>
<th>Global Teacher Identity</th>
<th>Chinese Teachers</th>
<th>American Teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Motivation</td>
<td>1) enthusiasm; 2) merit pay; 3) childhood dream; 4) willing to try to teach students useful knowledge instead of learning for exams</td>
<td>1) enthusiasm; 2) passion instead of payment; 3) childhood dream; 4) willing to learn more about China and Chinese education because they had Asian students and parents back at home</td>
</tr>
</tbody>
</table>

Task Perception

Task perception is how teachers define their jobs, such as how they teach and how they understand teaching as a job (Kelchtermans, 1993). Chinese teachers reported that their main task of teaching is to improve students’ test scores and help them get into a good university. Also, they felt that they were responsible for students’ moral and ethical development, such as to teach them to be honest, respectful, diligent, modest, brave, compassionate, generous, and helpful to others. Since the teacher-centered teaching mechanism is decided by the Chinese education system which values test scores and emphasizes knowledge memorization, Chinese teachers reported that it was difficult for them to care about an individual’s needs in class, but the American experience made Chinese teachers realize that every student is unique, and some of them started to care about individual
student’s needs. Of course, it was a conditional situation based on how well students learn from the key content that was going to be tested.

In terms of classroom instruction, the four Chinese teachers were quite similar. They usually started with a brief review of what had been taught in the previous lesson, and then they clearly stated the topic for the current lesson and wrote down the topic on the white board. Each of the Chinese lessons consisted of a combination of whole-class discussion and individual student seatwork. During the instruction, Chinese students were also frequently asked to read important points together. Chinese teachers seemed to believe that the more students read aloud, the more they would be able to remember and understand the important points, especially for language classes. At the end of each lesson, Chinese teachers always tried to summarize the main or important points related to the lesson. Some teachers had already written these important points on a small blackboard in advance. They simply hung up the small blackboard and then directed students’ attention toward what they considered to be the important points. Other teachers referred to what had been written on the large blackboard while they were discussing these important points. Chinese teachers rarely erased what had been written on the board during their instruction because the design of the white board presentation is considered part of the lesson plan. No group work was involved when I observed the four Chinese teachers’ lessons.

In contrast, the American teachers focused on fostering students’ creativity and independent thinking, encouraging students to develop their own judgment, critical thinking, and multiple answers, helping students become a better self, valuing team work, and supporting students’ extracurricular activities. The American student-centered teaching style put much less stress on students who were enjoying their class more and learning more compared to Chinese students. As the Chinese teacher, Li, commented:
American students are so lucky. They come to school at 7:30a.m…their school is done around 3:30p.m., which is so different from my Chinese students who stay in school from 7a.m. to 6p.m. and, when they are back home, they need to spend another at least two to three hours to finish their daily assignments.

But American teachers also pointed out they should learn from Chinese teachers on balancing between love and discipline. Compared with Chinese students, American students have more discipline issues. The American teacher, James, remarked: “Chinese students are the most perfect students in the world. They seems always following teachers’ instructions, and I did not see any discipline problems in the Chinese classrooms. We [American teachers] always struggled to balance love with discipline.”

Regarding American teachers’ instruction skills, the four American teachers reported two kinds of teaching styles. Two of the teachers used a combination of whole class discussion and group work/activities/game in their instruction, which was the same for Chinese teachers. The other two teachers mainly used whole class discussion. Every American teacher often used an overhead projector during instruction. There were two lessons from two different teachers in which American students were asked to display their solutions on the overhead, but they were not asked to explain their solutions to the rest of the students in the room. Like Chinese teachers, the American teachers tended to begin their lessons by reviewing what had been taught previously. Unlike Chinese teachers, the American teachers rarely summarized main or important points at the end of each lesson. Tanya concluded that: “My general impression is that the Chinese lessons were well-organized; Chinese teachers always review, then teach the new lesson, and summarize—a claim I cannot make about my lessons.” The following table describes the difference of Chinese teachers and American teachers’ understanding about their global identity in teacher’s task perception (see Table 6-4).

Table 6-4. Global Teacher Identity in Task Perception
<table>
<thead>
<tr>
<th>Global Teacher Identity</th>
<th>Chinese Teachers</th>
<th>American Teachers</th>
</tr>
</thead>
</table>
| Task Perception         | 1) to improve test scores  
                       | 2) to improve student’s moral/ethical standards  
                       | 3) responsible for both parents and students  
                       | 4) to use the teacher-centered teaching style and emphasize memorization  
                       | 5) willing to try to care about the individual rather than treating students as the same | 1) to foster students’ creativity and independent thinking  
                       | 2) to encourage student’s own judgement, critical thinking, and multiple answers  
                       | 3) to help student become a better self  
                       | 4) to support student’s extracurricular activities  
                       | 5) to value team work  
                       | 6) to use the student-centered teaching style  
                       | 7) willing to try to find the balance between love and discipline |

**Reflection on Being a “Good” Teacher**

According to Wenger (1998), there is a close connection between identity and practice: by learning in the community, identity forms and develops. The findings in this study echoed Wenger’s (1998) theory. In this study, teachers constantly reflected on their learning experiences both during and after the exchange program, and they constantly defined who we were by negotiating local ways of belonging to a broader global community (Wenger, 1998). The key issue that teachers discussed most often in their interviews was on how to be a good teacher and foster their own capacities so that they could use to motivate, inspire, and educate students. The capacities that teachers think they should possess include how to be reflective and find ways to improve teaching qualities, how to be resilient to cope with different students and school administration, how to show appreciation to students and receive appreciation from students, how to become a confident teacher and teach students to be confident, how to become a creative teacher and teach students to be
creative, how to differentiate instruction to meet students’ different learning needs, and most importantly, how to maintain passion and enthusiasm for teaching and learning.

**The Notion of Reflective Learners**

The teachers from both countries were reflective learners. In both one-on-one and focus-group interviews, they shared their experiences back in their home countries and discussed with me about how they felt it was important for them to see how they had grown and improved in all areas, just as the American teachers like Rose who shared these thoughts:

…learning from my past experience helps me become a deep thinker with a greater sense of who I am and how I choose to teach. The China experience definitely pushed me to think reflectively and comparatively, and made me become more sensitive in all areas.

Another American teacher, James, recalled:

When I joined Chinese teachers’ weekly faculty meeting, I noticed that Chinese teachers gathered together not only discussed their teaching plans, but [also] discussed reflectively on how to teach well and what they can improve…. Chinese teachers learn together as a reflective cohort, which is amazing. Well, I think we American teachers should do the same thing.

By becoming reflective learners themselves, the exchange teachers believed they could better help students become more reflective on their learning as well. The Chinese teacher, Xing, excitedly shared the following comments:

…I saw the American teachers held an award ceremony for their students toward the end of the semester….They acknowledged students’ effort and rewarded each student…. I did the same thing after I came back to China, you know… I also asked my students to openly talk about their achievement…uh… what areas they think they need to improve. They were absolutely inspired and motivated.

The goal of reflection is to find ways for teachers to become better teachers. There is no doubt that exchange teachers wanted to achieve this goal, although sometimes the reflective process might not be at all easy, especially for Chinese teachers who experienced a harder adjustment process in the USA. Zhang recalled that
I was not happy about my overall experience. Some memories were painful, but I cannot deny that I learned quite a lot. Now when I look back, I understand that “humiliation” and “losing face” are not all bad things. As long as learning happens, pain comes with it. All the other Chinese teachers also believed that going to the USA was a challenging but wonderful learning experience that can only lead to their becoming better teachers in the future.

Sharing their overseas experiences with other teachers in the focus-group interviews is another good way to help them reflect on their exchange experience. In addition, exchange teachers maintained either a journal, a photo album, or shared their experience on Facebook and Twitter. They believed that this kind of sharing with colleagues, friends, and family provided them an efficient way to let others understand them, and more importantly let themselves understand their own experience better.

Most exchange teachers kept a journal to record their memories and to reflect upon their past experience in each other’s country, but due to the private stories and emotions involved and specific names mentioned in their journals, the exchange teachers were not comfortable with sharing their journals with me. When asked how the journal helped them in terms of learning, the teachers answered that reflection allowed them to hold on to their memories longer which was a very special gift and provided a more complete memory of their exchange experience.

The Notion of Flexible Teachers

Being resilient and flexible is a good quality that teachers thought they had developed and needed to continue to develop. Going to a new country with all of its strange and new contexts, learning could be become impossible without resilience. The Chinese teacher, Qiao, provided a comment on how she felt that challenge and difficulty could made her a stronger person: “When things were tough and challenges appeared, I had to be strong and push myself to step out of my...
comfort zone and become a better self so that I can set up a role model for my student and encourage them to love, be optimistic, and passionate for learning.”

Teaching is a very demanding job, and all exchange teachers in my study had experienced burnout during their careers. Occasionally, their heavy workloads drained them physically and mentally, and they needed flexible strategies to cope with the possibility of burnout (Clark, 2004). Exchange teachers from both countries realized that being a teacher is not an easy job anywhere, and they became more empathetic about each other’s job and developed a better understanding about this occupation. The Chinese teacher, Li, discovered that:

…teachers experienced burnout everywhere, uh… I have learned to conquer it from my American peers. We Chinese do not know how to say “no”, [but] sometimes we have to realize that by taking too much work and too many duties, we are hurting our students…. Teachers should not feel bad about saying that… American teachers know how and when to say “no”… but, Chinese teachers did not know.

Changing an old thinking paradigm to a flexible and adaptable pattern needs time and training. Teachers reported that the exchange experience provided them opportunities to be more flexible and resilient to new situations and new challenges.

**Showing Appreciation**

Chinese teachers reported that from their exchange experience they had learned from American teachers the importance of expressing their appreciation and gratitude to students. Teachers are regarded as the knowledge authority in Chinese society (Li. 2003), and traditionally they are not expected to express appreciation to students. But the visit to the USA provided Chinese teachers an opportunity to value the importance of showing appreciation in their class. The Chinese teacher, Xing, commented:

American teachers saying “thank you” all the time when they were teaching. I did not use this kind of positive words enough in my class. Uh, I used to believe, as students, it was their job to work hard and get good grades… [But] I have changed since I came back from my trip. Saying “thank you” does not mean we are less qualified or less confident, but it was
just a way of showing our constant love and encouragement to our students. Meanwhile, we also get our students to understand the importance of being appreciative.

For American teachers, they also learned from Chinese teachers on how to express appreciation but the difference is in how to express appreciation to their colleagues. In China, teaching is a group and collective work. Teachers use the same curriculum and textbooks, and they have big offices or conference rooms for preparing their lesson plans together. All Chinese teachers have chances to observe how other teachers teach not only in their own schools but also in other schools. Teachers meet at a regular time to learn together or have meetings together. By comparison, American teachers lean more toward isolated and individual ways of teaching. American teachers have their own classroom. They have great flexibility and autonomy in their classroom which means they can choose their own textbooks or teaching techniques, and they can decide how much content they want to teach the students. American teachers reported that they rarely prepared for lesson plans with their colleagues, and students’ performance depends on this teacher’s personal preference of teaching and his or her own judgement. The lack of communication between American teachers is an issue that American exchange teachers mentioned in their interviews with me, just as Tanya observed:

As teachers, we are drained emotionally, mentally, and physically each day. I believe with a sharing community as what Chinese teachers have, we would feel less lonely and more productive…. We did not show enough appreciation to each other…but we should, you know. In my school, there are many dedicated, smart, experienced teachers…

Other American teachers also strongly believed that American teachers should learn from Chinese teachers on working together as a sharing and supportive cohort, such as helping each other refine teaching plans or solve problems together, especially for teachers who teach the same subject.

Just Be Confident
Exchange teachers mentioned that being confident is a quality that teachers must have, and they believed that constant learning contributed to confidence building, as Rose described: “I travelled so much by myself or with my family, and spent so much time in placing myself in new countries. My China experience helped me become extremely confident in teaching Asian students and conversing with Asian parents.”

For Chinese teachers, their confidence building is mainly from their improvement in English proficiency. Since the Chinese participants in my study are all English language teachers, the four-month living experience in USA helped them dramatically in strengthening their language skills. Qiao, the youngest exchange teacher among my Chinese participants, excitedly shared her story:

I thank my exchange experience because I not only improved my teaching skills but also my English ability. My students told me that I speak English with much beautiful pronunciation, which gave me great confidence.

Another Chinese teacher, Zhang, also commented:

Now when I teach about New York City or Washington D.C., I have a much better understanding about what I am talking about. You know before, all my knowledge was from the book, but now I am more confident in what I am teaching about because I have been there.

Both American teachers and Chinese teachers reported that the confidence they gained from their travel experiences also helped them build students’ confidence in the classroom. They believed that confident teachers have the power and ability to inspire their students to their fullest and gradually lead them to realize their potentials. In order to do so, teachers acknowledged that they themselves need to be constant learners so that they can facilitate students in the long run.

**Fostering Creativity**

Chinese teachers were amazed and even envious about American teachers’ ability to be creative which excited and inspired students in the classroom, such as American teachers’ different arrangement of classroom settings (e.g., horseshoe shape setting), learning through creative
games/activities, decorated “Fame Wall” by students, field trips, music teaching, video showing, and so on. However, traditionally, the Chinese examination system guides all learning to be examination-oriented, and there is little room for teachers to be creative. As a result, both teachers and students were exhausted and suffered during the learning process. The Chinese teacher, Zhang, commented:

In China currently, the government requires our teachers to foster students’ creativity…. [But] actually we did not know how to do that. Actually…uh… the key point is not how to foster students’ creativity, but teachers themselves need to be creative thinkers first…. We need to think out of box and change our mindset first. But, how can we do that? One of the ways is to step outside of our classroom to see how other good local or foreign teachers teach.

Another Chinese teacher, Xing, echoed Zhang’s opinion in a group interview session:

…we cannot change the foundational Chinese education system—this examination-oriented system, but at least I can do something extra to spice up the class, to reduce students’ pressure and bring them more fun in learning. So now whenever I teach American history in my English class, I play documentary videos to my students. To my great surprise, the learning result is much better than when I read the book to them. I have learned this from a history teacher in the USA. I am very thankful to this teacher...

For American teachers, their challenge was not to be creative, but to use creativity to raise test scores. Rose, the literature teachers, recalled her experience:

I used to try my best to help my students love reading. I read to them, read with them, asked them to read as a group or individually, but none of this seemed to work…. After I came back from China, I came up with an idea of using small practice drills to modify students’ understanding about the reading. Uh, you know, the learning result is quite satisfying....

Teachers from both countries work on their ability to be creative in order to engage students in productive learning. They all believed that teaching creatively is a quality that any teacher in the world should develop.

**Differentiating Teaching**

Compared with American school’s smaller class size with 20 some students, Chinese teachers commented that in a large size class with 60 or 70 students, they can never balance
instruction to meet different learning styles as what American teachers do. But the exchange experience caused Chinese teachers to be aware that students are different. Before then, they always treated the whole class as a “oneness”, and differentiating learning or teaching never occurred to them before the exchange experience. Xing expressed it this way:

... I noticed American teachers distributed different practice sheets to different students, and also saw 9th graders studies together with 10th graders.... Some students even go to another classroom with a different teacher to receive extra guidance if they are academically challenged. But, you know, in China, it is almost impossible... But this experience made me realize that students are different... Although I cannot do differentiating teaching, after class I will give more work to the advanced students...uh... or talk with students that I think they might have difficulty... I have become more caring about my students.... American teachers have set a good example for us.

After observing the Chinese classes, American teachers were proud of their differentiated instruction. They believed that students learn differently—some of them are visual learners, some of them are audio learners, and others are experiential learners. They have paid close attention to each individual in their class, which is different from a typical Chinese class.

**Passionate Teachers**

Passion is the word that both Chinese teachers and American used to describe who they are as a teacher. They believed that without passion they can never move far in their teaching career. When the burnout happened, it was passion and love of teaching helped them through difficult times. They all love teaching, and they believed that their true happiness was from lifting up others and seeing their students realize their potentials. In addition, the American teacher, James reminded me that passionate teachers are those who have a great sense of humor. Teachers’ optimistic views toward teaching and learning constantly encourage students to be the same way, just as James said: “Whatever I want my students to be, I act first.” The Chinese teacher, Xing, also commented: “It is only passion that makes my job worthy. I found my passion in teaching and will pursue it with my whole being.”
Meeting different teachers in another country not only helped exchange teachers reflect on their teaching qualities, but also guided them to become better persons in general. In a bigger global teacher community, they found not only divergence but commonality. They became more sure and confident in their teaching and the person they could become. As Jenny remarked, “Passion is contagious, and good teachers are the same all over the world.”

**Teaching as a Learning Profession**

Darling-Hammond and Sykes (1999) suggest that it is important and necessary for teachers to understand their job as a learning profession. But learning is not a process without pain. Teachers sometimes were confused and stressed, especially in a new context where cognitive dissonance often occurred. Also, learning in a global community is different from learning domestically, and for some teachers, the overseas learning experience could be transformative.

**Cognitive Dissonance**

The findings of this study indicate that participants from both the USA and China discovered some levels of cognitive dissonance toward the teaching profession and themselves as teachers, such as teaching-centered vs. student-centered teaching methods, the teacher’s role, and so on. Exchange teachers were amazed at how much teaching varied across cultures. Rose, the American teacher, stated:

… I am quite amazed at how Chinese teachers taught in a teacher-centered/content classroom… I used to believe that a large classroom with 50 to 60 students would be a total disaster for any sort of learning. But I was wrong, totally wrong. Chinese teachers prefer to utilize whole group teaching. Their students are not passive as they may appear to us, but rather to learn through listening-oriented learning…. When I asked a Chinese student if he could learn just by listening, he told me ‘I may be listening but I am not passive. I am learning in my head. I learn from my teacher and my friends, too. If they make mistakes, I learn from that, too’…. You know, uh, American kids do not like listen but doing in the class…. Maybe whole class activity is not all bad. I have tried the whole activity for a couple of times; some kids seemed more enjoy it. But I guess it depends on what kind of learning styles they prefer.
Another American teacher, James, had similar comments on Chinese teachers’ teaching:

Chinese teachers can use highly teacher-controlled methods to actively involve students…I did not know how they did that, but it worked…. Highly active and attentive students are learning within the framework of lessons skillfully orchestrated by the teacher.

Rose described in detail an English language class she observed and she believed that

…the teacher seemed to have an invisible script…. He choreographed what the students were supposed to perform. In spite of the students acting spontaneously, the teacher constructed meanings upon their participation and managed to finish the teaching agenda perfectly within 50 minutes.

However, Rose’s colleague, Barbara, had different perspectives on how Chinese teachers handle large class sizes through whole-class teaching; she thought that such learning was “boring, passive, and lack of creativity.” She did not believe American teachers could utilize such methods or do so as effectively because their students back in the USA are not as “perfect” as Chinese students who are trained to be eager and motivated to learn and respect their teachers’ guidance.

The culturally different views about how teachers should practice seems to have had a more negative influence on Chinese teachers. One of them, Li, said:

American teachers gave too much freedom to their students… I am not sure it is good for both the students and the teachers. Without knowing what is right and wrong, students spent too much time in doing self-exploration in accordance with their interests…. You know, sometimes, students were having too much fun rather than being engaged in real learning. I do not see that it can do any good to students…. [Also], students did not respect their teachers as my students in China do… I heard some students even called their teachers’ [by their] first names…. That would be unacceptable in my country.

Another Chinese teacher, Zhang, commented similarly. She believed that American students were spoiled because they received too much praise, and she missed her students back at home who were respectful and followed her lead. However, another two Chinese teachers, Xing and Qiao, gave different feedback. They believed their cross-cultural professional development experience was worthwhile although they had to overcome the discomfort that was brought on by cultural and social differences. It was a painful process for them, but they eventually overcame the discomfort
and embraced their overseas experience with a positive and active learning attitude. They gave high value to encouraging small group teaching. They also admitted that, although it was not what they traditionally would do, they adopted it and believed it could help meet with certain students’ learning needs. After visiting the USA, they said they tended to make greater use of their students’ existing knowledge in planning their teaching, to choose more variety of activities designed to allow students to test their own ideas, and to provide a classroom environment that was more conducive for the discussion of such ideas.

Obviously, there are some levels of disagreement for both American teachers and Chinese teachers regarding the teaching profession in a foreign culture. Teachers who dealt with this inconsistency quite nicely espoused positive and active learning and saw the possibility of “knowledge borrowing” from the teachers of the host country. They believed that their students benefited from this borrowing, and they also expressed their willingness to participate in similar overseas training programs if they would have a chance in the future. However, teachers who clung more to the difference of teaching practice in a foreign culture and resisted the adoption/borrowing of overseas knowledge were more passive and reluctant to learn in a foreign culture. As a result, their learning efficiency was low overall and their rate of learning was rather slow. They tended to be more stereotyping and judgmental about people from different cultures or countries and their resistance to learning in general was much harder to be overcome.

This discovery is consistent with Festinger’s (1957) cognitive dissonance theory. Festinger (1957) theorized that when an individual holds two or more elements of knowledge that are relevant to each other but inconsistent with one another, a state of discomfort is created. He called this unpleasant state “dissonance.” Persons are motivated by the unpleasant state of dissonance to engage in cognitive work so as to reduce the inconsistency. Although many teachers posited that,
when they were exposed to information that is inconsistent with their beliefs or attitude or when
they saw teachers acted in ways that violates their ingrained understandings about how to be a good
teacher and how to act as a teacher, they were definitely confused and felt discomfort but
meanwhile they were excited and motivated to find out why and how the differences occurred. They
wanted to reconcile inconsistent cognition and to affirm the integrity of their knowledge system.

One of the ways of reducing dissonance assessed most often is a change in attitudes.
Teachers who were willing to change their attitudes and perspectives toward the disagreement or
inconsistency eventually became much more open-minded and proactive in learning. They could
make fair judgments about the difference and similarity of the teaching profession in a foreign
culture. These fair judgments led them to reflect on their previous teaching and practice; as a result,
meaningful learning happened. This kind of learning helped them rethink who they were as
teachers, what practice might be more appropriate for their students back at their home countries,
and what a good teacher should look like. The interview data showed that, when teachers valued
more the importance of the professional development experience in a foreign country, the more they
were able to reduce the dissonance by reducing their perception of the importance of the dissonant
or inconsistent act, all of which is consistent with Festinger’s theory.

However, not every teacher eventually overcame the dissonance. They were deluged in
unpleasant emotions, akin to feeling uncomfortable, bothered, or tense. Festinger’s theory described
that dissonance as motivational and when people experience dissonance, they are motivated to
reduce it, much like the way they are motivated to reduce physical drives such as hunger and thirst:
the more dissonance one experiences, the more he/she is motivated to find a way to reduce it.

In this study, however, a few interviewees were not motivated to find a way to reduce the
dissonance but remained cynical and allowed the professional identity crisis to block their passion
and motivation for learning. This finding connects with participants’ age, language ability, and personality. Younger Chinese teachers with better English language ability overcame dissonance faster and more easily, and outgoing teachers reacted in the same way.

**Transformative Learning**

Transformative learning (also known as perspective transformation) takes place when a certain process leads people to give up a habit of mind, see alternatives, and thereby act differently in the world (Mezirow, 2000). Mezirow (2000) further explained that perspective transformation could happen through a series of phases that begin with the disorienting dilemma, followed by self-examination, sense of alienation, relating discontent to others, explaining options of new behavior, building confidence in new ways, planning a course of action, knowledge to implement plans, experimenting with new roles, and reintegration.

In this study, exchange teachers went through a series of disorientating situations both inside and outside of the classroom which caused them to critically reflect on their assumptions about teaching and learning. As the Chinese teacher Zhang remarked: “American foreign language teachers use games to deliver knowledge, and students love it. It seems that the learning outcome is satisfying. I would never imagine a teacher could teach like that. I might try that with my students.” Their reflection made exchange teachers realize the difference and led them to adopt a new perspective and apply it in practice. As a result, instead of teaching and learning in old mindsets, teachers began to look at their habits of mind and work with new possibilities, perspectives, and changes. The Chinese teacher, Qiao, provided a good example of her transformative learning experience:

I had always thought that I was a good teacher… I worked hard to improve students’ test scores… I thought that was the ultimate goal of my job… However, visiting American schools made me realize that test-oriented education system could be very harmful…. Too many hours focusing on preparing for the examination suppressed students’ creativity,
deprived them of their extracurricular time … harmed their physical health. You know, two-thirds of the students in my class wear glasses… their physical condition is much weaker compared with American students…. I spent days thinking about my old ways of teaching … I was quite upset, you know…. Then when I came back to China, I told myself that I would never teach just for the test scores. Although I cannot change the test-driven education system, I introduced fun activities into my teaching, such as using English songs to teach new sentence structures, watching American movies to learn new vocabulary and culture, or taking my students to the playground sitting under the sun to discuss their essays…. I saw my students smile more often, and I am glad I made this change.

Compared with Chinese teachers, American teachers’ disorienting dilemmas were less severe, and their self-examination and new actions were much more mitigating. Most of the American teachers reported that they witnessed education system differences but they did not think that they would directly help them in their teaching. Therefore, fewer American teachers underwent a transformative learning process in terms of professional development. As Brookfield (2000) concluded, learning cannot be considered transformative if essential questioning or new acts do not happen, which means that reflection itself does not constitute transformative learning.

Feinstein (2004) also suggests that a productive way to foster transformative learning is to engage learners in experience-based learning through which they are directly stimulated to reflect upon experiences. As the Chinese teacher, Xing, commented: “Once you travel internationally, you can never undo this experience. We will never be the same.”

Learning in a Global Community

Learning in a global community is quite different from learning in one’s home land. Teachers needed to overcome many different kinds of cultural, social, and institutional discomfort and challenges, which made their international learning a much harder process. To facilitate and advance this mission and increase the impact of globalization, exchange teachers believed that international teacher exchange programs provide possible collaborative opportunities and established partnerships for them to learn from their peers in other countries. Through international
collaborations, teachers are learning to differentiate instruction to better meet the needs of diverse groups of learners. For example, a shared commitment to professional growth helps to achieve a higher level of teaching qualification (Reed, 1988; Laughlin, 2008; Li, 2005). The exchange teachers felt that they were encouraged to engage in learning together to improve teaching and, by extension, improve learning for the students. They could not bring about necessary changes without global perspectives of the world that could cause organizational and systemic change.

Viewing themselves as adult learners and their professional development as a learning profession, exchange teachers believed that this kind of international exchange could provide them with both opportunities and challenges. The Chinese teacher, Qiao, commented that, “Observing ‘teachable moments’ broadened and enhanced my learning” and she believed that through continuous professional development, a global learning community of teacher practice would grow.

Paine and Fang (2006) explain that globalization is described as a blending of global and local, or an adaptation of the global with a distinct local twist that represents a transformation (e.g., incorporating local values, norms, culture, and materials). Even though going globally might be full of challenge and stress, most exchange teachers in this study believed that they benefited from this experience. As James commented: “We are willing to do this kind of experience-based learning. Through observation and interaction with Chinese students and teachers, we learned much more than just sitting in a classroom for a training session.”

**Future Perspectives**

As part of teacher’ identity, teachers’ future perspectives about learning affects the fluid dynamic of where the learning might take teachers (Kelchtermans, 1993). When exchange teachers discussed their expectations for the future development of their jobs, learning is the most important part in their agenda. Teachers from both countries expressed their strong urge to learn for the future.
The American teacher, Tanya, believed that travelling is a great way for teachers to learn: “I definitely want to travel again to other countries, maybe to Japan or Korea, and to see what their schools look like. Although they are all Asian countries, I heard that Korean or Japanese teachers are so different from Chinese ones, and I want to find out how and why.” For Chinese teachers, they are focusing more on the traditional way of learning in the future, just as Li mentioned:

…I know learning to become a better teacher is my lifelong mission. I am not sure I will travel again to another country in the near future, but, uh… we regularly attended faculty meetings, school district trainings, and summer courses… Our school district requires our teachers to have at least 300 hours of organized training every five years…. But I think I spent many more hours than that. For example, we have online training courses, such as Educational Psychology, and English Literature, which allow us to learn at any time. I spent at least 6 to 8 hours every week learning from these kinds of online courses.

Compared with Chinese teachers who spent most their time in organized classroom training or mentoring after they returned from their exchange trip, the American teachers preferred experiential and informal learning such as classroom observation, travel, or field trips. The following table describes the difference between Chinese teachers’ and American teachers’ understanding about their global identity in their future perspectives on learning (See Table 6-5).

<table>
<thead>
<tr>
<th>Global Teacher Identity</th>
<th>Chinese Teachers</th>
<th>American Teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Future Perspectives</td>
<td>Do not choose to spend their future learning time on informal training but prefer more organized learning formats</td>
<td>Choose to spend their future learning time on experiential and informal learning such as travel or field trips</td>
</tr>
</tbody>
</table>

**Summary**

The research findings in this chapter are salient and important for understanding teacher’s identity formation in a global learning community. Three main categories have been presented based on the data analysis: 1) teacher’s identity; 2) teacher’s self-reflection; and 3) teaching as a
learning profession. Through the findings, I have become much more empathic and clearer about the tension teachers were faced with during their stay in a foreign country. Although it was my assumption that teachers would inevitably go through some challenging stages in a foreign country, hearing them talk about it in person was still quite impressive and sometimes intense. Teachers’ stories informed me that learning in a socially and culturally unfamiliar situation was much more challenging and stressful than I had expected. But according to teachers’ feedback, through this painful learning process, they believed that grew much faster and gained very valuable experience.

The finding discloses that the teachers’ re-evaluation and reflection that emerged from their narrative data strengthened their understanding about their identity. Considering teacher’s identity, the findings were presented in five categories based on Kelchtermans’s (1993) five components of teacher identity—self-image, self-esteem, job motivation, task perception, and future perspective. This study shows that, different from domestic learning, teachers who learned in a global community tended to form a new type of identity. During the process of forming a new identity, teachers struggled to overcome the cognitive dissonance and had to reduce the dissonance through their active learning and reflection. The finding also revealed that how well teachers combined local knowledge with global borrowing is highly related to their personalities, language proficiency levels, and previous learning experience.

Considering the process of teacher’s learning, the findings enriched the existing theories, such as transformative learning (Mezirow, 2000) and the community of practice theory (Wenger, 1998, 2007, & 2008). For some exchange teachers, this PDE is transformative even in their lifetimes, and totally changes their perspectives about who they are as teachers and what education truly means to teachers, students, and parents. Through comparison and contrast, teachers from two
countries tended to attain a more complete understanding about themselves and their profession, although it might take time to put these realizations into action.

In sum, this study discovered that overseas PDE was valuable for teachers’ professional identity development, which provided them with an opportunity to compare and contrast different educational systems and educational ideas. This led them not only to reflect on their roles as teachers but, as a result, a new type of new professional identity gradually was formed by mixing both local and global knowledge. Teachers reported that the formation process of global teacher identity was an ongoing and dynamic process, which started at the beginning of the exchange teachers’ arrival in a new country and continued to influence them after they returned to their home countries. As well, the formation of this new type of professional identity greatly promoted their interest and curiosity in continuous and lifelong learning.
Chapter 7

Summary of Findings, Implications, and Recommendations

The purpose of this comparative study was to explore Chinese and American exchange teachers’ professional learning experiences and how these experiences influenced their notions of global teacher identity. A comparison of experiences of these teachers’ learning process and identity formation provided further insights to meet the research purpose. The participants’ shared insights, experiences, and suggestions serve as examples for future teachers who intend to participate in similar international teacher education programs.

In this chapter, a summary of the key findings for each research question is first explored. Then a detailed discussion of the findings is presented. And last, this chapter discusses the implications of the findings for Chinese and American exchange teachers, program planners, policy makers, and culture and language preparation programs.

Summary of Findings

Q1: What is the relationship between exchange teachers’ PDE and their global teacher identity?

1. Teachers’ PDE in a foreign country influenced the formation of their professional identity. PDE provided them an opportunity to look at their careers and themselves from new, different, and comparative angles. These informal learning experiences made them consciously reflect upon who they were as teachers and how to improve as teachers by observing others working in a different education setting. They constantly compared and contrasted their old thinking paradigms with new perspectives and ways of doing, and re-examined and reflected on their own image, self-esteem, job motivation, task perception, and how and what to learn in the future.
2. Through exploring teachers’ understanding of their identity (self-image, self-esteem, job motivation, task perception, and future learning plans), it was discovered that their local identity has been enriched and expanded by the contribution of their international experiences and new knowledge. This kind of learning eventually leads to a dynamic and fluid professional identity—global teacher identity, which is an identity combining with both local knowledge and global borrowings.

3. The process of forming a global teacher identity is ongoing and keeps guiding teachers’ future PDE choices about what to learn and how to learn, such as learning methods, learning content, and the motivations to learn.

**Q2: What are the tensions and conflicts that exchange teachers face in foreign countries and how is their PDE influenced by them?**

1. The tensions that teachers faced in a foreign country were mainly from culture shock causing negative emotions and feelings, such as feeling homesick, disoriented and confused, feeling isolated, and remaining “an outsider” in a new culture. They also encountered language barriers which could cause high stress for some teachers.

2. The conflicts that teachers faced in a foreign country were mainly from observing and experiencing the different education systems. Through the observation of classroom teaching in a new education setting, teachers reported that they identified huge differences in education between two countries including different examination systems, classroom settings, student-teacher relationships, and so on.

3. During the process of coping with tensions and conflicts, teachers underwent a process of cultural adaptation. How well teachers adapted in a foreign culture was determined by their
personality, their previous international travel experiences, and whether they had clear professional learning goals.

Q3: What are the differences and similarities of American and Chinese teachers’ PDE in foreign countries?

1. In terms of PDE similarities:

1) Both Chinese and American teachers went through a stage of culture shock and a process of cultural adaptation.

2) Through participating in the informal learning, such as classroom observation and communication with local teachers and students, all teachers started to rethink about who they were as teachers and how to better perform teaching. This process led to a formation of a new type of global teacher identity which was different from their original local identity.

3) All teachers’ future perspectives for learning were strengthened and they acquired a stronger learning interest through participating in this exchange program.

2. In terms of PDE differences, please see Table 7-1.

Table 7-1. PDE Comparison between Chinese Teachers and American Teachers

<table>
<thead>
<tr>
<th>PDE Differences</th>
<th>Chinese Teachers</th>
<th>American Teachers</th>
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<tbody>
<tr>
<td>Encountering Culture Shock</td>
<td>spent a much longer time in adjusting to a new environment (from three weeks to two months)</td>
<td>spent a relatively shorter time (from one week to three weeks)</td>
</tr>
<tr>
<td>Confronting Different Education Systems</td>
<td>1) initial reaction to the differences was more negative and judgmental; 2) as time passed, gradually adapted to the new culture and opened up to</td>
<td>1) were more open-minded and accepting comparing with Chinese teachers;</td>
</tr>
<tr>
<td></td>
<td>accept new ideas and new ways of doing things</td>
<td>2) welcomed new ideas more and enjoyed experiencing differences</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------------</td>
<td>------------------------------------------------------------------</td>
</tr>
<tr>
<td>The Learning Results</td>
<td>1) suffered more from the culture shock and did not enjoy their stay in the program as much as American peers in China; 2) took learning very seriously and borrowed practical teaching techniques and tools, such as purchasing reference books, buying copies of curriculum scripts and game/activities sheets, and so on and taking them back to China</td>
<td>1) tended to have more adoption of perspectives instead of the action and practical ways of doing; 2) enjoyed experiencing new and different ideas, knowledge, traditions, thoughts, and ways of doing, but not bringing them back home</td>
</tr>
<tr>
<td>Future Learning Expectations and Plans</td>
<td>1) two teachers were willing to go to another country for this kind of informal and experience-based professional learning in the future; 2) another two teachers did not think they would want to go abroad for this kind of informal training 3) preferred organized training regardless the locations</td>
<td>1) welcomed this kind of informal international travel/learning opportunity; 2) would love to join this kind of informal teacher education program again</td>
</tr>
<tr>
<td>The Formation Global Teacher Identity</td>
<td>new identity was formed based on not only acquiring new ideas but also implementing new ways of teaching</td>
<td>new identity remained at the “experiencing” level (experienced the differences and understood the differences but did not include new ways of teaching into their own teaching because either it was not related to their classroom culture or they personally did not prefer them)</td>
</tr>
</tbody>
</table>

**Discussion of Findings**

In this section, detailed discussion of the findings are explored—in particular, how PDE influenced identity formation, how identity guided future PDE, what the tensions and conflicts teachers faced, and what were PDE similarities and differences between two groups of teachers.

**PDE Influences the Formation of Global Teacher Identity**

This comparative research undergirds the need to examine teachers’ international PDE and explored how it influences their identity formation. The findings of this study extend the
understanding of the complexity of teachers’ professional identity formation, especially in a cross-cultural setting.

Day (1999) holds that teacher’s professional development aims to engage teachers in learning activities so that these experiences can be a benefit to the quality of education. However, for exchange teachers in this study, not all learning could be directly or immediately applied into a teachers’ classroom due to the different education systems, but the chance to witness and be aware of the difference itself has a huge impact on teachers. This process made them become more aware of their own teaching styles and education system, and promoted their eagerness for future learning.

As the Chinese teacher, Qiao, described:

> We needed this [chance] to learn in the USA, and it is not how much or what we learned, well...um... but what we saw and heard. We had never known who we were until we compared ourselves with the rest of the world and compared with others....I have been inspired to learn more, you know, step out of my comfort zone....of course, I am feeling it was hard to do that....although it takes time, I am willing to learn about different things and try different things....I also encourage my students to do that now.

The American teacher, Rose, commented that:

> I had asked myself many times why I was there for this exchange....to be honest with you.... we were so different and there was not much I can use. But when time passed, I realized that the influence from this exchange was profound.... [It is] influencing me in a very unconscious and interesting way....well, what I meant is, it made me think or look at the world with more possibilities.

During the process of staying in a foreign country, teachers’ local identity was challenged and they co-opted the new ideas, ways of thinking, and ways of doings into their understanding about who they were as teachers and how to teach better. Their experiences reshaped their understandings about their own image as a teacher, their self-esteem, job motivation, task perception, and future learning perspectives. These contribute to the five components of teacher identity (Kelchtermans, 1993). This new type of teacher identity not only strengthened their understanding of their old thinking paradigm which they originally valued and followed, but also
helped them compare and contrast the old with new knowledge systems during the process where learning happened. The Chinese teacher, Zhang, remarked:

I had always thought I was a good teacher because I worked hard to help my students improve their test scores. But when I saw how happy American students were in their class…they were having smiles on their faces…. I am asking myself: How could I help students achieve good grades but also make them enjoy the learning? ….in my class [in China], my students rarely smiled….

When I continued to ask her if she had figured out a good way to combine learning with fun, Zhang answered shyly: “No, I have not (blushed), but I am working on that, and most importantly, I am motivated to do so.”

The following chart (Figure 7-1) describes how teachers’ international PED influenced the formation of teacher’s global identity.

*Figure 7-1. How PDE Influenced the Formation of Global Teacher Identity*

As the above figure shows, exchange teachers started their learning as adult learners in a global community. In this community, they tried to learn as a member of it. Different from learning
in a local setting, teachers faced challenges to adjust culturally and socially in a global community. Through observation, reflection, and negotiation, teachers learned to make meaning of their experiences. During this process, they went through cognitive dissonance and had to overcome challenges caused by the tensions and conflicts brought on by culture shock and different education systems. Theories, such as community of practice (Wenger, 1998), cognitive dissonance (Festinger, 1957), and transformative learning (Mezirow, 2000) helped me understand and explain individual teachers’ tension and resistance in this learning process. Through observation, reflection, and making meaning of their experiences, teachers learned to form a new sense of self, or a new identity of who they were as teachers.

In addition, the findings in this study demonstrate that learning is not a one-way movement but can be ongoing, multi-directional, or spiral. This means teachers’ identity formation is continuous, has various ways to form, or can be retrieved to develop a stronger belief in their original identity. Being ongoing means that teachers continue to reflect on their international learning experiences even long after they have returned to their home country which affects how they will learn and what they will learn. Being multi-directional means learning in a new environment not only brought professional benefit to teachers but also helped them become a much more confident, reflective, self-directed, and open-minded person in general. For some teachers, the exchange experience made them value more their local ways of doing through comparison and contrast with teaching practices in another country. As the Chinese teacher, Zhang, stated:

I became more valued about my job after visiting American schools. Being a teacher in China is much more respected. I feel I am lucky to have such diligent and disciplined students. I would never choose to use group activity or role plays to teach my class because I have more than 60 students...If I did it, my class would be a total mess. You know… (Smiled)... I would never choose to teach there [in the USA].
Although some teachers developed a stronger faith in their original ways of teaching after the exchange, this does not mean the global experience did not influence teachers’ learning at all. On the contrary, because of the observation and reflection on foreign experiences, teachers realized more that teaching was contextual and not all global borrowing could be applicable in their local settings. Without this international comparison and contrast, exchange teachers might not be so aware of who they were as teachers and they could probably never be so confident about what they were doing. Global learning does not need to be ‘forcing’ our teachers to adopt any practical tools. All in all, teaching is a very local and contextual profession, and each teacher must decide what to borrow if anything. As one of American teachers, Tanya, explained, “Experiencing is more important than anything else.” Teachers need to step out of their own classroom to enter into a broader and much more different world to learn and experience. Their travel and learning experiences will inevitably benefit them and this benefit will spread into their classroom eventually. The getting-stronger local value and awareness have been built up based on exchange teachers’ global contact. So, we still can regard this kind of worshipping local identity as a type of global teacher identity because the global contact made them more aware of what they have and do not have. As Ginsburg, Cooper, Raghu, and Zegara (1990) point out:

One cannot adequately understand the dynamics in nation-states or localities without taking into considerations developments in the world system....We need to investigate how the global structural and ideological contexts constrain and enable group actors’ transactions concerning education.... [However, this] does not require that we ignore national-regional- and local-level cultural, economic and political dynamics. (pp. 493-494)

**Global Teacher Identity Guides Future PDE**

Researchers (e.g., Luk-Fong, 2005; Maguire, 2010; and Steiner, 1996) explained that global teachers are not defined by their location but by their thoughts, perspectives, competence, knowledge and skills. Maguire (2010) argues that it is important for global teachers to be competent
to help students achieve visible, calculable, and accountable learning outcomes. Different from Maguire’s approach of studying “global teachers” by focusing on students’ learning outcomes, the findings in this study paid close attention to investigating teachers’ thoughts and perspectives about how they incorporate global perspectives and encourage cooperation, critical thinking, democratic values, and practices (Steiner, 1996).

Studying teachers’ reflection and understanding of their global identity was based on five elements of Kelchtermans’ definition of teacher identity (1993)—self-image, self-esteem, job motivation, task perception, and future perspectives (see Figure 7-1). By discussing teachers’ reflection of their PDE based on these five aspects, this study discovered that teachers reflected on their learning experiences both during and after the exchange program, and they constantly compared and defined who they were/are by negotiating local ways of belonging to a bigger global community (Wenger, 1998). The findings in this study concluded that exchange teachers believed that global teachers are “reflective learners”, “flexible teachers”, “always showing appreciation to students”, “confident”, “encouraging and fostering creativity”, “using differentiating teaching skills”, and “passionate”. These understandings about global teachers not only benefited teachers’ current teaching practice but also guided them to make better choices for their future PDE (See Figure 7-2).

*Figure 7-2. How the Formation of Global Teacher Identity Guides Future PDE*
The findings show that Chinese teachers liked to spend their future PDE on more organized training (such as mentoring or joining conferences) which could help them refine their teaching skills or update their professional knowledge for their subject teaching. By contrast, American teachers preferred experiential and informal learning such as classroom observation, problem-based discussion, travel, or field trips. Although their future learning preference is different, they reported that they appreciated each other’s ways of learning and would like to incorporate different ways of learning into acquiring future learning plans. The American teacher, James, described it this way:

Seeing a big class of teachers sitting together for a PD course was pretty impressive. Teachers who teach the same subjects are sharing their knowledge together could be really helpful. But unfortunately we did not have that kind of PD course…. I am thinking to take a couple of graduate courses next summer.

The Chinese teacher, Qiao, remarked:
I know I am a good teacher back in China, but you know, I cannot be a good teacher forever. I saw American teachers using their spare time to read books or going online for new information. Although I enjoy school district’s formal summer trainings, I cannot depend merely on that. Maybe I should spend some time in self-directed learning according to my own interests. If I want my students to be self-directed learners, I myself should become one first.

Another Chinese teacher, Xing, echoed Li in their group interview:

Yes, I agree with [Qiao]. We focus too much on the textbooks and examination scores, and forget learning should be a process filled with enjoyment. American teachers set a good role model for us. We [Chinese] teachers spent almost all our time in learning how to help students improve their scores. This is important, but helping them become creative and active learners is more important. How could we teach them to do so if we are not that kind of people?

Regardless the different choices for future PDE, the process of forming a global teacher identity is ongoing and guides teachers’ PDE choices about what to learn, how to learn it, and why to learn it.

As adult and lifelong learners, teachers’ learning methods, learning content, and learning motivations are highly connected with their understanding and reflection of their own professional identity.

**The Tensions Caused by Culture Shock**

During this process of learning in a foreign country, culture played a very important role and greatly influenced teachers’ identity formation. Teachers encountered tensions and discomfort caused by culture shock. In order to reduce or minimize the tension and discomfort, teachers reported that they had to rethink, reflect, re-adjust, and/or modify their understanding of how to be a good teacher, how to act as a good teacher, how to understand their work and their place in society (Sachs, 2005), which contributed to reshape their identity. The findings revealed that the well-adjusted teachers presented a much more positive change in how to make themselves a good teacher. They not only showed changes in perspectives but also in actions such as utilizing new teaching strategies to better engage students and to increase students’ learning interests and
outcomes. However, less well-adjusted teachers showed indifference or denied their international learning experiences. As Li, the Chinese teacher, commented:

I do not think going to another country to learn is the best way for me. You know, uh…I love to learn from American teachers….my trip to WHS did help me learn a lot, but overcoming the discomfort brought by culture shock and cultural difference was hard and super time consuming. I can learn how American teachers teach through reading books or watching their teaching videos…. uh…instead of being there physically to learn.

Wenger (1998) explained that culture is a key factor in terms of deciding how identity forms, and this study proves Wenger’s statement that identity is contextual instead of static. The better adjusted teachers tended to have a positive change in seeing who they were as teachers and how to teach. The more confidently teachers believed in their own ability in teaching and their capacity in learning, the more they tended to adjust well in a new setting. According to the findings, the reasons that explain why some teachers adjusted better while others did not depend on a teacher’s personality, previous international travel experiences, or if they had a determined and strong learning will and goal. Teachers with previous international travel experience, who were curious, extraverted, and communicative and also believed in lifelong and self-directed learnings, adjusted relatively easily in a new cultural setting. These teachers embraced more positive changes through their exchange journey and were willing to take another opportunity to travel to a new country and learn again. Those who did not adjust well were found to have an introverted personality, unclear learning goals, or were first-time international travelers. For them, the real learning happened at a rather later stage in their exchange stay compared to other better-adjusted teachers.

**The Conflicts Caused by Different Education Systems**

The conflicts that exchange teachers reported were mainly caused by their observing the different education systems. In general, Chinese education is teacher-centered and a subject-focused
national curriculum (Deng, 2000). Although the education reform has transformed from
examination-based learning to focusing on students’ learning interests and capabilities (Zhu, 2007),
“this reform has been slow and less effective” according to the Chinese teacher, Zhang. By contrast,
“American education is student-centered, and teachers have more choices in deciding what to teach
and how to teach”, said the Chinese teacher, Xing. Although “Common Core State Standards has
put a lot of stress on us [American teachers], comparing with Chinese education, we have much less
strict curriculum requirements and much less pressure of test scores,” reported the American
teacher, Rose.

Teachers from both countries identified the education system differences as the followings:
1) the different examination systems (learning for exams in China vs. learning for knowledge
and fun in the USA);
2) classroom participation and classroom settings (teacher-centered teaching/learning styles in
China vs. student-centered teaching/learning styles in the USA);
3) discipline issues (there is few discipline issues in Chinese classrooms vs. relatively more
discipline issues in the American ones);
4) cohort system (students stay with one another for the entire high school years in China vs.
students take classes with one another from different teachers in the USA);
5) the advisor teacher (each class cohort has its own specific advisor teacher in China vs.
guidance counselors who are in charge of students from different grades);
6) student-teacher relationships (formal in China vs. much more casual in the USA);
7) different textbook system (students purchase their own textbooks in China vs. students rent
textbooks in the USA);
8) On-duty system (students are involved in cleaning classrooms and maintaining an orderly school in China vs. maintenance people clean the school and principals supervise the school order in the USA).

Although teachers from both countries can identify these differences in their education systems, due to the non-relevance of the local context, teachers cannot directly apply some of the global borrowings to their classroom in the home country. However, this does mean that learning in a culturally different country was invalid. Experience and identifying differences itself is an important learning process for adult learners (Knowles, 1970).

**Comparison between American and Chinese Teachers**

As adult learners, American teachers and Chinese teachers learn very differently (Li, 2012). Li (2012) compared the Chinese and American cultural foundations of adult learning, she discovered that American adult learners value learning as a critical thinking and discovering process based on practical application and communication, while Chinese adult learners tend to learn from authorities and experts or read extensively, and believe learning is a painstaking and constant process. When two groups of adult learners with different cultural backgrounds crossed borders to interact together, they inevitably went through clashes and negotiation in order to engage themselves in a new community.

The findings in this study resonate with Li’s study (see Table 7-1). In terms of encountering culture shock and different education systems, teachers from both countries faced this challenge, but American teachers seemed to welcome new challenges more and it took them much shorter time to adjust to the new environment. Chinese teachers regarded it as a painful process but they were willing to make efforts to overcome this learning pain and eventually succeeded. About the learning results, American teachers tended to learn more about “knowing” and “understanding” instead of
“being” and practical ways of “doing”, which means that they enjoyed experiencing new and different knowledge, traditions, thoughts, and ways of doing, while not bringing them back home. Although the Chinese teachers suffered more from culture shock and did not enjoy their stay in the USA as much as American peers did in China, all of them took learning very seriously and either borrowed practical teaching techniques and/or brought tools (they purchased reference books, brought copies of curriculum scripts and game/activities sheet, and so on) back to China. This finding echoes the work of some researchers (e.g., Li, 2003; Mascolo, 2013; Tweet & Lehman, 2002). Li (2003) discovered that Chinese people’s learning is oriented by self-perfection and the primacy of the action over thought. By contrast, American people value the primacy of the individual which involves independence, self-expression, and the pursuit of happiness. Mascolo (2013) reveals that Chinese people tend to have a celebratory attitude toward virtues and hard work. Tweet and Lehman (2002) also found that Chinese people value a Confucian way of learning, such as “effortful learning”, “acquisition of essential knowledge”, and “pragmatic learning” (p. 92).

Considering teachers’ future learning expectations and plans, American teachers and Chinese teachers chose differently according to their self-perception, learning needs, intentions, social-cultural backgrounds, and so on (Kasworm, Rose, and Rose-Gordon, 2010). The American teachers welcomed informal learning opportunities, such as communicating with local people, observing teaching, and engaging in local travels. They all reported that they would love to join this kind of teacher education program again. However, because Chinese adult learners like to learn from authorities and experts (Li, 2012), only two Chinese teachers, Xing and Qiao, were keen to go to another country for this kind of informal and experience-based professional learning in the future. The other two Chinese teachers, Zhang and Li, did not think they would want to go abroad for this kind of informal training but preferred more organized training regardless the location.
This study discovered that the PDE in a foreign country led to a formation of a new type of global teacher identity which is different from their original local identity, just as Olsen (2008) concludes that teacher professional identity is a useful frame that “treats teachers as whole persons in and across social contexts who continually reconstruct their views of themselves in relations to others, workplace characteristics, professional purposes, and cultures of teaching” (p. 6). In this study, American teachers’ new identity remained more at the “experiencing” level (they experienced and understood the differences but did not include Chinese ways of teaching into their own teaching because either it was not related to their classroom culture or they personally did not prefer them), but the Chinese teachers’ new identity was embedded not only with new ideas but also new ways of doing.

**Implications of Findings**

This study involves cross-border teacher education beyond East and West, and local and global, in order to deepen the understanding of teachers as adult learners and foster awareness of teacher identities and professional development choices. Within this specific site in an unfamiliar country and workplace filled with different social and cultural norms and rules, exchange teachers’ professional learning experience is filled with challenge, tension, and frustration. By making a contextually specific focus on Chinese and American teachers, this study drew implications for global teacher professional identity and its potential for the creation of professional development options and lifelong learning in teacher’s education. The following section discusses the research implications for three primary stakeholders: teacher education program planners, policy makers, and exchange teachers. The implication for future research is also discussed.

**Implications for Program Planners**
This study has explored Chinese and American exchange teachers’ cross-cultural professional learning experiences in each other’s country. It not only revealed the ways in which the exchange program had an impact on the teachers’ professional development, but also illuminated important considerations for how this kind of international teacher training program influenced teachers’ identity (re)construction. These professional learning experiences provided teachers not only with new teaching ideas but also with guidance to support their subsequent attempts to put them into new practice and foster their sense of lifelong learning. Such practical issues as culture shock, language obstacles, and the concern of exchange program sustainability are important considerations because these factors influence teachers’ personal concerns which are likely to affect their learning motivation, thereby decreasing the likelihood of these influence might better engage teachers in learning activities. This study highlights that, if these issues were not properly addressed, they could cause serious conflict and dissonance. Therefore, exchange program planners must consider these influences carefully.

**Pre-departure cross-cultural training.** For teachers without enough cross-cultural knowledge and competence, perception dissonance occurred between them and local host environment. Therefore, teacher education program planners might need to take action on organized cross-cultural competence training before exchange teachers leave their home country for the exchange. Training content might focus on introducing cultural differences about both cultural differences and the education system differences. This kind of cultural competence training could act like a vaccine that strengthens teachers’ immunization to culture shock, even though this means the program budget would need to be increased. With well-prepared cross-cultural expectations, cross-cultural knowledge, and relevant coping skills, teachers would be more mentally and emotionally ready for the new challenges and discomforts. Therefore, even if when unavoidable
cognitive dissonance occurs, teachers could choose positive strategies instead of resorting to hostility and alienation in seeking effective learning outcomes.

**Language preparatory training.** Language barriers are another apparent challenge for cross-cultural professional learning. Program planners should emphasize the importance of learning the host language for all teachers before their exchange, at least, requiring them to learn basic survival language. For American teachers, the language barriers were minimized in school settings because all Chinese students and teachers had learned English as their second language. But the language barriers were maximized when American teachers left school to interact with local people, such as dining in the local restaurant or doing grocery shopping, because most local Chinese citizens do not speak English at all. Therefore, program planners should implement a Chinese survival language course to help American teachers function outside of the classroom. For Chinese teachers, although all of them can speak English, their language usage is more textbook oriented, which means they might know a lot of English words but they rarely use them in daily lives. Chinese exchange teachers should study daily communicative English to help them communicate with local people more confidently and efficiently.

**Pre- and post-program evaluations.** The current exchange program investigated in this study did not have pre- and post-program evaluations which should be an alert for the program planners’ attention. The pre-program evaluation is crucial for understanding teachers’ learning needs, expectations, and more importantly, their concerns and worries. With the pre-program evaluation, the program planners and organizers could better plan their program beforehand and eliminate risks or solve potential problems. The after-program evaluation survey or phone follow-ups are even more important not only for helping teachers reflect on their learning but also helping program planners refine the details for future exchanges.
**Exchange between relevant countries.** Due to the huge differences between American and Chinese education systems, program planners might need to consider the international exchange not only between countries that share minimal similarities in education, such as exchange between China and the USA, but also should consider sending teachers to countries that share similar education systems and cultures, such as exchanges between Japan and China, or exchanges between Canada and the USA. In that way, teachers might encounter less culture shock and less conflict in education systems. Therefore, ideally, exchange programs should not only provide “exotic foods” to teachers but also allow them to immerse themselves in familiar settings. Teachers will be more motivated to learn if they can immediately apply the new knowledge to their work because adult should learn in order to solve problems (Knowles, 2005).

**Implications for Policy Makers**

Since 2013 after Mr. Xi Jinping had been appointed China’s new president, China has promulgated much stricter regulations about sending civil servants such as teachers and government officials to travel or study abroad at state expense (Liu, 2014; Xi, 2014). Within recent years, Chinese Ministry of Education has sent fewer and fewer teachers to international education programs at public expense, and the whole country has reduced about 37.87% of its international training costs in 2013 (Xinhua Net, 2013). Due to this new policy, many international teacher exchange programs have been terminated (Huang, 2013). Yet, this current comparative research would suggest that international exchange is quite important for teacher’s professional development. Education reform has been less effective than what Chinese Ministry of Education has expected and American schools also are under great pressure to implement the Common Core State Standards. Therefore, learning from each other should be an urgent need. Also, with more and
more Chinese students choosing to study in the USA (Suhu News, 2016), and more and more American schools showing interest in offering Chinese language courses (Renmin Net, 2016), it is important for teachers in the two countries to have first-hand experience of each other’s culture and education so that the students can benefit from it.

As discussed, where government funds are limited, well-organized and efficient international teacher education programs can play a significant role in benefitting teacher education. Informed by this current comparative research, policy makers in both countries—especially for Chinese policy makers—should provide reasonable funds to support international teacher education in the time of globalization.

**Implications for Exchange Teachers**

This study discovered that exchange teachers’ existing local beliefs about teaching and learning were dominant and ingrained and were not easily reshaped. As well, the effect of participating in exchange program varied greatly for different teachers. Taking the Chinese teachers as an example in which teaching has been influenced by a long tradition of more than 2000 years has meant that teachers focused on memorization as students fought for high test scores (Connell, 1987; Li, 2003, 2012). In such classrooms teachers are regarded as knowledge authorities (Yan, 2008a). Traditional Chinese teaching methods and materials (such as unified syllabi, rote learning, and the utilization of nationwide textbooks) are common in many school settings as a result of pressure from the examinations (Yan, 2008a). So, Chinese teachers could not freely apply the new methods for fear of negative responses from parents and administrators to new methods because different teaching methods might jeopardize students’ test scores. The huge difference between
Chinese and American education systems caused some teachers to question whether this kind of professional experience is relevant. As Chinese teacher, Li, suggested:

…future exchange program might send us to a country that has a similar education system so that learning results might be more ideal…I am not sure, but maybe….such as exchange program between us [China], Japan or Korea because these countries resemble each other’s educational background so that our learning might be more applicable…I do not know…I just guess so.

Li’s remarks caused us to pause: is there an exchange mismatch? In order to answer this question, future research should include exchange teachers who went to different countries for professional development trainings.

However, teachers cannot ignore the huge impact that this China-USA exchange program had on them personally and professionally. Teachers also should become more confident that a successful teacher training program does depend on specific social, political, and cultural contexts. They should be aware that, with our world becoming more connected and more and more global citizens being needed, effective learning outcomes may derive from an integration of different approaches: group work with individual tasks, borrowed materials with local textbooks, experiential learning with memorization, building up test abilities with encouraging critical, creative, and innovative thinking, classroom teaching with practical field work, teacher-made syllabi used alongside nationwide ones, and so on (Yan, 2008a). Therefore, teachers should embrace the learning opportunities at the time of globalization and understand that teachers all over the world face the challenge of combining local perceptions and practices with the need for cultural integration and globalization (Canagarajah, 2012; Easterly, 1994; Loomis, Rodriguez, & Tillman, 2008; Sahlberg, 2004; Weber, 2007).

Implications for Future Research
This study acknowledges the advantages of cross-cultural learning, such as promoting cross-cultural awareness, developing global teacher identity, and enhancing teachers’ lifelong learning expectations. Meanwhile, this study also recognizes the limitation of research conducted on teachers’ professional development within a foreign context. Based on this comparative research, three areas of future research should be considered if we are going to better understand how teacher identity is re/constructed through learning in different contexts.

One implication for future research is that a comparison should be made between teachers who have had exchange experience with those who have never participated in international teacher education programs. This type of research might enhance this investigation by providing us with all-round data and help us to better understand whether international teacher education/training does benefit teachers’ professional development.

Another implication for future research is the need for a literature on cross-cultural global teacher identity. In order to better explain this phenomenon and understand it in depth, a relatively larger sample size should be employed so that an appropriate basis could be established on which to examine changes in teachers’ identity formation. This could help us understand the whole story of a group of exchange teachers’ daily lives and find patterns of the group of people with common problems such as a possible identity crisis that might lead to a new formation of a global teacher identity. In a much broader sense, a study with a larger sample size could help us understand the politics of cultural identity and its impact on education and the global knowledge economy.

Finally, a longitudinal study is necessary to monitor teachers’ change of perception about their identity over time since the identity formation process is ongoing, fluid, and dynamic.

**Summary**

The world is undergoing profound changes, and these changes should encourage different
organizations to develop career-long learning for their employees. As the world becomes a more interdependent and global society, the education profession is not immune to these global shifts, and so, we need to improve teachers’ professional development experience and begin to experiment with new approaches for their learning (Collinson, et al., 2009). This research has focused on studying teachers as adult and lifelong learners, and aimed to understand the relationship between their cross-cultural professional development and their identity formation. It not only investigated the influence of cross-cultural learning on teacher’s identity formation, but also explored how the identity formation made an impact on their lifelong learning options.

In this study, global contact has taken teachers to a new professional community and allowed them to experience different educational formats and re-evaluate who they were as teachers and how to teach better. Through reflection and practice in cross-cultural contexts that provoked tensions to challenge their identities, teachers had to overcome culture shock and dissonance and question themselves and their beliefs on teaching. Roskell (2013) has argued, exchange teachers need to be “allow[ed] the time to articulate their [teachers’] grief and disappointment, and eventually, to assimilate successfully new ideals, reconstruct their identity, restore equilibrium, and establish a sense that life is meaningful and one has some control over the achievement of desired outcomes” (p. 169). Therefore, fostering teachers’ cross-cultural competence and facilitating their adaptation process played a vital role in determining whether teachers learned quickly or slowly, whether they learned more or less, what they learned, and how they learned.

In terms of the learning result, borrowing global knowledge is a very personal decision depending on teachers’ personality, their pervious international experience, learning goals, and so on. Whether or not teachers borrowed any new ideas or ways of doing or not, their teacher identity would never be the same. Their global teacher identity has been created through participating in this
international exchange program because they became more aware and reflective of who they were and were not, and what they wanted to do/became and not to do/become. During this process of comparison and contrast in a global professional community, this study shows that the fundamental changes in teacher identity did not take place easily; identity formation takes time and is a difficult and sometimes painful process. Through participating in the exchange programs, regardless of whether teachers felt more empowered after the exchange program or not, through learning in a global professional community, teachers’ understanding about their identity was expanded and enriched, especially around the aspects of redefining their self-image, self-esteem, job motivation, task perception, and future learning perspectives.

In conclusion, studying teachers as adult and lifelong learners in global community has led to very intriguing findings. In this study, through entering others’ lives, exchange teachers began to enter a new domain which provided them with something to compare themselves to, and by comparison to learn to look at people, themselves, and education from broader global perspectives. This study contributes to an understanding of how teachers develop a global teacher identity in a global learning community, how this newly-formed identity has influenced their perspectives and behaviors in the classroom, and how their lifelong learning has been guided. Since culture shock has been a big obstacle for teachers’ learning in a cross-cultural setting, exchange program planners and policy makers should pay close attention to understanding the importance of facilitating this cross-cultural transition process, and provide positive changes that are likely to reduce perception dissonance.

To become a lifelong learner is so important for teachers especially at a time of globalization. Dale (1999) has emphasized that teaching and learning are fundamentally an exchange—an interchange and an intra-change, and teachers teach both what they know and who
they are. Understanding that adults learn differently in different social and cultural backgrounds, teacher education programs should be well designed and organized in order to meet different teachers’ learning needs. Additionally, teachers’ global professional identity is on the way to being developed over time which requires future longitudinal research to monitor professional learning outcomes.
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Appendix A
IRB Approval of Submission

IRB Program
Office for Research Protections
Vice President for Research
The Pennsylvania State University
205 The 330 Building
Phone: (814) 865-1775
Fax: (814) 863-8699
Vice President for Research
The Pennsylvania State University
205 The 330 Building
Phone: (814) 865-1775
Fax: (814) 863-8699
Email: orprotections@psu.edu
University Park, PA 16802

APPROVAL OF SUBMISSION

Date: February 4, 2016
From: Joyel Moeller, IRB Analyst
To: Jinjie Wang

Web: www.research.psu.edu/orp

Type of Submission: Modification and Continuing Review

Title of Study: Exchange Teachers’ Professional Development and How Their Experiences in the USA and China Influence Their Global Teacher Identity

Principal Investigator: Jinjie Wang
Study ID: STUDY00002172
Submission ID: MODCR00002021
Funding: Not Applicable
IND, IDE, or HDE: Not Applicable

Documents Approved:
. Focus Group Questions Modified (English and Chinese).docx (0.02), Category: Data Collection Instrument
. Interview Protocol Modified (English and Chinese).docx (0.02), Category: Data Collection Instrument
. HRP-591 -Protocol for Human Subject Research.pdf (0.01), Category: IRB Protocol
. HRP-588 -ORP Consent Form (Signed) (English).pdf (0.01), Category: Consent Form
Review Level: Expedited

IRB Board Meeting Date:
On 2/4/2016, the IRB approved the above-referenced Modification and Continuing Review. This approval is effective through 2/3/2017 inclusive. You must submit a continuing review form with ID00000026 all required explanations for this study at least 45 days before the study’s approval end date.
You can submit a continuing review by navigating to the active study and clicking ‘Create Modification / CR’.

If continuing review approval is not granted before 2/3/2017, approval of this study expires on that date. To document consent, use the consent documents that were approved and stamped by the IRB.

Go to the Documents tab to download them.

In conducting this study, you are required to follow the requirements listed in the Investigator Manual (HRP-103), which can be found by navigating to the IRB Library within CATS IRB (http://irb.psu.edu). These requirements include, but are not limited to: Documenting consent

. Requesting modification(s)

. Requesting continuing review

. Closing a study

. Reporting new information about a study

. Registering an applicable clinical trial

Maintaining research records

This correspondence should be maintained with your records.
Appendix B

Informed Consent Letter

Title of Project:
Exchange Teachers’ Professional Development and How Their Experiences in the USA and China Influence Their Global Teacher Identity

Principal Investigator: Jinjie Wang

Address: 905M W AARON DR, STATE COLLEGE, PA 16803

Telephone Number: 857-207-5698

Advisor: Dr. Ladislaus Semali

Advisor Telephone Number: 814-865-2246

Subject’s Printed Name: _____________________________

We are asking you to be in a research study. This form gives you information about the research.

Whether or not you take part is up to you. You can choose not to take part. You can agree to take part and later change your mind. Your decision will not be held against you.

Please ask questions about anything that is unclear to you and take your time to make your choice.

1. Why is this research study being done?
   We are asking you to be in this research because you have been participated in the China-USA Teacher Exchange Program during the past five years.

   This research is being done to understand and compare exchange teachers’ professional development experiences (PDE) in the USA and China. More specifically, this study will explore the relationship between teachers’ PDE and their global identity formation during their stay and participation in an international teacher exchange program. This comparative study will also seek to uncover how exchange teachers from two countries make meaning of their international PDE, such as what tensions and conflicts they face, how their experiences influence them to reflect on their understandings, beliefs, and pedagogical practices as a teacher, and how such understanding might contribute to their professional identity formation in a global community.

2. What will happen in this research study?
   The individual interviews, focus group interviews, and participant observation activities were developed to ask you a few questions regarding your informal learning experiences in another country as your PDE. The investigator hopes that this information can lead to a better
understanding of how participants make meaning of their professional learning experiences and how these experiences help them become better teachers.

Responses to the interview and focus group questions will be digitally recorded (e.g., by using devices such as IPhone audio recording) but only be reported in aggregated form to protect the identity of respondents. The planned use of this information will be reported in investigator’s dissertation thesis. Neither the investigator nor the Pennsylvania State University has a conflict of interest with the results.

Follow-up interviews might be conducted if the investigator needs you to provide clarification or detailed information regarding certain interview questions. Whether or not you take part the follow-up interviews is up to you. You can choose not to take part. Your decision will not be held against you.

3. **What are the risks and possible discomforts from being in this research study?**

There are no identified risks from participating in this research. However, the interview process might cause you to experience discomfort when you have to recall some worst moments (e.g., cultural or social embarrassment) in your PDE. Participation in this research is completely voluntary and you may refuse to participate without consequence during the interview. There is a risk of loss of confidentiality if your information or your identity is obtained by someone other than the investigators, but precautions will be taken to prevent this from happening.

4. **What are the possible benefits from being in this research study?**

4a. **What are the possible benefits to you?**

By comparing and contrasting the similarities and differences of teachers’ professional experiences in China and the USA, this study hopes to promote teachers’ lifelong learning and foster an international learning community of teacher practice. Through this global learning community, teachers can learn more about themselves by participating in this study through broadening their perspectives to reflect on their professional, cultural, national, and global identification.

4b. **What are the possible benefits to others?**

Possible findings could be beneficial to future program planners and policy makers of international educational exchanges and partnership programs and help them improve teacher education dynamics and strengthen inter-group relations. In addition, the educational gaps between the USA and China could be filled through international exchange. Just as many Americans admire the Chinese system of education (such as its high test performance), China is concerned about its rigid educational model, especially in regard to how it is in favor of the rote learning (Li, 2008). The knowledge gap between two countries attracts teachers from two countries to cross the Pacific to learn from each other.

5. **What other options are available instead of being in this research study?**

NA

6. **How long will you take part in this research study?**
If you agree to take part, the formal interview will last approximately 60 minutes. The follow-up interview also will take approximately 60 minutes. The observation will take place three times. Each observation will last approximately 90 minutes.

7. **How will your privacy and confidentiality be protected if you decide to take part in this research study?**

   Efforts will be made to limit the use and sharing of your personal research information to people who have a need to review this information. Your identity will be protected as no data will be identifiable or tied back to the participant.

   Interviewee's will be labeled as interviewee one, interviewee two, etc...Audio recordings will be labeled using the project name, thus they will not be traceable back to the participants. The code list will be kept in the investigator’s password-protected computer as the password-protected file.

   It will be destroyed three years following the completion of the principal investigator’s doctorate studies at the Penn State University. Participants will be made aware of these conditions in the consent letter. In the event of any publication or presentation resulting from the research, no personally identifiable information will be shared.

   We will do our best to keep your participation in this research study confidential to the extent permitted by law. However, it is possible that other people may find out about your participation in this research study. For example, the following people/groups may check and copy records about this research.

   - The Office for Human Research Protections in the U. S. Department of Health and Human Services
   - The Office for Research Protections.

   Some of these records could contain information that personally identifies you. Reasonable efforts will be made to keep the personal information in your research record private. However, absolute confidentiality cannot be guaranteed.

8. **What are the costs of taking part in this research study?**

   NA

9. **Will you be paid or receive credit to take part in this research study?**

   NA

10. **Who is paying for this research study?**

    NA

11. **What are your rights if you take part in this research study?**

    Taking part in this research study is voluntary.

    - You do not have to be in this research.
    - If you choose to be in this research, you have the right to stop at any time.
12. If you have questions or concerns about this research study, whom should you call?

Please call the head of the research study (principal investigator), Jinjie Wang, at 857-207-5698 if you:
- Have questions, complaints or concerns about the research.
- Believe you may have been harmed by being in the research study.

You may also contact the Office for Research Protections at (814) 865-1775, ORProtections@psu.edu if you:
- Have questions regarding your rights as a person in a research study.
- Have concerns or general questions about the research.
- You may also call this number if you cannot reach the research team or wish to talk to someone else about any concerns related to the research.

INFORMED CONSENT TO TAKE PART IN RESEARCH

Signature of Person Obtaining Informed Consent

Your signature below means that you have explained the research to the subject or subject representative and have answered any questions he/she has about the research.

_________________________ ___________ ___________
Signature of person who explained this research Date Printed Name

(Only approved investigators for this research may explain the research and obtain informed consent.)

Signature of Person Giving Informed Consent

Before making the decision about being in this research you should have:
- Discussed this research study with an investigator,
- Read the information in this form, and
- Had the opportunity to ask any questions you may have.

Your signature below means that you have received this information, have asked the questions you currently have about the research and those questions have been answered. You will receive a copy of the signed and dated form to keep for future reference.

Signature of Subject

By signing this consent form, you indicate that you voluntarily choose to be in this research and agree to allow your information to be used and shared as described above.

_________________________ ___________ ___________
Signature of Subject Date Printed Name
Appendix C

Interview Protocol

**Part 1: Open-up Questions**
1. To find out participants’ personal information: age, gender, the subjects they teach, and for how long.
2. When did you participate in the teacher exchange program to another country? And for how long?
3. Why did you participate in this exchange program?

**Part 2: Perspectives on Teacher Identity**
1. Before attending the exchange program,
   a. how did you describe yourself as a teacher (*self-imagine*);
   b. what was your evolution of yourself as a teacher, how good or otherwise as defined by yourself or others/society (*self-esteem*);
   c. what made you choose, remain committed to the teaching job (*Job-motivation*);
   d. How did you teach a class before, for example, to list three key strategies you use to teach your students and how your students reacted to your teaching strategies (*task perception*)?
2. After attending the exchange program,
   a. how do you describe yourself as a teacher (*self-imagine*);
   b. what is your evolution of yourself as a teacher, how good or otherwise as defined by yourself or others/society (*self-esteem*);
   c. what makes you remain committed to the teaching job (*Job-motivation*);
   d. How do you teach a class now, for example, to list three key strategies you’ve learned to teach your students and how your students reacted to your teaching strategies (*task perception*)?

3. After participating the exchange program, how did your experience influence your views on understanding your fundamental belief and value in teaching and learning?

**Part 3: Key Events in PDE**
I would like you to begin by thinking about the key events in your PDE during the time when you participated in this exchange program. A key event should be a specific happening, a critical incident in your past set in a particular time and place. It is helpful to think of such an event as constituting a specific moment in your PDE that stands out for some reason. Be *very specific* here.

The key events are:
1. **High point**: A high point in your PDE; the most wonderful moment in your PDE.
   a. Describe in detail what happened,
   b. Where you were,
   c. Who was involved,
   d. What you did
e. What you were thinking and feeling in the event,
f. What the impact of this key event has been in your teaching, and
g. Comment on what this event says about who you are or were as a teacher, how it influences your evolution of yourself as a teacher, and how it motivates you.

2. **Low point**: A low point in your PDE; the worst moment in your PDE.
a. Describe in detail what happened,
b. Where you were,
c. Who was involved,
d. What you did,
e. What you were thinking and feeling in the event,
f. What the impact of this key event has been in your teaching, and
g. Comment on what this event says about who you are or were as a teacher, how it influences your evolution of yourself as a teacher, and how it demotivates you.

3. **Turning point**: A learning episode wherein you underwent a significant change in your understanding of yourself, if there is any. It is not necessary that you comprehended the turning point when it in fact happened. What is important is that now, in retrospect, you see the event as a turning point, or at minimum as symbolizing a significant change in your life.
a. Describe in detail what happened,
b. Where you were,
c. Who was involved,
d. What you did,
e. What you were thinking and feeling in the event,
f. What the impact of this key event has been in your teaching, and
g. Comment on what this event says about who you are or were as a teacher, how it influences your evolution of yourself as a teacher, and how it motivates or demotivates you.

4. **Areas of stress**: All learning stories include significant conflicts, unresolved issues, problems to be solved, and some periods of great stress. I would like you to consider some of these now.
a. Please describe two areas of stress in your PDE at least one of the following: significant stress, a major conflict, or a difficult problem, or challenge that must be address.
b. For each of the two, describe the nature of the stress, problem, or conflict in details, outline the source of the concern, a brief history of its development, your coping strategies.
c. For each of the two, what the impacts have been in your teaching, and
d. Comment on what these areas of stress say about who you are or were as a teacher, how they influence your evolution of yourself as a teacher, and how it motivate or demotivate you.

**Part 4: Future Plan as a Lifelong Learner**
Now that you have told me a little bit about your pre-and post-PDE, I would like you to consider the future.

1. As your professional learning extends into the future, what might be the script or plan for what is to happen next in your life? (Most of us have plans or dreams that concern what we would like to get out of life and what we would like to put into it in the future. These dreams or plans provide our lives with goals, interests, hopes, aspirations, and
wishes. Furthermore, our dreams or plans may change over time, reflecting growth and changing experiences. Describe your present dream, plan, or outline for the future related to learning and PD).

2. Tell me how, if at all, your dream, plan, or outline enables you to become the ideal teacher you want to be, how it enables you to learn constantly and to make contribution to your professional growth.

**Part 5: Wrap-up**

1. Considering everything we’ve discussed, is there anything you would like to add that hasn’t been mentioned?
2. Anything else you want to share?
3. Follow-up questions
4. Set-up next meeting time and place
5. Thank you!

**采访问题**

**Part 1: 个人背景**

1. 被访问者的个人信息：年纪，性别，所教授课程，和教书年限。
2. 你何时参加的教师交流项目？在国外呆了多久？
3. 你参加这个教师交流项目的目的是什么？

**Part 2: 参加交换项目前对于教师职业身份的理解**

1. 参加交换项目前对于教师职业身份的理解
   a) 作为一个老师，你怎么描述自己的职业形象（自我评价）？
   b) 作为一个老师，你觉得社会和他人怎么看待你的职业身份？（自信和自我满意度）
   c) 请描述你为什么选择教师这个职业，什么使得你全力致力于这个工作？（工作任务的理解）
   d) 请描述你如何教授课程？列举三个你常用的教学方法，以及学生们对此的反馈？（工作任务的理解）

2. 参加交换项目后对于教师职业身份的理解
   a) 作为一个老师，你怎么描述自己的职业形象（自我评价）？
   b) 作为一个老师，你觉得社会和他人怎么看待你的职业身份？（自信和自我满意度）
   c) 请描述你为什么选择教师这个职业，什么使得你全力致力于这个工作？（工作任务的理解）
   d) 请描述你如何教授课程？列举三个你常用的教学方法，以及学生们对此的反馈？（工作任务的理解）
3. 参加交换教师后，您的出国学习的经历对您对教育教学的基本态度和观点是影响？

Part 3: 职业发展经验中的关键事件

请你回忆一下在参加交换项目的过程中所发生的一些重要事件。重要事件是在特定时间地点发生的具备特殊性和关键性的事情。这些事件对你理解职业发展经历有决定性意义。请具体描述这些事件。重要事件包括：

1. 高潮事件：职业发展中的高潮事件；职业发展中的让你最欣喜的时刻
   a. 描述发生了什么细节
   b. 你当是在哪里？
   c. 有谁参与其中？
   d. 你做了什么？
   e. 对于这件事情你有什么所思所想？
   f. 这件关键事件对你教育工作有什么影响？
   g. 作为一个老师，你对这件事情有什么态度和评价，尤其是它如何影响你对做为一名教育工作者的理解和自我评价？对于你做为教师而言有什么, 这件事情是如何激励你的？

2. 低谷事件：职业发展中的低谷，是你职业发展中的低落的时刻
   a. 描述发生了什么细节
   b. 你当是在哪里？
   c. 有谁参与其中？
   d. 你做了什么？
   e. 对于这件事情你有什么所思所想？
   f. 这件关键事件对你教育工作有什么影响？
   g. 作为一个老师，你对这件事情有什么态度和评价，尤其是它如何影响你对做为一名教育工作者的理解和自我评价？对于你做为教师而言有什么, 这件事情是怎么阻碍你的发展？

3. 转折事件：转折点是有意义的改变发生的时刻。它使你更加了解自己。这个转折点可能你当时并没有意识到。重点是，当回忆起此事的时候，你觉得它是个转折点或者至少象征了某一个剧烈转变的开始，即该事件对你现在改变的意义何在。
   a. 描述发生了什么细节
b. 你当是在哪里？
c. 有谁参与其中？
d. 你做了什么？
e. 对于这件事情你有什么所思所想？
f. 这件关键事件对你教育工作有什么影响？
g. 作为一个老师，你对这件事的这件事情有什么态度和评价，尤其是它如何影响你对做
   为一名教育工作者的理解和自我评价？对于你做为教师而言有什么, 这件事情怎么
   鼓励/阻碍到你？

4. 压力事件: 所有学习的过程都会遇到巨大的阻力，无法解决的困惑，有待解决的问题，和
   压力事件。让我们来谈谈这些事情。
   a. 请描述你职业发展经历中遇到的两种压力，至少包含下面提供选项的一种压力：
      巨大的压力，主要矛盾，一个难题，或者挑战。
   b. 对于提出的这两个压力，请具体描述一下事情的发生发展经过，以及你是如何解
      决的？
   c. 这些事件对于你的自我评价和理解有什么影响？他是如何激励/阻碍你的？

Part 4: 终身学习者的未来计划

现在让我们来谈谈你未来的职业发展计划。

3. 展望你的未来职业发展计划，你有什么具体的计划吗？( 大多数人都有梦想，并
   希望它成为未来将要实施的计划。这些梦想和计划给我们的生命提供鲜活的动力，
   能量，希望，和目标感。同时，我们的梦想和计划可能随着时间而改变。请你来描述一
   下你未来职业发展计划。)

4. 你的计划是否让你曾为一个更出色的教师。这些计划和梦想是如何促使你不断地
   进行职业技能提升和发展的？

Part 5: 结尾问题

6. 考虑到我们刚才讨论过的问题，还有什么你觉得想要补充的吗？

7. 你还有什么愿意同我分享的吗？

8. 后续问题

9. 约定下次见面时间和地点

10. 致谢
Appendix D

Focus Group Questions

Part 1: Open-up

4. To greet the participants (four people in the focus group)
5. To introduce the study to the participants
6. Participants do self-introductions and get to know each other

Part 2: Perspectives on Teacher Identity

1. Before attending the exchange program, how did you see yourself as a teacher in general, such as: What does a good teacher look like? What is your fundamental beliefs and values about teaching and learning? How do society and others define a good teacher? What motivates teachers? And please list three key strategies you used to teach your students.

2. How did your exchange experience influence your views on seeing yourself as a teacher in general, such as: What does a good teacher look like? What are your fundamental beliefs and values about teaching and learning? How do society and others define a good teacher? What motivates teachers? And please list three key teaching strategies you’ve learned from your PDE if there is any.

Part 3: Perspectives on PDE

1. Now let’s talk about some key events in your PDE during the time when you participated in this exchange program. It is helpful to think of such an event as constituting a specific moment in your PDE that stands out for some reason. The key events can be the most wonderful moment, the worst moment, the turning point, and the area of stress.

2. I would like to know, do you have any plan to keep your professional learning even though you have finished the exchange program?

3. What else you can tell me that would help me understand your learning experiences in a global community?

Part 4: Wrap-up

a. Considering everything we’ve discussed, is there anything you would like to add that hasn’t been mentioned?

b. Anything else you want to share?

c. Follow-up questions

d. Thank you!
小组采访问题

Part 1: 开场白
1. 向四位参与者致谢问好
2. 简要介绍该研究
3. 参与者自我介绍

Part 2: 对于教师职业身份的理解
1. 在参加该交换项目前，你如何看待教师这个职业？比如说，一个好老师是什么样子？社会和他人如何看待教师这个职业？如何激励教师？请列举三个你的教学方法。

2. 您交换教师的经历对于您怎么看待自己有什么影响？比如说，一个好老师是什么样子？您对教育教学的基本态度和观点是什么？社会和他人如何看待教师这个职业？如何激励教师？如果有的话，请列举三个你学习到的新教学方法。

Part3: 对国外学习经历的理解
1. 现在让我们谈谈你在国外职业发展中遇到的重要事件。这些重要事件对你的职业发展和认识教师身份构建起到关键性的作用。重要事件可以是令你愉悦的高潮事件，让你沮丧的低谷时间，转折事件，或是让你觉得备感压力的事件。
2. 你已经告诉了我你参加交换项目前后的一些观点。现在我想知道你对于未来有什么样的学习规划来帮助你的职业提升？
3. 还有什么你愿意与我分享的，以便于我更好的理解你在国外环境中的学习体验？

Part 4: 尾声
a. 考虑到我们刚才讨论过的问题，还有什么你觉得想要补充的吗？
b. 你还有什么愿意同我分享的吗？
c. 后续问题
d. 致谢
## Observation Note Taking Form

### Observer’s Name: ____________________________  | Subject: ____________________________

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<th>5: Follow-up Questions</th>
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<tr>
<td>5: 后续问题</td>
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下次观察时间和地点：

重点：
VITA
Jinjie Wang

EDUCATION
The Pennsylvania State University, University Park, PA, USA
05/2017: Ph.D. Adult Education; Comparative and International Education (Dual-title Degree)

Teachers College, Columbia University, NYC, USA
05/2012: Master of Arts, International Educational Development

University of Saskatchewan, Saskatoon, Canada

Xi’an University of Technology, Xi’an, China
07/2001: Bachelor of Engineering, Mechanical and Electronic Engineering

RESEARCH EXPERIENCE
2014-2015 Graduate Assistant, Adult Education, the Pennsylvania State University

2013 AERC. Paper presented entitled “Cultural Intelligence and Cross-Cultural Learning” with Dr. Melody Thompson

2006-2007 Graduate Assistant, Educational Foundations, University of Saskatchewan

PUBLICATIONS