

GLOBAL EDUCATION POLITICS AND POLICY: DISCOURSES, COALITIONS, AND CO-  
CONSTRUCTION AMONG GLOBALLY COMMITTED NATIONAL, STATE, AND  
DISTRICT ACTORS

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## **ABSTRACT**

Ariel Tichnor-Wagner: Global Education Politics and Policy: Discourses, Coalitions, and Co-Construction among Globally Committed National, State, and District Actors  
(Under the direction of Lora Cohen-Vogel)

Our world today is more interconnected than ever before due to unprecedented levels of economic, political, social, and cultural globalization. There is growing recognition among policymakers, practitioners, and NGOs that schools must prepare students to live in a global society. Global education is one way of teaching that aims to prepare students with the attitudes, knowledge, and skills needed for citizenship in a globalized world. This three-article dissertation examines the politics and policies of global education in the United States on national, state, and local levels.

The first article examines dominant discourses that national policy entrepreneurs have evoked when advocating for global education. A content analysis of documents disseminated by advocacy groups, foundations, government institutions, NGOs, and professional educator organizations promoting global education found that neoliberal and nationalist discourses were used most frequently overall. Yet neoliberal and nationalist discourses were also “stacked” alongside other discourses and not used by multiple NGOs.

The second article uses the advocacy coalition framework to understand the evolution of state global education policy in one critical case: North Carolina. Analysis of interviews with 26 key informants and over 140 policy documents revealed that a broad coalition of governmental

and non-governmental actors representing education, policymaking, and business sectors coalesced around four major policy objectives: systemic integration of global content and perspectives, language programs, international partnerships, and teacher training focused on global competency development. These beliefs translated into state policy incrementally passed between 2000 and 2015. Strategies that coalition members identified as catalyzing policy action included incremental will-building, setting a vision and following through, and creating hubs.

The third article uses policy co-construction theory to explore how two globally committed school districts in North Carolina adapted state global education initiatives. Findings from this comparative case study demonstrate district-level actors' agency in adapting state global education initiatives based upon local context and multi-directional influences. Overall, these three studies illuminate the beliefs, strategies, structures, and contexts that have shaped the adoption and implementation of global education policies on a national, state, and local scale and hold implications for policymakers and practitioners seeking to instill global competencies in K-12 students.

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## **CHAPTER 1: PROMOTING THE GLOBAL EDUCATION AGENDA IN THE UNITED STATES: POLICY ENTREPRENEURS AND THEIR DISCOURSES**

### **Introduction**

Public schools in the United States have long held the purpose of teaching students to become productive workers and participatory citizens in a democratic society (Labaree, 1997; Rothstein, Jacobsen, & Wilder, 2008). The world that students will work and live in after graduation is largely defined by unprecedented levels of economic, political, social, and cultural globalization (Bottery, 2006; Suarez-Orozco, 2001; Zhao, 2010). Global education has emerged as one way of teaching that is aimed at preparing students for global citizenship in this interconnected world (Gaudelli, 2003; Noddings, 2005).

A broad coalition of education policymakers, business leaders, non-governmental organizations (NGOs), foundations, and scholars, herein called *policy entrepreneurs*, have advocated for K-12 educators in the U.S. to infuse global education into their teaching (Becker, 1982; Frey & Whitehead, 2009; Fujikane, 2003; Kagan & Stewart, 2004; Parker, 2011; Tye, 2009; Wiley, 2009). However, policy entrepreneurs frame global education as a solution for different problems arising from globalization (Oxley & Morris, 2013), and operationalize what it means to prepare students for an interconnected world in different ways. For some, global education is a means to address environmental, human rights, and diversity concerns. For others, it is a way to give students an edge in a competitive global economy (Frey & Whitehead, 2009; Gaudelli, 2009; Oxley & Morris, 2013; Parker, 2008; Spring, 2008).

Currently, global education is on the agenda of departments of education at the state and

federal levels, as evidenced by global education task forces, summits, and commissioned reports (Sanders & Stewart, 2004) and a proliferation of global education NGOs seeking to influence federal, state, and local education policymakers (Tye, 2009). In this agenda-setting stage of the policy process, the message that policy entrepreneurs portray in language and symbols embody underlying beliefs and ideologies and “construct” the social problems that make particular policy solutions salient (Edelman, 1985; Fischer, 2003). The ideologies that advocates espouse for particular reforms shed light on the discourses of competing agendas, which ultimately shape the policies that impact schools and classrooms (Cochran-Smith & Fries, 2001; Cohen-Vogel & Hunt, 2007). Determining the competing discourses used most frequently and by which policy entrepreneurs for a given policy agenda can help reveal which discourses are most dominant, and ultimately lay the groundwork for predicting future policy directions.

While currently on the policy agenda, global education has not been mandated nationally or in the vast majority of state and local jurisdictions. In order to make informed decisions about global education policies and programs to adopt, policymakers and education practitioners need to understand the varied ways that advocates have defined global education and justified its incorporation into schools. This study contributes to that understanding by using political discourse analysis to disentangle the discourses used by global education policy entrepreneurs in the United States. In doing so, it illuminates which definitions and justifications have been dominant among different advocates seeking to influence K-12 global education. While literature points to the various ways that global citizenship, as a by-product of globalization, is defined (Gaudelli, 2009; Oxley & Morris, 2013; Parker, 2011), less is known about the discourses forwarded by different global education policy entrepreneurs. Therefore, the purpose of this

study is to identify the prevalent problem definitions and policy solutions surrounding global education, and which policy entrepreneurs have promoted these discourses.

In the sections that follow, I first define global education and associated terms and provide a brief history of what I contend are the three waves of global education in the United States. Next, I review the literature on discourses defining global citizenship education, followed by a definition of policy entrepreneurs and the strategies they use to push a policy idea onto policymakers' agendas. After explaining the methods, I analyze the discourses used most frequently overall, by policy entrepreneur types, and by individual policy entrepreneurs who use strategies that lead to political sway.

### **Global Education, Global Competency, and Global Citizenship**

Terms such as global education, international education, global competency, and global citizenship are often used interchangeably due to ambiguity over terms and a lack of consensus and clarification among global education scholars over definitions (Buczynski et al., 2010; Kirkwood, 2001; Oxley & Morris, 2013). While closely related to one another, they hold minor distinctions (Zhao, 2010). Each is described below.

*Global education* is a way of teaching aimed at preparing students of all ages and across all content areas to live in an interconnected world and develop a global perspective (Case, 1993; Davies, 2006; Gaudelli, 2003; Hanvey, 1982; Kirkwood, 2001; Parker, 2008). Becker (1969) first distinguished global education as a topic of study that considered “the world as a totality,” characterized by “interdependence, common values, and shared problems” (p. 30). Though global education advocates have never coalesced around one definition, at its core, global education teaches that the world is one interconnected system by covering topics that transcend national boundaries, such as poverty reduction, environmental sustainability, and human rights



(Frey & Whitehead, 2009; Gaudelli, 2003; Gutek, 2006; Kolar, 2012; Merryfield, 1998). In viewing the world from a “spaceship Earth” vantage point, global education addresses commonalities across and differences within individuals, cultures, and nations (Becker, 1969; Gutek, 2006, p. 34). Global education also reflects on the constant, dynamic interplay between the global and local: connecting global content to the lived experiences of students (e.g., illustrating the “global assembly line” that produces locally-sold products) and demonstrating local effects of global events (e.g., increased crime rates in Central America contributing to an increase in immigrant student enrollment in North Carolina schools) and vice versa (Merryfield, 1998, p. 356; O’Conner & Zeichner, 2011).

Scholars have also distinguished global education from *international education*, with the latter placing the nation-state at the center of study (Dolby & Rahman, 2008; Frey & Whitehead, 2009, p. 274; Gutek, 2006). International education focuses on countries as distinct entities, whereas global education focuses on the connections between countries. Kirkwood (2001) differentiated this as a “nation-state perspective” as opposed to a “world-centric” perspective (p. 11). Further, international education has traditionally taken the form of foreign language and area studies in higher education institutions to teach students interested in a foreign service career. Conversely, global education is ideally meant to permeate across all grade levels and subject areas in K-12 schools (Gaudelli, 2003; Kirkwood, 2001; O’Connor & Zeichner, 2011). Due to definitional ambiguities, some policy entrepreneurs have used the terms global education and international education interchangeably to broadly capture the teaching of global content in K-12 classrooms (Kirkwood, 2001),

*Global competence* is the knowledge, skills, and dispositions needed to “live, work, and interact with people from different cultures and countries” (Zhao, 2010, p. 425), in essence, the

competencies that global education teaches. Knowledge entails understandings of *how the world is interconnected and interdependent* (Hanvey, 1982; Merryfield, 1998; O'Connor & Zeichner, 2011; Zhao, 2010), *global conditions and current events* (Davies, 2006; Hanvey, 1982; Zhao, 2010), and *commonalities, complexities, and uniqueness of different cultures* (Hanvey, 1982; Merryfield, 1998). Global competence skills include *cross-cultural communication*, including being able to speak multiple languages (Cushner & Brennan, 2012; Fox, 2012; Zhao, 2010), *working cooperatively* with diverse groups from local and international communities (Banks, 2008; O'Connor & Zeichner, 2011), *using critical thinking and reflection to investigate issues of global importance* (Noddings, 2005), and “*taking personal and collective action on behalf of humankind*” through decision-making, participation, and sustained involvement in local and global arenas (Becker, 1982; Davies, 2006; Merryfield, 1998; Tye, 1990, p. 7). Dispositions include a *respect and open-mindedness for differences, diversity, and multiple perspectives* (Hanvey, 1982; Landorf et al, 2007; Noddings, 2005; O'Connor & Zeichner, 2011; Zhao, 2010), *empathy* (Case, 1993; Noddings, 2005), *a commitment to human rights* (Landorf, 2009; Osler & Vincent, 2002; Oxley & Morris, 2013) and *social justice* (Davis, 2006; Landorf et al., 2007; Merryfield, 1998; Noddings, 2005; O'Connor & Zeichner, 2011; Oxley & Morris, 2013; Zhao, 2010), and *caring about the world, its inhabitants, and its future* (Hanvey, 1982; Noddings, 2005; Zhao, 2010).

These competencies are required of *global citizenship*, or, taking responsibility for and actively participating in the global community (Davies, 2006; Zhao, 2010). While the notion of citizenship has historically been associated with the rights and responsibilities of those connected to a particular place (Noddings, 2005), global citizens understand the need to take action and make decisions to solve problems of our interconnected world (Banks, 2008; Noddings, 2005)

and to take responsibility for “the well-being of the entire human race and planet” (Myers, 2010, p. 113). Developing global citizens could be considered the ultimate goal of global education.

### **A Brief History of Global Education Policies in the United States**

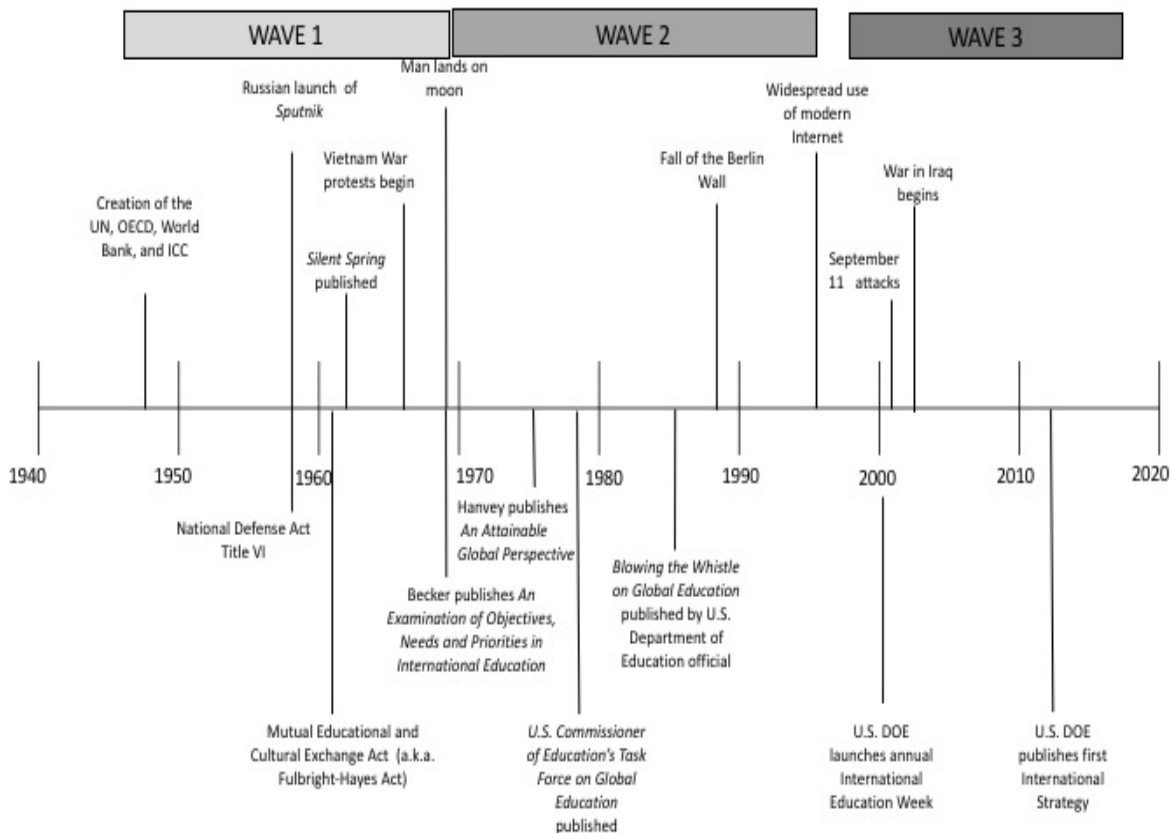
Global education is not a new phenomenon. It has gained traction in K-12 education in the U.S. in what I contend are three waves: immediately following the Second World War, the late 1960s through the early 1990s, and since the beginning of the twenty-first century. Each wave is distinct in that it marks a new or renewed interest in global education policy, and each wave is separated by political opposition to global education that resulted in an ebb in global education activities (Parker, 2011; Tye, 2009). Though Parker (2011) depicted global education as occurring in two historical waves, one that began in the late 1960s and a second that has emerged in the past 15 years, Tye (2009) and Dolby and Rahman (2008) pointed out that the seeds for global education were planted immediately following World War II, with the introduction of United Nations programs and federal policy still in existence today, such as Title VI of the Higher Education Act and the Fulbright-Hayes Act. Therefore, I count this post-World War II time period as the first wave. While examining policy entrepreneur’s discourses during Wave 1 and Wave 2 are beyond the scope of the current study, they provide important historical context for the organizations and trends that characterize the global education movement today. Each wave is discussed below and depicted in Figure 1.1.

**Wave 1: 1945 – 1960s.** The first wave of global education took place immediately following World War II through the late 1960s. The years immediately following World War II were marked by the formation of supra-national governing organizations, such as the World Bank, the Organization for Economic Cooperation and Development (OECD), the United Nations (UN), and the International Criminal Court (ICC), all aimed at fostering international

collaboration (Dolby & Rahman, 2008). After the allied nations formed the UN in the mid-1940s, there was a growing focus in K-12 education on how it functioned (Mundy & Ghali, 2009; Tye, 2009). This took the form of UN-sponsored programs such as the Associated Schools Project Network, which since 1953 has connected over 9000 educational institutions in over 180 countries through conferences and projects promoting peace, sustainable development, intercultural dialogue, and global equality. The Model United Nations was also created during this time as an extracurricular experiential learning program aimed to advance understanding of the UN, international issues and diplomacy, and global citizenship (Becker, 1977; Tye, 2009).

Figure 1.1

*Timeline of Influential Global Education Events and Milestones*



As the Cold War climate of the 1950s raised national security concerns among policymakers, the federal government invested money in higher education area studies and foreign languages (Frey & Whitehead, 2009). Passed in response to the Russian launch of *Sputnik*, Title VI of the National Defense Education Act (1958), which since 1965 has been reauthorized as Title VI under the Higher Education Act, created area centers to study different regions of the world, language centers to expand instruction of “uncommon languages” (e.g., Russian, Chinese, Arabic, Hindi-Urdu), and, of relevance to K-12 education, language institutes to train foreign language teachers (Wiley, 2001). The Mutual Educational and Cultural Exchange Act (also known as the Fulbright-Hayes Act), passed by Congress in 1961, funded educational and cultural exchange programs for research and educational purposes, which included appropriating travel funds for K-12 teachers under the Projects Abroad and Seminars Abroad programs (Hines, 2001). As with Title VI centers, these programs also emphasized area studies and foreign language development (Wiley, 2001). However, support for global education was not widespread, and Title VI was not fully funded. This was due to pervasive anti-communist sentiments during the first decades of the Cold War wherein schools and teachers were attacked for teaching “internationalism” and being “soft on communism” (Tye, 2009).

**Wave 2: 1970s – mid-1990s.** During the second wave of global education – from the late 1960s to the early 1990s – global education came to fruition as a topic of study for K-12 students (Gaudelli, 2003; Tye, 2009). Global education gained currency in the late 1960s and early 1970s as global issues such as human rights, the environment, nuclear proliferation, burgeoning population growth, and even the powerful images of Earth from space, rose up in the public consciousness, as did growing national concern, and widespread public protest, in support of Civil Rights and ending the war in Vietnam (Dolby & Rahman, 2008; Frey & Whitehead, 2009;

Gaudelli, 2003; Gutek, 2006.) During this second wave, federal and state education departments and various foundations provided funding to support the development and implementation of global education programs in K-12 schools (Frey & Whitehead, 2009). Throughout the ensuing decade, universities were hubs for modeling global education projects (e.g., the Mid American Program for Global Perspectives at University of Indiana and Ohio State University) and for producing seminal works on global education that remains influential in global education programs today (e.g., Robert Hanvey's *An Attainable Global Perspective*).

Federal and state reports during this time showed that global education held a place on the policy agenda (e.g., the 1979 *U.S. Commissioner of Education's Task Force on Global Education*). These were accompanied by government-funded initiatives. For example, states established global education as a part of the curriculum, statewide advisory boards, school district grants, global education centers, and high school course requirements (Becker, 1982; Gaudelli, 2003; Tye, 1990). Title VI continued to provide area and language studies at the collegiate level; an amendment to Title VI was also passed in 1976 that authorized support for the development of K-12 international programs (Becker, 1977).

Government and foundation support for global education waned in the 1990s after attacks from conservative organizations publicly denounced global education as anti-American, leftist, and a threat to national sovereignty and identity (Gaudelli, 2003; Tye, 2009). In 1986, a U.S. Department of Education official published a report, *Blowing the Whistle on Global Education*, that accused global education as being anti-American and part of the "left wing agenda for social change," teaching students to become "redistributionist" activists that sought to replace the American economic and political order (Gaudelli, 2003, p. 17). An onslaught of negative press against global education programs throughout the country followed, mainly from conservative,

political right, and fundamentalist Christian organizations. This resulted in a loss of global education support from elected government officials, departments of education, schools, and foundations (Tye, 2009).

**Wave 3: Global education in the twenty-first century.** The twenty-first century has heralded in new national and global developments, warranting renewed interest in global education. The United States emerged out of the Cold War as the world's sole superpower, representing the principles of democratic government and free-trade capitalism. Yet the September 11 attacks marked the beginning of a new global war - the War on Terror. National security now focused on terrorist organizations, countries harboring terrorists, and weapons of mass destruction in the Middle East. The rapid development and widespread diffusion of the Internet has made it easy to instantly communicate and collaborate with individuals across the globe. In 1994, over 24 million individuals – or less than 1% of the world's population – had internet access; by 2014, that number had exponentially grown to over 3 billion Internet users, or about 40% of the world's population (Internet Live Stats, 2015). The number of social media users has exponentially grown as well, from 7% of the adult U.S. population in 2005 to 65% of the adult U.S. population in 2015 (Pew Research Center, 2015). Global migration is also on the rise; between 1990 and 2013, the number of international migrants worldwide has grown from 154 million to 232 million; in that same time period in the U.S., the number of immigrants doubled from 23 million to 46 million (Pew Research Center, 2013).

In this twenty-first century socio-geopolitical climate, global education has reemerged on the national education agenda (Fujikane, 2003; Parker, 2008). This is evidenced by recent policy reports (e.g., *Succeeding Globally Through International Education and Engagement: U.S. Department of Education International Strategy 2012 – 2016*); policy statements (e.g., the

Council of Chief State School Officers 2006 *Global Education Policy Statement*); new state advisory committees; changes in teacher professional standards that reflect global perspectives; government-sponsored study abroad programs for teachers and students; and global education administrative positions created in departments of education and district offices (Frey & Whitehead, 2009; Kirby & Crawford, 2012; Zong, 2009). In addition, the U.S. Department of Education has annually hosted International Education Week since 2000<sup>1</sup>, while Congress has continued to reauthorize Title VI of the Higher Education Act and the Fulbright-Hayes Act and has introduced legislation supporting a federal global education policy<sup>2</sup>. Furthermore, numerous NGOs have appealed directly to local education governing arenas across the country (i.e., districts, schools, and classroom teachers). For example, the International Baccalaureate has nearly 1700 programs operating throughout the United States and the Asia Society has partnered with 40 schools in eight states and Washington D.C. to develop globally competent students.

As in prior waves of global education, support for global education today comes from the federal and state government, foundations, professional education organizations, and a diverse array of NGOs. Yet, the various actors who support global education express different rationales for doing so. As such, they may define globalization and complementary global education initiatives in ways that construct different notions of the type of global citizen schools should foster: for example, a global worker, a participant in supranational governing organizations, a part of a common humanity, or an environmental steward.

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<sup>1</sup>International Education Week is a weeklong event that occurs every November in efforts to promote the development of international education and exchange programs. For more details, go to <http://eca.state.gov/programs-initiatives/international-education-week>.

<sup>2</sup>This legislation has included The U.S. and the World Education Act, introduced in 2008 and 2009, and the 2001 House and Senate Concurrent Resolution “expressing a sense that the United States should establish an international education policy.”



This study focuses on this third wave of global education, with the purpose of revealing the discourses that the recent proliferation of global education policy entrepreneurs use to move global education onto the policy agenda. In the section that follows, I outline a synthesis of various global citizenship discourses that scholars have previously identified (Banks, 2008; Gaudelli, 2009; Oxley & Morris, 2013; Parker, 2011). This synthesis serves as a framework for understanding which discourses have been dominant among different advocates in shaping the intended global education policies, programs, and practices implemented in K-12 schools.

### **Global Citizenship Discourses: A Framework for Understanding Global Education Goals**

Just as the multifaceted nature of globalization conjures up diverse definitions, ranging from free trade to neo-colonialism to transnationalism (Suarez-Orozco & Qin-Hillard, 2004), conceptions of what it means to be a citizen in a globalized world are complex. Global citizenship embodies shifting and overlapping meanings, is understood in various ways by different people, and changes over time (Oxley & Morris, 2013, p. 305). Ideas of what global citizenship entails are given meaning through political discourse, “the communicative interactions among political actors that translate problems into policy issues” (Fischer, 2003, p. 30). In political discourse, language and symbols both convey and create meaning (Parker, 2011). Discourses frame problems in ways “that distinguish some aspects of a situation rather than another” (Hajer, 1993, p. 45). They are used to construct particular conditions as policy problems, confer legitimacy upon particular policy actions, and sustain the power of some values or ideologies over others (Fischer, 2003). Ultimately, discourses play the important role of moving issues onto the agenda of policymakers by framing conditions as policy problems that can be linked to specific policy alternatives (Kingdon, 1984). As Beland (2005) argued, “the ability to frame a policy programme in a politically –and culturally – acceptable and desirable

manner is a key factor that can help explain why some policy alternatives triumph over others and why elected officials decide to do something in the first place” (p. 12). Global education policy entrepreneurs evoke different global citizenship discourses to legitimize their preferred course of action that schools should take to prepare students to participate in a globalized society (Gaudelli, 2009).

Scholars have put forth different frameworks for making sense of these discourses. For example, Gaudelli (2009) enumerated five global citizenship discourses: neoliberal, nationalist, Marxist, world justice/governance, and cosmopolitan. Oxley and Morris (2013) created a typology of four “cosmopolitan types,” which included political, moral, economic, and cultural global citizenship, and four “advocacy types,” which included social, critical, environmental, and spiritual global citizenship. Parker (2008) outlined three major discourses: national economic competitiveness and military readiness, cosmopolitanism, and international student body. Due to the overlapping concepts within these different frames for organizing global citizenship discourses, I synthesized the discourses these different scholars identified. I grouped similar constructs together while keeping those conceptually distinct on their own. The result was seven total discourses. As shown in Table 1.1, these citizenship discourses include: world justice and governance, cosmopolitan, transformative, critical, environmental, neoliberal, and national (Banks, 2008; Gaudelli, 2009; Oxley & Morris, 2013; Parker, 2008). Each is described below.

*A world justice and governance* discourse largely defines globalization in political terms. It emphasizes international governing bodies (e.g., the UN, International Criminal Court) that promote human rights, peace, and democratization, and endorses international law that applies to individuals regardless of national affiliation (Gaudelli, 2009; Mundy & Ghali, 2009; Oxley & Morris, 2013). As Gaudelli (2009) explained, “Being a global citizen in this discourse rests on

the supremacy and singularity of personhood” (p. 75). Therefore, this form of citizenship holds particular application to immigrants, refugees, and global minorities whose rights may not be recognized by nations. The world justice and governance discourse espouses K-12 curriculum, for example, Model UN clubs that teach about and simulate the functioning of the United Nations (Gaudelli, 2009). United Nations agencies, particularly the United Nations Educational, Scientific, and Cultural Organization (UNESCO) and the Office of the High Commissioner of Human Rights (OHCHR), also produce curricular frameworks and programming for schools for member nations. For example, following the UN General Assembly proclamation for UN Decade for Human Rights Education in 1994, UNESCO disseminated various reference materials, training materials, and guidelines to assist education agencies around the world in implementing human rights education (Laypayese, 2004).

*A cosmopolitan* discourse frames global citizenship as each individual holding the responsibility of respecting the dignity of all people and taking actions in ways that benefit humanity (Banks, 2008; Gaudelli, 2009; Parker, 2008). In K-12 education, such responsibilities and calls for action may be taught in curriculum that values human rights, social justice, diversity, peace, and sustainable development (Gaudelli, 2009; Kolar, 2012). As with world justice and governance, a cosmopolitan perspective takes a universalist view that all humans share the same fundamental values, rights, and responsibilities (Landorf, 2009; Oxley & Morris, 2013). But rather than focus on “the creation of fledgling organizations to work towards similar ends,” “cosmopolitans,” as they are often called, focus on the “development of discourses around matters of value, morality, and humane treatment” and the obligations that every human being has to one another in order to actualize these values (Gaudelli, 2009, p. 76; Landorf, 2009).

Oxley and Morris (2013) identified different types of cosmopolitan citizenship that correspond with political, moral and cultural globalization<sup>3</sup>. Political cosmopolitan citizenship has been conceived in various ways: promoting global governance that “stresses democratization and strengthening of current international institutions such as the United Nations” (p. 307), a sovereign world state, or an anarchist conceptualism wherein there is no nation-state system. Moral cosmopolitan citizenship, which espouses the notion of a universal global ethic, has been most prominent in declarations of universal human rights. Cultural cosmopolitanism refers to one’s openness to learning about cultural practices “from other places,” the globalization of language and media, cultural competence, and actively accessing a variety of cultures within a multicultural society. The actualization of cosmopolitan discourses is best exemplified by the work of grassroots organizations that emphasize human rights, social justice, and ecological protection. Therefore, NGOs and international governance channels have been vehicles through which cosmopolitans bring their message to K-12 schools, with the goal of creating global solidarity between interconnected local communities (Gaudelli, 2009; Kolar, 2012; Spring, 2008) and “empowering individuals to act according to what has been defined for them as...an ideal world” (Andreotti, 2006).

*A transformative* discourse recognizes cultural, national, regional, and global identifications as interconnected constructs (Banks, 2008). As Banks (2008) argued, “each should be recognized, valued, publically affirmed, and thoughtfully examined in schools” (p. 134). An educational program that addresses transformative citizenship responds to the needs of a culturally and linguistically diverse student body (Parker, 2008) and explicitly addresses

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<sup>3</sup>Oxley and Morris (2013) also include economic cosmopolitanism in their typology as well, but acknowledge the tensions of neoliberalism and capitalism with other forms of cultural, moral, political cosmopolitan principles. Therefore, economic cosmopolitanism is included under the neoliberal discourse.

diversity within and across national borders to “help students to interact and deliberate with their peers from diverse racial and ethnic groups” (Banks, p. 129; Kolar, 2012). Examples may include multicultural curricular materials (Banks, 2008), cooperative learning (Banks, 2008), and ongoing opportunities for democratic participation during curricular and extracurricular activities (Davies, 2006). This embodies what Oxley and Morris (2013) describe as social global citizenship that captures “transnational activism” wherein “members of global civil society take a perspective within a particular social context,” such as culture, gender, ethnicity, sexuality, disability, or class identities (p. 312), and spiritual global citizenship that emphasizes caring, love, empathy, and “mutual appreciation and respect for differences” (p. 315).

Juxtaposed against a cosmopolitan notion of one global culture, transformative citizenship education embraces cultural relativism, whereby individuals recognize that their worldview and cultural norms are not universally shared and learn to appreciate and interact respectfully with people from different backgrounds (Landorf, Rocco, & Nevin, 2007). Teaching students to balance and appreciate cultural, national, and transnational identities has become paramount due to the unprecedented increase in immigration, domestic diversity, and school enrollment of culturally and linguistically diverse students in record numbers (Banks, 2008; Suarez-Orozco, 2001). Immigrants living in the U.S. today have never been more diverse in regard to their cultural, linguistic, religious, educational, and socioeconomic backgrounds. Further, they are settling in a greater diversity of locations including “new gateway” states, cities, and towns that have previously not had experiences with immigration populations (Rong & Preissle, 2009; Suarez-Orozco, 2001). This raises “complex and difficult questions about citizenship, human rights, democracy, and education” within the United States and the transnational identities of those who cross borders (Banks, 2008, p. 132; Suarez-Orozco, 2001).

A *critical* discourse expresses a form of counter-hegemony that advocates for the dismantling of oppressive political and global structures (Oxley & Morris, 2013). According to O'Connor and Zeichner (2011), critical global citizenship education “seeks to educate students about the causes and consequences of global injustices and aims to support students to work in solidarity with the world’s people toward transformative change” (p. 523). A critical global citizenship curriculum “decolonizes mainstream knowledge about global societies” by examining historical factors, economic systems and “cultural and racial systems of domination” that have shaped unequal global power relations, reflecting on one’s own subjectivities about the global “Other,” and including historically marginalized sources of knowledge into the curriculum (O’Connor & Zeichner, 2011, p. 524; Subedi, 2010). Additionally, this critical perspective questions the continued legacy of imperialism and includes the multiplicity of experiences, knowledge, and worldviews of historically oppressed groups within nations (Apple, 2011; Merryfield, 2009; Subedi, 2010). It is analogous to a Marxist notion of citizenship whereby oppressed people across the world unite to overthrow the exploitative economic system (Gaudelli, 2009). Critical global citizenship is also grounded in responsibility towards and learning with each other, as compared to cosmopolitan citizenship which focuses on helping or teaching the other (Andreotti, 2006). Yet, with the exception of renegade lesson plans or units, critical global citizenship that reveals and transforms imperialistic power relations is largely absent from mainstream or formal curriculum (Gaudelli, 2009).

An *environmental* discourse “focuses on advocating changes in the actions of humans in relation to the natural environment” (Oxley & Morris, 2013, p. 306). In K-12 schools, this agenda is realized through curricular activities that teach environmental sustainability and the “interconnectedness of living things” (Bottery, 2006, p. 97). Such curriculum recognizes the

interdependence of ecology, global climate change and air and water pollution (Bottery, 2006; Noddings, 2005); advocates for “the rights of human beings around the world to enjoy clean air, fresh water and uncontaminated food...and the rights of future generations to do the same” (Oxley & Morris, 2013, p. 314); and asserts that all people are responsible for protecting the earth (Bottery, 2006). As Noddings (2005) argued, “protecting the earth is one of the most important tasks facing global citizens. Without a hospitable environment, we will live with increasing discomfort and perhaps even meet extinction” (p. 9). The need for students to learn how to protect the earth has increased with growing attention towards worldwide environmental changes (e.g., global warming) and transnational spread of infectious diseases (Bottery, 2006).

A *neoliberal* discourse values the principles of a free market, competition, deregulation, and the privatization of public institutions. An educational program with a neoliberal agenda focuses on the competencies students need to succeed in a competitive global market (Gaudelli, 2009). This discourse emphasizes that in today’s global economy, individuals compete for jobs with and businesses need employees with the knowledge and skills to effectively work with people from all over the globe (Kagan & Stewart, 2004). Motivated by the desire to improve their standing in the capitalist global economy, national and state business leaders and governors have advocated for global education as a way to align education with American economic interests (Kagan & Stewart, 2004; O’Connor & Zeichner, 2011; Spring, 2008). The neoliberal perspective can be seen in educational discourses that evoke language describing human capital and the knowledge economy (Spring, 2008) and the globalization of education practices and standards (Ball, 1998; Engel & Olden, 2012; Zhao, 2010) whereby “policies are ‘borrowed’ and ‘travel’ across borders” in countries’ efforts to increase internationally benchmarked test scores and prime students for competition in a 21<sup>st</sup> century economy (Apple, 2011, p. 223; Ball, 1998).

Finally, a *nationalist* discourse emphasizes the sovereignty of the nation-state above all else. As Gaudelli (2009) wrote, “Those that adopt a national perspective about global citizenship believe civic identity is first and foremost a matter of social compact among nations and their citizens” (p. 72). In the United States, nationalist discourses perceive national security and economic interests as the central rationale for learning about the world (Gaudelli, 2009; Parker, 2008). Justifying global education for military security purposes is evidenced by an emphasis on language policies that support languages “critical” to national security, such as Arabic, Chinese, Korean, Pashtu, and Persian (Parker, 2008). The economic security argument closely mirrors the neoliberal agenda promoting free markets and privatization (Frey & Whitehead, 2009; Parker, 2008). It is embodied in global education rhetoric emphasizing global competitiveness for jobs and comparing international test score ranking on the TIMSS and PISA (Darling-Hammond, 2010; Zhao, 2010). Neoliberal and nationalist discourses are closely related as neoliberal values have permeated into state and federal education policy (Apple, 2011; Ball, 2012).

In sum, these seven global citizenship discourses demonstrate how global education is a “solution on the loose” that “solves a variety of problems, serves an array of masters, and expresses diverse and sometimes conflicting values” (Parker, 2008; p. 202). In politics, there are dominant discourses that shape the conversation about particular policy issues and competing discourses that rarely get any recognition (Fischer, 2003, p. 76). Recent research has pointed to the prominence of nationalist and neoliberal discourses in government-supported global education policies, and the marginalization of cosmopolitan, transformative, critical, and environmental discourses (Frey & Whitehead, 2009; Gaudelli, 2009; Oxley & Morris, 2013; Parker, 2011). As Fujikane (2003) argued, U.S. government leaders have stressed “international competitiveness rather than international cooperation and understanding” (p. 140). However, there



is a gap in the literature in examining a) who is using which discourses towards what ends, and b) the political strategies global education policy entrepreneurs use to make their discourses resonate with policymakers.

### **Examining Dominant Discourses: Policy Entrepreneurs and Agenda-Setting Strategies**

Unpacking which discourses various global education policy entrepreneurs evoke and the political strategies used to make their policy solutions salient provides a deeper understanding of what global citizenship discourses are most dominant, both in terms of frequency of use and political influence. Policy entrepreneurs are those who play a crucial role in moving policy items up on political agendas as they introduce and advance new ideas into different policy arenas (Kingdon, 1984; McDonnell & Weatherford, 2013; Mintrom & Norman, 2009). Policy entrepreneurs include business leaders, university professors, think tank researchers, foundations, non-profits, interest groups, and current or former elected officials (Kingdon, 1984; McDonnell & Weatherford, 2013). They invest resources, including time, energy, reputation, and money, to advocate for a policy change at critical junctures in the agenda-setting process.

The political clout of policy entrepreneurs varies depending on the strategies they use. Mintrom and Norman (2009) posit that effective policy entrepreneurship involves four key strategies. The first is *social acuity* – making good use of social networks that span jurisdictions and show an understanding of the motives, concerns, and ideas of those in their local policy context. Second is *defining problems* in ways that get individuals and groups to pay attention and deem them salient to policy discussion. This can be done through “presenting evidence in ways that suggests a crisis is on hand,” highlighting current policy failures, and drawing support from a broad scope of policy actors (p. 652). Third, effective policy entrepreneurs *build teams* that contain individuals with different knowledge and skills that support the pursued change, make

use of personal and professional networks within the jurisdictions where they want to promote that change, and recognize the importance of working with coalitions. Fourth, they *lead by example* – “taking an idea and turning it into action themselves” (p. 653). Global education policy entrepreneurs who display the elements outlined above are more likely to successfully get their ideas on the agenda of policymakers (Mintrom & Norman, 2009).

Policy entrepreneurs have portrayed global education as a solution to a myriad of problems wrought on by globalization. The cries for global education among advocates have been broad, discordant, and at times disparate: as O’Connor & Zeicher warned (2011), the “social, political, and economic objectives behind these dissonant calls to internationalize education are often antithetical to one another and advocates of global education should be careful not to confound [the social, political, and economic objectives behind the calls for global education]” (p. 522). This study untangles who has used which discourses to reveal a holistic picture of how global education has been framed as a response to globalization, and which framing may more likely lead to policy action.

### **Research Questions**

The complexity of the global education landscape warrants closer examination to map out how various policy entrepreneurs operating in the United States have used global citizenship discourses to promote their agendas. Findings from this study will provide “consumers” of global education policy (e.g., district and school administrators, teachers, parents) knowledge of the type of “global citizens” programs or policies might be expected to foster depending on who the advocate is. Therefore, this study answers:

- 1) What are the dominant discourses evoked by global education policy entrepreneurs advocating on a national level during the third wave of global education policy in the United States?
- 2) How do the discourses used by different policy entrepreneurs compare? What strategies do they use to promote particular discourses, and what does that reveal about the dominance of different global education discourses?

### **Methods**

To ascertain the dominant discourses evoked by policy entrepreneurs promoting global education policy on a national level in this third wave of global education in the United States, I conducted a political discourse analysis of organizational and institutional documents distributed by global education policy entrepreneurs (Fischer, 2003). Political discourse analysis shows the ways in which policy entrepreneurs use language to construct meaning about “the significance of events, of problems, [and] of crises” (Edelman, 1985, p.10; Fischer, 2003). This study examines the social construction of “globalization” and “global citizen” and the implications of this construction on global education policies.

Policy storylines - which include a beginning that introduces a problem situation, a middle action that introduces a policy intervention, and an end that reveals the consequences of a policy outcome - “are the basic linguistic mechanism for creating and maintaining discursive order” (Fischer, 2003, p. 86; Stone, 1988). Global citizenship discourses can be perceived as such as story, with a beginning problem or condition (e.g., a condition or problem resulting from globalization), a middle policy action (e.g., the introduction of a specific global education policy), and an end in which policy outcomes are revealed (e.g., students becoming a specific construct of global citizen). Policy entrepreneurs may use linguistic symbols to further construct

problems in particular ways, along with keeping language ambiguous as a strategy to facilitate political negotiation and compromise. They may similarly use numbers to measure, and therefore define, a problem (Stone, 1988). Through strategic use of symbols and numbers, policy entrepreneurs represent situations and define problems in ways that “promote their favored course of action” (Stone, 1988, p. 106).

The way that policy entrepreneurs use language to construct global education as a policy solution for preparing students for citizenship in a globalized world has implications for how global education becomes actualized in schools. Global education “solutions” may vary based upon policy entrepreneurs’ conceptualization of globalization and global citizenship. For example, a neoliberal discourse that emphasizes problems of economic security may promote policies that emphasize the study of world languages in emerging economic markets to ensure students have job skills needed in a global economy. In contrast, a cosmopolitan discourse may conceivably emphasize the incorporation of human rights as a part of the core curriculum with the goals of fostering global citizens that respect the rights and dignity of all humankind. Therefore, “Understanding how language is used to build support for particular paths is critical for analysts, researchers, and others who wish to forecast or influence policy trends in education” (Harrison & Cohen-Vogel, 2012, p. 518).

### **Data Collection**

Policy positions of key political actors and collectives “can be extracted from political texts and speeches” (Cohen-Vogel & Hunt, 2007; Laver, Benoit, & Garry, 2003). The current study includes political texts such as policy documents (e.g., congressional bills), reports, position statements, program brochures and websites, and other publications disseminated by both governmental and non-governmental policy entrepreneurs with national influence, all who

evoke narratives to promote their political agendas. This study specifically focuses on national global education trends because of the growing influence of the federal government on education policy since the latter half of the twentieth century (McDonnell, 2005) and the growing role of advocacy organizations and foundations who work with formal policymaking structures and schools to influence federal, state, and local officials on a national scale (Scott & Jabber, 2013).

Research has shown that the web of national actors who influence K-12 education policy generally include the U.S. Department of Education, Congressional committees, interest and advocacy groups, and foundations (Scott & Jabber, 2013). Therefore, this study defines global education policy entrepreneurs in the U.S. as those organizations and individuals representing the U.S. Department of Education, the U.S. Congress, professional educator organizations, advocacy organizations, education non-profit and for-profit NGOs that target teacher and student learning, and foundations. I identified them as those who are investing resources to advance a specific global education policy or practice (e.g., curriculum, international exchanges, professional development) in K-12 education in the U.S. and whose target audience traverses multiple states and/or includes federal government actors.

Government policy entrepreneurs were found through searches on the U.S. Congress website ([www.congress.gov](http://www.congress.gov)), U.S. Department of Education website ([www.ed.gov](http://www.ed.gov)), National Governor's Association website ([www.nga.org](http://www.nga.org)), and Chief Council of State School Officer website ([www.ccsso.org](http://www.ccsso.org)). Non-governmental national policy entrepreneurs were identified through a thorough review of the global education literature, special journal issues with global education themes, national resources listed under the U.S. and various states' Department of Education global education websites, lists of global education organizations published in the ERIC Clearinghouse for Social Studies/Social Science Education (Sutton & Hutton, 2001), and

the Global Education Coalition NYC (a network of supranational, national, and local organizations with the goal of fostering global competency in youth)<sup>4</sup>. Additional policy entrepreneurs also emerged as initial documents were analyzed. Saturation of the pool of policy entrepreneurs occurred when I saw the same names repeated across articles, websites, and documents.

A total of 37 policy entrepreneur organizations were included in the final study. While there was not one definitive list of all global education policy entrepreneurs from which to draw the sample of documents, this comprehensive search of varied sources led to representation across different global education entrepreneurial types. This included five organizations representing government officials (e.g., U.S. Department of Education; Council of Chief State School Officers, U.S. Congress), four advocacy groups (e.g., American Forum for Global Education; Partnership for 21<sup>st</sup> Century Skills), twenty U.S.-based and supranational NGOs (e.g., Asia Society, Facing the Future, OxFam, TeachUNICEF), six professional educator organizations (e.g., American Association of Colleges for Teacher Education, National Council for Social Studies), and two foundation (e.g., Longview Foundation, NEA Foundations).

To capture discourses used to frame global education, I searched for documents produced for public dissemination by the K-12 global education policy entrepreneurs delineated above. The texts used from these policy entrepreneurs included published reports, position statements, program brochures, websites, and policy documents that contained arguments or rationales as to why “consumers” of education policies and programs (e.g., policymakers, school and district leaders, teachers) should adopt global education. Due to the ambiguity of global education

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<sup>4</sup>For a list of all GECNYC organizations, see <https://gecnyc.wordpress.com/gec-nyc-members/>.

terminology (Buczynski et al., 2010; Kirkwood, 2001), on each identified policy entrepreneur website I used the search terms “global education,” “international education,” “global citizen,” “global awareness,” and “global competency” to come up with an initial set of global education documents disseminated by each organization. Final document selection criteria included the following: 1) direct reference to global education, global citizenship, global awareness, global competency, or international education, 2) focus on policies, programs, and practices that state an explicit aim to foster global citizenship or global competencies (e.g. valuing multiple perspectives, understanding how the world is interconnected, cross-cultural communication), and 3) the policies, programs, and practices target K-12 students and/or teachers. I excluded documents that exclusively focused on higher education without reference to teacher education and those explicitly labeled as “human rights education,” “multicultural education,” or similar fields. Because analysis also focused explicitly on rationales for global education, I did not analyze the content of lesson plans, units, and assessment rubrics. In total, I analyzed 149 documents. Table 1.2 provides a complete list of global education policy entrepreneurs and number of documents analyzed. (For a complete list of all documents, refer to Appendix A. All numerical designations in the text refer to specific source material listed in Appendix A as well.)

### **Data Analysis**

I used political discourse analysis to understand the dominance of different global education discourses (Fischer, 2003). Political discourse analysis “begins with the recognition that discourses are distributed across institutions” and that dominant discourses along with competing discourses struggle to gain recognition and power (Fischer, 2003). Specifically, this study utilized the global citizenship discourses and policy entrepreneur strategies reviewed above as an analytic framework to understand the storylines associated with global education in the

U.S., examining how different global education policy entrepreneurs frame global education as a solution for problem conditions associated with globalization.

Data was imported into and coded using Dedoose 6.2.21 software. Analysis of the data occurred in two phases to understand the dominance of different global citizenship discourses: 1) how often each discourse is used within and across policy entrepreneurs, and 2) the political power of policy entrepreneurs using these discourses (Fischer, 2003).

First, I applied *a priori* descriptive codes derived from the literature on global citizenship discourses, employing a directed content analysis (Hsieh & Shannon, 2005) to count the frequency of global citizenship discourses used. These codes included *world justice and governance*, *cosmopolitan*, *transformative*, *critical*, *environmental*, *neoliberal*, and *nationalist*. Units of text were coded at the paragraph level to capture the broader context and fuller narrative wherein discourses were evoked. Aware that multiple discourses could be advanced within a single document, coding at the paragraph level allowed to capture instances of discourses being stacked, or listed one right after the other.

In addition, documents were tagged by *policy entrepreneur type* (government, NGO, professional educator organization, advocacy organization, foundation) to facilitate comparison between categories of policy entrepreneur type, and *year*. I also tagged documents by *document type* (report, position statement, speech, guidance document, program brochure, website) to capture the resources policy entrepreneurs utilized to disseminate their favored discourses, and tagged documents by *target* (federal, state, district, school, teacher, teacher education institution, parent) to capture the intended reach of each document.

In the tradition of qualitative research, I refined codes throughout the data analysis process as new insights, constructs, themes and relationships emerged and initial codes did not fit



the data (Miles & Huberman, 1994). Discourse codes that emerged from the data included *technological*, *personal growth*, and *stacking*. Sub-codes also emerged under discourse codes, including *universal values and problems* and *making the world better* under cosmopolitan, *global migration/local diversity* and *recognizing differences* under transformative, and *security*, *diplomacy*, and *competitiveness* under nationalist.

After this first round of coding, I ranked the frequency of each global citizenship discourse code overall (i.e., how many times they occurred across all of the documents). Then, I ascertained which discourses were most prevalent among specific global education policy entrepreneurs. I did so by calculating the prevalence of each discourse for each individual policy entrepreneur as a percentage, using the total number of coded discourse units as the denominator. Then, I rank ordered the prevalence of discourses mentioned within the documents for each policy entrepreneur to facilitate comparisons between them (Hsieh & Shannon, 2005). From this data, I was able to determine which discourses were used by the most policy entrepreneurs and by the most policy entrepreneur types. The number of documents were unevenly distributed across policy entrepreneurs, the number of discourse codes within each document were not uniform, and the number of policy entrepreneurs within each “type” varied. Therefore, looking at “dominance” of discourses through a variety of lenses – overall, by policy entrepreneur type, and by individual policy entrepreneur – allowed me to cross-check patterns of frequency.

Further, I examined which discourses were used concurrently (i.e., in the same sentence, paragraph, or document and by the same policy entrepreneur) and which appeared to be unconnected (i.e., never appearing together, appearing with some policy entrepreneurs but not others). This was done by a) creating a discourse co-occurrence table that showed how many

times two discourses occurred in the same paragraph across all documents and b) examining the breakdown of discourse frequency for each document and policy entrepreneur.

To capture dominance of global citizenship discourses in regards to the power of different global education policy entrepreneurs, I conducted a second round of pattern coding (Miles & Huberman, 1994) to illuminate the discursive, social, and political resources that policy entrepreneurs use to advance their favored storylines about global citizenship. While frequency counts illuminate the prevalence of discourses, policy entrepreneur strategies (Mintrom & Norma, 2009) highlight the power and know-how that policy entrepreneurs have to leverage these notions of global citizenship into policy action. For example, two discourses may be equally prevalent in a given time period; however, who promotes those discourses and how they are promoted may give one discourse more political authority than another (Mintrom & Norman, 2009).

In this second round of coding I identified examples of how policy entrepreneurs demonstrate *social acuity*, *defining problems*, *team building*, and *leading by example* (Mintrom & Norman, 2009). *Social acuity*, or making good use of social networks, represents the social resources policy entrepreneurs have at their disposal. This was evidenced by the different jurisdictions the organization targeted and references to research, quotes, reports, or other resources. I created open codes to capture the names and affiliations of the individual or organization referenced, which allowed me to track how discourses traveled between different policy entrepreneurs. *Defining problems* is key to making an issue relevant in policy discussion and determining who ultimately pays attention to them (Mintrom & Norman, 2009). Sub-codes under these broad categories that emerged included urgency, statistics, global comparisons, quoting people in influential positions, and metaphors. *Team building*, which Mintrom and

Norman (2009) define as the diversity of individual talent within an organization, included evidence of the human resources policy entrepreneurs have within their organization and by publications produced by multiple organizations. Finally, *leading by example* captured ways that policy entrepreneurs actually did the changes they want to see (e.g., creating K-12 global competency standards, lesson plans, etc.). See Appendix B for a complete list of codes.

These codes follow the assumption that policy entrepreneurs that demonstrate these strategies may effectively promote change within policy arenas and therefore wield more power in promoting particular discourses (Mintrom & Norman, 2009). After completing this round of coding, I created a matrix that compared at the level of policy entrepreneur evidence of each of these four strategies and the discourses, ranked by prevalence, that each policy entrepreneur used.

### **Findings**

Analysis of how policy entrepreneurs portrayed the problems that K-12 global education policy would solve revealed the presence of *world justice and governance*, *cosmopolitan*, *transformative*, *critical*, *environmental*, *neoliberal*, and *nationalist* discourses. Two new discourses also emerged, discourses which I refer to as *technological* and *personal growth*. A technological discourse emphasizes the rise of digital and other technologies that facilitate communication and the transmission of ideas across geographic divides; a personal growth discourse frames global education as a means to helping individual students personally improve their cognitive, academic, and social development. These nine discourses were coupled with a variety of K-12 global education policy actions aimed at providing students the knowledge, skills, and dispositions to succeed as citizens in a global world. Such policy actions included K-12 language learning pipelines, integrating global competencies into standard curriculum and

instruction, independent courses or curriculum covering topics such as geography, world history, cultural studies, and peace education, international exchanges (i.e., study abroad, virtual partnerships), and internationalizing teacher preparation.

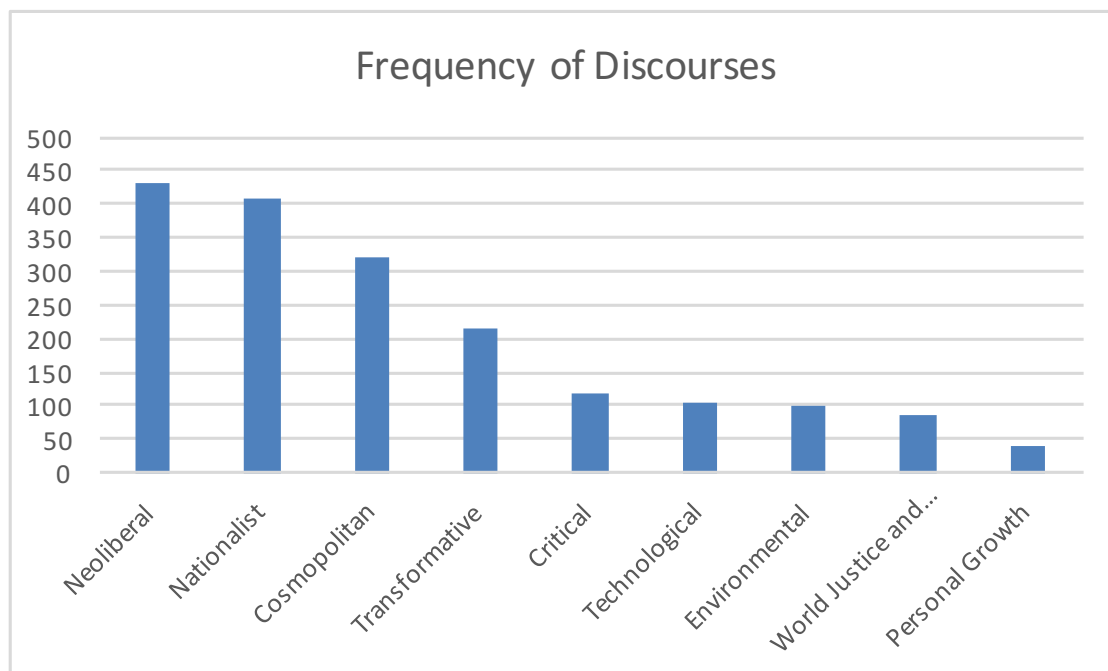
The sections that follow focus on the discourses used to depict the problem conditions requiring global education policy action, describing a) the overall frequency of these discourses, b) how discourses varied by policy entrepreneurs, and c) the most prevalent discourses used by those utilizing effective policy entrepreneur strategies delineated by Mintrom and Norman (2009). As detailed below, neoliberal and nationalist discourses were used with the greatest frequency across documents and by those who showed evidence of using all four policy entrepreneur strategies. At the same time, neoliberal and nationalist discourses were often evoked alongside other discourses, and were not used at all by a number of NGOs who favored cosmopolitan, critical, and transformative discourses. This points to convergence across some but discord across other policy entrepreneurs' framing of global education.

### **Frequency of Global Education Discourses**

Nine discourses were present in the documents analyzed, and multiple discourses were used by all but three policy entrepreneurs within and across the global education documents they published. Yet as Figure 1.2 illuminates, certain discourses were evoked more frequently than others. Neoliberal and nationalist discourses occurred with the most frequency, coded 432 and 410 times, respectively. They were followed in frequency by cosmopolitan and transformative discourses, coded 319 and 215 times, respectively. Critical, technological, and environmental discourses were coded about a hundred times each, world justice was coded 85 times, and personal growth occurred with the least frequency at 40 total codes.

Figure 1.2

*Frequency of Discourses*



**Neoliberal.** Neoliberal discourses occurred with the most frequency (432 times), evoked at least once by 22 of 37 policy entrepreneurs, and was either the first or second most prevalent discourse used by 17 professional organizations, advocacy organizations, foundations, and NGOs. Notably, the 15 policy entrepreneurs who did not use neoliberal discourses were predominately NGOs.

Neoliberal discourses pointed to the burgeoning global economy as a rationale for global education. They specifically referenced the need for students to have the skills to compete for jobs in the global economy and employers' demands for a workforce able to navigate increasingly interconnected global markets. For example, U.S. Senator Feingold (D-WI) asserted when arguing in support of International Education Week: "The Department of State has noted that 88 percent of American college students believe international education will give them a

competitive advantage in the workplace” (no. 121). The *U.S. Department of Education*

*International Strategy 2012-2016* similarly explained:

Students today will be competing for jobs with peers around the world and those jobs will require advanced knowledge and non-routine skills. Transglobal communication and commerce are increasingly part of the daily work of large and small businesses, which face difficulties in hiring employees with the requisite global skills, including cultural awareness and linguistic proficiency. To be successful in such an environment, students will need to perform at the highest academic levels and have the capacity to understand and interact with the world, including language skills and appreciation for other countries and cultures. (no. 141)

Emphasizing employers’ preferences for hiring a globally competent workforce, Global Teacher Education, a professional organization for teacher educators, suggested: “Employers in business, government, community, and non-profit organizations recognize that it is foolhardy, if not impossible, to work in isolation from the rest of the world, and take this into consideration in hiring practices” (no. 39). The Committee for Economic Development (CED) likewise argued,

It is becoming increasingly important for U.S. companies of all sizes to succeed in overseas markets. Many small- and medium-sized businesses from New England to the Pacific Northwest are now finding it necessary to do business in the languages and cultural environments of the world’s emerging markets. (no. 26)

A nearly identical message was reiterated by the Asia Society, an NGO:

From a family fishing business in New England, to a machine parts exporter in California, to a small farmer in the Midwest, all employees need an awareness of the wider world in order to compete. Ask any chief executive of a Fortune 500 corporation and they will say that basic skills, such as reading and writing, are simply no longer enough. (no. 15)

These three organizations also referenced the same statistic that “one in five jobs is tied to international trade.” As these examples demonstrate, language around employers needing a globally competent workforce traveled across professional educators, NGOs, advocacy groups, and government officials. The “problem” evoked in these neoliberal discourses was largely a human capital issue in response to global economic forces: students entering the workforce

needed global competencies to compete for jobs and employers needed a globally competent workforce to benefit their companies.

**Nationalist.** Following right behind neoliberal in frequency were nationalist discourses, used 410 times by 19 of 37 policy entrepreneurs. This was either the first or second most prevalent discourse across 11 professional organizations, advocacy organizations, and government bodies. Of note, two-thirds of nationalist codes came from documents that explicitly targeted the federal government as their audience.

Nationalist discourses emphasized security, diplomacy, competitiveness, and leadership on the global stage, with issues of national security expressed most often. A range of NGOs, advocacy groups, and government organizations argued that national security concerns necessitated proficient speakers in a wider range of world languages and individuals with an understanding of multiple cultures. The U.S. Congress, the Asia Society, the Council of Chief State School Officers (CCSSO), and the Longview Foundation all quoted the National Research Council's (2007) urgent warning: "A pervasive lack of knowledge about foreign cultures and foreign languages in this country threatens the security of the United States as well as its ability to compete in the global marketplace and produce an informed citizenry." The CED further advocated, "To improve our national security, CED recommends expanding the training pipeline at every level of education to address the paucity of Americans fluent in foreign languages, especially critical, less-commonly taught languages such as Arabic, Chinese, Hindi, Japanese, Korean, Persian/Farsi, Russian, and Turkish" (no. 26).

Policy entrepreneurs, including U.S. Congress, ASCD, and NAFSA, evoked images of Sputnik, September 11, and the War against Terrorism to illustrate a national security problem caused by the country's lack of global competence. For example, U.S. Senator Kennedy (D-MA)

used the War against Terrorism to rationalize the Cultural Bridges Act of 2002, whose purpose was to “to promote the national security of the United States through international educational and cultural exchange programs between the United States and the Islamic world” (no. 133). As Senator Kennedy argued:

The terrorist attacks on September 11 and the war in Iraq have brought into sharp focus the many negative images and perceptions of our nation abroad... If the United States is to win a genuine victory in the war against terrorism... we must also do all we can to dispel the disturbing trend of anti-American rhetoric and beliefs. An effective way to do so is to engage Islamic peoples in the realm of values and ideas. (no. 132)

As with neoliberal discourses that argued how employers required a globally competent and multilingual workforce, a similar human capital issue was raised in regards to U.S. military and intelligence agencies. Policy entrepreneurs – including NAFSA, the Asia Society, the Council on Foreign Relations, and the Committee for Economic Development – warned that this workforce shortfall presented a national security issue. According to the Council on Foreign Relations, “the U.S. State Department and intelligence agencies are facing critical language shortfalls in areas of strategic interest”, which made “it harder for defense-related employers, both governmental and private sector, to find qualified candidates, leaving jobs unfilled.”

NAFSA’s *Securing America’s Future* also warned that

Shortfalls have adversely affected agency operations and hindered U.S. military, law enforcement, intelligence, counterterrorism, and diplomatic efforts. Many shortages were in hard-to-learn languages from the Middle East and Asia. Our adversaries around the world may well speak English in addition to their mother tongues, but we can be sure that they will not be planning attacks against American interests in the one language we are capable of deciphering.” (no. 74)

As these examples show, national security discourses narrowly focused in on regions of the world with strategic importance, particularly Asia and the Middle East.

Often entwined with national security were discourses related to American diplomacy, leadership, and competitiveness. The need for enhanced American leadership abroad was made



clear in the Council for Foreign Relations report *U.S. Education Reform and National Security*: “We feel strongly that the United States must continue to provide an education that allows our country to lead the international community. The nation cannot allow Americans to lose confidence or the country to turn inward, resulting in a lack of American leadership around the world.” The Committee for Economic Development echoed this sense of urgency for both national security and national leadership purposes:

We are now at a critical moment in our history...Despite America’s status as an economic, military and cultural superpower, we risk becoming narrowly confined within our own borders, lacking the understanding of the world around us that is essential to our continued leadership role in the world community. The day has long passed when a citizen could afford to be uninformed about the rest of the world and America’s place in that world. CED therefore believes it is critical to ensure that all students become globally competent citizens who will lead our country in the twenty-first century.

A NAFSA report further argued: “The U.S. cannot conduct itself effectively in a competitive international environment when our most educated citizens lack minimal exposure to, and understanding of, the world beyond U.S. borders” (no. 74).

Often, U.S. Congressional global education advocates joined multiple nationalist sentiments together. For example, 2001 Senate Concurrent Resolution 7 evoked national security, diplomacy, and competitiveness in “expressing the sense of Congress that the United States should establish an international education policy to enhance national security and significantly further United States foreign policy and global competitiveness” (no. 135). The 2005 House Concurrent Resolution 100 similarly encapsulated diplomacy, security, and leadership in its introduction: “Expressing the sense of Congress that the United States should establish an international education policy to foster mutual understanding among nations, promote a world free of terrorism, further United States foreign policy and national security, enhance United States leadership in the world, and for other purposes” (no. 127).

**Cosmopolitan.** Cosmopolitan was the third most frequently used discourse overall, evoked 318 times. Yet it was the most widespread discourse used across policy entrepreneurs, evoked by 32 out of 37 organizations, and was either the first or second most prevalent discourse across 20 NGOs, education providers, foundations, and professional organizations.

Cosmopolitan discourses emphasized universal values, global issues that transcended national borders, and making the world a better place. Images of universality included “we all live on the same planet” (no.15) and “the global community” (no. 1, no. 25, no. 100). Universal values and goals to which advocacy groups, professional organizations, and NGOs alluded included peace, human rights, freedom, and a common humanity. For example, the NGO TeachUNICEF emphasized the universal value of human rights in saying:

All people have basic human rights that are universal and that transcend the rights granted by the nations in which they reside. As global citizens, we have a collective responsibility to better understand the world outside our own borders, protect and preserve the human rights of people everywhere, and challenge injustice wherever it occurs. (no. 98)

The National Council for Social Studies defined “a common humanity” as “the human condition, clarifying their understanding that across the globe, people share common concerns, but find solutions in different ways” (no. 76). A UNESCO report elaborated that “global citizenship does not imply a legal status. It refers more to a sense of belonging to a broader community and common humanity.” Of note, the UN’s Global Education First Initiative acknowledged that these universal themes were not prevalent in schools, stating that “the values of peace, human rights, respect, cultural diversity and justice are often not embodied in the ethos of schools” (no. 100).

Policy entrepreneurs also underscored global issues that transcended national borders. As defined by NGO Facing the Future, global issues encompassed

Those that are trans-boundary and hold the potential for far-reaching impacts on large numbers of people regardless of political or geographic lines; persistent or long acting,

both in their impact and the timeframe necessary to resolve them; and interconnected to each other, such that a change in one will likely impact another. (no. 32)

Global issues that policy entrepreneurs depicted included broad references to a world facing humanitarian crises, along with specific global challenges such as climate change, environmental degradation, poverty, disease, and human conflict. For example, the Asia Society and Council of Chief State School Officers (CCSSO) report *Educating for Global Competence* stated “Those growing up in the world of today—and tomorrow! —need preparation to tackle the range of pervasive problems: human conflict, climate change, poverty, the spread of disease, the control of nuclear energy” (no. 17). The Committee for Economic Development (CED) recited a similar list of global issues: “Human-security challenges, such as the AIDS pandemic, environmental degradation, and Third World poverty, have become global problems” (no. 26). The U.S. Department of Education likewise argued that “Students will need to have substantive knowledge and understanding to address issues, phenomena and catastrophes that cut across borders, like the spread of disease, climate change, natural disasters, and financial crises” (no. 141). As these examples show, the cosmopolitan notion of borderless global issues tended to overlap with other discourses such as nationalist, environmental, and neoliberal.

A third way in which cosmopolitan notions of global citizenship were portrayed was through language that embodied a desire to make the world a better place. NGOs, professional organizations, and foundations made statements about “building a just and peaceful world,” being “effective stewards of a sustainable future,” and “making a difference.” While this alludes to what Oxley and Morris (2013) described as spiritual undertones of “working towards the betterment of the whole society” (p. 315), de-localizing who the world will be made better for and on whose terms implies a universalist notion of how the world should be (Andreotti, 2006). The missions and stated purposes of multiple foundations, NGOs, and professional organizations

specifically emphasized creating a better world. For example, NGO iEARN's stated purpose was "to enable young people to undertake projects designed to make a meaningful contribution to the health and welfare of the planet and its people" and "make a difference in the world" (no. 52). The mission of New Global Citizens was to "activate individuals to use their knowledge and skills to impact the global community" (no. 35). TeachUNICEF stated that "Today's education for global citizenship empowers students to understand and exercise their human rights in ways that demonstrate solidarity with human beings everywhere and make a positive impact on the world" (no. 96). Likewise, NAFSA advertised that "we lead the way in advocating for a better world through international education" (no. 69).

Among Congressional policy entrepreneurs, the notion of a better world at times occurred alongside nationalist discourses, particularly among federal actors. For example, U.S. Senator Lugar (R-IN) argued in support of Senate Concurrent Resolution 7, which proposed an international education policy:

Success in promoting international education programs today and in the future will help promote democratic values and international cooperation. They can serve to reduce poverty and injustice and promote new leaders and new leadership skills in the U.S. and abroad that are essential to a better world. (no. 136)

Senator Durbin (D-IL) made a similar argument in support of the resolution for making 2005 the Year of Study Abroad:

The experiences and lifelong friendships that result from studying abroad can help foster mutual understanding between the future leaders of the world. Such relationships and cooperation are vital for a secure and prosperous future, not only for the United States, but for the entire world. (no. 123)

As these two examples insinuate, when coupled with nationalist discourses, a "better world" and "secure and prosperous future" imply a world in which U.S. values, goals, and leadership would define what the global community looks like.

**Transformative.** Transformative was the fourth most frequently utilized discourse. It was used 215 times by 26 different policy entrepreneurs, and 11 times as either the first or second most prevalent discourse that individual policy entrepreneurs used.

The transformative discourse emphasized the increasingly diverse population within the United States, resulting from of “a world of unprecedented global migration” (no. 17). The Committee for Economic Development (CED) stressed:

Today’s America is, and will continue to be, characterized by ethnic and linguistic diversity. Citizens experience this diversity every day in our shopping malls, our schools, and in our workplaces...As the United States becomes increasingly diverse within its own shores, knowledge of other countries and languages is essential if our workplaces, schools, and communities are to embrace their diversity and maintain our civic culture. (no. 26)

A very similar statement was made in Asia Society’s *Going Global: Preparing Students for an Interconnected World*, which stated “New immigrants from such regions as Asia and Central and South America are generating a diversity in U.S. communities that mirrors the diversity of the world, and are transforming the cultures of local communities, workplaces, and even the local mall.” As UNESCO’s Global Citizenship Education Statement succinctly concluded, “Increased transnational migration is making communities inevitably more heterogeneous or ‘glocalized’, and the necessity of learning how to live together more acute.”

Multiple organizations specifically pointed to increasingly diverse classrooms as a reason for instilling global education in K-12 classrooms and teacher preparation programs. For example, a Global Teacher Education report stated, “The school population is growing increasingly diverse. Teachers who study second languages can communicate with students and parents in languages other than English” (no. 43). The Longview Foundation likewise argued that “In today’s multicultural communities, there are obvious benefits to increasing the number of elementary and secondary teachers able to communicate with students and parents in

languages other than English” (no. 65). The NAFSA report *Teaching the World* quoted the Dean of the School of Leadership and Education Sciences (SOLES) at the University of San Diego as saying, “[Student teachers] want the experience of interacting with other cultures. They know that in their world of work, they are going to be working with a very diverse population in America” (no. 72).

Though with less frequency, policy entrepreneurs evoked students’ layered cultural, national, and global identities (Banks, 2008) as an underlying rationale for why global education initiatives, such as international partnerships and globalized curriculum, were necessary. For example, *U.S. Department of Education International Strategy* reported that the U.S. Department of Education and Mexico forged a Memorandum of Understanding to “foster dialogue between policymakers on education issues of mutual concern with particular attention for efforts to improve the quality of education for binational migrant students” (no. 140). The Global Youth Leadership Institute, an NGO, embraced “the sharing, understanding, acceptance, and promotion of multiple identities – based on color, culture, class, character, and context – and the common characteristics that unite us within a community” (no. 45). A UNESCO Global Citizenship Education Working Paper likewise underscored students’ layered identities as “a sense of shared destiny both with their local/national social, cultural, and political environments as well as with humanity and the global community, as a whole” (no. 102).

**Critical.** Critical discourses occurred 116 times across 12 policy entrepreneurs, all of whom were NGOs with the exception of two professional organizations. Critical was also one of the top two prevalent discourses for five different NGOs, all of whom offered curricular resources to teachers, schools, and/or districts and did not target state or federal policymakers. Of note, three-fourths of critical codes came from documents that directly targeted teachers.

Critical discourses illuminated global inequities, power relations, social justice, and the voices of the marginalized speaking up against transnational corporations and governing bodies and advocating for the rights of workers, children, and indigenous populations. For example, the NGO Rethinking Schools stressed that “We need to direct students' attention to the broad trends that continue to make the world an unequal and dangerous place.” Their introduction to the publication *Rethinking Globalization* listed these trends, among them colonial domination, “the debt crisis and how it has been manipulated by Western-led institutions like the World Bank and the International Monetary Fund,” free trade agreements “that encourage poor countries to export their way to economic health and to specialize in the ‘commodity’ of cheap labor,” and “military interventions in places as far apart as Vietnam, Guatemala, and the Congo which have discouraged alternative routes to development” (no. 95). The National Council of Social Studies’ Global Education Position Statement similarly read, “In studying the traditions, history, and current challenges of other cultures, the perspective consciousness of our students must be raised and ethnocentric barriers must be addressed. The social studies curriculum should provide a forum for discussion of issues of inequity and unfairness, racism, and power in and among societies” (no. 75).

Critical discourses also pointed to a need for students to take action on injustices and inequities *with* those individuals and groups affected by injustices and inequities. For example, the NGO New Global Citizens’ website explained,

New Global Citizens believes that for too long, charities, politicians, and development groups believed they could come in as outsiders and “fix” whatever problems were faced by the world’s poor. Nevertheless, this approach ignored the very people it was supposed to help—the people who were best placed to create change. That is why all Global Projects are supported and led by the local community. (no. 36)

This differs from the cosmopolitan notion of “making a difference”, which evokes an ideal of creating change from the outside based upon universal principals of a common humanity rather than creating change based upon the voices and actions of those experiencing injustices (Andreotti, 2006).

**Technological.** Language related to technological globalization emerged as a new discourse supporting the need for global education, occurring 102 times. While making its way into the language of 18 policy entrepreneurs, the technological discourse occurred more as a secondary discourse in that it was not the most prevalent discourse evoked for any policy entrepreneur. Rather, it tended to be listed as one of many globalizing forces that necessitated global education.

This technological discourse emphasized rapidly-evolving digital media and new technological advances that increased connectivity, communication, and collaboration of people throughout the world. This reflects scholarship on digital democracy that discusses the accessibility of technology and digital media (e.g., smartphones, social media) as a means towards constructing a global democracy and creating networks of global activism (Andreotti & Pashby, 2013; Bennett, 2003). Multiple advocacy groups, NGOs, and government officials depicted a world wherein people connected and contributed via technology. As the advocacy group Partnership for 21<sup>st</sup> Century Skills stated, “Today, we live in a technology and media-driven environment, marked by access to an abundance of information, rapid changes in technology tools and the ability to collaborate and make individual contributions on an unprecedented scale” (no. 91). NGO World Savvy similarly reported that “the educational landscape needs to change to meet the needs of digital-age learners and the challenges of a rapidly changing knowledge and technology-based global society” (no. 148). The U.S. and the



World Education Act of 2008 also utilized a technological discourse, finding that “Rapid technological advances and the information age are shrinking the world, exponentially enlarging access of all peoples to essential knowledge, concepts, and ideas, and connecting Americans to their counterparts across the globe” (no. 116).

**Environmental.** Similar to technological, environmental was a secondary discourse. It occurred 98 times across 18 policy entrepreneurs, but was only the first or second most prevalent discourse used by two policy entrepreneurs. An environmental discourse also surfaced alongside cosmopolitan discourses 72 times, representing about three-fourths of all environmental codes. This suggests that policy entrepreneurs, including advocacy groups, government officials, NGOs, and foundations, tended to portray environmental concerns as one of many global issues that transcended national borders.

For example, the Committee for Economic Development (CED) contended, “To solve most of the major problems facing our country today— from wiping out terrorism to *minimizing global environmental problems* to eliminating the scourge of AIDS—will require every young person to learn more about other regions, cultures, and languages” (no. 25, italics added for emphasis). Former Secretary of Education Arne Duncan similarly listed the environment as one of multiple global concerns: “We are reminded that the challenges we face today are increasingly borderless. Climate change, the environment, and the economy are but some of the issues that affect our daily lives and demand our attention on a global scale.” (no. 108). Facing the Future, an NGO that provides tools for educators focused on global issues and sustainability, likewise stated, “Six billion people and growing, *increasing pressures on our planet's environmental systems*, widening gap between the rich and poor, and international conflicts – these are some of the critical issues facing youth today” (no. 33).

Instances where an environmental discourse was evoked independent from lists of multiple global concerns underscored the need for environmental sustainability and “planetary citizenship, focusing on the global community’s responsibility to planet Earth” (no. 101). As elucidated by a report produced by the Asia Society and CCSSO:

Because greenhouse gases do not respect national borders, the problem is essentially a global one. Climate change is affecting every region, country, city, and village on the planet in distinct ways and shaping living conditions, job opportunities, and civic participation for youth...A more concerted global effort will be needed to return atmospheric temperatures to sustainable levels and to adapt effectively to climate change. (no. 20).

The National Council for the Social Studies independently highlighted an environmental discourse as well, explaining that “humankind is an integral part of the world environment. The human-natural environment should be seen as a single system” (no. 77).

**World Justice and Governance.** World justice and governance occurred 85 times, found in the discourses of 13 policy entrepreneurs. It was the second most prevalent discourse for UN/UNESCO and TeachUNICEF, two supranational organizations.

World Justice and Governance discourses were used by NGOs, government representatives, and professional organizations, all who mentioned specific supranational organizations. Rethinking Schools, TeachUNICEF, and the American Association of Colleges for Teacher Education (AACTE) brought up various UN initiatives such as the Universal Declaration of Human Rights, Millennium Development Goals, and Education for All. *The Department of Education International Strategy* enumerated multiple supranational organizations in which the United States joined:

The United States actively participates in multilateral organizations—Asia-Pacific Economic Cooperation (APEC), East Asia Summit (EAS), Organization of American States (OAS), OECD, and UNESCO – through which we share best practices and lessons learned and work collaboratively to improve education here and abroad. (no. 140)

Other usage of World Justice and Government included broad references to “political structures grow[ing] more global in scale” (no. 107), the need for more “international cooperation among governments” (no. 21), and “world-wide political interdependence that is altering traditional boundaries between domestic and international politics” (no. 75).

**Personal growth.** In addition to the technological discourse, personal growth was a second discourse that emerged from the data. Personal growth portrayed global education as a means to helping individual students personally benefit. This discourse occurred with the least frequency, used 40 times. Found in the discourses of 13 policy entrepreneurs, it was not the most prevalent discourse for any them. Examples of personal growth suggested that global education would help “promote the personal development of the individual” (no. 54) or would provide students “cognitive, academic, and social benefits” (no. 112). As the International Baccalaureate (IB) program advertised: “an IB education is unique because of its rigorous academic and personal standards. IB programmes challenge students to excel not only in their studies but also in their personal growth.”

**Stacking discourses.** Policy entrepreneurs tended to use combinations of these nine discourses in concert rather than exclusively using one over another, a term which I call stacking. Table 1.3, which depicts how often discourses co-occurred in the same sentence or paragraph, shows that nearly every discourse occurred alongside every other discourse at some point. Neoliberal, the most frequently used discourse overall, was also the most common discourse that co-occurred alongside nationalist (233 times out of 413 total nationalist codes), cosmopolitan (107 times out of 319 total cosmopolitan codes), transformative (86 times out of 215 total transformative codes), and technological (54 times out of 102 total technological codes). The

prevalence of stacking implies that discourses were not portrayed as being antithetical to each other, but as co-existing reflections of a globalized world.

Examples of “stacking” abounded across foundations, advocacy groups, NGOs, professional organizations, and government officials. The Longview Foundation’s report *Teacher Preparation for a Global Age* drew upon neoliberal, national security, and personal growth discourses to support language programs: “Whether to promote global citizenship, economic competitiveness, national security, or academic and cognitive benefits, calls are increasing from many quarters for more and better world language education” (no. 65). Security, economic, and environmental discourses were stacked in the advocacy group American Forum for Global Education’s *Checklist for Teachers, Schools, School Systems, and State Education Agencies*, whose introduction read:

Global terrorism has recently changed the world. The global economy has been changing the world for some time. Sustainability of the earth and its inhabitants requires acute attention to the global environment and the means to development. These three facts alone—and there are certainly more—are reason enough to ask: Are the American people prepared for this new world? Are we learning to think globally? (no. 5)

Professional organization the American Council for the Teaching of Foreign Languages (ACTFL) listed five “needs” for global competence in their Global Competence Position Statement (2014), which captured neoliberal, nationalist, cosmopolitan, transformative, and personal growth discourses: 1) Need in the Global Economy, 2) Need in Diplomacy/Defense, 3) Need in Global Problem-solving, 4) Need in Diverse Communities, and 5) Need in Personal Growth and Development (no. 3).

Government-affiliated policy entrepreneurs stacked discourses as well. The findings of The U.S. and the World Education Act of 2008, designed to provide grants for teaching training

and programs that supported international education in elementary schools and secondary schools stated:

(1) A host of growing challenges—international security, global markets, immigration, world health, the environment, and the emerging educational and material aspirations of the world's poorest people—are fundamentally altering the international landscape. (2) Rapid technological advances and the information age are shrinking the world, exponentially enlarging access of all peoples to essential knowledge, concepts, and ideas, and connecting Americans to their counterparts across the globe. (3) The diversity of American workplaces, schools, and communities increasingly parallels the world's diversity. (4) Americans, in the performance of their citizenship roles, are required to make informed judgments about the role of the United States in the world, as well as the impact of other nations and world regions on the United States. (5) The place of the United States in the world will depend on whether teachers, citizens, and policy-makers of the United States understand how international events shape the lives, politics, economics, and security of the Nation. (6) American-based multinational corporations, as well as small businesses, increasingly need employees with knowledge of foreign languages and cultures to market products to customers domestically and around the globe, and to work effectively with foreign employees and partners in other countries. (7) It is the primary function of the Nation's schools to prepare America's students to meet the requirements of the workplace and to perform citizenship roles in dynamic and rapidly changing domestic and global communities. (no. 115)

This congressional bill brought in cosmopolitan, technological, transformative, nationalist, and economic discourses to highlight the need for global education. Not unlike the use of ambiguous language (Stone, 1988), this stacking may have served the purpose of convincing a wider array of constituents to support global education.

A notable exception to stacking was when critical discourses were evoked. Table 1.3 shows that critical discourses were rarely to never used with nationalist, neoliberal, personal growth, technological, and world justice and governance discourses. This could be because at its core, critical global citizenship questions inequities and injustices created by the transnational economic and governmental institutions that neoliberal, world justice and governance, and nationalist discourses promote (Oxley & Morris, 2013).

## **Discourse Differences by Policy Entrepreneur Type**

While neoliberal and nationalist discourses were evoked with the highest frequency across all policy entrepreneur documents and neoliberal discourses were stacked most frequently with other discourses, cosmopolitan discourses were evoked by the most policy entrepreneurs. This may be due to patterns of discourse prevalence that differentiated NGOs from other policy entrepreneur types.

NGOs, who accounted for over half of the total policy entrepreneurs analyzed in this study, overwhelmingly used cosmopolitan discourses as a rationale for global education. Seventeen out of the 20 NGOs used cosmopolitan discourses at least once, and 13 out of 20 used cosmopolitan discourses with the most frequency as compared to the other eight discourses. About half of NGOs also used transformative, critical, and environmental discourses, as compared to only approximately one-fourth of NGOs using neoliberal and nationalist discourses. This is illustrated in Table 1.4, which depicts the number of policy entrepreneurs for each policy entrepreneur type who used each of the nine discourses at all and the number of policy entrepreneurs for each type who evoked each discourse the most frequently and second-most frequently.

In contrast to NGOs, advocacy organizations, foundations, government, and professional organizations tended to evoke nationalist and neoliberal discourses with the most prevalence, and did so alongside cosmopolitan and transformative discourses as well. As displayed in Table 1.4, all four advocacy organizations used neoliberal, nationalist, and transformative discourses while three of four advocacy organizations used cosmopolitan discourses. Four out of five government organizations used neoliberal, nationalist, and cosmopolitan discourses, and all five used transformative discourses. Five of six professional organizations used nationalist and

transformative discourses, and all six used neoliberal and cosmopolitan discourses. A combination of these four discourses tended to be the first and second most prevalent discourses used as well, with neoliberal discourses the most prevalent among this group of policy entrepreneur types.

NGOs also stood out from other policy entrepreneur types in that rather than stacking multiple discourses together, they tended to use fewer total discourses on average than advocacy organizations, foundations, government and professional organizations. While all other policy entrepreneur types used on average close to 6 discourses, NGOs on average used 3.9 discourses. (Notable exceptions were the Asia Society, International Baccalaureate, UNESCO and the UN, and World Savvy, who used between 7 and 9 discourses.)

A third way in which NGOs also stood apart was the extent to which they evoked critical and environmental discourses. While these discourses rarely showed up as the most or second-most prevalent discourse, 95% of critical codes and 85% of environmental codes were found in documents published by NGOs. At the same time, critical discourses were not used at all by government organizations, foundations, or advocacy groups.

While these general patterns distinguished NGOs from other policy entrepreneur types, there was also variation in discourse use within policy entrepreneur groups. Table 1.5 shows the prevalence (as defined by the percent of total discourses coded overall for that policy entrepreneur) of each discourse for each individual policy entrepreneur. For example, as Table 1.5 shows, the Peace Corps World Wise Schools differed from other government organizations in that half of its discourses were transformative and the other half cosmopolitan discourses. The four other government organizations' first and second most prevalent discourses were nationalist and neoliberal. Variation was found within NGOs as well. The Asia Society and World Savvy

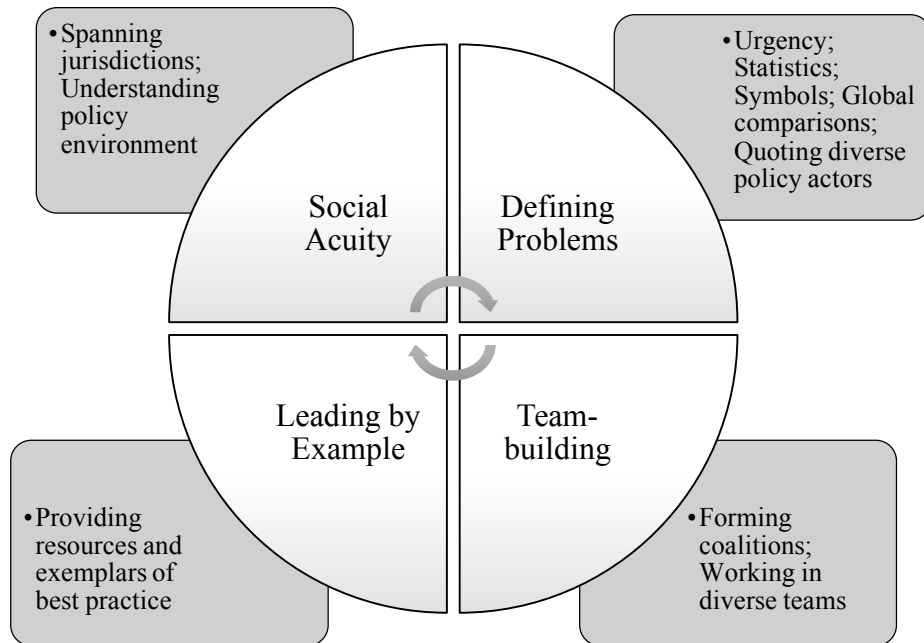
stood out from other NGOs in that they stacked discourses – utilizing nine and seven respectively – and had neoliberal as the most prevalent, or tied for most prevalent, discourse. Overall, these findings suggest that the most dominant discourses, as defined by frequency, depended on the policy entrepreneur.

### Policy Entrepreneur Strategies Promoting Global Education Discourses

Dominance of particular discourses can be understood not only by how frequently discourses occurred but also by the extent to which policy entrepreneurs evoking specific discourses demonstrated strategies that could help place particular policy solutions on the agenda. Each global education policy entrepreneur demonstrated evidence of at least one of the strategies identified by Mintrom and Norman (2009): social acuity, defining problems, teambuilding, and leading by example. These four strategies are depicted in Figure 1.3.

Figure 1.3.

*Policy Entrepreneur Strategies*



*Note.* Adapted from Mintrom and Norman (2009)



Regarding *social acuity*, about half of policy entrepreneurs showed evidence of spanning jurisdictions. They referenced and were referenced by multiple policy actors and they targeted a combination of different levels of education governance (e.g., federal government, state government, teacher preparation programs, school districts, schools, and teachers).

When policy entrepreneurs *defined problems*, they did so in ways that highlighted crises (i.e., using language that framed global education as “a necessity”, “critical,” “essential”, “imperative”, “an urgent need”, and “vital”), used statistics to highlight trends in the global economy and global migration, evoked symbols (e.g., the Russian Sputnik launch, September 11, an interconnected world, and the 21<sup>st</sup> century), and compared the U.S. to other countries around the globe to illustrate the failure of the U.S. education system to prepare globally competent students. Policy entrepreneurs also defined problems through the words of diverse policy actors, reflecting Mintrom and Norman’s (2009) assertion that policy entrepreneurs paid attention to problem definition by “drawing support from actors behind the immediate scope of the problem” (p. 652). Policy entrepreneurs quoted a range of actors: government officials (e.g., current and former U.S. Presidents, state governors), leaders of the UN and OECD, business executives, diplomatic and military personnel such as U.S. Secretaries of State, generals, and ambassadors, university professors and teacher educators, directors of youth organizations, school administrators, teachers, and students.

About a third of policy entrepreneurs revealed evidence of *teambuilding* in the documents analyzed. They formed coalitions with other organizations to write reports and create educational programs or curricula. Policy entrepreneurs also recruited individuals with diverse areas of expertise to serve on task forces, produce reports, or sit on advisory boards. These diverse teams

represented a cross-section of professional sectors and jurisdictions: the education sector, the State Department, local, state, and national government officials, and the private sector.

Finally, policy entrepreneurs – in particular, foundations, NGOs, and advocacy groups – *led by example*. Policy entrepreneurs have provided curricular, instructional, and programmatic resources and shown examples of how global education initiatives had taken roots in exemplary K-12 schools and schools of education. Others have created rubrics and checklists to help teachers, schools, districts, and states benchmark the global competence of their students. These examples provided evidence of how global education can become incorporated into schools, districts, states, and teacher preparation programs in advance of policy adoption.

Three policy entrepreneurs provided evidence of all four of these strategies: Asia Society, NAFSA: Association for International Educators, and the Partnership for 21<sup>st</sup> Century Skills (P21), who represented an NGO, professional organization, and advocacy group, respectively. One discourse did not pervade their global education narratives. Rather they drew on four (NAFSA), six (P21), or all nine (Asia Society) discourses. Common across these three policy entrepreneurs was that a neoliberal discourse occurred as one of the top two prevalent discourses. Below, I show the discourses that each of these three policy entrepreneurs used with the greatest frequency, how each policy entrepreneur used policy entrepreneur strategies to promote those discourses, and, in doing so, reveal that these policy entrepreneur strategies largely promoted neoliberal or nationalist discourses while at the same time stacking multiple discourses.

**Asia Society.** The Asia Society, a nonpartisan, nonprofit education institution, evoked all nine discourses within and across the reports, guides, rubrics, and websites they published. Neoliberal was the most frequent discourse used across all Asia Society documents with a

prevalence of 34.8% of all codes, followed by cosmopolitan (14.9%), transformative (14.9%), and nationalist (13.8%).

***Social acuity.*** To illustrate the need for global competence development, the Asia Society reached across multiple jurisdictions and stakeholders, stacking multiple discourses as they did so. Asia Society reports referenced a range of stakeholders, including professional organizations (e.g., the American Association of Colleges for Teacher Education), governmental departments and organizations (e.g., Title VI Centers, the U.S. Department of Education, the U.S. Department of State, Peace Corps), education NGOs (e.g., epals, iearn, VIF International Education); advocacy organizations (e.g., P21, the Committee for Economic Development), the College Board, the UN, universities, and foundations. The Asia Society was also referenced the most as compared to all other policy entrepreneurs examined in this study. Those who referenced their work included professional organizations (e.g., the American Association of Colleges for Teacher Education, the Association for Supervision and Curriculum Development, NAFSA, and Global Teacher Education), advocacy groups (e.g., P21, the Committee for Economic Development), the Longview Foundation, and the U.S. Department of Education.

The Asia Society also targeted multiple jurisdictions. For example, the report *Educating for Global Competence* was “intended for classroom teachers, administrators, informal educators, policymakers, community leaders, researchers, parents, and all other stakeholders interested in preparing our youth for the 21<sup>st</sup> century” (no. 20). Other reports targeted specific stakeholders: *Expanding Horizons* and *Global Competence in Expanded Learning Time* targeted school leaders and out-of-school time (OST) programs; *Going Global: Preparing our Students for an Interconnected World* targeted middle and high schools; *Putting the World into World-Class Education: State Innovations and Opportunities* targeted state education policymakers.

Perhaps reflective of the diverse audiences of teachers, school leaders, district administrators, and state education policymakers they targeted, Asia Society reports tended to stack discourses on top of one another. In the *State Innovations and Opportunities* report co-produced with the Council of Chief State School Officers (CCSSO), neoliberal accounted for 43% of coded discourses and nationalist 34% of coded discourses. The publication *Educating for Global Competence*, which targeted teachers, schools, districts, and state education agencies, had a more even dispersal of discourses: neoliberal accounted for 25% of the discourses, environmental 21%, transformative 19%, cosmopolitan 14%, technological 12%, and nationalist 11%. The first chapter “A Rationale for Global Competence”, opened by saying:

Globalization, the digital revolution, mass migration, and the prospect of climate instability are triggering new concerns and demanding a new kind of graduate. At the dawn of the 21<sup>st</sup> century we are recasting our understanding of economics, communication, security, cultural identity, citizenship, and the environment... This chapter reviews three forces shaping lives on the planet: the flattened global economy and changing demands of work; unprecedented global migration and the changing nature of neighborhoods, identities, and citizenship; and climate instability and the growing need for global environmental stewardship. (no. 20)

This example shows the stacking of multiple discourses at once, including neoliberal, technological, transformative, environmental, and nationalist, thus satiating an array of concerns that diverse stakeholders might hold about globalization.

***Defining problems.*** Asia Society used various discursive tactics to amplify the need for global competence: instilling a sense of urgency, referencing statistics, quoting influential individuals, and using global comparisons. Nearly every published document evoked urgency with language such as “it [is] imperative that our students receive a world-class education that includes global knowledge and skills.” Three separate reports used the exact same language in warning: “The cost of ‘putting the world into world-class education’ will be considerable. The cost of not doing so will be infinitely greater” (no. 16, no. 20, no. 22).

Asia Society used statistics most often to highlight neoliberal discourses, specifically the expanding global economy and the imperative for students to gain global skills for the job market. For example, their State Advocacy Statistics report highlighted that “Already one-in-five U.S. jobs is tied to international trade” and “Nearly two-thirds (65%) of Americans surveyed believe that if our young people do not learn world languages, they will be at a competitive disadvantage in their careers.” They also used statistics to elucidate a transformative discourse, highlighting a growing immigrant population, for example, “By the summer of 2010 the total number of migrants in the world will have been about 214 million. Fifty million were estimated to be living in the United States” (no. 16).

Another way that the Asia Society defined problems was by quoting individuals from various sectors: education (e.g., students, school administrators, teachers, afterschool program directors), business (e.g., the Business Roundtable, the Committee for Economic Development, Goldman Sachs), and policymakers (e.g., governors). In doing this, they once again evoked multiple discourses. Quotes from the business sector and policymakers portrayed neoliberal discourses. The *Expanding Horizons* report quoted Former CEO of the Coca Cola Company as saying “If you want to understand business anywhere and be successful, it isn’t just about the language. You absolutely must understand the culture” (no. 15). In that same report, quotes from students and community groups illustrated cosmopolitan discourses as well. For example, a student stated, “Now that I’ve found out about global issues, I want to change something and know that I’m here for a purpose. I want to know that I’m not only taking away from my community but giving something back globally.” The quote of former president of the National Urban League also evoked a cosmopolitan discourse: “All children now are children of the globe, not just children of the neighborhoods where they live.”

The Asia Society used global comparisons to illustrate the failure of the U.S. education system in teaching students the knowledge and skills needed to navigate a global world. As written in *Expanding Horizons*:

Research demonstrates that most young people lack essential international knowledge and skills. Surveys conducted by Asia Society and National Geographic-Roper indicate that, compared with students in nine other industrialized countries, American students lack knowledge of world geography, history, and current events. Very few American students learn languages that large numbers of people around the world speak, such as Chinese and Arabic. (no. 15)

Such global comparisons also reflected a nationalist discourse, reflecting a perspective wherein the United States should lead among other nations and a focus on world regions of national economic and military importance.

***Teambuilding and leading by example.*** Much of the Asia Society's internal advisory committees represent an array of government and non-government sectors. For example, the National Advisory Committee for the Asia Society's education activities included representation from the CCSSO, state-level coordinators for global education, school administrators, and teachers. Their "jury" for choosing annual international education prizes - which from 2003 to 2007 provided a \$25,000 award to states, elementary, middle, and high schools, and NGOs - represented a cross-section of policymakers and business leaders. The jury included an ambassador, U.S. congressmen, a former U.S. Secretary of Education, the College Board president, and representatives from the George Lucas Educational Foundation, Goldman Sachs, CBS, the Educational Testing Service, and the Boeing Company.

The Asia Society also has partnered with multiple organizations representing different jurisdictions to lead by example. They partnered with the CCSSO to commission the EdSteps Global Competence Task Force. The Task Force was comprised of representation from state education agencies, nonprofit organizations focused on global education, and higher education

institutions. The Task Force produced Global Competence Matrices which defined global competence and helped to “guide teachers in designing lessons and developing assessments for student work.” With CCSSO, the Asia Society also published the report *Educating for Global Competence* and *Putting the World into World Class Education: State Innovations and Opportunities*, which provided examples of state actions already being taken and recommendations for what states should do to increase students’ global knowledge and skills.

Asia Society has also partnered with the Longview Foundation to a) create and convene a States Network on International Education, b) write the *International Education Planning Rubric: State Strategies to Prepare Globally Competent Students* to assist state education agencies in “building global competence into all P-12 schools,” and c) work with tech company SAS to create Mapping the Nation, an online tool that uses data points to show how globalized the 50 states are regarding international jobs and trade, population, and K-12 and higher education. Furthermore, when writing reports on infusing global education into afterschool programs, the Asia Society drew upon expertise of “leaders in the field of afterschool and international education;” their report on *Funding Global Competence* was written in partnership with a nonprofit firm The Finance Project.

Along with building diverse teams to create rubrics, guides, and reports, the Asia Society has led by example through their International Studies Schools Network (ISSN). The ISSN, established in 2003, is a network of public schools across the state implementing Asia Society’s Graduation Performance System, which centers on integrating global competence in student learning. As with the State Network, ISSN members have provided input into global education guides and rubrics and examples of extant practices that show policymakers, school leaders, and educators examples of how global education can be integrated into classrooms and schools.

Finally, the Asia Society has received money from multiple foundations, including the Charles Stewart Mott Foundation, Goldman Sachs Foundation, Freeman Foundation, Gates Foundation, and MetLife Foundation to support their work. Their partnership with Goldman Sachs provides yet another illustration of leading by example, as the Goldman Sachs Foundation Prizes for Excellence in International Education awarded schools, states, and NGOs who carried out already exemplary work in the field of global education. All of these examples of policy entrepreneur strategies have the common theme of bringing together diverse stakeholders, which again may also be reflective of discourse stacking that pervaded across Asia Society documents.

**NAFSA.** NAFSA: The Association for International Educators utilized nationalist, neoliberal, transformative, and cosmopolitan discourses when advocating for global education. They drew upon nationalist discourses over 50% of the time, followed by neoliberal (25.4%), transformative (11.9%), and cosmopolitan (10.3%).

***Social acuity.*** NAFSA reports displayed that they knew their audience by evoking certain discourses with more frequency depending upon the target audience. NAFSA documents that targeted teacher education programs most frequently evoked transformative discourses (accounting for 50% of coded discourses) whereas NAFSA reports that targeted the federal government most frequently evoked nationalist discourses (accounting for 63% of coded discourses). As with the Asia Society, NAFSA referenced a diverse spectrum of actors, including professional organizations (AACTE, American Council on the Teaching of Foreign Languages), teacher educators, education NGOs (e.g., the Asia Society, International Baccalaureate, National Geographic), government organizations (e.g., CCSSO, the U.S. Department of Defense, U.S. Congress, the U.S. Department of Education), the Longview Foundation, and the OECD. For example, the introduction to the *InTASC as a Framework* report stated, “We believe that our



work supports similar views expressed by AACTE, the Asia Society, Global Teacher Education, NAFSA, AASCU, the Longview Foundation for World Affairs and International Understanding, and the U.S. Department of Education.” NAFSA reports were also referenced by U.S. Congress, the Committee for Economic Development, Global Teacher Education, and the Longview Foundation, thus evidencing that the reach of their ideas spanned across government, economic, educational, and philanthropic sectors.

***Defining problems.*** NAFSA used symbols to define problems in ways that evoked nationalist discourses. Reports alluded to Sputnik and September 11 to draw attention to national security. For example, their report *Securing America’s Future* stated:

We are now in another Sputnik moment. We can remain as ignorant of the outside world as we were on September 11... That grim morning took us by surprise, in part, because we had closed our eyes and ears to the world around us. We could not hear or understand what our enemies were saying. We need to reverse this dangerous course by adequately preparing our youth to understand and deal with the problems of today’s world. This effort will take years and the support of the nation, not unlike America’s effort to become preeminent in space. (no. 74)

When quoting influential policy actors (e.g., Secretary of Education Arne Duncan, President Barack Obama, President George W. Bush, Secretary of State Colin Powell, Secretary of Defense Robert Gates, Senator J. William Fulbright. Senator Daniel Patrick Moynihan), NAFSA reports evoked varying discourses. For example, Secretary Duncan’s quote encapsulated a neoliberal discourse: “To be on track today for college and careers, students need the 21<sup>st</sup> century skills that are so vital to success in the global economy” (no. 70), and President Obama’s quote made a national leadership argument: “America must play its role in ushering in a new era of peace” (no. 71). When targeting teacher preparation programs (e.g., the report *Teaching the World*), NAFSA quoted teacher educators who underscored transformative discourses. For example, a coordinator of international initiatives in a department of teacher education was

quoted as saying, “The twenty-first century classroom is becoming more globally and culturally diverse, and the needs of students to be globally competent citizens also is increasing. We have made a commitment to preparing teachers to work in the global context of the twenty-first century classroom” (no. 72). This quote usage embodies social acuity in defining problems, as who NAFSA publications quoted and which discourses such quotes evoked varied depending on audience.

Similar to the Asia Society, NAFSA used global comparisons to show how the U.S. was falling behind other nations regarding study abroad, recruiting international students, and speaking multiple languages. For example, a report noted: “In some international comparisons, the United States is falling behind, both in terms of disciplinary knowledge and global competence” (no. 68). Another report warned, “It is to our disadvantage that we are able to conduct foreign relations and international commerce in only one tongue, while the rest of the international community continually builds upon its proficiency in multiple languages.” These comparisons reflect nationalist and neoliberal discourses that pervaded much of NAFSA’s documents.

***Teambuilding and leading by example.*** NAFSA brought in a diverse team to write reports. For example, NAFSA’s strategic Task Force on Education Abroad, which produced the report *Securing America’s Future*, included U.S. senators, university presidents, deans, and administrators, and private sector representation. The team who contributed to *InTASC as a Framework* contained the expertise of teacher educators across the U.S. and around the world alongside NAFSA staff. These reports also provided cases of leading by example. They highlighted work underway in schools of education across the country who had “heeded the call

to study abroad on their own campuses” (no. 74) and were “internationalizing teacher education in all its dimensions” (no. 72).

**Partnership for 21st Century Skills.** The Partnership for 21<sup>st</sup> Century Skills (P21), an advocacy group bringing together business, education, policy, non-profit, and foundation leaders, most frequently used neoliberal discourses, which accounted for 44% of discourses coded across documents. This was followed by technological (19.7%), transformative (15.2%), cosmopolitan (10.6%), and nationalist (7.6%) discourses.

**Social acuity.** As with the Asia Society and NAFSA, P21 targeted multiple jurisdictions: the federal government, state government, parents, schools, and teachers. Regardless of target, neoliberal discourses were most prevalent in every P21 document. Notably, reports that targeted both policymakers and educators stacked transformative, neoliberal, cosmopolitan, and technological discourses. For example, *Re-imagining Citizenship for the 21<sup>st</sup> Century* stated:

Globalization, accelerated by advances in technology, has fundamentally altered our civic, economic and social lives. Communities and workplaces are much more diverse, in terms of language, culture, heritage and more—and that diversity creates a mosaic of ways of looking at and living in the world. Multinational companies serve international markets and operate globally, often customizing products and services for different markets. Local events in any corner of the world can ripple in a flash into international repercussions. A tightly connected, digital world empowers people to access unlimited information, join communities around shared purposes, contribute creative ideas to solve problems, and amplify their voices and impact. (no. 88)

As further evidence of social acuity, P21 cited an array of NGOs, policy officials, and private sector companies in their reports, among them the Asia Society, World Savvy, the U.S.

Department of Education, and McKinsey & Company. In turn, P21 was referenced in documents published by the AACTE, the Longview Foundation, the Asia Society, World Savvy, and the Council on Foreign Relations, suggesting that their ideas had traveled across professional organizations, foundations, NGOs, and government groups.

**Defining problems.** Various P21 documents implied a sense of urgency. For example, the *State Framework for Global Education* stated “the framework offers areas of focus and corresponding actions to speed state actions, which can’t come soon enough for students.” The P21 website further stressed, “As we enter the second decade of the 21st century, 21st Century Skills have built up a resonance and a movement to represent an alarm bell, reminding us that the time is now for us to ensure that all students master these vital skills.” P21 further defined problems using statistics that tended to emphasize neoliberal and technological discourses. For example, in *Reimagining Citizenship for the 21<sup>st</sup> Century*, the statement “Nearly six in 10 say they would be better employees if they had a better understanding of world cultures, and 80% believe that jobs are becoming increasingly international in nature” pointed to the need for global education as a way to get jobs (no. 88). Another statistic “66% of parents of high school students reported that mobile devices and apps help their children connect around social issues and causes” painted a picture of a world connected via technology (no. 88).

**Teambuilding.** P21 membership united business, government and education leaders. Founding government units and organizations included the U.S. Department of Education, AOL Time Warner Foundation, Apple Computer, Inc., Cable in the Classroom, Cisco Systems, Inc., Dell Computer Corporation, Microsoft Corporation, National Education Association, and SAP. The majority of these organizations were private sector, technology corporations, which could explain P21’s emphasis on neoliberal and technological discourses. As of 2014, organization membership in the coalition expanded to include more private sector companies and for-profit education companies, the majority of whom have technological foci. P21 members include, for example, Adobe Systems, Blackboard, Cengage Learning, the College Board, Crayola, ETS, EF Education First, Fisher-Price, GlobalScholar, Houghton Mifflin Harcourt, Hewlett Packard, Intel,

KnowledgeWorks Foundation, LEGO Group, McGraw-Hill, Measured Progress, netTrekker, Oracle, the Pearson Foundation, U.S. Fund for UNICEF, and VIF International Education. P21 has also extended membership to federal, state, and local education leaders. They support a bipartisan Congressional 21<sup>st</sup> Century Skills Caucus; have 19 P21 Leadership States committed to fuse 21<sup>st</sup> century skills into state standards, assessments, and professional development programs; and tout an exemplar K-12 school program.

Task Force members for P21 reports tended to include internal organization members. For example, the *State Framework for Global Education* Task Force members included VIF International Education, People to People Ambassadors Programs, Destination Imagination, ENA, Intel, Education First, and Crayola. The *Re-Imagining Citizenship for the 21<sup>st</sup> Century* Task Force included Walt Disney Company, EF, Destination Imagination, Education Networks of America, US Fund for UNICEF, Common Sense Media, PBS, Cengage Learning, Cable in the Classroom, and VIF. In addition, P21 has demonstrated teambuilding by partnering with other organizations to produce reports. For example, they worked with AACTE to write the white paper *21<sup>st</sup> Century Knowledge and Skills in Educator Preparation* (2010) and the National PTA to write *A Parents Guide for 21<sup>st</sup> Century Learning and Citizenship*.

***Leading by example.*** P21 has led by example at multiple education governance levels. They created a Framework for 21<sup>st</sup> Century Learning aimed at helping schools, districts, and states integrate 21<sup>st</sup> century skills (among them global awareness) into core academic subjects, adopted the *Teacher's Guide of K-12 Global Competence Grade-Level Indicators*, and produced the *Framework for State Action on Global Education* with six essential elements for states to follow. As the *Framework for State Action on Global Education* explains,

The P21 Framework for State Action on Global Education is designed to support states that have a history of action in global education and those that are just beginning to build

or explore global education agendas. Wherever a state may be on the implementation continuum, the framework provides a comprehensive but achievable set of activities to execute on as quick a pace as state leadership and implementation capacity will allow. (no. 89)

At the local level, the P21 Exemplary School Program provides case studies (documented online) showcasing exemplary schools exhibiting one of the 21<sup>st</sup> century themes (e.g., global awareness, financial literacy, environmental literacy). In contrast to the Asia Society, the exemplary schools did not provide input in the writing the global education publications. Rather, P21 discourses appeared most often to reflect neoliberal discourses influenced by the internal team of private sector companies, reflected in the emphasis on neoliberal discourses throughout their documents.

In sum, this closer look at Asia Society, NAFSA, and P21 reveals how the policy entrepreneurs who demonstrated the strategies of social acuity, defining problems, teambuilding, and leading by example promoted neoliberal and nationalist discourses most consistently. For P21, the dominance of the neoliberal and technological discourses reflected the make-up of their membership, mostly business leaders of multinational and/or tech-focused companies who could benefit from educational policies and programs that emphasize a globally and technologically literate workforce. Yet, other discourses were not ignored or opposed. The multiple discourses that NAFSA and the Asia Society evoked seemed to reflect the diversity of the teams they built and the people to whom they reached out. This raises the question of whether these discourses embodied these policy entrepreneurs' actual beliefs, or if discourses more accurately represented a form of social acuity, wherein discourses reflected the problems that policy entrepreneurs believed their target audience would want to hear.

### **Discussion**

This study confirms descriptions of the many calls for global education in the 21<sup>st</sup> century (O'Conner & Zeichner, 2011; Parker, 2008). These findings add more noise to these calls as

technological and personal growth discourses emerged alongside the crowded field of neoliberal, nationalist, cosmopolitan, transformative, critical, environmental, and world justice and governance rationales for global citizenship education (Banks, 2008; Gaudelli, 2009; Oxley & Morris, 2013, Parker, 2008). While all of these discourses were present, neoliberal and nationalist stood out as occurring with the highest overall frequency and as being a dominant discourses utilized by organizations who invoked multiple policy entrepreneurial strategies. That neoliberal and nationalist discourses occurred with the greatest frequency is concurrent with broader trends regarding the rise of “corporate” or “market-based” reforms in education (Ball, 2012; Giroux & Saltman, 2009) and the historic purposes of public schools as a socializing agent for spreading a national American identity and teaching subject matter from an American-centric nationalist slant (Frey & Whitehead, 2009; Gaudelli, 2003; Gutek, 2006; Thornton, 2005).

At the same time, the majority of policy entrepreneurs stacked neoliberal and nationalist framing alongside multiple other discourses. Just as policy advocates may use ambiguous language to attract broader constituencies (Stone, 1988), global education policy entrepreneurs’ stacking of discourses may have been a strategic move to provide specific rationales for global education that could resonate with a wide swathe of people. The discourses illuminated in advocacy documents where stacking occurred could reflect deep-seeded beliefs about the type of global citizen schools should foster. Indeed, scholars have noted that policy problems are complex, therefore resulting in political arguments containing multiple discourses at once (Hajer, 1993), and advocacy coalitions promoting a particular policy agenda may hold varying beliefs that they prioritize in different ways (Shanahan, Jones, & McBeth, 2011). Yet the fact that discourses arguably antithetical to each other – such as nationalist and cosmopolitan (Gaudelli, 2009) – were evoked numerous times in the same sentence or paragraph suggest that these

discourses may have been used as tools to accrue the broadest possible band of global education supporters. This could theoretically increase the odds of policy entrepreneurs' ability to slide global education initiatives through a policy window opened through any number of events, be it an international trade agreement, national security concern, or global pandemic (Kindgon, 1984).

Analyzing discourse prevalence by policy entrepreneur type also suggests that the “dominance” of a particular discourse also can depend on who the policy entrepreneur is and who the policy entrepreneur targets. In general, NGOs, who most often targeted educators, schools, and districts, emphasized cosmopolitan, transformative, and critical discourses with the highest frequency. Conversely, NGOs, professional organizations, and advocacy groups who targeted federal and state policymakers (such as Asia Society, NAFSA, and P21), along with those in government positions, underscored nationalist and neoliberal discourses. NGOs also tended to stack discourses less frequently as compared to foundations, advocacy groups, and government officials, thus sending a more consistent message about the type of global citizen their education products, programs, and resources sought to foster.

The disconnect in the messages policy entrepreneurs sent to people operating at different levels of education governance, particularly between federal government and local jurisdictions working directly with education NGOs, could be further indicative of strategic use of discourses based upon who the policy entrepreneur targeted. However, this disconnect could ultimately result in discrepancies in how educators who have worked closely with NGOs could come to understand and implement future federal or state global education initiatives as compared to the intended outcomes of the policy. This could particularly be the case if educators and policymakers have different understandings of who they expect to benefit from a global education: the nation and employers, as nationalist and neoliberal discourses would suggest, or



all of humanity, culturally and linguistically diverse students, and marginalized and disenfranchised populations, as NGOs targeting educators might argue.

### **Implications**

Understanding the discourses invoked to support global education, who uses them, and in what ways has implications for consumers of global education policies and programs. Though O'Connor & Zeichner (2011) cautioned advocates to be wary of confounding rationales for globalizing K-12 education, the majority of policy entrepreneurs did just that. Therefore, it is important that “consumers” – including congressmen and congresswomen, elected state officials, district superintendents, principals, teachers, parents, and students – be aware of the language policy entrepreneurs use to try to shape their understanding of global education. A school principal, for example, may be attracted to a particular global education program because it stresses the need for schools to be prepared to teach a growing population of students from around the world. Yet that principal must also pay attention to other discourses embedded in that program’s framing of global education because, if discourses are stacked together, it is difficult to ascertain which rationales are stated to attract more supporters and which rationales represent a policy entrepreneur’s true beliefs and intentions.

The similarities and differences in discourses found across policy entrepreneurs have implications for researchers examining the discourses of educational reforms such as global education that focus on teaching and learning. Such research should ensure that policy entrepreneurs who target federal, state, and/or local education governance are represented. As findings from this study revealed, advocacy organizations, professional organizations, government officials, and a handful of NGOs who targeted federal, state, or multiple jurisdictions used similar discursive strategies, recycled facts, and cited one another, suggesting a

similarity in how groups with seemingly different functions and purposes go about promoting global education in similar ways. However, NGOs such as ASF, Facing History and Ourselves, Facing the Future, Global Concerns Classroom, Global Kids, Global Nomads, Global Youth Leadership Institute, iearn, New Global Citizens, OxFam, and Rethinking School, all of whom largely targeted teachers and schools, rebuked the dominant neoliberal and nationalist discourses, focusing largely instead on cosmopolitan, transformative, or critical discourses. By not targeting those tied to federal and state policy, these NGOs perhaps did not have to “sell” global education using nationalist and neoliberal discourses found in broader state and federal education policy arenas (Ball, 2012; Frey & Whitehead, 2009).

While it was beyond the scope of this study to examine policy outcomes attached to these discourses, policy implications do arise. If the dominant neoliberal and nationalist discourses among government, foundation, advocacy, and professional organizations are not merely rhetoric but reflect the true beliefs of policy entrepreneurs, then the languages students learn, the cultures and countries they study, the problems they are asked to solve, the virtual partnerships their classrooms form, and the exchange programs in which they participate may only represent a limited part of the world that target areas and languages deemed important to the economy (e.g., China) or national security (e.g., countries in the Middle East). This could leave out from the curriculum, for example, the languages and cultures of immigrant populations from countries that do not provide a large international trade market or areas around the world facing environmental, health, social, political, or economic challenges that do not directly affect the economy or America’s national security.

## **Limitations and Directions for Future Research**

Findings were interpreted in light of the following limitations. First, data sources were limited to publicly available published texts disseminated by organizations identified as global education policy entrepreneurs. Therefore, I only reported on the *stated* goals of the organization, rather than the goals of individuals within the organization or individuals who may privately influence the organization. To understand the actual goals that individuals within these organizations sought to realize, future research should interview key policy entrepreneur informants and analyze the discrepancy between publicly-disseminated goals and their personal beliefs.

Second, I limited documents to those “officially approved and sanctioned” by policy entrepreneur organizations, such as published reports, position statements, brochures, and websites, all of which advertised reasons why global education should be adopted (Fischer, 2003). Therefore, voices of those who did not have access to publish “official” material were not included, nor were the voices of those operating in online participatory forums such as blogging or Twitter. Future research, therefore, might consider examining new public online spaces for engaging in discourse around global education: blogs, Twitter, and other social media venues that allows for more democratic participation in conversations about why global education should be integrated into K-12 education.

A third limitation is that because this study focused on global education discourses at the national level, discourses of policy entrepreneurs operating only on a state or local level were not examined. Furthermore, the documents included in this analysis come from organizations that operate within the United States. As such, findings cannot be generalized to the dominant global

education discourses in other nations. Future research could use this nine-discourse framework to examine and compare how discourses play out across different localities and nations.

Fourth, this study focused exclusively on discourses framing global education policies and programs, rather than the policies enacted and implemented as a result of the discourses used. Therefore, this study did not determine which discourses influenced what type of global education policy ultimately enacted in federal, state, and local jurisdictions, nor did it examine which discourses were associated with specific student outcomes. Now that the prevalence of these discourses is known, an important next step for research is to ascertain whether specific discourses, groupings of discourses, or policy entrepreneur strategies led to the passage of specific global education policies, and to which specific student competencies (e.g., intercultural communication, taking action) these “effective” discourses were attached.

A fifth limitation is that this study focused exclusively on examining the current wave of global education. Therefore, future research could apply this framework to prior waves of global education to provide a temporal analysis of how discursive trends among global education advocates have changed over time. In addition, the scope of the present study examined policy entrepreneurs who promoted global education; future research could examine the narratives of those who have historically and currently oppose global education, and compare the discursive framings of the two camps.

This study also lays the groundwork for future research that will further our understanding of global education policy and political agenda-setting in a number of ways. The phenomenon of stacking that emerged from the data raises questions as to whether stacked discourses actually align in terms of global citizenship goals or whether they are antithetical. That stacking was more unanimous among some policy entrepreneurs than others raises the

question as to whether homogeneity of discourse use is more or less effective than stacking discourses in getting schools to adopt a program or governing bodies to adopt a policy. Finally, agenda-setting literature argues that policy adoption is more likely to occur when there is alignment between the discourses defining policy problems and solutions and the sociopolitical climate and current events (Kingdon, 1984). When agenda-setters are discordant in how they frame the need for global education, as was found in this study, then how might that impact policy adoption?

### **Conclusion**

Findings from this study revealed the complexity of policy agendas that claim global education as a solution to the myriad problems and conditions students face in our globalized world. Rather than illuminate distinct meanings and intentions of different policy entrepreneurs, global education initiatives - from international exchanges to standards integration to language learning - were framed as solutions to address any number of rapidly changing economic, national, demographic, technological, environmental, and health conditions. This leaves an image of the global citizen that K-12 education should foster as ambiguous and contradictory, and raises a new generation of questions for research on political agenda-setting regarding what the heterogeneity of discourses defining policy problems might mean for future policy action.

Table 1.1

*Global Citizenship Discourses*

<b>Discourse</b>	<b>Sources</b>	<b>Key Features</b>
<i>World Justice and Governance</i>	World justice/governance (Gaudelli, 2009); Political (Oxley & Morris, 2009)	Supra-national governing bodies that promote human rights and peace for all individuals
<i>Cosmopolitan</i>	Cosmopolitan (Gaudelli, 2009); political, moral, cultural (Oxley & Morris, 2013); cosmopolitan (Parker, 2008)	Individuals take actions in ways that benefit humanity and respect the dignity of all humans
<i>Transformative</i>	Transformative (Banks, 2008); international student body (Parker, 2008); social, spiritual (Oxley & Morris, 2013)	Recognizes cultural, national, regional, and global identifications as interconnected constructs and a respect, love, and caring for of differences
<i>Critical</i>	Marxist (Gaudelli, 2009); critical (Oxley & Morris, 2013)	A form of counter-hegemony that educates about oppressive global systems, the causes and consequences of global inequities and voices of the marginalized
<i>Environmental</i>	Environmental (Oxley & Morris, 2013)	Advocates changes in the actions of humans in relation to the natural environment
<i>Neoliberal</i>	Neoliberal (Gaudelli, 2009); economic (Oxley & Morris, 2013)	Values the principles of a free market, deregulation, the privatization of public institutions, and competition
<i>Nationalist</i>	Nationalist (Gaudelli, 2009); national economic competitiveness and military readiness (Parker, 2008)	National security and economic interests as central rationale for learning about the world

Table 1.2.

*Data Sources*

<b>Policy Entrepreneur</b>	<b>Number of Documents</b>
<b>Advocacy</b>	
American Forum for Global Education (AFGE)	1
Committee for Economic Development (CED)	1
Joint National Committee for Languages-National Council for Languages and International Studies (JNCL)	8
Partnership for 21 <sup>st</sup> Century Skills (P21)	10
<b>Foundation</b>	
Longview Foundation	4
NEA Foundation	1
<b>Government</b>	
Council of Chief State School Officers (CCSSO)	1
Council on Foreign Relations (CFR)	1
US Congress	35
US Department of Education	8
Peace Corps	1
<b>NGOs</b>	
ASF	1
Asia Society	14
Avenues	1
Choices	1
Facing History and Ourselves	2
Facing the Future	5
Global Concerns Classrooms	1
Global Kids	1
Global Nomads	1
Global Youth Leadership Institute (GYLI)	1
International Baccalaureate Program (IB)	8
iearn	1
International Virtual Schooling (IVECA)	1
OxFam	3
National Geographic	2
New Global Schools	1
Rethinking Schools	3
TeachUNICEF	3
United Nations/UNESCO	7
World Savvy	4
<b>Professional Organization</b>	
American Association of Colleges for Teacher Education (AACTE)	2
American Council on the Teaching of Foreign Languages (ACTFL)	2

<b>Policy Entrepreneur</b>	<b>Number of Documents</b>
<b>Professional Organization, cont.</b>	
Association for Supervision and Curriculum Development (ASCD)	2
Global Teacher Education (GTE)	5
NAFSA: Association for International Educators	9
National Council for Social Studies (NCSS)	2
<b>Total</b>	<b>149</b>



Table 1.3.

*Discourse Co-Occurrence*

	Cosmopolitan	Critical	Environmental	Nationalist	Neoliberal	Personal growth	Technological	Transformative	World Justice
Cosmopolitan	x	*	*	*	*	*	*	*	*
Critical	16	x	*	*	*	*	*	*	*
Environmental	75	21	x	*	*	*	*	*	*
Nationalist	64	1	12	x	*	*	*	*	*
Neoliberal	107	2	42	233	x	*	*	*	*
Personal growth	15	0	1	11	14	x	*	*	*
Technological	27	3	15	16	54	1	x	*	*
Transformative	58	7	27	15	86	7	32	x	*
World Justice	24	3	14	4	14	0	11	11	x

Table 1.4.

*Discourses by Policy Entrepreneur Type*

	Advocacy	Foundation	Government	NGO	Professional	Total
Total PEs	4	2	5	20	6	37
<i># of PE's Using...</i>						
Neoliberal	4	2	4	6	6	22
Nationalist	4	1	4	5	5	19
Cosmopolitan	3	2	4	17	6	32
Transformative	4	2	5	10	5	26
Critical	0	0	0	10	2	12
Technological	3	2	4	7	2	18
Environmental	2	1	1	11	3	18
World Justice	1	0	2	6	4	13
Personal Growth	2	1	3	5	2	13
Avg. # Discourses Used	5.8	5.5	5.6	3.9	5.7	4.7
<i>Most Prevalent</i>						
Neoliberal	2	0	2	2	1	7
Nationalist	1	0	2	0	2	5
Cosmopolitan	0	2	1	13	1	17
Transformative	1	1	1	3	2	8
Critical	0	0	0	2	0	2
Technological	0	0	0	0	0	0
Environmental	0	0	0	0	1	1
World Justice	0	0	0	0	1	1
Personal Growth	0	0	0	0	0	0
<i>Second-most Prevalent</i>						
Neoliberal	1	2	2	2	3	10
Nationalist	2	0	2	1	1	6
Cosmopolitan	0	0	0	1	2	3
Transformative	0	0	0	3	0	3
Critical	0	0	0	2	0	2
Technological	1	0	0	0	2	3
Environmental	0	0	0	1	1	2
World Justice	1	0	0	2	0	3
Personal Growth	0	0	0	1	0	1

Table 1.5.

*Discourse Prevalence by Policy Entrepreneur*

	<b>Total Discourses Used</b>	<b>Neolib. (%)</b>	<b>National. (%)</b>	<b>Cosmo. (%)</b>	<b>Transf. (%)</b>	<b>Critical (%)</b>	<b>Technol. (%)</b>	<b>Environ. (%)</b>	<b>World Justice (%)</b>	<b>Person. Growth (%)</b>	<b>Total Excerpts Coded</b>
<b>Professional Organizations</b>											
ACFTL	5	9.1%	<b>36.4%</b>	9.1%	<b>36.4%</b>	x	x	x	x	9.1%	11
AACTE	6	<b>37.0%</b>	10.9%	<b>34.8%</b>	8.7%	x	x	x	6.5%	2.2%	46
ASCD	6	<b>14.2%</b>	<b>14.2%</b>	<b>14.2%</b>	x	7.1%	<b>14.2%</b>	<b>14.2%</b>	<b>21.2%</b>	x	14
Global Teacher Education	6	<b>34.5%</b>	6.9%	6.9%	<b>41.4%</b>	x	x	6.9%	3.4%	x	29
NAFSA	4	25.4%	<b>52.4%</b>	10.3%	11.9%	x	x	x	x	x	126
NCSS	7	<b>17.2%</b>	x	<b>27.6%</b>	10.3%	3.4%	<b>17.2%</b>	10.3%	13.8%	x	29
<b>Advocacy Organizations</b>											
AFGE	5	10.0%	<b>20.0%</b>	x	<b>40.0%</b>	x	x	10.0%	<b>20.0%</b>	x	10
CED	6	<b>43.2%</b>	<b>39.0%</b>	2.3%	12.6%	x	1.5%	0.4%	x	x	264
JNCL	6	<b>41.2%</b>	<b>45.1%</b>	3.9%	2.0%	x	5.9%	x	x	2.0%	51
P21	6	<b>43.9%</b>	7.6%	10.6%	15.2%	x	<b>19.7%</b>	x	x	3.0%	66
<b>Foundations</b>											
Longview Foundation	6	<b>23.5%</b>	11.8%	<b>26.5%</b>	<b>23.5%</b>	x	8.8%	5.9%	x	x	34
NEA Foundation	5	<b>23.5%</b>	x	<b>47.1%</b>	11.8%	x	11.8%	x	x	5.9%	17
<b>NGOs</b>											
AFS	1	x	x	100.0%	x	x	x	x	x	x	3
Asia Society	9	<b>34.8%</b>	13.8%	<b>14.9%</b>	<b>14.9%</b>	0.9%	9.5%	8.3%	1.7%	1.1%	348
Avenues	1	x	x	<b>100.0%</b>	x	x	x	x	x	x	5
Choices	1	x	<b>100.0%</b>	x	x	x	x	x	x	x	7

	<b>Total Discourses Used</b>	<b>Neolib. (%)</b>	<b>National. (%)</b>	<b>Cosmo. (%)</b>	<b>Transf. (%)</b>	<b>Critical (%)</b>	<b>Technol. (%)</b>	<b>Environ. (%)</b>	<b>World Justice (%)</b>	<b>Person. Growth (%)</b>	<b>Total Excerpts Coded</b>
Facing History and Ourselves	2	x	x	<b>60.0%</b>	x	<b>40.0%</b>	x	x	x	x	5
Facing the Future	5	x	x	<b>45.0%</b>	10.0%	15.0%	x	<b>25.0%</b>	5.0%	x	20
Global Concerns Classroom	3	x	x	<b>50.0%</b>	x	25.0%	x	25.0%	x	x	12
Global Kids	1	x	x	x	<b>100.0%</b>	x	x	x	x	x	1
Global Nomads	2	33.0%	x	<b>66.0%</b>	x	x	x	x	x	x	3
GYLI	2	x	x	x	<b>61.1%</b>	x	x	38.9%	x	x	18
IB	7	x	x	<b>52.5%</b>	<b>17.5%</b>	2.5%	2.5%	5.0%	2.5%	<b>17.5%</b>	40
Iearn	1	x	x	<b>100.0%</b>	x	x	x	x	x	x	11
National Geographic	3	33.0%	x	<b>50.0%</b>	x	x	x	16.7%	x	x	6
New Global Citizens	3	x	x	<b>66.7%</b>	x	<b>25.0%</b>	x	8.3%	x	x	12
OxFam	5	x	x	<b>36.4%</b>	x	<b>36.4%</b>	9.1%	9.1%	x	9.1%	11
Rethinking Schools	6	x	1.1%	8.0%	3.2%	<b>66.0%</b>	x	16.0%	2.1%	x	95
TeachUNICEF	5	7.0%	x	<b>48.0%</b>	<b>18.5%</b>	x	7.0%	x	<b>18.5%</b>	x	27
UNESCO/UN	9	7.2%	6.3%	<b>27.0%</b>	13.1%	11.4%	4.2%	7.6%	<b>21.5%</b>	1.7%	237
World Savvy	7	<b>21.4%</b>	x	<b>21.4%</b>	<b>21.4%</b>	7.1%	14.3%	7.1%	x	7.1%	14
Government Organizations											
CCSSO	6	<b>40.6%</b>	<b>25.0%</b>	6.3%	12.5%	x	10.9%	x	4.7%	x	64
Council on Foreign Relations	5	32.2%	<b>60.0%</b>	x	3.3%	x	2.2%	x	x	2.2%	90
US Congress	7	26.5%	<b>52.9%</b>	9.4%	4.1%	x	2.4%	x	0.6%	4.1%	170
US Department of Education	8	<b>37.6%</b>	<b>30.6%</b>	10.6%	5.9%	x	1.2%	3.5%	x	5.9%	85
Peace Corps - WWS	2	x	x	<b>50.0%</b>	<b>50.0%</b>	x	x	x	x	x	4
TOTAL		21	19	32	26	12	18	18	13	13	

Note. The first and second most prevalent discourse for each policy entrepreneur are bolded.

## **CHAPTER 2: THE EVOLUTION OF A STATE INSTRUCTIONAL REFORM: THE CASE OF GLOBAL EDUCATION POLICY IN NORTH CAROLINA**

### **Introduction**

State governments have wielded increasing power in the past three decades in shaping policies that affect K-12 classroom instruction (Cooper & Fusarelli, 2009; Fuhrman & Elmore, 1990; McDermott, 2009; Wirt & Kirst, 2001). Across the United States, standards-based accountability has become the new normal for state K-12 education policymaking (LaVenía, Cohen-Vogel, & Lang, 2015; Sunderman, 2001). Since the early 1980s, states have adopted standards-based accountability reforms that target the instructional core of schooling by mandating content area standards and assessments to measure student achievement (Cohen-Vogel, 2005; Malen, 2003; Ogawa, 2009). The 1988, 1994, and 2001 reauthorizations of the federal Elementary and Secondary School Act (ESEA) further catalyzed accountability reforms by requiring states to define levels of achievement, establish content standards and aligned math and reading assessments, and hold schools, districts, and states accountable for all students meeting designated levels of achievement (McDonnell, 2005). This policy trend has continued with widespread state adoption of the Common Core State Standards (LaVenía et al., 2015).

Globalization has been used as one rationale for standards and accountability in K-12 education reform (Ball, 1998; Engel & Olden, 2012; Zhao, 2010). This narrative about globalization argues that the U.S. is competing with other nations in a rapidly globalized economy, but has fallen behind other nations in education. If not remedied, the U.S. will lose the race for jobs and economic supremacy. Therefore, states must adopt rigorous standards and hold

schools accountable for reaching them (Ball, 1998; Gaudelli, 2013). Yet fourteen years before *A Nation at Risk* (1983) sparked a national conversation that helped influence state governments to adopt standards-based accountability reforms, the U.S. Office of Education published another commissioned report that proposed a different educational response to globalization. This report, *An Examination of the Objectives, Needs, and Priorities of International Education in U.S. Secondary and Elementary Schools*, written by James Becker in 1969, marked the birth of global education (Tye, 2009). Becker (1969) asserted: “how young people learn to perceive and interpret the world” would shape the future (p. 7). Therefore, the core of instruction needed to emphasize the “wholeness,” “interconnectedness,” and “totality” of the world and “concern with the earth as a planet and a concern with mankind as a species” (Becker, 1969, p. 29).

As with standards-based accountability, global education addresses globalization albeit in different ways. While both standards-based accountability and global education reforms acknowledge globalization’s effect on economic markets, global education addresses the social, cultural, and political consequences of globalization as well. The new realities of a globalized world include the unprecedented movement of immigrants and refugees across borders, the formation of supra-national governing apparatuses, and new information and communication technologies that instantly connect people across geographic divides (Bottery, 2006; Gaudelli, 2009; Suarez-Orozco & Qin-Hillard, 2004). With the spread of goods, services, political systems, and people across borders has come the spread of ideas, inventions, and cultural pluralism along with deleterious realities of disease, hunger, terrorism, and environmental degradation (Apple, 2011; Banks, 2008; Suarez-Orozco, 2001).

Globalization also presents challenges that directly impact K-12 education: international competition for educational supremacy through global comparative tests such as the TIMSS and

PISA, rapidly changing student population demographics, and a need to prepare students to take action on environmental, ethical, political, cultural, and technological issues arising from ever-expanding global systems (Spring, 2008; Tye & Tye, 1992; Zhao, 2010). Global education addresses these realities by teaching concepts such as the interconnectedness of global systems, global conditions and concerns, cross-cultural awareness, an understanding of multiple perspectives, and how to make responsible choices (Case, 1993; Gaudelli, 2003; Hanvey, 1976; Kniep, 1986).

Global education is intended to integrate learning about the world across all grade levels and subject areas (Gaudelli, 2003; O'Connor & Zeichner, 2011; Schweisfurth, 2006; Tye, 1990). Yet the rise of statewide standards-based accountability reforms has arguably thwarted efforts to incorporate global education into the core of schooling (Elmore, 1996; Frey & Whitehead, 2009; Gaudelli, 2003; Tye & Tye, 1992). Consequences of high-stakes testing, including the narrowing of curricular options to tested subject areas and altering classroom instruction to “teach to the test” (Anagnostopoulos, 2003; Darling-Hammond, 2007; Nichols & Berliner, 2007), has further left global education on the margins of K-12 education (Cogan & Grossman, 2009; Cruz & Bermudez, 2009; Gaudelli, 2003; Zhao, 2010). For example, global education has most commonly been integrated into the non-tested subject area of social studies (Dolby & Rahman, 2008); yet No Child Left Behind (NCLB) has caused districts to reduce time in non-tested subjects by 71%, with social studies being most affected (Jennings & Rentner, 2006).

Yet, as states over the past decade have continued to comply with federal mandates (i.e., NCLB) and compete for inducements (i.e. the Race to the Top competitive grants) that require high-stakes reading and math assessments (Fusarelli, 2009; LaVenía et al., 2015), global education has made it onto nearly half of state governments’ policy agendas (Sanders & Stewart,

2004). The growth in global education is evidenced in global education task forces and summits, reports, the creation of new global education administrative positions, and legislation that incorporates global education into state standards and increases world language programs (Asia Society, 2008; Sanders & Stewart, 2004).

Because states have “tightened the grip” on district’s governance of curriculum, instruction, assessment, and accountability (Cooper & Fusarelli, 2009; Malen, 2003), the fact that global education has made its way onto the agendas of state policymakers suggests potential for global education to scale across more districts and schools. Although local education agencies have historically held jurisdiction over policies pertaining to curriculum and instruction, today, state governments are arguably “the primary policymakers in K-12 education” in that they determine the curricular standards, assessments to measure student performance, graduation requirements, and teacher certification requirements (Cooper & Fusarelli, 2009, p. 4). Therefore, state government is the key unit of study to understand the recent rise of global education policy as an instructional reform aimed at preparing students for success in today’s globalized world.

The purpose of this study is to understand how global education emerged as a state education policy in an era of standards-based accountability in one case study state: North Carolina. Studying the adoption and enactment of global education in one state serves as a critical case for understanding the process through which global education can become incorporated into state-level education policy amidst the dominance of standards-based instructional reforms. Furthermore, as McLendon, Cohen-Vogel, and Wachen (2014) contend, “notably lagging in the research literature are efforts aimed toward building, elaborating, and testing theories of state policy making and policy change for education” (p. 87). This study heeds that call by applying and elaborating upon the Advocacy Coalition Framework (ACF), a



framework from political science that can help explain policy change in the K-12 global education policy arena (Sabatier & Jenkins-Smith, 1993).

I begin by first defining global education and situate the context of this study in the history of global education policy in U.S. K-12 schools. Then, I introduce the central tenets of the ACF and explain the viability of its application to state-level global education policy. After describing the methods used to understand the evolution of global education in North Carolina, I reveal the members of the North Carolina global education advocacy coalition and the beliefs they held, how their policy beliefs influenced state-level policies adopted from 2000 to 2015, and the strategies they used to effectively herald in policy change.

### **Defining Global Education**

Just as globalization is a complex phenomenon, global education is multifaceted, with multiple components and a “multiplicity of definitions” (Gaudelli, 2003, p. 6; Kirkwood, 2001). Though the field lacks one clear definition (Gaudelli, 2009; Oxley & Morris, 2013; Tye & Tye, 1992), there is widespread agreement that at its core, global education is a way of teaching that promotes a *global perspective* – that is, seeing the world as one interconnected system from multiple points of view (Case, 1993; Tye & Tye, 1992). There is also agreement that global education should foster *global citizenship* – assuming responsibility for and participating in the global community (Noddings, 2005; Zhao, 2010). Put another way, global education teaches the dispositions, knowledge, and skills – or the *global competencies* - needed to live and work in a global society and act on issues of global importance (U.S. Department of Education, 2012; Zhao, 2010).

These competencies include the *dispositions* of valuing multiple perspectives (e.g., Case, 1993; Hanvey, 1982; O’Connor & Zeichner, 2011) and committing to make the world a more

just and equitable place (e.g., Noddings, 2005; O'Connor & Zeichner, 2011); *knowledge* of how the world is interconnected (e.g., Hanvey, 1982; Merryfield, 1998; Zhao, 2010), global conditions and current events (Apple, 2011; Hanvey, 1982, Zhao, 2010), and cultures different from one's own (e.g., Hanvey, 1982, Merryfield, 1998); and *skills* in intercultural communication (e.g., Zhao, 2010), cooperation (e.g., Banks, 2008; O'Connor & Zeichner, 2011), and taking action through decision-making, participation, and sustained involvement in local and global arenas (e.g., Becker, 1982; Davies, 2006; Merryfield, 1998). These competencies broadly cover the content of global education.

In addition to being integrated into existing courses across subject areas (Algers, 1985), global education is meant to be taught via constructivist, or student-centered, pedagogy whereby teachers guide students to “build knowledge that helps them explain or meaningfully extend their known experience” (Carlsson-Paige & Lantieri, 2005; Gaudelli, 2003; O'Connor & Zeichner, 2011, p. 526). Constructivist pedagogy allows students to discover relationships between their own perspectives and the perspectives of others and to make connections between personal experiences and global content, leading students to “see themselves as actors affecting and being affected by an increasingly interconnected world” (Merryfield, 1998, p. 369; Selby & Pike, 2000). To instill global competency in students necessitates that teachers likewise develop the dispositions, knowledge, and pedagogical skills to help students become globally competent (Parkhouse, Tichnor-Wagner, Glazier, & Cain, 2015). As will be described below, global education policy has, therefore, tended to target both student and teacher learning.

### **A History of Global Education State Policy**

The seeds of global education were planted in state-level policy in the late 1970s and 1980s, just as state governments had begun to exercise increasing authority over curriculum and

instruction. During this time, states legislatures passed mandates that included course requirements for high school graduation in global studies or foreign language, training requirements for global studies teachers, and the incorporation of global topics (e.g., world history, geography, religions) into state standards (Becker, 1982; Becker, 1991; Butler, 1999; Gaudelli, 2003).<sup>5</sup> By the end of the 1980s, 23 states had passed mandates requiring high school students to take a world or global studies course for graduation (Gaudelli, 2003). States also supported capacity-building projects, such as providing curricular materials and professional development opportunities for K-12 educators (Tye, 2009). Examples included state-sponsored projects such as “Kentucky in the World: The World in Kentucky” and “Indiana in the World: The World in Indiana” that included “extensive units on the state’s international links and activities” (Anderson, 1982, p. 172)<sup>6</sup>. The Indiana Global Education Program, a collaborative initiative between the Department of Public Instruction, the Mid-America Program at Indiana University, and ten school districts also provided global education training and the development of classroom materials (Becker, 1982, p. 232).

A handful of state governments pledged symbolic resolutions in support of global education during this time, showing their commitment with state advisory boards, task forces, and reports that provided rationales and directions for implementing global education (Becker, 1982). Florida, for example, passed a resolution in 1979 that urged development of school programs promoting global perspectives, and subsequently created the Florida Advisory Council on Global Education and a State Plan for Global Education (Cruz & Bermudez, 2009). As

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<sup>5</sup>Examples of states that supported Global Education in some capacity during this time included Arkansas, California, Florida, Illinois, Indiana, Massachusetts, New Jersey, New York, Ohio, and Washington.

<sup>6</sup>These two projects, housed in Kentucky’s and Indiana’s state departments of education, were modeled off of the resource created at the Mid-America Program for Global Perspectives at Indiana University *Your State and the World*.

another example, in 1981, New York provided recommendations to the Board of Regents for foreign language and an international and multicultural education programs in a report, *Education for a Global Perspective: A Plan for New York State 1982 – 2000* (Becker, 1982).

Key global education advocates at the state level during this time included those holding powerful positions in state legislatures and state departments of education, college and university professors, professional educator associations, school personnel, and private foundations (Becker, 1982; Cruz & Bermudez, 2009; Tye & Tye, 1992). Because state global education policy initiatives were often underfunded, funding primarily came from private foundations<sup>7</sup>. Professional development for global education was mostly provided from state colleges and universities (Butler, 1999; Cruz & Bermudez, 2009), and the work of global education scholars largely influenced state capacity-building instruments such as curricular frameworks and professional development opportunities (Cruz & Bermudez, 2009; Gaudelli, 2003).

By the mid-1990s, states had begun to pull back their legislative support for global education for two key reasons (Butler, 1999; Cruz & Bermudez, 2009; Tye, 2009). First, members of the conservative right in the 1980s publically lambasted global education as being anti-American and leftist (Gaudelli, 2003; Tye, 2009). Global education critiques came from prominent officials in the U.S. Department of Education, including Denver’s regional director Thomas Tancredo who commissioned Gregg Cunningham to write the scathing report “Blowing the Whistle on Global Education.” This report accused global education as being a “political

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<sup>7</sup>For example, in Arkansas the Danforth Foundation funded teacher educators to prepare for and teach the global studies courses teachers were required to take and the Rockefeller Foundation provided teachers funding to enroll in the course (Butler, 1999). The Danforth Foundation was also a major source of funding for the Global Awareness Project, a state-supported partnership between Florida International University and Miami-Dade County Public Schools (Cruz & Bermudez, 2009). A grant from the Helen Devitt Jones Foundation funded the Center of Human Independence, which from 1985 to 1989 created a network of 11 California schools that were provided fiscal, material, and professional development support to infuse global education into their schools (Tye & Tye, 1992).

issue of the most controversial sort” that “ridiculed our value system” and sought to convert students to be a part of a “radical” new world order that promoted a “hard left” agenda (Gaudelli, 2003; Lamy, 1991; Tye, 1999). Second, as mentioned earlier, the standards-based accountability movement pushed global education to the margins of what was taught. It was not a tested subject area and the “drilling and skilling” pedagogy used to teach to standardized tests became more prominent in classrooms. These factors pushed aside constructivist pedagogy most conducive for teaching a global perspective (Gaudelli, 2003; Tye & Tye, 1992).

Yet, a new wave of global education has emerged in twenty-first century state education policy (Asia Society, 2008; Parker, 2011; Sanders & Stewart, 2004; Stewart, 2012). North Carolina has become a leader in this resurgence, adopting a series of global education policies that target state and local education agencies along with schools and educators. This study utilizes theory on the process of policy change to examine the evolution of global education policies in North Carolina, exploring who has supported these policies, the beliefs driving their support, and the strategies they have applied to help global education gain traction among North Carolina K-12 education policymakers.

### **Advocacy Coalition Framework for Understanding Policy Change**

This study uses the Advocacy Coalition Framework (ACF) to unpack the evolution of global education policy in North Carolina. Developed by Sabatier and Jenkins-Smith (1986; 1988; 1993) and revised in the ensuing two decades (Sabatier & Jenkins-Smith, 1999; Sabatier & Weible, 2007), the ACF argues that policy change is a function of advocacy coalitions seeking to achieve a particular policy goal and external changes and stable system parameters that constrain or enable coalition members’ actions. This framework has been applied by scholars studying diverse policy areas, including environmental, energy, health, economic, and education (Weible,

Sabatier, & McQueen, 2009). This section first describes the core premises of the framework, followed by its model of policy change.

### **Overview of the Advocacy Coalition Framework**

The ACF is used to understand the process of policy change over time. According to Sabatier and Jenkins-Smith (1993), the ACF holds four basic premises. The first is a focus on policy change and policy learning over a time period of a decade or more. This captures at least one cycle of policy formulation and implementation and provides a more accurate account of policy success and failure, given that some policies take a few years to get off the ground while others may have initial successes that disappear over time (Jenkins-Smith & Sabatier, 1994).

The second premise is a focus on the policy subsystem, or “the interactions of actors from different institutions who follow and seek to influence governmental decisions in a policy area” (Sabatier & Jenkins-Smith, 1993, p. 16). Subsystems are bound by a “functional/substantive dimension,” such as water policy, and a “territorial” dimension, such as a country or state (Sabatier & Weible, 2007, p. 192). A policy subsystem typically contains one dominant coalition and one or more minority coalitions that advocate around a particular policy issue, whose scope can be broad or narrow (McLendon et al., 2014). Sabatier and Jenkins-Smith (1993) also acknowledged that “in quiescent systems there may be only a single coalition” (p. 26). Researchers using the ACF framework have documented anywhere from zero to five coalitions within a policy subsystem (McLendon et al., 2014; Weible, et al., 2009).

Third, actors within the policy subsystem extend beyond the traditional “iron triangle” of Congress, bureaucracy, and interest groups. Rather, subsystems include a diverse array of actors from a variety of professional positions that hold formal or unofficial government roles (Sabatier & Jenkins-Smith, 1993). These actors “play important roles in the generation, dissemination, and

evaluation of policy ideas" (Jenkins-Smith & Sabatier, 1994, p. 179). In state education policymaking arenas, formal actors include elected legislative officials, the governor, state board of education members, state education chiefs or superintendents of public instruction, and department of education administrators (Manna, 2012; Marshall, Mitchell, & Wirt, 1986). Interest groups also play key unofficial roles in advocating and supporting particular state policies. Notably, since the 1980s, business, industry, philanthropies, and other NGOs have increased their influence in state education policymaking (Anderson, 2010; Marsh & Wolhstetter, 2013; McDermott, 2009). Therefore, one might expect any combination of these actors in a state-level coalition seeking to influence K-12 global education policy.

Fourth, policies are conceptualized as belief systems, which Jenkins-Smith and Sabatier (1994) define as “sets of value priorities and casual assumptions about how to realize them” (p. 178). This belief system contains three parts: 1) a deep core that reflects underlying personal philosophies about values, justice, and the nature of man; 2) a policy core “of basic strategies and policy positions for achieving deep core beliefs in the policy area of subsystem in question;” and 3) secondary aspects that contain the various instrumental decisions and information searches needed to implement the policy core (Sabatier & Jenkins-Smith, 1993, p. 30). Actors who share similar policy core beliefs and work in concert to achieve them form what is called an *advocacy coalition* (Jenkins-Smith & Sabatier, 1994; McLendon et al., 2014). According to the ACF, policy change occurs when an advocacy coalition translates its shared policy core beliefs into adopted policies (McLendon et al., 2014).

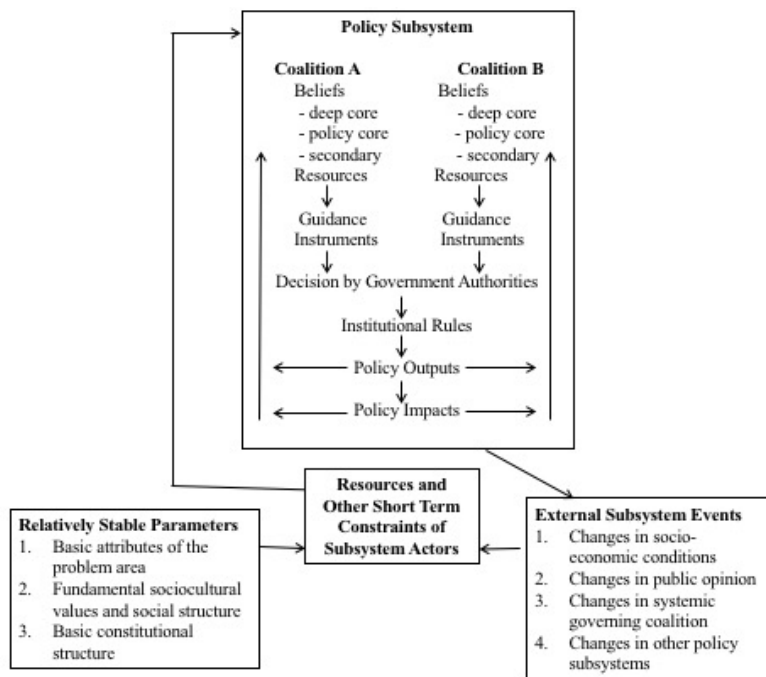
### **The ACF and Policy Change**

Figure 2.1 illustrates the ACF’s theory of action for policy change. The *policy subsystem* serves as the central unit of analysis (McLendon et al., 2014). Actors within a policy subsystem

are partitioned into *advocacy coalitions* (referred to as Coalition A and Coalition B in Figure 2.1). As noted above, coalitions contain a diverse and dynamic group of policy actors held together through shared agreement on policy core beliefs, which the ACF considers the casual driver for political behavior (Weible, et al., 2009). Coalition members, while holding the same policy core beliefs, may not hold homogenous deep and secondary beliefs nor share the same desired tactics to influence government officials (Weible, et al., 2009). Additionally, coalition members themselves may shift over time (Sabatier & Jenkins-Smith, 1993).

While belief systems establish the direction towards which an advocacy coalition will drive to change policies, *resources* influence a coalition’s ability to do so (Sabatier & Jenkins-Smith, 1993). Resources include money, strategic use of information, mobilized supporters, legal authority, and skillful leadership (Sabatier & Weible, 2007). As the three boxes on the bottom of Figure 2.1 show, relatively stable parameters of the problem area and external subsystem events can constrain the resources that advocacy coalitions have available.

Figure 2.1 *The Advocacy Coalition Framework* (adapted from Sabatier & Jenkins-Smith, 1993)





Coalitions adopt strategies, which the ACF refers to as *guidance instruments*, to influence the behavior of governmental institutions in ways that further the coalition's policy objectives (Sabatier & Jenkins-Smith, 1993). (Guidance instruments are illustrated in Figure 2.1, directly below resources.) A coalition may vary the guidance instruments they use over time, depending on their perceived effectiveness in swaying policymakers, the costs and benefits of using particular instruments, and the resources at their disposal (Sabatier & Jenkins-Smith, 1993).

Sabatier and Jenkins-Smith (1993) provided a "tentative list of guidance instruments" that coalitions may use to appeal to administrative agencies directly overseeing implementation of the policy under discussion (e.g., a state department of education) or to appeal to "the legislative, executive, judicial, or intergovernmental sovereigns who control administrative agencies' budgets or legal authority" (p. 227). Guidance instruments that advocacy coalitions might use to persuade an administrative agency included persuading officials through testimony, changing personnel within the administrative agency, providing research reports, or offering inducements (e.g., bribes, offers of future employment). To appeal to legislative, executive, or judicial sovereigns, guidance instruments included: altering political appointees, pursuing changes in legislation or litigation, pursuing changes in the agency's budget, using electoral strategies to vote supportive individuals into office, or mobilizing public opinion. Research on state education policy has elaborated on the final strategy of mobilizing public opinion, noting that education reformers have used persuasion tactics such as holding town hall meetings and roundtables (Finch, 2012), publicizing results of state performance exams (Fuhrman & Elmore, 1990; Malen, 2003), and using discursive strategies that define problems in ways that point to specific policy solutions (e.g., Cohen-Vogel & Hunt, 2007; Fischer, 2003; Harrison & Cohen-Vogel, 2012). As seen directly below guidance instruments in Figure 2.1, coalitions strategically

use guidance instruments to influence the *decision by government authorities* on policy programs, which are meant to impact *policy outputs* in ways that align with the coalition's policy core beliefs (Sabatier & Jenkins-Smith, 1993).

When a dominant coalition is in power, policies remain relatively stable. According to the ACF, changes to policy – and the beliefs of coalition members – occurs primarily through four possible paths: policy-oriented learning, negotiated agreements, shocks internal to the subsystem, and shocks external to the subsystem (McLendon et al., 2014; Sabatier & Weible, 2007). The first three occur within the subsystem and the fourth occurs outside of the subsystem.

First, policy change within the subsystem can occur through subsystem actors' policy-oriented learning, wherein one's policy beliefs or actions change resulting from new information or experiences (Mintrom & Vergari, 1996; Sabatier & Jenkins-Smith, 1993). Information may derive from a) internal feedback loops between policy outputs and impacts and policy beliefs, resources, and strategies, b) perceptions of external dynamics, or c) growing knowledge of the parameters of the policy problem and the factors that may affect them (Sabatier & Jenkins-Smith, 1993). Second, negotiated agreements between opposing coalitions within a subsystem can forge a path to policy change (Sabatier & Weible, 2007). Third, internal subsystem events that reveal current problems or policy failures in subsystem practices (e.g., disasters such as an oil spill) can lead to policy change by shifting political resources or casting doubt upon the core beliefs of the dominant coalition (Sabatier & Weible, 2007; Weible et al., 2009).

Fourth, exogenous forces shape and constrain actions and resources within the policy subsystem. As seen at the bottom of Figure 2.1, exogenous forces include *relatively stable parameters* (i.e., the attributes of the problem area, fundamental sociocultural values and social structure, basic constitutional structure) and *external events* (i.e., changes in socioeconomic

conditions, governing systems, policy decisions and impacts of other subsystems). Exogenous events, or “shocks” outside of the subsystem, can account for major policy change within the subsystem. Such events may shift resources or actors’ policy core beliefs (Mintrom & Vergari, 1996; Sabatier & Jenkins-Smith, 1993; Sabatier & Weible, 2007; Weible et al., 2009). Actors can additionally “actively exploit” external events to augment their power (Mawhinney, 1993).

### **Applying the ACF to K-12 Global Education**

Few studies have examined advocacy coalitions in K-12 education (McLendon et al., 2014). In those that have used the ACF (Ansell, Reckhow, & Kelly, 2009; Brecher, Brazil, Weitzman, & Silver, 2010; Mawhinney, 1993; Mintrom & Vergari, 1996), subsystems studied have ranged from narrow to broad policy foci and short to long durations of time. For example, Brecher and colleagues (2010) examined after-school program coalitions operating for one decade in five U.S. cities whereas Mawhinney (1993) examined 200 years of changes in the French language minority policy subsystem in Ontario, Canada. Further, these studies examined specific features of the ACF rather than the entire framework. For example, Brecher and colleagues (2010) documented coalitions and core belief conflicts within the after-school subsystem (Brecher, et al., 2010) and Ansell and colleagues (2009) solely focused on the members and beliefs of the Oakland education reform advocacy coalition (Ansell, et al., 2009). Overall, the findings from these studies all supported the viability of applying components of the ACF to topics pertaining to K-12 education stability and change.

The ACF is a viable framework for understanding global education policy change in North Carolina as it fits the framework’s four premises for policy change (Jenkins-Smith & Sabatier, 1994). Meeting the first premise of studying policy change over a decade or more, North Carolina has had incremental global education policy action since the early 2000s.

Following the second premise, global education is a distinct policy subsystem within the broader North Carolina education policymaking arena. It holds a distinct global education “functional/substantive dimension” (with global education professional development programs, curricular resources, and formal State Board of Education global education subcommittee) and is bound by the political “territory” of North Carolina. Regarding the third premise, the subsystem contains a diverse set of actors working together to influence governmental decisions who represent a variety of governmental and non-governmental institutions.

Meeting the fourth premise, global education advocates may hold different deep core beliefs about what it means to be a citizen in today’s interconnected world (Gaudelli, 2009; Oxley & Morris, 2013; Parker, 2011). Deep beliefs about global citizenship, which drive the global education policies that individuals and organizations pursue, include the following: world justice and governance (i.e., valuing the supra-national governing bodies that promote human rights and peace), cosmopolitan (i.e., valuing benefit the respect and dignity of all humans), transformative (i.e., valuing cultural, national, and global identities in a pluralistic society), critical (i.e., valuing counter-hegemonic discourses that critique oppressive global structures and give voice to the marginalized), environmental (i.e., valuing environmental sustainability), neoliberal (i.e., valuing the principles of a free competitive market), and nationalist (i.e., valuing national and economic security) (Banks, 2008; Gaudelli, 2009, Oxley & Morris, 2013; Parker, 2011; Subedi, 2010). This diversity of deep beliefs could result in either multiple coalitions within the subsystem or a coalition held together by broad definitions of global education.

This study specifically focuses on three components of the ACF: 1) the coalitions within the global education subsystem in North Carolina and the beliefs that bind together or cause conflict between coalition members, 2) changes to global education policy outputs in ways that

reflect coalition members' beliefs, and 3) the guidance instruments used to transform beliefs into policy. While additions and elaborations have been made to the ACF concerning belief systems, resources, paths to policy change, and external constraints specific to non-U.S. government contexts (Sabatier & Weible, 2007; Weible et al., 2009), the original ACF developers acknowledged that guidance instruments remain an underdeveloped construct within the framework in need of being fleshed out conceptually (Jenkins-Smith & Sabatier, 1994; Sabatier & Jenkins-Smith, 1993). Recent ACF literature, which has not elaborated on guidance instruments, suggests that this is still the case (Weible et al., 2009). Therefore, I elaborate on this aspect of framework by focusing on guidance instruments that North Carolina state actors within the global education subsystem use to influence state-level policymakers, which contributes to our understanding of how advocacy coalitions impact policy change at the state level.

### **Research Questions**

Responding to McLendon and colleagues' (2014) call for research that applies theories of policy change to K-12 education, this study uses the ACF to examine how global education has been adopted in North Carolina, a state that has emerged as a leading global education player in the twenty-first century. It asks:

- a. Who are the key members that comprise the advocacy coalitions within the global education subsystem in North Carolina? What beliefs have propelled coalition members to advocate for global education? What does this reveal about why global education was placed on the state's policy agenda by the coalition(s) supporting it?
- b. What K-12 global education policies has North Carolina adopted between 2000 and 2015, and how do they embody coalition members' beliefs?

- c. What “guidance instruments” (i.e., strategies) have been used to achieve the policy objectives of the global education advocacy coalition(s)?

## Methods

### Research Design and Setting

This critical case study (Yin, 2009) examines how global education policy has evolved in North Carolina from 2000 to 2015. In state policy research, McDermott (2009) explains that “rather than selecting randomly, researchers tend to choose cases based on the characteristics of their policies” (p. 751). North Carolina was selected as a critical case through which to study the evolution of global education reform for two reasons. It is the only U.S. state with comprehensive global education policy that targets teachers, schools, and districts and it has been recognized by national organizations for being a global education leader<sup>8</sup>. Furthermore, North Carolina has adopted these policies in a political context that previous scholarship suggests would not be conducive for global education reform. This constitutes the rationale for critical case sampling as described by Patton (2002): “If it can happen here, it can happen anywhere.”

North Carolina is also a unique context in which to study K-12 global education policy because it is home to external subsystem events outside of the global education arena, some of which could help and others hinder global education. North Carolina has experienced external subsystem events that prior research and government officials have cited as key rationales for why policymakers have supported global education: economic instability caused by global

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<sup>8</sup>In 2003, North Carolina received the first State Prize for the Goldman Sachs Foundation Prize for Excellence in International Education. National global education organizations including the Asia Society, Partnership for 21<sup>st</sup> Century Skills (P21), Global Teacher Education, the Longview Foundation, and NAFSA have highlighted various North Carolina programs and institutions as global education exemplars. See for example, *Educating for Global Competence* (Asia Society & CCSSO, 2011), *Putting the World into World Class Education* (Asia Society & CCSSO, 2008), *Framework for State Action on Global Education* (P21, 2014), and *Preparing Globally Competent Teachers* (NAFSA, 2012).

outsourcing and the Great Recession and unprecedented growth in immigration (Frey & Whitehead, 2009; Houck & Ross, 2010; U.S. Department of Education, 2012). In the past few decades, North Carolina has experienced a shift from a largely agrarian and manufacturing economy (e.g., tobacco, textiles, and furniture) to a global economy characterized by knowledge-based, multinational enterprises (Peacock, 2010). North Carolina also has one of the fastest growing immigrant populations in the United States (Rong & Preissle, 2009). Though historically North Carolina's population has fallen into a black-white binary, today, 10% of North Carolinians are Latino or Asia and the percentage of North Carolina's foreign-born population rose from 1.7% in 1990 to 7.6% in 2013 (American Immigration Council, 2015). As such, North Carolina urban and rural schools must be prepared to teach an increasing amount of culturally and linguistically diverse students. As Peacock (2010) summarized, "race and ethnicity are no longer dualistic in the South; immigration and cultural influences that express global forces have made the pattern of southern race and ethnicity more pluralist" (p. 18).

At the same time, North Carolina has experienced external subsystem events that all but led to the demise of many global education initiatives in the early 1990s: a rise in standards-based accountability and a rise in right-wing conservatism (Tye, 2009). North Carolina has been a leader in standards-based reform since the early 1990s when it launched new curricular standards and a statewide assessment system aligned with the National Assessment of Educational Progress (NAEP) (Darling-Hammond, 2010). The state was an early adopter of the Common Core State Standards (CCSS) as well, in which former governor and influential education policy entrepreneur James B. Hunt, Jr. played a major advocacy role (McDonnell & Weatherford, 2013; Porter, Fusarelli, & Fusarelli, 2015). In 2010, the state received \$400 million through the federal Race to the Top grant that supported, among other instructional reforms, the

implementation of the CCSS and Turnaround Schools program aimed at improving the test performance of the state's lowest-achieving schools (Thompson, Brown, Townsend, Henry, & Fornter, 2011). In addition, an electoral swing in 2010 placed the North Carolina General Assembly House of Representatives and Senate in the hands of conservative Republicans. This was followed in 2012 by the election of a super-Republican majority to both chambers in the General Assembly and the governorship, and an onslaught of conservative education legislation that decreased public school resources (Marshall, Johnson, & Tichnor-Wagner, 2014). Given the dynamic trends occurring within and outside of the global education subsystem, North Carolina is a critical place for studying the processes through which global education initiatives can become adopted despite unfavorable conditions.

### **Data Collection**

Data collection consisted of document analysis and interviews to accurately capture a picture of the full case under study (Yin, 2009). To explore global education policy outputs, beliefs of coalition members, and guidance instruments that they used to turn their beliefs into concrete government action, I first collected publicly available global education policy documents produced by organizations and individuals within the North Carolina global education subsystem. The positions of policy elites can be extracted through content analysis of relevant documents and interest group publications (Sabatier & Jenkins-Smith, 1993). Therefore, I collected bills and laws pertaining to global education introduced and passed between 2000 and 2015 that targeted K-12 students and teacher education programs, General Assembly task force reports, annual state budgets, State Board of Education (SBE) biennial reports and meeting minutes, Department of Public Instruction (DPI) curricular resources, teacher professional standards, and SBE/DPI regulatory policies that pertained to global education. To find



documents within this large pool of data, I used the key search terms “global education,” “global competence,” “global awareness,” “international education,” “21<sup>st</sup> century skills,” “global” AND “education,” “global” AND “school,” “global” AND “teacher,” and “global” AND “student,” only selecting documents that directly pertained to K-12 global education. I also included coalition members’ websites and reports posted on them as a key data source for understanding beliefs and strategies.

Once this initial pool of documents was collected, I used the following criteria for inclusion in the final sample: 1) pertains to K-12 education or teacher education programs within higher education institutions, and 2) has a policy focus that addresses the teaching and/or learning of global content and perspectives. I checked the final list of documents with key informants (i.e., “experts” within the global education subsystem) to ensure that key pieces of legislation, reports, committee meetings, organization websites, and other relevant policy documents were all included, including any and all documents before and after 2000. The final list of documents is included in Appendix C.

Document data were triangulated with semi-structured interviews. For interviews, I purposefully sampled key subsystem members who have played a formal role in the adoption, enactment, and/or implementation of global education policy at the state level (e.g., DPI’s Special Assistant to Global Education, SBE members on the Special Committee for Global Education, intermediary organizations that provide global education services to school districts) and searched for those who have vocally opposed global education policy. Following Fischer (2003), I initially identified participants to interview through documents. Then, using a snowball sampling methodology (Patton, 2002), I asked participants to provide names of others who supported and opposed global education in North Carolina. In total, I interviewed 26 participants.

This included two SBE members, two state legislators, two high-ranking DPI officials, two district superintendents, two University of North Carolina administrators, nine current and former intermediary organization leaders and personnel (hereon in referred to as state external partners), a business sector representative, three individuals representing both liberal and conservative advocacy organizations, and three representatives from national organizations advocating global education policies in North Carolina. (The names and positions of participants have been omitted to ensure participant confidentiality.) I reached saturation when a) I contacted all of those whose names had come up as leaders or committee members in policy documents and b) the same names recommended in interviews were repeated, revealing no new ones.

Interviews were on average 63 minutes long, ranging from 34 to 90 minutes. Interview questions asked participants to describe their involvement in the global education subsystem, why they became involved, what their global education policy priorities are, who they have worked with on global education issues, the various strategies they and other members of the global education coalition have used to advance their core policy beliefs, who else has supported and opposed global education, and which external subsystem events have influenced global education policy (See Appendix D for the complete interview guide).

To address issues of social desirability bias that may arise as a result of participants being in positions that support global education, I employed the following methods recommended by social science research (Holbrook, Green, & Krosnick, 2003; Krumpal, 2013): a) conducting interviews in person when geographically possible, as face-to-face meetings allow the interviewer to build rapport and trust<sup>9</sup>, b) asking questions about challenges and opponents to global education towards the end of the interview once the informant felt comfortable, and c)

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<sup>9</sup>20 of 26 interviews were conducted in-person.

ensuring confidentiality and anonymity by using pseudonyms and not publishing specific jobs, titles, or other information that could be linked back to participants' identities. Further, participant responses were triangulated with the documents collected. This triangulation of interviews and documents allowed me to cross-check and validate findings (Patton, 2002).

### **Data Analysis**

Data were collected and analyzed in an iterative fashion (Stake, 2005). I began with the initial collection and analysis of documents, which informed interview participant sampling and questions. The first round of document data analysis began with a mixture of *a priori* and open coding to derive initial codes and inform clustering of codes into patterns (Marshall & Rossman, 2011). To answer each research question, the initial coding framework contained seven domains: 1) global education policy outputs, 2) global education advocacy coalition members, 3) coalition members' deep, policy core, and secondary beliefs, 4) advocacy coalition resources, 5) guidance instruments, 6) external subsystem events, and 7) stable parameters.

First, global education policy output codes captured General Assembly and SBE policies adopted. Second, advocacy coalition member codes included their *personal governmental and non-governmental organizational affiliations* and what Ansell and colleagues (2009) call *allies* (i.e., individuals and organizations that members work with around global education issues). Details on coalition member affiliations came from interview questions, an examination of organization websites for board members, partners, and sponsors, and global education reports or related documents created by multiple members of a coalition.

Third, belief codes included *deep beliefs* about global citizenship (e.g., neoliberal, nationalist, world governance, cosmopolitan, transformative), *policy core beliefs* (e.g., global themed schools, language programs), and *secondary beliefs* (e.g., budget allocations,

administrative rules). I uncovered deep beliefs by examining how, within documents and during interviews, coalition members defined the problem of globalization (Fischer, 2003) and ascertained policy core and secondary beliefs through policy documents and interview questions on global education policy priorities.

Fourth, *resource* codes incorporated the money, information, supporters, legal authority, and skillful leadership that coalitions had available. Fifth, *guidance instruments* codes included strategies that coalition members employed to turn their beliefs into government action (e.g., mobilizing public opinion). Sixth, *external events* captured exogenous events that may have “shocked” the global education subsystem (e.g., electoral changes in government, changes in other policy subsystems). Finally, *stable parameter* codes documented the extant social, cultural, and political structures that constrained or enabled the resources and guidance instruments coalitions were able to use.

As data continued to be collected and analyzed, codes were added, expanded, revised, and refined as I looked for areas of convergence to merge codes together, internal and external homogeneity to ensure that codes were internally consistent and externally distinct from one another, and divergent cases that did not fit dominant patterns (Miles & Huberman, 1994; Patton, 2002). Table 2.1 shows the complete list of final codes, which included an eighth domain, *opposition*. This section captured oppositional attitudes and inaction that stymied global education policy change at the state level and the spread of practices across local districts.

After all data were initially coded, I looked for emerging patterns and themes that provided insight into the connections and cleavages between subsystem members’ allies and policy core beliefs to ascertain what individuals and organizations belonged to which advocacy coalition, and explored similarities and differences regarding members’ belief systems and

preferred guidance instruments. This was done by writing analytic memos on each of the eight domains (Miles & Huberman, 1994). Memos tied together trends and relationships concerning global education policy outputs, coalition member affiliations, beliefs, resources, guidance instrument use, and exogenous forces. These memos were also a place for me to reflect on the positionality of informants, and how their professional role, political connections, gender, race/ethnicity, age, and prior experiences may have shaped their perspectives, understandings, and beliefs of global education policy (Marshall & Rossman, 2011; Patton, 2002). For a statement of my own positionality in the data collection and analysis process, see Appendix E.

Additionally, I created various analysis matrices to compare documents, interview participant responses, and changes over time in policy, coalition members, beliefs, guidance instruments, and exogenous events. For example, I created matrices to compare the coalition members, deep beliefs, and policy beliefs found within global education strategic plan reports published between 2000 and 2015 and to compare beliefs and guidance instruments of coalition members interviewed. Finally, to make sense of global education policy change over time in North Carolina, I created a time-ordered display (Miles & Huberman, 1994). In this display, I marked when global education policies were passed, who the key policy actors were in the advocacy coalitions, evidence of deep, policy core, and secondary beliefs, what resources and guidance instruments were used, and changes external to the subsystem that may have occurred.

I conducted member checks to confirm whether findings accurately represented informants' understanding of global education policy change over time. To do so, I sent personal emails to each participant with an executive summary of key findings. Participants were asked whether they agreed or disagreed with each of the findings, to explain any discrepancies, and to add anything they felt that I had missed.

I now turn to the findings, partitioned into four sections. First, I describe the global education subsystem, noting the emergence of only one advocacy coalition held together by four policy core beliefs. Next, I delineate the global education policies enacted at the state level, explaining how aspects of these policies changed over time while consistently representing the policy core beliefs of the advocacy coalition. Then, I highlight the three comprehensive guidance instruments that advocacy coalition members used to help enact their policy beliefs. Finally, I describe opposition and challenges that advocacy coalition members faced as they made slow and steady progress in pushing global education into classrooms across the state.

### **The North Carolina Global Education Advocacy Coalition**

As the ACF would predict, global education policy change in North Carolina from 2000 - 2015 was shaped by an advocacy coalition of governmental and non-governmental actors representing local, state, and national organizations. The advocacy coalition was bound together by shared policy beliefs and a shared understanding of deep beliefs regarding the purpose of global education. This is illustrated in Figure 2.2. As Figure 2.2 also points out, these beliefs were shaped by external subsystem events. The section that follows describes who these coalition members were and the roles they served in promoting global education, followed by a description of the policy core and deep beliefs they held.

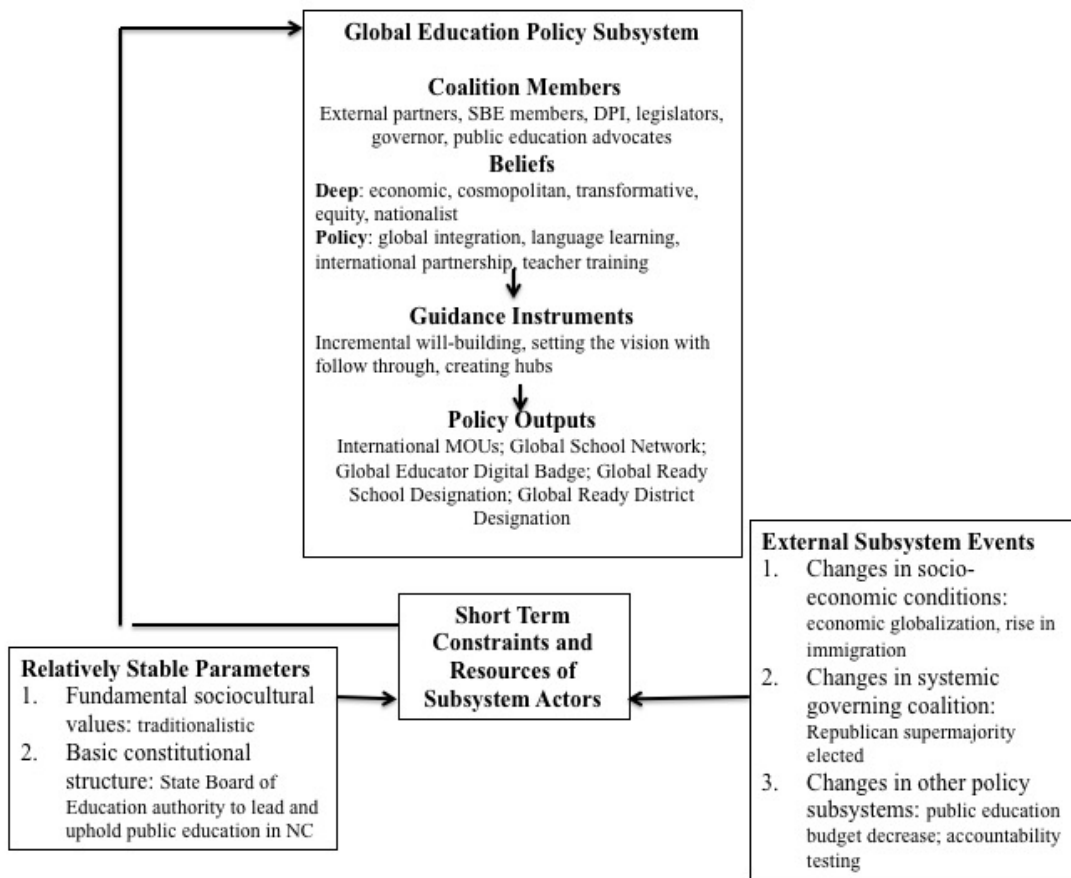
#### **Advocacy Coalition Members**

A broad coalition representing education, policymaking, and business sectors advocated for global education in North Carolina. These advocates formed the sole coalition within the global education subsystem, as all coalition members overlapped in the policy beliefs they pursued and every interview participant stated that there was no organized opposition to state global education policies.

Education sector coalition members included representatives of state-level education governing and administrative bodies such as the State Board of Education (SBE) and the Department of Public Instruction (DPI), school district superintendents, higher education representatives including deans from schools and colleges of education and University of North Carolina General Administration, and intermediary organizations representing non-profit, for-profit, and university-affiliated public service branches that provide global education products, services, and advocacy. Global education intermediary organizations included the Center for International Understanding (CIU), VIF International Education, World View, the Public School Forum of North Carolina, the Asia Society, and Partnership for 21<sup>st</sup> Century Skills (P21).

Figure 2.2.

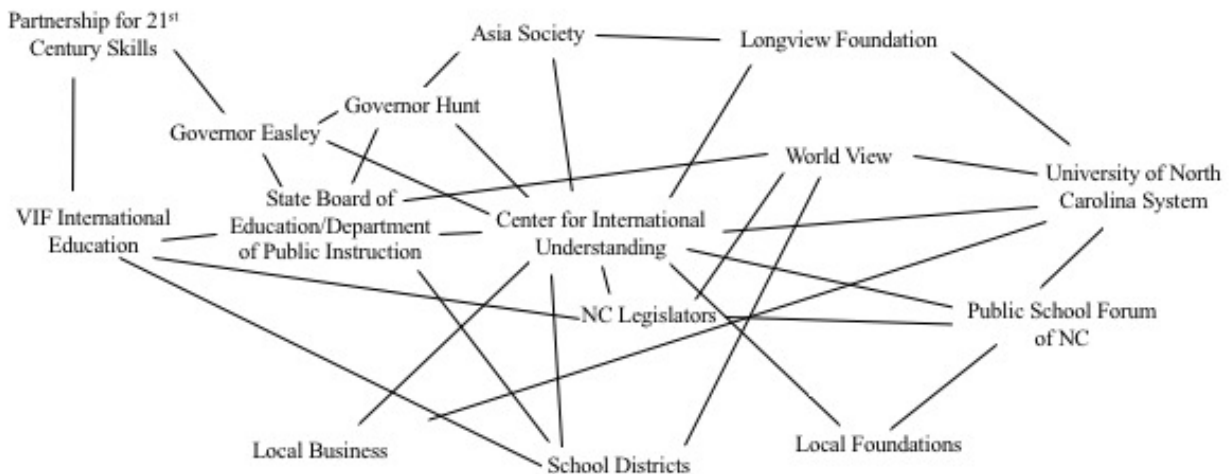
*Applying the ACF to North Carolina's Global Education Subsystem*



Policymakers in the coalition included a handful of legislators elected to the North Carolina General Assembly and former North Carolina governors Jim Hunt and Mike Easley, along with Governor Hunt's wife Carolyn and Mike Easley's deputy education advisor. Business sector representation included local companies, multinational corporations, the NC Department of Commerce, and the NC Department of Agriculture. Finally, a variety of local and national foundations connected to education, business, and policymakers supported global education initiatives in North Carolina, including the Longview Foundation, the Goldman Sachs Foundation, the William and Flora Hewlett Foundation, the Burroughs Welcome Fund, and the Kenan Trust. This web of diverse coalition members is illustrated in Figure 2.3. Appendix F provides a list of advocacy coalition members along with information about their history, mission, and global education activities in North Carolina.

Figure 2.3.

*North Carolina Global Education Advocacy Coalition Members*





Coalition members played different roles in pushing the global education agenda forward. Some coalition members played a more prominent role, evidenced by how many interview participants brought up their work. (See Appendix F). For example, over two-thirds of participants mentioned CIU, the University of North Carolina system, World View, VIF, and the SBE, while one-third or less mentioned state legislators, foundations, and P21.

Coalition members also differed in the duration of their involvement. CIU, VIF, and World View have consistently promoted global education in North Carolina schools since the 1990s. In contrast, the Public School Forum of North Carolina was heavily involved in global education from 1996 through 2011, but their involvement has waned in the past five years. Similarly, governor support for global education was strong in the 1990s and early 2000s. Multiple participants pointed to Governor Hunt (1977-1985, 1993-2001) as the initial catalyst of global education in North Carolina. His wife Carolyn was the “driving force” behind CIU, and, as a board member of the Asia Society, he helped facilitate the grant North Carolina received to initiate the statewide project *North Carolina in the World*. Governor Hunt’s successor Governor Mike Easley (2001 -2009) instituted the nation’s first Center for 21st Century Skills, which included global awareness as an integral part of its strategic plan (CIU Legislative Report, 2007). Yet interview participants acknowledged that recent governors have not initiated new global education projects.

Furthermore, those closest to the daily operations of school (i.e., those overseeing or providing global education services such as state external partners, universities, and SBE/DPI) have played a substantive role in forming and implementing policy, whereas policymakers, business leaders, and foundations have tended to express support for global education and provide funding. For example, the CIU, World View, and VIF, the state’s three “external

partners” to DPI’s global education efforts, have provided substantive support by partnering with individual school districts to provide professional development and instructional resources for K-12 educators. They have also participated in working groups and committees to formulate state-wide policy. As a DPI official said, “You had roots in North Carolina: The North Carolina Center for International Understanding, World View, VIF. All of those roots were a part of the initial recognition about the importance of global education.” While overlapping in many regards, the three external partners also carved distinct niches in the global education services they provided to school districts and the state. (Illustrated in Appendix F). Participants also pointed to the University of North Carolina system as providing substantive support for K-12 global education. The university houses state external partners CIU and World View, provides K-12 global education instructional resources through federally-funded Title VI Centers, and has colleges and schools of education committed to internationalizing teacher education.

The SBE and DPI have provided at times symbolic and other times substantive support. For example, from 2003 through 2015, under the direction of three different Chairmen appointed by three different governors<sup>10</sup>, the SBE has passed symbolic resolutions in support of global education, commissioned a Task Force on Global Education, created a Special Committee on Global Education to facilitate implementation of the task force recommendations, and passed multiple policies focused on incorporating global awareness into schools and classrooms. Regarding DPI, the administrative arm of the SBE, participants described Superintendent of Public Instruction Dr. June Atkinson, an incumbent since 2004, as “a big proponent” of global education, while pointing to DPI’s Special Assistant to Global Education as “instrumental” and “a champion” in turning SBE commitments into implementable policy.

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<sup>10</sup>In North Carolina, State Board of Education members are appointed by the governor for eight-year terms.

In contrast, public and private entities representing the business sector have provided only symbolic support for global education. They have served on global education committees and the CIU and World View boards and presented at summits and task forces. Finally, participants pointed to two sets of coalition members – national and local foundations and a handful of state General Assembly representatives – as playing the role of providing or championing funding for specific global education programs run by CIU, VIF, and World View.

In sum, an array of public, private, and not-for-profit NGOs, along with policymakers and governmental agencies, have been a part of the coalition advocating for global education in North Carolina. While holding different roles, these coalition members came together around the same policy beliefs and, to an extent, deep beliefs, a finding which is described next.

### **Member Beliefs**

As the ACF contends (Sabatier & Jenkins-Smith, 1993), the policy actors in North Carolina's global education advocacy coalition were bound together through shared agreement on four policy core beliefs, that is, the policy positions that they wanted to see enacted and the casual driver for their political behavior (Weible et al., 2009). Though the ACF also contends that members of the same coalition may hold disparate deep beliefs, or underlying philosophies, one main deep belief tied the North Carolina global education coalition together as well.

**Policy core beliefs.** As evidenced in Table 2.2, coalition members coalesced around four major global education policy beliefs: 1) systemic integration of global content and perspectives into classroom instruction and the DNA of schools and districts, 2) language programs, 3) international partnerships, and 4) teacher training focused on global competency development. These policy beliefs were reflected in the recommendations of the following key reports: *North Carolina in the World: A Plan to Increase Student Knowledge and Skills about the World* (2005),

*Creating Internationally Competitive Schools* (2006), *Preparing Students for the World: Final Report of the State Board of Education Task Force on Global Education* (2013), and *A World of Opportunity: North Carolina Blueprint for Global Engagement* (2015) and confirmed in participant interviews. (See Appendix G for a list of reports along with their recommendations.)

First and foremost, nearly every participant interviewed stated that global education should be *integrated* into the fabric of education in North Carolina. SBE members, DPI officials, external global education partners, and school district leaders all repeated a variation of the phrase “what we call global education, the rest of the world calls education,” and emphasized a future when “global education is simply what we do.” Specifically, participants stated that global concepts and perspectives should be integrated into the teaching of all content areas, and not taught as an isolated subject or relegated to language or social studies courses. As an external partner explained, “It's not just about social studies or language teachers traveling to other countries, but what can we do to help math teachers, science teachers, or kindergarten teachers bring the world into their classroom and help create citizens that are globally competent.” A government official similarly shared, “This should not just be flags, food, and festivals for today, or we're going to do a once-a-year, great little community festival. This should be incorporated every day when you're teaching the standard course of study.” Furthermore, one-third of participants also stated that global content and perspectives should be intentionally integrated into the structure of the entire school, citing models such as global-themed schools emphasizing language and culture or schools of choice with a “global emphasis in their curriculum.”

Second, the vast majority of participants emphasized a policy core belief in programs that supported K-12 language learning, including world language and immersion programs. Coalition members spoke in generalities about the need for students of all ages to learn to speak multiple

languages. As one participant shared, “Languages are really important. When you learn another language, you’re not just translating words....you’re learning that somebody else thinks in a very different way.” A legislator agreed, saying “When you learn a new language, it’s a new way to think.” Four participants, including an external partner, superintendent, SBE member, and legislator, further emphasized that immersion programs were the most effective and cognitively beneficial method for language acquisition. An external partner shared, “We've transitioned to dual-language immersion as our focus area, so the language programs that we do support tend to be very intensive, highly effective programs that generate incredible proficiency gains and student outcomes.” Whether supportive of world language, immersion programs, or both, there was overall consensus across participants that language learning was an important piece of global education.

A third policy belief around which the vast majority of coalition members came together was *international partnerships*. This included international partnerships between schools, teacher and student exchanges, and importing “cultural exchange teachers.” In describing school partnerships during interviews, participants emphasized having students in classrooms in different countries communicate with one other via technology and participate in joint learning activities. As an SBE member shared, “Everybody’s not going to be able to travel, [so we need] to make sure all our schools have the technology to partner across continents [through] project-based learning and inquiry.”

Another aspect of international partnerships that coalition members promoted was teacher and student exchanges, including undergraduate study abroad for pre-service teachers, overseas teaching programs, and educational international trips. A former school of education dean

explained that a major policy priority was working with the SBE and DPI to allow student teaching abroad to count towards a North Carolina teaching license. She explained,

If a person were to do a substantial internship in Africa, for example, they would [also] need to do student teaching in a North Carolina public school. So [if they studied abroad they] would lose a semester. [Our priority has been] to make the case that a North Carolina teacher candidate can meet the same standard and have the same level of supervision in another country, that would allow that candidate to bring back special resources and understandings for North Carolina schools.

A DPI official similarly shared that in formulating a potential partnership between the SBE and a country in Africa, she hoped that it would provide "opportunities for teachers' professional development, maybe time in classrooms in both countries...[because] what those teachers learn, they're going to be able to bring back."

Acknowledging fiscal and policy barriers to getting all North Carolina teachers to travel abroad through educational exchanges, eight coalition members interviewed also advocated for one-way exchanges, wherein "cultural exchange teachers" (i.e., teachers from foreign countries) come to teach in North Carolina schools. A superintendent, policy advocate, and external partner each explained that cultural exchange teachers benefited both North Carolinian teachers and students by "sharing a wealth of global mindedness" with the students they taught and the faculty with whom they planned lessons. A policy advocate stated, "[cultural exchange teachers] might be in a better position to communicate how the rest of the world works than someone who is trained in the United States." For VIF, advocating for cultural exchange teachers directly benefitted their company, as their original business model focused on recruiting international teachers. As one VIF participant stated, "It's still our business of bringing teachers over." Therefore, this organization alone among other coalition members worked to advocate for policies in the U.S. State Department to extend visa stays for international teachers.

A fourth policy belief was the importance of *teacher training* around global issues. This included pre-service teacher education and in-service teacher professional development. Pre-service education incorporated: 1) infusing a global perspective into the teacher education curriculum (i.e., assignments, international partnerships, field experiences with immigrant students) and 2) study abroad for future teachers with a particular emphasis in non-Western countries. As an external partner emphasized,

It would be great if every student who graduated from college with a teaching degree had some kind of international experience before they graduated, and moved into the classroom having some idea of how they might help their kids understand the rest of the world in addition to math, science, social studies, reading, and literature.

A national advocate explained that it was important to target teacher preparation because “If we prep teachers when they are just beginning their careers and make sure that they have the bandwidth and enthusiasm to support bringing the world into their classroom, it’s a lot better than trying to convince someone mid-career.” As coalition members argued, changing teacher preparation would require both integrating global perspectives into extant courses *and* changing certification requirements, particularly to provide pre-service teachers opportunities to study and teach abroad that counted towards fulfilling licensure requirements.

Coalition members also targeted in-service teacher professional development, including a range of structured abroad programs, symposiums, workshops, and online modules. As one participant shared, “[We need to] provide professional development for teachers because...if teachers aren’t trained then it’s not going to happen in the classroom.” A superintendent and an external partner further emphasized the importance of in-service training because of the high percentage of educators who have not traveled outside of the U.S.

**Deep beliefs.** Although the ACF posits that coalition members coalesce around policy core beliefs rather than deep beliefs, overwhelmingly, economic rationales for global education

dominated coalition members' stated beliefs for why global competencies should be integrated into North Carolinians' K-12 education. At the same time, the majority of coalition members also described additional deep beliefs they personally held regarding the purpose of global education, including cosmopolitan, equity, transformative, and nationalist. (See Table 2.2).

***Economic.*** An economic belief was evident in all but two interviews and across all global education documents, from reports produced by external partners to General Assembly policies to SBE meeting minutes. As an SBE member stated, "If there's one driving force for it [global education], it is economic development." Economic arguments emphasized "global competitiveness" regarding students' ability to get jobs in a global marketplace and for the state to import and export business.

Deep beliefs that global education would make students competitive for employment in a global marketplace abounded across documents and interviews. For example, the stated purpose in the report *North Carolina in the World: A Plan to Increase Student Knowledge and Skills about the World* (2005) was to serve as "a catalyst to draw attention to the need for strong K-12 international education and its link to successfully maneuvering in the global marketplace." A DPI official stated, "Our corporations need people who are interested in global affairs. You have an edge, there's no question, if you have a global background, speak more than one language. You have an advantage in the employment market." Likewise, a business sector coalition member believed that the purpose of global education was to prepare kids to "thrive in jobs that will be numerous in the global marketplace."

An equally utilized economic rationale for global education was enhancing North Carolina's economic development. A legislator explained that the "main trigger event" for global education occurred in the 1990s when the state's "trading partners becoming increasingly



international,” spreading from Europe, Canada, and Mexico to emerging markets in Asia and Africa. A national advocate further noted that Governor Hunt initially supported global education because “he saw how beneficial this could be for economic reasons and for trade reasons.” The SBE Chairman’s opening statement of the *Final Report of the State Board of Education’s Task Force on Global Education* (2013) summarized these economic motivations:

I have seen first-hand the enormous impact of the economic changes of the past few years. This has left me with the deep belief that North Carolina’s future depends more heavily than ever before on students graduating public schools fully prepared for jobs and life in a globalized 21st Century America. Our jobs and lives are already inextricably linked to the rest of the globe. Our global relationships will become deeper and more extensive over the next few decades. Those who work in business and industry already routinely work with companies from other countries and interact with their co-workers around the world. Those who work in small businesses in their communities rely on global supply chains and, more easily than ever, sell their products around the world.

While economic reasoning dominated stated purposes surrounding global education, participants also held a variety of other deep beliefs. This suggests that a global economy was one of multiple motivations behind coalition members’ pursuit of global education. As an external partner stated, “There are lots of different reasons to support global education that hit different people’s buttons... There’s an economic reason to support it. There’s a social justice reason to support it.” A handful of reports alluded to these multiple underlying beliefs as to why global education was important. For example, the introductory letter for the *The North Carolina in the World: Preparing North Carolina Teachers for an Interconnected World* report (2006), written by former UNC system president Erskine Bowles, read:

All of us have seen with our own eyes the dramatic changes that have occurred in North Carolina’s economy because of job losses on our farms and in the textile, apparel, and furniture industries – industries that sustained us for generations. In the new knowledge-based global economy, we are competing head-to-head with dozens of countries that are making strategic investments in education, innovation, and research. The cold hard fact is that if we don’t get more of our own people better educated, we’re in a losing fight. North Carolina’s teachers must have the knowledge and understanding to equip our children to be successful on this global playing field. At the same time, we must help our children

understand and appreciate classmates and neighbors who now come from all over the world. We must prepare our children to become citizens who can work for international understanding and peace among all peoples. Our interconnected world demands both competition and cooperation.

A number of participants also stated that while many policymakers used the economic argument for rationalizing global education, they themselves held different beliefs closer to their hearts. As a university coalition member stated, “Global competitiveness is a really important driver for some policymakers; it’s a modest driver for me. Collaboration, communication, and community drivers hit a lot of us more.” An external partner agreed that “The original basis for [global education] was economic development in the state, preparing teachers for the global economy. But then there’s other people who believe that there’s much more to it.” A participant working for a conservative foundation even stated,

I'm actually disturbed about the fact that if [legislators and the current governor] talk about global education, it's only with regard to the workforce. Why I think it's important to have a workforce that's trained well and that has some sort of understanding of the global environment, I think it's more important that we have citizens that are globally aware because part of their vote is going to have global implications and they should understand what those implications are. For me, it's global literary issue, not a global workforce issue.

As alluded to in the quotes above, alternative deep beliefs that participants evoked other than economic competitiveness included cosmopolitan, equity, transformative, and nationalist.

***Cosmopolitan.*** Fourteen participants, representing external partners, the university system, legislators, the SBE, DPI, the Asia Society, and a conservative foundation, reported holding cosmopolitan beliefs, which emphasized the importance of global education for teaching students to solve global problems and achieve world peace. As a university coalition member shared, “My commitment to globalization of teacher education comes from a peacemaking perspective. I want my teachers and those they teach to be able to collaborate, communicate and work for peace in globally interconnected world.” A legislator also stated, “I think it's a national

security issue to understand our competitors and to be able to protect our own economy by being competitive. But I also think that it's a question of international understanding and peace.” Other participants emphasized the need for students be able to “work together to solve the world’s problems.” As an external partner stated, “I think that there’s issues and problems our generation’s creating that my kids will have to solve [that are] global. They don’t have passports; those issues are going to cross.”

**Equity.** Eleven participants evoked the value of equity as an underlying purpose of global education, noting that global education should “be the education that all kids received” and “an opportunity that all students are going to benefit [from].” A superintendent explained, “For me, the purpose of global education is to ensure that every student leaves that public K-12 education experience understanding the interconnectedness of themselves, their communities, their state, and this country to the rest of the world.” An external partner emphasized that, in his experiences, global education was still “for the lucky few.” His organization’s goal was to “not just provide global education opportunities to magnet schools in Wake County, but we want this to be available to all kids.” As another external partner explained, “We’re really pushing equity. I feel like [global education] is a gifted education approach for all kids.” A handful of participants specifically emphasized equity of access for all school districts, and particularly the need to reach out to rural counties.

**Transformative.** Nine participants – including individuals representing DPI, schools of education, school districts, external partners, and national organizations – evoked a transformative perspective that recognized the need to prepare teachers to teach classrooms becoming increasingly diverse due to immigration. For example, a national advocate believed that global education

will go a long way in helping create more peace and understanding in these major global issues that we're facing in Syria, or in Hungary with the migrants, or even in our own backyard with the racism and all of the different immigration issues we face here.

A university coalition member further shared,

The real initial impetus for me was worrying about our teacher education candidates who had a pretty small worldview... They didn't have passports, their dream was to go back and teach in the school that they had attended, [but] the schools they attended were not the same schools. The influx of particularly Hispanic immigrants to North Carolina meant that they would be teaching students with different experiences and different needs than maybe expected. It really was a close to home motivation about we've got to do better about preparing teachers who are alert to cultural differences and cultural contributions, who have competency in supporting and working with all kinds of kids.

For external partners, the question of "how teachers are going to be prepared to teach in the classroom when they have such a diverse group of students" similarly drove their work. For example, an external partner described the revelation of one teacher who attended an international program:

She sat in German classes where the teacher is teaching in German, and a light bulb went off: "This is what my [ESL] kids must feel like when they're sitting in my classroom and they don't understand half of what I'm saying." She came back and paired up with a Spanish speaking math teacher to do videos in English and Spanish for parents so that the parents could understand the math and help their kids understand it... That coming back and going, "I can make a difference in my community. I can make a difference in my classroom. I can make a difference in my school." That's the power of that transformative experience with global education I feel is so important.

As these quotes imply, such transformative perspectives were responsive to the changing demographics of North Carolina, and, as the *Final Report of the State Board of Education's Task Force on Global Education* read, "a population that is becoming more ethnically and culturally diverse than before."

**Nationalist.** Finally, seven participants alluded to *national security* as a deep belief for pursuing global education. One state advocate shared, "Learning about the rest of the world and seeing differences is so important, particularly in an age of ISIS and Putin, getting people to

really think beyond their own town or county. It's incredibly important to the welfare of the U.S." An external partner raved that the military "loved" the work of his organization:

We had a legislator in [a military county] who came to [us] and said, "I can't get people who are linguists. We have all these things happening in the Middle East; we can't find people who have the skills coming in.... We have to start encouraging this." So, [the military county] actually built an early college high school based around global education.

Of particular interest to the military were "critical" languages such as Arabic, Chinese, and Farsi (CIU Legislative Report, 2007; NC World Language and Culture Summit, 2010), reflective of areas in the world of ongoing military operations and potential economic volatility.

Notability, coalition members interviewed did not view these economic, cosmopolitan, transformative, equity, and nationalist rationales as mutually exclusive, but rather mutually beneficial. For example, an external partner shared, "Communication, collaboration, and competition... That's the sequence. You want [students] to communicate, you want them to collaborate, and then if they can do that they will be competitive." This was also revealed in an interview exchange with a state legislator:

Legislator: There are two purposes [of global education]. I think one is from a competitiveness capacity. You cannot be competitive and have the nation's security interests preserved without being fully globally aware and conversant. The second, though, is broader. That is this idea that we are all global citizens, and in order to be responsible citizens, one to another, we have to understand each other, and that means understand our languages, our cultures, our religions of our nations. That is the only way we are going to live peacefully on this planet.

Interviewer: And do you find these two purposes compatible?

Legislator: Yes. I think they are. You don't make peace with your friends; you make peace with your enemies. But you can't make peace with your enemies if you don't understand them. So I think trying to create a more peaceful world also enhances by its pure definition our security. I think they are inseparable.

A university administrator also shared how economic arguments for global education can make inroads for other beliefs to gain traction:

If we can get constituencies other than the UNC system talking about the value of the rest of the world [such as] companies that want to export, then we can tell the story about the 200,000 people who work in North Carolina for foreign-owned companies or that one-third of our all investment in North Carolina last year came from outside the country. If we can get those people talking together about the importance of embracing the rest of the world, then it's a lot easier to talk about in-state tuition for undocumented visitors, about increasing funds for study abroad, [and] about why we should invest some extra money in recruiting international students.

Other participants further suggested that the multiplicity of deep beliefs regarding global education complemented one another, commenting that a reason global education gained traction in North Carolina was because “a lot of people have a stake and a piece in it” and “an array of motivations means we can pull together to make that work happen.” As the next section shows, these multiple beliefs incrementally influenced North Carolina legislative and SBE policy in the first decade and a half of the 21<sup>st</sup> century.

### **North Carolina K-12 Global Education Policies**

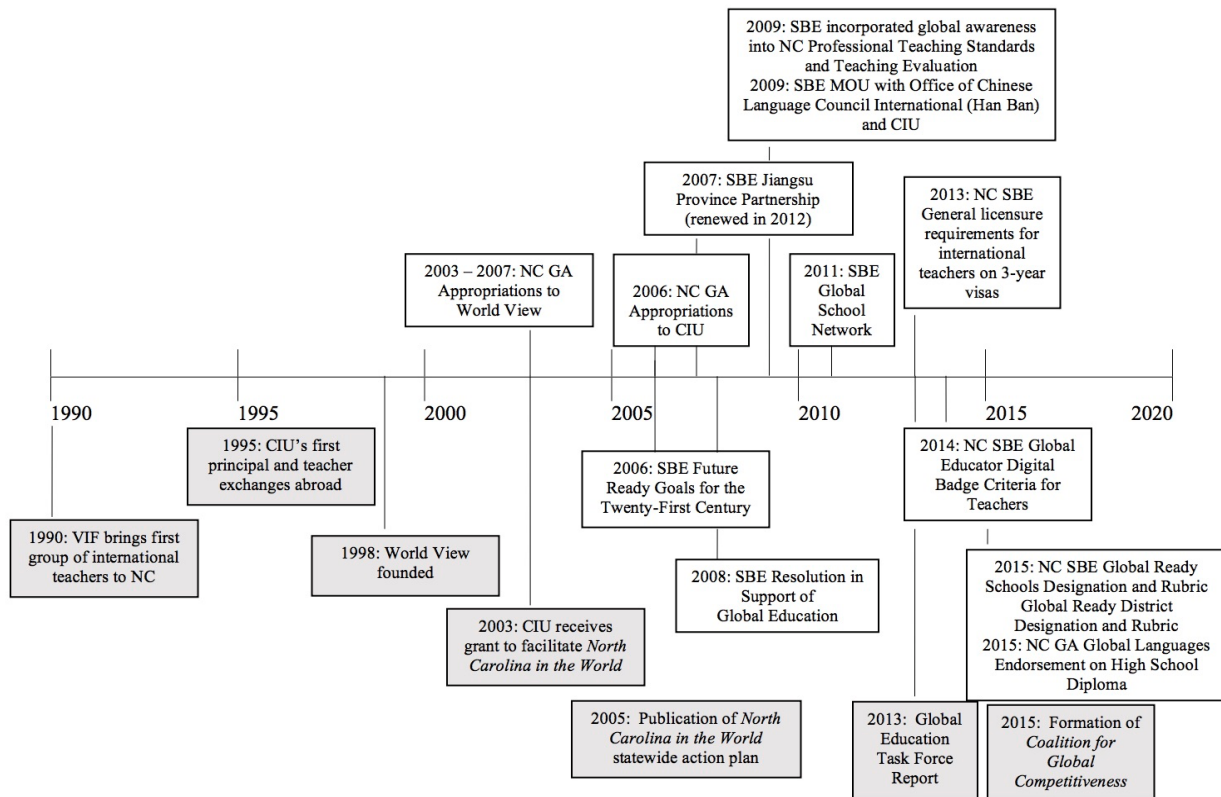
Global education policies have been adopted incrementally in North Carolina from the early 2000s through 2015. These policies have entailed funding for school and professional development programs and recognitions designed to build systemic capacity of teachers, schools, and districts to educate students with the knowledge, skills, and attitudes to compete, collaborate, and communicate in a global society. Figure 2.4 illustrates a timeline of these policies (delineated in the white boxes) along with additional global education policy activities (delineated in shaded boxes).

Over time, the content and location of state global education policy shifted, from appropriations from the General Assembly to global education recognition systems at the State Board of Education (SBE). In the early 2000s, global education policy largely entailed General Assembly appropriations to individual external partners. In 2003-2004 and 2004-2005, the General Assembly appropriated \$250,000 to World View and in 2006 provided CIU an

appropriation of \$200,000 to coordinate statewide global education efforts. Around 2006-2007, global education policies shifted from the General Assembly to the SBE. Here, policies included resolutions in support of global education, partnerships between the SBE and international provinces and countries, licensure requirements for international teachers, and recognitions for which exemplary teachers, schools, and districts could choose to apply. As described next, the policy core and deep beliefs of coalition members successfully made their way into these adopted state policies.

Figure 2.4

*Timeline of North Carolina Global Education Policies*



## **Policy Core Beliefs Reflected in SBE Policies**

Adopted SBE policies embodied the policy core beliefs of the global education coalition, centering on building local capacity for global integration, language programs, international partnerships, and teacher training. For example, the 2008 Resolution in Support of Global Education resolved that “students need language and culture studies,” “students need interaction with international communication and technology,” and “every education professional will receive preparation and professional development in the interconnectedness of the world” (SBE Meeting Minutes, 4/2/08). The 2009 MOU between the Office of Chinese Language Council International (Han Ban), CIU, and the SBE aimed “to develop 45 Chinese language programs and North Carolina-China school partnerships” (SBE Minutes, 2/3/09), reflecting policy beliefs in international partnerships and language learning. The 2014 Global Educator Digital Badge (GEDB) incorporated two policy beliefs as well: global integration and teacher training. It recognizes educators who receive 100 hours of global education professional development (i.e., teacher training) and complete a capstone project that “must demonstrate the educator’s ability to embed opportunities for students to frame, analyze, communicate, and respond to issues of global significance through instructional practices that meet the content standards and foster students’ global awareness” (i.e., global integration).

The two most recent global education policies the SBE has adopted, the 2015 Global Ready School (GRS) and Global Ready District Designations (GRD) embodied all four policy core beliefs. As one participant stated, these designations were “the linchpin of it all.” Each designation consisted of 10 attributes that covered teacher training (i.e., Attribute 3: professional development on embedded global education curriculum), global integration (i.e., Attribute 4:



embedded global themes and problem-based learning is evidenced throughout the curriculum), language learning (i.e., Attribute 7: leading-edge language instruction is available), and international partnerships (i.e., Attribute 5: face-to-face and virtual global learning experiences are available; Attribute 10: partnerships for global education opportunities extend beyond the classroom walls). The GRS, GRD, and GEDB were not mandated nor did schools receive any fiscal inducements for applying. Rather, the SBE “applauded,” “encouraged,” and “supported” teachers, schools, and districts to participate in structured global competence- building activities. In particular, participants described the GRS and GRD designations as “roadmaps” and “something really operational, with ways to evaluate with rubrics how you make progress.”

### **Deep Beliefs Reflected in Adopted Legislative and SBE Policies**

Deep beliefs revealed themselves in adopted global education policies as well, including economic, cosmopolitan, and transformative. First, adopted policies were often framed in economic terms. Contingent upon receiving appropriations from the General Assembly, CIU had to follow these directives:

In collaboration with the State Board of Education and the Department of Commerce, the NC Center for International Understanding shall develop a plan to ensure that public K-12 international education effort such as teacher and student exchanges, curriculum development, and other initiatives for students, teachers, and administrators are focused on key countries and regions of strategic economic interest to North Carolina (SB 1741, Sec. 9.3, 2006).

CIU’s subsequent legislative report, *North Carolina in the World Report 1: Aligning K-12 International Education Efforts with State Economic Development Priorities* (2007) stated that global education initiatives should prioritize countries and regions “with strong economic ties to North Carolina and those with growing importance on the world stage.” Their list included Brazil, Canada, Europe, India, Japan, Mexico, the Middle East, Russia, South Africa, South

Korea, Southeast Asia, and Turkey. Notably, the countries with which the NC SBE formed MOUs were on or in a region on CIU's list, including China and Spain.

Likewise, the Global School Network, which provided recognition for school districts engaged in global work and spaces for conversation between school district and business leaders on how to improve global education practices, was intentionally designed "as a good connection between education and the Department of Commerce." The preamble to the 2011 Joint Resolution for Global School Network in part read:

WHEREAS, the NC SBE, along with the North Carolina Department of Public Instruction, the North Carolina Department of Commerce and the North Carolina Business Committee for Education, has made international education a priority in a shared mission to ensure that *North Carolina can develop the nation's most competitive workforce and best business climate for job growth*; and WHEREAS, providing integrated opportunities for global and international education through the expansion of programs such as teacher exchange, international-themed schools, enriched core curriculum, learning partnerships with other countries, and world languages *will better prepare students to be competitive candidates for college and to be prepared for skilled careers in North Carolina.* (italics added for emphasis)

The SBE's 2006 Strategic Plan likewise framed global education in economic terms, pronouncing that "NC Public Schools Will Produce Globally Competitive Students." An external partner explained that this global guiding mission of the SBE "wasn't exactly what we wanted... It was globally competitive and we wanted it to be competent. But they [SBE members] had said there would be backlash if they said competent. Competitive got us a little farther along the road." As this final quote suggests, the political climate necessitated policies to be framed in economic terms, even if coalition members held other deep beliefs.

However, the recently adopted GEDB, GRS, and GRD policies aimed at classroom, school, and district implementation have reflected transformative and cosmopolitan deep beliefs. For example, there is only one mention of global competitiveness in the implementation guides and rubrics for the GEDB, GRS, and GRD designations. Instead, these policies emphasize

learning that incorporates local diversity and preparing students to solve global issues.

Reflecting a transformative belief, Key Element 5.2: Local Global Connections of the GSR rubric includes “the school's student body heritage is intentionally mapped into curriculum and intentionally highlighted throughout the year.” Likewise, the Teacher Professional Standards identified in the GEDB implementation guide to which teachers could align their professional development plan included: “teachers embrace diversity in the school community and in the world” and “teachers recognize the influence of race, ethnicity, gender, religion, and other aspects of culture on a child’s development and personality.” Similarly, the GRD implementation guide addresses the concept of “the global community,” which the guide defined as “culturally and ethnically diverse communities in the local area and across the globe.”

Other concepts that the GRD implementation guide addresses embody a cosmopolitan belief. It emphasizes “global service” as “an opportunity for us to understand other's cultures and problems, while at the same time actively addressing, at a community level, some of the pressing local and global issues facing others” and “global citizens” who have “responsibilities to each other and to the earth itself.” This trend confirms Parker’s (2011) assertion that beliefs tend to focus more on diverse student populations and cosmopolitan citizenship the closer they get to schools themselves. It also implies, as one participant stated, that over time economic arguments may have paved the way for cosmopolitan beliefs to percolate into policies.

In sum, the string of enacted policies enumerated in Figure 2.4 reflect the slow but steady progress that North Carolina had made in turning global education policy and deep beliefs into policy enactment in the inaugural years of the 21<sup>st</sup> century. This was also achieved throughout volatile economic and political times. The following section explains the strategies, or what the AFC refers to as “guidance instruments,” that helped make global education politically viable

amidst volatility.

### **Global Education Guidance Instruments**

Interviews and documents pointed to three comprehensive guidance instruments, or strategies, that the global education advocacy coalition used to achieve their policy objectives: incremental will-building, setting the vision and following through, and creating hubs. These are illustrated in Table 2.3.

#### **Incremental Will-Building**

The most widespread and comprehensive of guidance instruments used, participants described multiple ways in which they slowly built will for global education across levels of governance and across constituents. Will-building strategies included creating coherence and fostering vertical and horizontal support.

**Creating coherence.** First, coalition members built will by creating coherence between global education and the external economic environment and other education subsystems in North Carolina. North Carolina has long been identified as having a traditionalist political culture wherein economic elites have largely ruled state-level politics (Elazar, 1984). In recent years, globalization has drastically changed the economic landscape, with textile and furniture industries moving overseas and multinational companies moving into North Carolina. These two political and economic conditions came in play as over half of participants interviewed reported using an economic, or “dollar and cents” argument, to “sell” the idea of global education to state-level policymakers and local education agencies.

Coalition members across all sectors shared that they “framed” global education as helping students “have a better chance to get a career” and “our employers need this.” Multiple

external partners stated that this “framing” was especially viable in forming partnerships with conservative districts. An external partner shared:

I would have made an assumption that there were some areas that were more conservative where global education might be questionable, like why aren't they learning about the place they live and anxiety around changing demographics. I think the arguments you use for districts like that are around global competitiveness... That tends to be the approach you take in an attempt to get them on board.

A business sector coalition member likewise used an “employers need this” narrative to “make the case” for global education in rural communities:

Most easily understood, in Tarboro, the biggest manufacturing employer is Japanese. In Morrisville the biggest factory and big employer is Japanese. In New Bern, the biggest manufacturing company is a German company. I'm deliberately referring to small, rural [towns], where maybe it escapes people, but we have a lot of pretty sustainable, well-paying jobs that are here because of foreign investments.

Coalition members also intentionally framed global education as helping to entice international companies to settle in North Carolina and encourage North Carolinian companies to export abroad. As an SBE member shared,

If we can show a return on investment, we can probably make a better, compelling case for why it's important... I think if we could have more stories that talk back to economic prosperity, that seems to be a good way to drive change. Follow the money, right.

Coalition members also stressed that having this narrative come directly from the mouth of employers was “a huge strategy.” An external partner explained, “We knew that if it just came from education it wouldn't go far... So business people would tell policy people, ‘I've got to have people that are educated about the world. That's what I need to have for my jobs.’” A national advocate summarized the importance of what she labelled “code-switching,” saying “You have to craft your argument to the method that people are most likely to hear it.” This is emblematic of recent ACF literature that suggests narrative discourses play a role in enticing

people into coalitions and in mobilizing public opinion to influence policymaker actions (Fischer, 2003; Shanahan, Jones, & McBeth, 2011).

In addition to framing global education to align with the economic environment, coalition members also created coherence between global education initiatives and the standards-based accountability education subsystem in North Carolina (e.g., the NC Standard Course of Study, Teacher Standards and Evaluation). This is consistent with coalition members' policy belief that global education should be integrated into existing courses and curriculum. For example, a DPI official explained of the Global Educator Digital Badge (GEDB):

It is very closely aligned with the educator evaluation system. This is a seamless thing; it is not an add-on... What they're doing already around the evaluation and observation, they're doing with this process as well... The administrators feel that they can totally support it because it's not taking away from what they're supposed to be doing.

Another DPI official agreed that "The whole notion of infusion of global education as a part of the strategy to teach the standard course of study certainly has potential to be the most successful." Multiple external partners similarly viewed alignment with the standard course of study as an important "sell" to school districts and educators. As one external partner explained,

This integrated approach has been highly effective because we're solving multiple priorities with global as the context, but you're not having to shut down your school and reopen it. You can integrate it into the things you're already doing. I think that's been critical because it doesn't seem so overwhelming.

Furthermore, a handful of participants also created coherence with global education and Career and Technical Education, school choice, and STEM, suggesting that, as a national advocate stated, "global education can be integrated into everything... if that message is communicated, I don't think that there's a ton of opposition."

**Fostering vertical and horizontal support.** A second way in which coalition members incrementally built will was by garnering top-level support of influential state policy leaders

while simultaneously building bottom-up support of school districts, which one external partner labeled “vertical and horizontal support.” As he defined it,

The vertical is you have policy leading it and us supporting you with making it happen. The horizontal is you have got other superintendents that are doing this and being successful who you can point to and say, “See, it worked for them, it will work for me too.” Those were big successes for us, and the policy.

Vertical and horizontal support was intentionally built through the framing tactics described above and by taking policymakers, education leaders, and educators on educational programs abroad, disseminating reports from those trips to influential leaders, and highlighting pockets of excellence found in global education programs initiated from the bottom up in local districts.

One way that “vertical” top-down support was built was through international educational programs. Since 1993, CIU has annually facilitated international trips with bipartisan delegations of legislators, SBE members, leaders of influential groups, and educators. The former director of the Public School Forum of North Carolina was so inspired by an early trip to Japan, he partnered with CIU to initiate the “Learning From” series. For over a decade, this program brought delegations of legislators serving on education and appropriation committees, SBE members, DPI administrators, heads of educational agencies (e.g., North Carolina Association of Educators), school of education representatives, superintendents, and funding agencies to China, Denmark, England, Finland, India, Ireland, Japan, the Netherlands, Singapore, and South Korea. Program leaders and program participants explained that it was “absolutely intentional” who was invited to attend those trips. Criteria included those who held positions of political influence (e.g., heads of legislative education committees) or who had not had international experiences. One program leader explained the strategy:

When we were selecting legislators for all of our programs we tried to take people who were against this. As educators you don’t push your own agenda. You just exposed them to it and, and every time you exposed them to it they got it.

In addition, CIU and the Public School Forum intentionally targeted state policymakers from both sides of the aisle in efforts to form bipartisan consensus around global engagement. As another program leader stated, “number one had to be bipartisan; we tried to get usually four to six legislators in both the House and Senate.” This was particularly important for making global education politically palatable in a highly partisan state.

Multiple participants who attended these trips, including education officials and legislators, highlighted their effectiveness in “raising awareness,” “educating current and future leaders in North Carolina about the need for global sensitivity,” and “forcing you to have a different perspective.” For example, an SBE member shared the new cosmopolitan perspective gained from an experience abroad:

When I got back [from my first trip to China] I realized there are many things that bind us together across the planet that are the same... We [the SBE] had been talking a lot about how our kids need to be globally competitive. But what they talked about in China, they talked a lot about collaboration. It really is about collaborating across the planet. [If there's a nuclear energy accident in another part of the world, it has the potential to affect the entire planet. How we solve those problems needs to be the entire planet of people who are world citizens.

Furthermore, coalition members described a “carry on effect” of policy leaders who went on CIU trips subsequently supporting other CIU global education programs.

Another key to garnering vertical support was by following up international programs with reports and summits. For example, after each “Learning From” delegation, the Public School Forum and CIU disseminated a report to all legislators with key education policy recommendations based on what the delegation learned from the host country. A coalition member explained that when the Public School Forum and CIU disseminated these reports, they “normally would hold a conference or dinner meeting and invite education committee members, and members of the State Board... the people that were closest to the policymaking individuals.”



While CIU played the largest role in strategically building top-down support of policymakers through educational international experiences and policy reports, over the past two decades all three external partners (CIU, VIF, and World View) have built horizontal support across school districts by creating pockets of successful global education programs. Each organization has done so by reaching out to individual districts to form partnerships with principals and superintendents. A DPI official reported, “We’ve got great global education partners: World View, the Center for International Understanding, VIF International Education. We’ve had this fundamentally in North Carolina for a long time...It’s always been the LEA decision to do these partnerships.” To date, World View has over 145 partnerships, CIU has placed Chinese guest teachers in 46 schools across North Carolina, and VIF has over 200 global school partnerships in North Carolina and other states.

These partnerships have provided “horizontal support” across school districts, allowing superintendents to help each other as they embarked on global initiatives. An external partner explained that many of VIF’s programs got started in one school district with a particularly forward-thinking superintendent. This superintendent “gave us [VIF] the opportunity to show people what it could be. We were able to develop some very strong models there. Then those models hosted lots of administrators... They could easily get to [district name] and see global education in action.” Another external partner explained the intentionality behind building support across superintendents when they started the Chinese language program:

The biggest thing that supported us was having multiple superintendents working together and supporting each other. We clustered them together so there would be districts that were contiguous. So if this guy was having trouble and this one was not, then she could support him, and they would have this cover in their own communities. That to me drove things forward faster than anything else.

A superintendent concurred, stating, “Places where nobody thought this kind of work was going to occur emerged as real leaders in [global education]. Now that’s given some momentum to show other districts that they can do this too.”

In addition to building supportive networks across school districts, external partners and school district partnerships served as exemplars of best practices, showing policymakers the possibilities for global education reform and providing suggestions of what should be incorporated into policy to make implementation feasible. A national advocate explained

Our network of international study schools are examples of what a global education looks like ... Those have been like innovation labs for us. We used the data from those schools to show that those students are graduating at a higher rate because students are more engaged. We used that to make the case at the state level... To have some of those best practice examples has really been a key part of advocating to take things to statewide scale.

A school district superintendent who partnered with CIU, VIF, and World View likewise shared, “I would talk with legislative groups, State Board of Education groups, the governor’s office. I not only talked with them, but they came and saw things in action. It wasn’t unusual for one of our representatives or senator to schedule a group session so they could see just what we did.”

The very formation of the GEDB, GSR, and GRD designations epitomized the vertical and horizontal support that coalition members sought to create. The vision for these SBE policies came top-down from the SBE’s commitments to global education delineated in the *Final Report of the State Board of Education’s Task Force on Global Education*, while the details of each policy were vetted by the state external partners and representatives from local school districts. A DPI administrator explained the process, which all external partners confirmed:

I held meetings just looking at the policy language [with] the global education partners because they were already working with districts. The idea was you want to make sure that the policy does not limit them, and allows them to continue to choose according to what it is they need... That flexibility has to remain there... When we developed the [GRS and GRD] rubrics, the global education partners helped in developing the overall

framework ... The first consensus was it has to come from here [the Task Force Report]. Then it was, how do we do it? So that was several meetings with them thinking about it and then actually going back to their organizations and/or their stakeholders to get feedback. That's one reason why it worked so well. These folks had already done some implementation, they had already worked with the partners on implementation, they knew it was working for them, and they knew what they wanted to change.

As this quote shows, the SBE provided the guiding framework and local district leaders and the external partners already implementing global programs defined the details of the policy.

### **Setting the Vision and Following Through**

In addition to incrementally building will, a second major strategy that two-thirds of global education members discussed was setting a vision and making an effort to follow through. Education leaders interviewed underscored the importance of “a well articulated vision with a plan to get there.” As one SBE member explained “my job is to develop a vision that’s so compelling that you want to play, that you want to be part of what we’re doing. Then I need to find a way to support you to do that.” In North Carolina, visions for global education have largely come from a) SBE strategic plans and b) committee reports, wherein coalition members came together to recommend action steps for global education. Reports included *North Carolina in the World: A Plan to Increase Student Knowledge and Skills about the World* (2005), *Creating Internationally Competitive Schools* (2006), *Preparing Students for the World: Final Report of the State Board of Education Task Force on Global Education* (2013), and *A World of Opportunity: North Carolina Blueprint for Global Engagement* (2015). (Appendix G describes these reports in detail.) Common across these visions have been attainable objective and creating new positions or committees to oversee implementation.

**Attainable goals.** In 2006, the SBE first placed global efforts as a priority in their strategic plan. Two of the five goals in the strategic plan had explicit global aims. Goal 1: Globally Competitive Students stated “every student is expected to excel in rigorous and relevant

core curriculum that reflects what students need to know and demonstrate in a global 21st Century environment, including mastery of languages, an appreciation of the arts and competencies in the use of technology.” Goal 2: Globally Competent Teachers stated that “every professional receive preparation in the interconnectedness of the world with knowledge and skills, including language study.”

Multiple participants from government and external agencies reported that by 2011, it had become clear that the global components of the SBE vision had not been realized. As one external partner stated “The State Board adopted priorities that included global, but then didn’t really define it for the state or put anything into place to help teachers address it.” Because of this, the SBE led a Global Education Task Force. A DPI participant explained,

When the State Board of Education back in ‘09 and ‘10 determined that we were not meeting the mission and vision statement of producing globally competitive students...they pulled together a task force to look at specifically what’s happening and what is that we need to be doing in terms of policy implementation and practices.

The Task Force recommended five global education commitments, with 13 sub-commitments (listed in Appendix G).

According to participants, and evidenced in the report itself, this report emphasized the importance of “having a coherent document with actionable items” (SBE Minutes, 1/9/13) and being able to “turn this vision into a reality” (SBE Task Force Report, 2013). The report’s conclusion charged DPI and external partners with the responsibility of “crafting an implementation plan for the following actions, and reporting that plan back to the State Board of Education after receiving this report,” to which the State Superintendent agreed. DPI administrators, policymakers, and external partners described the commitments as “focused on the things that have had started to work across the state potentially at scale,” stressed the importance of following through on sustainable strategies, and lauded the SBE’s effort to make

global education “concrete.” The 2015 revision of the SBE Strategic Plan incorporated two of the five global education state commitments: teacher supports and tools and new school models. Under “Goal 2: Every student has a personalized education,” Objective 2.3 read “Increase the number of schools designated as STEM or Global Education Ready.” Under these objectives, the strategic plan set measures for the number of designated Global Ready Schools (Measure 2.3.1) and number of teachers earning global badges or micro-credentials (Measure 2.3.2).

In addition to the goals and visions set forth by the SBE, North Carolina has also benefited from statewide coalition vision-setting reports facilitated by CIU: *North Carolina in the World: A Plan to Increase Student Knowledge and Skills About the World* (2005) and *A World of Opportunity: North Carolina Blueprint for Global Engagement* (2015). Each laid out a strategic plan with measurable objectives for global education (delineated in Appendix G). In 2005, the *North Carolina in the World* report became what many participants described as the first statewide K-12 global education action plan. Each objective in the plan had a clear measurable outcome. For example, Objective 1 stated that “by 2012, all teachers will earn at least one renewal credit from activities with an international focus” and Objective 6 stated that “By 2008, every school district will have at least one international school partnership.” Approximately 3,000 publications of the strategic plan were “widely distributed” across stakeholders that could shape implementation, including legislators, SBE members, deans of colleges and schools of education, superintendents, and educators.

The Coalition for Global Competitiveness strategic plan published ten years later also contained measureable “prospective indicators” such as “K-12 foreign language enrollment” and the “Number of schools and districts globally badged/certified.” Coalition members further emphasized that the approximately 200 people invited to the unveiling of the 2015 report were

those “who we imagined could theoretically move this statewide plan forward.” This report also emphasized next steps for effectively and sustainably “working together towards the shared vision expressed in this document.”

**Creating new positions and committees to oversee implementation.** Coalition members took intentional action to follow through on the global education goals they set by creating new positions to “shepherd” implementation. The *Final Report of the State Board of Education’s Task Force on Global Education* presented the five state commitments to global education in January of 2013; by August, the NC DPI had appointed a new Special Assistant to Global Education responsible for implementing them. A coalition member described the importance of this position, “One of the big priorities and a big success was institutionalizing global education. What that meant was DPI had to not only say this was important but put a position behind it.” The SBE also created a global education special committee to oversee implementation of the five state commitments. This committee met on a consistent basis and regularly provided updates during whole SBE meetings. As one external partner explained, the Task Force had “morphed into the special committee, which means [SBE members] still prioritize it. Without that committee they wouldn’t address the issues of it.”

In 2014 and 2015, the SBE and DPI oversaw the formation and adoption of the GEDB, GRS, and GRD designation policies. These directly responded to task force commitments: Commitment 1.2: Implement an SBE-recognized badging process for teacher and administrator global professional development and Commitment 4.2: Institute a Global-Ready designation for schools and districts (GRS Application, 2015). External partners CIU, VIF, and World View confirmed that these policies “all came from the global education task force report and those commitments.” As one SBE member shared, “We wanted to not just have recommendations that

were on the shelf, so making sure that there were actually deliverable things that happened as a result of the recommendations was important, global badging being one example.”

CIU followed the same approach of hiring new personnel and forming committees after unveiling the *North Carolina in the World* statewide strategic plan. They hired a new staff member to have “ultimate responsibility for each of the recommendations” and “come up with a detailed plan and then decide how to work to make that happen.” Participants also described “periodic meetings” in the first two years after the report was unveiled. However, a handful of external partners admitted that these objectives were difficult to implement because of the complexity of the plan and the lack of teeth behind it. As one external partner shared, “we didn't have staffing nor the mandate to make other people do anything. They had to have been sufficiently motivated by the experiences and the discussion.” Yet a coalition member who played a prominent role in the internationalization of teacher education component of *North Carolina in the World* still stressed the value in creating committees:

The best campus efforts in the internationalization of teacher education involve having a plan and having somebody responsible for seeing that that plan isn't just a piece of paper. We developed a new standing committee of the faculty of the College of Education called the Internationalization Committee, charged with developing a plan and bringing it to the faculty for approval, and then supporting the faculty in the implementation of that plan.

This quote embodies the majority of participants' supposition that equally important to intentionally setting the vision was creating structures to turn these visions into reality.

### **Creating Hubs**

Along with incrementally building will and setting the vision, a third guidance instrument for enacting global education policy that two-thirds of participants described was creating and participating in state and national global education hubs that brought together networks of policymakers and practitioners committed to global education. In continuous improvement

research, the function of a “hub” is to identify and bring together relevant stakeholders, build consensus on important problems and promising solutions, devise and communicate how the network will function, maintain itself, and expand, and initiate and oversee network activities (Bryk, Gomez, & Grunow, 2010; Goldsmith & Eggers, 2004). For global education in North Carolina, two entities have served in this “hub” capacity: 1) CIU in orchestrating *North Carolina in the World* and the *Coalition for Global Competitiveness* at the state level and 2) the Asia Society for overseeing the national State Network for Global Education. These organizations have brought together global education advocates and stakeholders to create consensus on global education visions and open up lines of communication to share information, ideas, and resources.

**Bringing stakeholders together.** The majority of participants interviewed have pointed to CIU as North Carolina’s “umbrella organization that is helping to bring together different stakeholders in North Carolina who are all interested in global engagement.” For example, a legislator described CIU as “really crucial” in convening coalition members and investing them in the importance of global work. A university administrator similarly considered CIU a critical “point entity” to help “shepherd the process.”

From 2003 through 2009, CIU facilitated the *North Carolina in the World* project, which created structured opportunities for K-12 global education networking between formally disparate policymakers, practitioners, and external partners. During the first two years (2003-2005) the *North Carolina in the World* committee met to come to consensus on a statewide vision and objectives. An external partner explained: “One of the original seeds for starting to get groups on the same page was North Carolina in the World. CIU took the lead...and that was the first time that they had groups working on the same priorities and agenda for global together.”



Participants specifically emphasized the importance of bringing policymakers and practitioners into the same network. An external partner emphasized about the project:

The interaction between practitioners and the policymakers, both on the State Board and in the legislature, was a valuable thing. That in my opinion is what led the groundwork for the achievements of today ... That's one of the big takeaways, by pulling together these cross-sectional groups, people were now talking to others who were doing the same kind of thing and it created an energy that built on itself.

With the *Coalition for Global Competitiveness* that first convened in 2013, CIU once again positioned themselves as a ‘backbone organization’ for “global-facing organizations” in education, commerce, and agricultural sectors. The purpose of this coalition was, in the words of one member, to “pull together all the global organizations that have a stake in making sure North Carolina’s a factor” and to create a systematic statewide global engagement strategy. As written in its report *A World of Opportunity: North Carolina Blueprint for Global Engagement* (2015), “The Blueprint is built with the belief that coordination among disparate education, economic, cultural, and government efforts will amplify the impact of all of our work and position North Carolina as a great place to invest, study, work, visit, partner, and live.”

Since 2002, representatives from CIU and DPI have also actively participated in a national global education hub: The State Network for Global Education, annually convened by the Asia Society and the Longview Foundation. This hub has been a “loose network” of 26 states, with 10 to 12 attending the annual meeting in any given year. Their goal has been to “get folks together around implementing international perspectives into K-12 education.” While this hub has not created specific objectives for global education, it has provided a space for states such as North Carolina to create their own plan. One national advocate explained, “We brought these [state] teams together to help them think through a plan or strategy as they were starting to implement this work.” A DPI official affirmed that “Asia Society launching a global education

initiative was incredibly helpful to us because we had a national network of peers and supporters.”

**Opening lines of communication to share information, ideas, and resources.** In addition to convening global education stakeholders, a second purpose of the hubs was to open communication channels to share information, ideas, and resources across invested stakeholders. Coalition members involved in *North Carolina in the World* commented that “Some of the underlying goals were just connecting people and letting people know what you’re doing and if they want to be a part of it” and “that was really our role, more than anything else, connecting people who had common interests and helping educators figure out what those resources were.” This also allowed organizations to publicize one another’s efforts. As an external partner illustrated, “If we know that something is happening, [for example] World View's doing a symposium in the Fall, we want to try to let people know. We try to promote that out to others who might not have seen World View's promotion of it.”

Creating lines of communication and information sharing across state-level education governing and administrative agencies was the primary function of the State Network for Global Education. A network organizer depicted the network’s role as “convener, collaborator, and resource provider.” She further explained, “We shot out information and we also paired up states that had similar things in common that they were wrestling with, and we gave them the opportunity to connect with one another.” Another network organizer likewise described their role as “providing technical assistance,” for example, providing states with models for what other states were doing. A participant in the state network explained, “We exchange ideas and give feedback. Some states copy the other states’ initiatives, which is fine with permission to move along with that.” A different state network participant pointed to moral support as another

important resource the hub shared, saying “It’s really exciting that we had those resources around. Now it’s a matter of letting people know you’re not in this by yourself.”

In sum, coalition members reported using a comprehensive set of guidance instruments to push global education policy forward, including incrementally building will from the top-down and the bottom-up, setting a vision and following through, and creating hubs. The result has been the creation of state policies that embody the shared policy goals of the coalition. However, as the next section reveals, obstacles and opposition have slowed the speed of policy adoption and spread of implementation.

### **Opposition and Obstacles**

The majority of participants reported no organized opposition to global education policies at the state level. Participants commented, for example, “I have not really seen any organizations that have mounted an effort to actively oppose global education,” “there really haven't been any major scuffles [or] disagreements when it came to any sort of global education thing,” and “it’s considered a good idea by just about everybody I’ve encountered.” Yet, at the same time, many participants emphasized frustration or disappointment that oppositional attitudes and the obstacle of inertia prevented global education becoming embedded into K-12 education across all of North Carolina’s school districts. As participants commented, “I’m encouraged by the pockets of excellence.... discouraged by the deserts” and “it’s not moving as fast as I would like.”

#### **Oppositional Attitudes**

First, while the conservative backlash against global education in the 1980s and 1990s has subsided (Gaudelli, 2003; Tye, 2009), such sentiments have not entirely disappeared. “Anecdotal” or “bits and pieces” of opposition in North Carolina reflected xenophobic attitudes

and fears. Participants reported that this in part stemmed from economic globalization that took jobs overseas, a rise in immigration, and international terrorism.

While coalition members used economic globalization as a discursive tool to build will for global education among stakeholders, six participants also stated that economic globalization was a reason why some people opposed anything global. As a coalition member shared,

On some level there are still people who have seen the rest of world mostly as the people who shuttered the textile mill. That's who the enemy is. My life is not as good as it used to be and it's somebody else's fault: China, Malaysia, Vietnam, or wherever it was that that textile mill moved. That's what they see about the rest of the world.

Another participant agreed that “a lot of people have their frame of reference...they would refer to it as ‘the Chinese taking our jobs’ or ‘the Mexicans taking our jobs’...I think that’s a mindset that exists in a large part of the state that probably weighs against a lot of enthusiasm for global education.”

Participants also brought up xenophobic attitudes against immigrants and religious minorities, particularly Muslims. As one DPI official stated, “Another big issue is really the xenophobia we see happening in our nation. The whole conversation about immigration and undocumented people. All of those things can work against us having a focus on the infusion of global understanding.” Illustrating this point, an external partner shared the following challenge:

In some parts of the state there's still a mindset that global [is] godless.... I've heard from teachers who come from a western county, [the teachers] pray together at school...and more than once they had to pray that they won't go to hell because they have to teach that Islam even exists as a religion. Not that they're prophetilizing, but that they even have to expose their students to other world religions. So that's still happening in our state.

In addition, three participants specifically pointed to the Han Ban Chinese language partnership as riling up nationalist sentiments at the local level. They described individual cases wherein community members accused the Chinese language program of teaching communism and creating communist spies, thus reflecting xenophobic attitudes.

Participants also considered isolationist attitudes an impediment to global education. Five participants specifically pointed to instances wherein individuals accused global education of being a UN conspiracy to create one world government that would take over the United States. This sentiment was expressed mainly through sporadic posts on social media. For example, a national advocate shared, “There are definitely people out there who are posting comments on our website about how this is all a UN conspiracy to have global citizens instead of U.S. citizens and it is anti-American.” She did add, however, that “we haven’t seen as much lately. It’s usually different web comments. It’s not people out picketing or things like that.” Underscoring other embodiments of isolationist attitudes, other coalition members explained that one hurdle to overcome was “a division of opinion about whether the rest of the world exists.”

While these “nationalist American dominance,” “isolationist,” and “Donald Trumpish” attitudes still existed in pockets, those coalition members who had advocated for global education for the last decade noted that attitudes had improved. For example, one participant stated he hadn’t recently heard anecdotes of local school board opposition to Chinese language programs. Furthermore, three participants reported that “the climate has improved in the last decade” because they used to not be able to even use the word global without backlash from the Christian right. This suggests a shift that oppositional attitudes are moving towards, as one participant stated, the “fringe.” Yet, alluding to changes in the governing coalition – specifically a) the shift to a Republican supermajority in North Carolina state government and b) the Republican primary for the 2016 presidential nominee, whose candidates have contentiously brought up wall-building and screening to keep Mexicans and Muslims out of the country – one participant suggested,

Getting past this time in our state's history and the country where we have this isolationist trend, the 2016 election, both on a state and national level, will probably tell us whether

we are going to move very, very slowly or whether the pace will pick up on back to a global understanding movement.

### **Obstacle of Inertia**

Though participants were somewhat split on whether oppositional attitudes would continue to move towards the fringe or back towards the center of policymaking, there was large consensus around the obstacle of inertia in passing substantive global education policies. This is reflective of the “stasis” school of thought in understanding education policy reform, which argues that “the American political system possesses inertial forces that uphold the status quo” (Cohen-Vogel & McLendon, 2009, p. 736) and causes any policy change to occur incrementally (Lindblom, 1965). Although policymakers generally supported the idea of global education, in the words of one participant, it was “nobody’s emergency;” therefore, it took a backseat to other “crises.” An external partner shared that “people know it’s important but it’s not a crisis. You’re not going to get superintendents and principals who lose their job because of it.” Another external partner similarly observed that there was “no opposition but no explicit support. By not acting in a proactive way to push global education, in some ways that’s a lack of support. But no one’s been trying to tear down things either.”

Overwhelmingly, participants pointed to a lack of funding as both a sign and a cause of this inertia. Coalition members did enjoy intermittent funding streams from the late 1990s through 2009. This included foundation funding for international programs, internationalizing teacher education, and legislative summits, a \$25,000 award from the Goldman Sachs Foundation which provided “seed money” for *North Carolina in the World*, and legislative appropriations for external partners. However, external changes to the subsystem, including the economic recession in 2008 and the decline in the state education budget since the Republican

supermajority took office in 2013 “slowed momentum” for global education. As a participant observed,

There's certainly an understanding on the part of a large number of people [in state government] that it is important for our students to be able to be globally competent, but I don't think that there is a big priority on putting funding behind that. Right now they're figuring out can we fund teacher's assistants for public education.

Even though the SBE set new commitments and policies in the last three years, multiple participants pointed out that there is not enough money behind it to successfully scale language programs and professional development focused on global competency. This led two participants to refer to global education as “an unfunded mandate” or “an unfunded request.” As one participant explained of the GEDB:

Right now there's nothing beyond the teacher's own interest to encourage them to do [the GEDB]. There's no extra money. There's not even necessarily money in the district budget to pay for the professional development, so you may have to come up with your own funding to pay for the professional development... There's not a monetary incentive, so, technically it is an unfunded mandate, right? I think the General Assembly's idea is, “That's great, but we don't have any money either.”

Similarly, another participant explained described the general perspective of the UNC Board of Governors as “it’s generally a good idea to get better connected to the rest of the world as long as it doesn’t cost us any money.”

A second contributor to inertia that participants pointed to was the issue of competing educational priorities, particularly testing and accountability. A national advocate suggested that one of the challenges for global education was the “crowded landscape for political agendas.” An external partner further stated, “There's definitely a piece opposing global education that I have other bigger priorities... If we are not making sure that kids know how to read, write, and do math, this is an extra. This is nice, but it's not a priority.” A district superintendent agreed that all school systems and educators suffered from “one more thing” syndrome, and the obsession with

standardized tests created a cultural not conducive to global initiatives. An external partner elaborated,

The pressure to focus on test scores only and not get diverted to something like global education is huge on school administrators. A lot of people view this as a sideshow, not something essential ...As long as the climate is what it is what it is right now and the pressure on schools is obsessive about test scores, I think it's very difficult to generalize in any large scale way.

Although a lack of fiscal resources combined with competing priorities stymied the rate of growth for global education in the state, advocacy coalition members remained positive that the global education seed planted over a decade ago was now deeply rooted. As one external partner summarized,

Teachers have had so many different things kind of thrown at them left and right with standards and testing and budget cuts. It's tough days but we have a core that really believes in it, and if we can keep that State Board core a priority there for global, I think we just get through it.

A district representative similarly acknowledged that while the SBE did not have resources to put behind global education,

They've made a really strong push and effort to show the value in it. There are always going to be 'put your money where your mouth is' kind of things. But I think that we're making progress...The fact that the conversation is so alive and well means that we have the capacity [for global education] to happen everywhere in the state of North Carolina.

These quotes suggest that though external subsystem changes provoked challenges for global education, the global education vision remained stalwart.

### **Discussion**

This critical case for understanding global education policy change at the state level points to how policies related to integration of global content and perspectives in K-12 content areas, international partnerships as vehicles for global learning, language learning programs, and training teachers to prepare students for a globalized society can successfully be enacted amidst



competing priorities and oscillating political environments. Findings revealed that one advocacy coalition comprised of an array of government officials and intermediary organizations (i.e., national and state NGOs, business leaders, school district leaders, State Board of Education members, state legislators, governors, administrative governing bodies) propelled global education policies forward. Findings further uncovered the beliefs that drove their advocacy efforts, how their beliefs translated into adopted policies, and the strategies they used to successfully influence the state's adoption of global education policies.

There are similarities to the global education state policies passed in the 1970s and 1980s and those passed in 21<sup>st</sup> century North Carolina, including symbolic resolutions that encouraged schools to embrace a global perspective and support for capacity-building programs that provided professional development and curricular resources to educators (Becker, 1982). What is new about the case of North Carolina is that education policymakers, specifically the SBE, has provided roadmaps for how global education can systematically be integrated into classrooms, schools, and districts through the GEDB, GRS, and GRD designations. These recent designations approved by the SBE further distinguish themselves from previous policies because rather than focusing on mandates for students, such as global studies courses for graduation, North Carolina policies have targeted the entire system, from the state down to individual teachers.

These policy outputs were very much a combined effort of top-down vision setting of policymakers and education leaders and bottom-up actions of external organizations working directly with school and district personnel. This points to the importance of building coalitions that bring together individuals across state and local levels of education governance in addition to non-governmental actors (e.g., CIU) who bridge policymakers and educators.

Notably, North Carolina global education policies steadily moved forward in a time period marked by external educational, economic, and political subsystem changes. While prior research has documented how school actors negotiate reforms amidst “turbulent” policy environments (Kaufman & Stein, 2010; Wirt & Kirst, 2001), this study disclosed key strategies that advocacy coalition members utilized to manage external “shocks.” These shocks included the introduction and intensification of standards-based accountability mandates, a decrease in state education funding, and a turnover from a Democrat-dominated legislature and Governor’s Mansion to a Republican supermajority. In many regards, the strategies that coalition members used buffered global education from policy turbulence, and kept global education initiatives on the K-12 education policy agenda from the early 2000s onward, surviving three governors, four General Assembly elections, and federal incentives (i.e., Race to the Top grants) focused on raising math and reading test scores.

For example, coalition members built will by creating coherence between global education and standards-based accountability policies (e.g., teacher evaluations, content area standards) and making intentional efforts to include legislators and SBE members from both political parties to prevent global education from becoming a victim of partisan divisiveness. As the economic and political climate in North Carolina from 2008 onward precipitated a lack of funds available for public education overall, global education initiatives survived using capacity-building instruments instead. These required little funding from the state, but the will of teachers, schools, and districts to jump on board, a committed vision from state education leaders, and hubs that facilitated the creation of a shared vision and accruing of resources.

While there were no opposing coalitions within the global education subsystem, one coalition member noted that perhaps there was little pushback because the pro-global education

advocacy coalition wasn't "pushing hard enough." This calls into consideration the trade-off between encouraging instructional reforms versus mandating them. To use a military metaphor, global education advocacy coalition members in North Carolina tended to focus on winning hearts and minds - that is, persuading educators, school and district leaders, and policymakers about the value of global education through discursive narratives, programs abroad, and classroom resources – rather than the shock-and-awe strategy commonly deployed in state education policymaking wherein school districts are required to immediately implement new policies without buying in to its importance. While the former strategy has potential to build more will and ownership, therefore leading to deeper levels of implementation, it comes at the cost of instructional reforms remaining in pockets of excellence rather than being scaled across the state. Conversely, mandates might quickly scale a policy to every district, but at the cost of local sites merely complying or symbolically implementing without actually changing the instructional core (Tyack & Cuban, 1995). While winning hearts and minds prevented opposition from mounting attacks against global education and may eventually scale global initiatives across the state, many participants expressed frustration that it did not spread the teaching of global perspectives fast enough, suggesting that there is not one clear solution in how to balance capacity-building versus mandated instructional policies.

Another tension arose between the deep beliefs publicly propagated and those expressed by participants during interviews. Economic rationales dominated discourses about why the policy core beliefs of global integration, language programs, international partnerships, and teacher training should be infused into North Carolina K-12 schools. At the surface, this suggests that global education was placed on the policy agenda to benefit business. Yet, multiple coalition members also expressed goals reflecting cosmopolitan, transformative, and equity beliefs. These

deep beliefs suggested that global education could also benefit humankind, new immigrant populations, and all students regardless of geographic location.

On the one hand, this implies that the same policy core can simultaneously speak to multiple deep beliefs about the purpose of global education, and that business, global crises, immigrant students, and geographically isolated communities can simultaneously benefit from the same policies. For that reason, perhaps, one global education advocacy coalition emerged rather than splintered competing factions. On the other hand, by not publicly promoting purposes beyond jobs and business, the global education movement could alienate the very communities it seeks to work with and allow oppositional attitudes to fester rather than bring to light deep-rooted xenophobia and prejudices that a global education emphasizing cultural awareness, intercultural communication, and a recognition of multiple perspectives could potentially abate.

### **Implications for Policy**

While global education is on the agenda of a growing number of states, few state-level coalitions have translated global education to concrete policy outputs that target teaching and student learning. Jenkins-Smith and Sabatier (1994) argued that the ACF “has the potential for contributing to a better world by helping policy activists understand a very complex process and by showing how individuals with solid information can make a difference over time” (p. 197). As such, using the ACF to illustrate how belief systems and strategies translated to global education policy outputs in North Carolina has applications for coalitions seeking to shape global education policy, or similar initiatives, in other states’ education policymaking arenas.

First, policies built slowly on one another over time. For example, legislative appropriations to external partners in the early 2000s built capacity for local school district programs to flourish. These school and district programs in turn served as exemplars that helped

design the 2015 GRS and GRD designations. This suggests that global education advocacy coalitions should take time to build capacity and localized “islands of excellence” first, which can then inform state policy to ensure that policy guidelines are in fact implementable while simultaneously building will across other school districts.

In North Carolina, early capacity-building in school districts was predominately done by three external partners that provided professional development and instructional resources. A second recommendation, therefore, is to utilize external organizations as important resources for building the initial foundation for global education through the introduction of programs in individual school districts. North Carolina’s external partners included public service outfits of the university system (CIU and World View) and a for-profit company (VIF). In the past fifteen years, a number of NGOs working with local schools and districts to provide global education services across the country have burgeoned as well (e.g., Asia Society, World Savvy) that could also help build local foundations. As the North Carolina case demonstrated, these external organizations can also serve as hubs to coordinate visions, resources, and information in efforts to facilitate top-and-bottom change.

A third recommendation is to create coherence with existing mandated instructional policies and across policy sectors. For example, the passage of the 2015 Every Student Succeeds Acts (ESSA), the most recent reauthorization of the Elementary and Secondary Education Act, gives state education agencies the discretion to incorporate additional indicators beyond test scores into their accountability formulas. Therefore, state education agencies could feasibly hold schools and districts accountable for global engagement indicators, access to language programs, or even measures of students’ global competence. Equally important to the North Carolina global education advocacy coalition’s will-building strategy was creating coherence across education

and non-education sectors as they found allies in the Department of Commerce, corporations, and local companies. This implies that global education advocates should ascertain how global education could benefit other sectors – be it commerce, health, social services, or law enforcement – and partner with those organizations for mutual benefit.

Fourth, advocates should target institutions, not individuals. In North Carolina, this allowed global education to become a non-partisan issue as it was not explicitly tied to a governor's regime, say, but rather entwined with the SBE's vision. This prevented opposition rising out of partisan divisiveness and allowed for consistency when gubernatorial leadership changed hands and SBE membership shifted as different governors appointed new SBE members. Furthermore, the multiple vision-setting reports that advocates produced, such as *North Carolina in the World: A Plan to Increase Student Knowledge and Skills about the World* and *Preparing Students for the World: Final Report of the State Board of Education's Task Force on Global Education* were created through coalition member consensus rather than introduced as the vision or goals of a particular policymaker or advocate.

A fifth recommendation is for advocates to fight for and find a steady stream of funding. Many advocacy coalition members interviewed lamented that North Carolina did not have adequate funding to put teeth behind the latest GEDB, GRS, and GRD designations. While legislative appropriations are currently hard to come by in North Carolina, coalition members were able to find other funding sources through foundations and local businesses. This emphasizes the need for foundations within global education advocacy coalitions to prioritize capacity-building initiatives in their funding streams (Devlin-Foltz, 2010).

As a final recommendation, global education advocates in different states should do as North Carolina coalition members have done and ground their arguments for global education in

their local state context. Peacock (2010) stated that “globalization is grounded, rooted in locale” (p. 40). Advocacy coalition members in North Carolina intentionally rooted their arguments for expanding K-12 instruction beyond the cultural, linguistic, and geographic borders of students’ towns, state, and nation in economic and demographic concerns specific to North Carolina (e.g., the arrival of multinational companies, a rise in the immigrant population). The discursive narratives that North Carolina coalition members used were unique to their state (e.g., statistics on population changes, foreign exports, multinational companies). Therefore, it is important for advocates to first research how globalization has taken root in their unique locales and then use those findings as a “marketing” strategy.

### **Implications for Theory**

Findings from this study both confirm and extend the components of ACF as a framework for understanding state policy change in K-12 education and, in particular, global education. To begin, this study confirms the four premises of the ACF, and particularly underscores the importance of studying policy change over long periods of time. Had I only examined the 2013 SBE global education task force commitments and subsequent policy actions, I would have missed out on the incremental changes taking place throughout the 1990s and 2000s, changes that data revealed to be important in building political will among state and local education leaders.

Findings also confirm, as the ACF model predicts, the influence of exogenous forces (i.e., policy changes in other education subsystems resulting from a shift in political power, effects of globalization on economic and social sectors) on the actions and beliefs within the subsystem. While budget decreases to the broader K-12 education subsystem constrained the resources that state and local education agencies had in carrying out global education initiatives, advocacy

coalition members promoted their cause by “actively exploiting” other external events, most notably the condition of the state economy to frame the need for global education (Mawhinney, 1993). This suggests that external events can strategically be used to either support or thwart advocacy coalition members’ agendas. Future researchers using the ACF might, therefore, analyze how coalition members actively use exogenous subsystem events as a guidance instrument to promote their cause. This is in contrast to Sabatier and Jenkin-Smith’s (1993) conceptualization of exogenous subsystem events as causing policy change outside of the locus of control of coalition members.

Findings also contribute to the body of ACF literature in that they elaborate on the guidance instruments that advocacy coalition members use to leverage global education. Data revealed the use of some guidance instruments listed in previous literature, such as: mobilizing public opinion through discursive strategies, providing research reports, testifying, and pursuing changes in administrative personnel agencies (Fischer, 2003; Sabatier & Jenkins-Smith, 1993). New guidance instruments also emerged that embodied a comprehensive approach to placing global education on the policy agenda that, in part, incorporated the strategies listed above: 1) incremental will-building, which included the dissemination of reports recommending global education initiatives and the use of an economic narrative as a discursive strategy; 2) setting a vision and following through, which involved the creation of new administrative positions and committees, and 3) creating hubs. New strategies under these three comprehensive guidance instruments deployed to advance global education policy beliefs included: creating coherence across education and non-education subsystems, providing opportunities for stakeholders to participate in educational programs abroad, highlighting local pockets of excellence, setting forth



attainable objectives, and bringing stakeholders together to share information, ideas, and resources.

Furthermore, the use of these guidance instruments was not a one-time deal (e.g., publishing one vision statement or lobbying legislatures one year for appropriations). Guidance instrument usage spanned multiple years (e.g., strategic plans emphasizing global education were published in 2005, 2006, 2013, and 2015) and targeted multiple governing bodies overseeing education (e.g., SBE, legislature, school districts). This not only confirms the ACF's basic premises that policy change occurs over time and includes diverse actors with different formal and informal government roles, but advances the framework by revealing that the guidance instruments used to catalyze policy change were consistently advanced over time and sought to influence all stakeholders rather than just state policymakers.

### **Limitations and Directions for Future Research**

This study has at least four limitations. First, the way in which the documents and interview participants were sampled are skewed towards those who support global education, as there has been little public debate over global education in the North Carolina legislature and media outlets and little organized opposition. As such, opposition to global education has been described through the lens of the advocacy coalition supporting it. Because there was only one coalition in the global education subsystem, future research might compare studies using the ACF that have identified multiple coalitions in a subsystem to explore whether guidance instruments differ if there is one coalition or competing coalitions.

Second, this study is limited by its use of the ACF. The ACF framework has been critiqued for 1) only including the voices of those in the hegemonic center of policymaking arenas while leaving out non-dominant groups and 2) for failing to address the strategies used to

build and sustain coalitions (Fischer, 2003). With these limitations in mind, future research could build on findings from this study by using different conceptual tools in order to a) understand how non-dominant voices on the margins of traditional policymaking arenas (e.g., students, teachers) perceive global education, and b) examine the formation of global education coalitions. For example, these findings revealed some discrepancies between stated and actual beliefs, as some advocacy coalition members may have been bound by a deep belief in the economic purpose of global education while others understood that the economic rationale was an important discursive strategy to exploit. Research, therefore, might examine the extent of conflation between discourses that bind coalitions together and discourses used to sell a policy. A further avenue that future research could explore is the role different coalition members take in contributing to and sustaining the coalition, and how coalition members interact with one another in this shared policy space. To what extent do they communicate about responsibilities, collaborate, step on each other's turf, or resolve conflicts? What is the impact of prior and current institutional cultures on coalition members' actions and beliefs?

Third, the focus of this study's application of the ACF was on coalition members, their beliefs, and the guidance instruments they used to turn their beliefs into policy outputs. Future research should examine policy impacts – specifically the number of teachers, schools, and districts applying for and receiving global designations and the extent to which applications and designations are geographically spread across the state. Because SBE policies are new as of 2015, there has not been time for learning processes to take place (Sabatier & Jenkins-Smith, 1993). Further research should therefore examine the policy learning that takes place after coalition members examine policy impacts, and whether that shifts the beliefs or guidance instruments of coalition members as a result.

Fourth, as the research design examines one critical case, findings cannot generalize to all other state contexts. Therefore, future research could apply this framework to other states to understand how those states' unique political, economic, and social contexts shape global education reforms in different ways. The guidance instruments that North Carolina advocacy coalition members used were shaped by external forces indigenous to their state context. This brings to surface the question of whether the same guidance instruments would apply in states with different political cultures, demographics, and economic effects arising from globalization.

### **Conclusion**

Though not generalizable, findings from this study contribute to theory development in confirming and expanding the ACF components that explained the evolution of global education policy in North Carolina. Further, the case of global education policy evolution in North Carolina provides insight into how members of an advocacy coalition can successfully trigger state-level policy change that emphasizes the teaching and learning of how to live and work in a pluralistic, globalized world. These insights may transfer to other education policy subsystems that, rather than focus on test-based accountability, emphasize relationships between teachers, students, and the wider world in which they live.

Table 2.1.

*Coding Structure*

<b>1. Policy</b>
Appropriations, Global District Designation, Global Educator Digital Badge, Global Ready School Designation, Global Schools Network, High School Diploma Endorsement, International Faculty Licensure, Language, Partnerships, Professional Teaching Standards, Resolution Supporting Global Education, Teacher Evaluation
<b>2. Advocacy Coalition Member</b>
a. Personal affiliations b. Global education allies: Asia Society, business, CCSSO, CIU, colleges/universities, Department of Agriculture, Department of Commerce, DPI, Foundations, General Assembly, Governor, Longview, Military, NC School Districts, Other States, P21, Public School Forum NC, SAS, SBE, Ted Fiske, Title VI centers, VIF, World View c. Turf battles
<b>3. Beliefs</b>
a. Deep: Cosmopolitan, Equity, Nationalistic, Neoliberal, Transformative, Ambiguous b. Policy core: Global integration, Global schools, Teacher training (teacher education, professional development), Languages (dual immersion, world), International partnerships, Study abroad c. Secondary
<b>4. Resources</b>
Hubs, Information, Instructional, Leadership, Legal authority, Money, Supporters
<b>5. Guidance Instruments Strategies</b>
a. Incremental will building: Mobilizing horizontal and vertical support, persuading through testimony, mobilizing public opinion, creating coherence, highlighting existing models, international travel, lobbying, nonpartisan, targeting influential leaders, framing b. Setting the vision and following through: changing agency personnel, providing research reports, pursuing changes in legislation or litigation, pursuing changes in the agency's budget, committees/task force, strategic plans, vision statements
<b>6. External events</b>
a. Changes in socio-economic conditions: economic globalization, global current events, immigration, technology b. Changes in systemic governing coalition: democratic leadership, partisan divisiveness, Republican supermajority, presidential primaries c. Changes in other policy subsystems: accountability/testing, budget decrease, school choice, STEM, teacher deprofessionalization
<b>7. Stable parameters</b>
a. Attributes of global education b. Sociocultural values and social structure c. Basic constitutional structure
<b>8. Opposition</b>

Table 2.2.

*Global Education Beliefs*

<b>Beliefs</b>	<b>Prevalence in Participant Interviews</b>
<b>Policy Core Beliefs</b>	
Global integration	22/26
Existing courses/curriculum	20/26
Global schools	10/26
Language programs	19/26
World language	17/26
Dual immersion	12/26
International partnerships	21/26
School partnerships	10/26
Teacher/student exchange	15/26
Cultural exchange teachers	8/26
Teacher training	
Professional development	17/26
Teacher education	15/26
<b>Deep Beliefs</b>	
Economic	22/26
Cosmopolitan	14/26
Equity	11/26
Transformative	9/26
Nationalistic	7/26

Table 2.3.

*Guidance Instruments*

<b>Guidance Instrument</b>	<b>Components</b>
Incremental Will-Building	<ul style="list-style-type: none"> <li>• Creating coherence across and within sectors               <ul style="list-style-type: none"> <li>- Economic environment, standards-based accountability education subsystem</li> </ul> </li> <li>• Fostering vertical and horizontal support               <ul style="list-style-type: none"> <li>- Educational programs abroad, disseminating reports, highlighting local pockets of excellence</li> </ul> </li> </ul>
Setting the Vision and Following Through	<ul style="list-style-type: none"> <li>• Attainable objectives</li> <li>• Creating new positions/committees to oversee implementation</li> </ul>
Creating Hubs	<ul style="list-style-type: none"> <li>• Bringing stakeholders together</li> <li>• Opening up lines of communication to share information, ideas, and resources</li> </ul>

## **CHAPTER 3: DISTRICT CO-CONSTRUCTION OF GLOBAL EDUCATION: A COMPARATIVE CASE STUDY OF TWO GLOBALLY COMMITTED SCHOOL DISTRICTS**

### **Introduction**

As the world is becoming more interconnected and interdependent due to unprecedented levels of economic, political, social, and cultural globalization (Bottery, 2006; Suarez-Orozco, 2001), business leaders, government officials, and international NGOs are placing pressure on schools to prepare students for work in a global marketplace, to live peacefully with those whose perspectives and cultures may differ from their own, and to solve problems that transcend national borders (e.g., Partnership for 21st Century Skills, 2014; UNESCO, 2014; U.S. Department of Education, 2012). As argued by the U.S. Department of Education (2012), “In today’s globalized world, an effective domestic education agenda must address global needs and trends and aim to develop a globally competent citizenry” (p. 2).

Global competencies are the dispositions, knowledge, and skills needed to effectively engage in an interdependent world (Zhao, 2010). These competencies have been taught in K-12 schools under the umbrella of global education, a way of teaching about the world that involves learning about problems that transcend national boundaries, multiple perspectives, global interconnectedness, and cross-cultural understanding (Gaudelli, 2003; Hanvey, 1982; Merryfield, 1998; Tye, 1990). While sharing a core focus on the world as an interdependent system, exact definitions of global education, the purposes it should serve, and the educational programs and practices it should promote are plural and, at times, dissonant (Gaudelli, 2009; O’Connor & Zeichner, 2011).

With a multiplicity of meanings attached to global education, recent global education policies have taken a variety of forms. Some policies have targeted student coursework – for example, high school graduation requirements for global studies or foreign language courses (Asia Society, 2008; Sanders & Stewart, 2004). Others have targeted school-wide initiatives. For example, states have initiated school-to-school international exchanges, and schools – often working with external partners such as universities and non-profit and for-profit organizations – have adopted global missions, international themes, and dual language immersion programs (Frey & Whitehead, 2009; Parker, 2008; Stewart, 2012). Still other global education policies are directed at teachers. Policies targeting teachers have included the incorporation of global perspectives into professional teaching standards and globally-oriented professional development programs, such as teacher study abroad (Asia Society, 2008; Gaudelli, 2006; Kirby & Crawford, 2012). These global initiatives have largely been designed as capacity-building policies rather than mandates or inducements (McDonnell & Elmore, 1987), leaving it up to local school districts to determine whether and how to incorporate global education into students’ learning experiences.

Given the flexibility school districts have in deciding whether and how to implement global education, they are an important unit of study in understanding how state global education policies become operationalized at the local level. Furthermore, although schools, departments, and individual classroom teachers have long been recognized as key implementers of federal and state instructional policies (McLaughlin, 1990; Elmore, 1996; McLaughlin & Talbert, 2003), the districts in which they operate shape the conditions under which local implementation occurs and can provide vital guidance and support to ensure successful implementation (Levin & Datnow, 2012; Spillane, 1998). School districts are “an organized collective” comprised of the



superintendent, elected school board, and the central office-level administration that overlap with school principals, staff development coaches, and teacher communities (Rorrer et al., 2008, p. 311; Stein & Coburn, 2008). Within this broad web, districts rely on external actors (e.g., professional development providers, reform design teams) to work directly with administrators and teachers and provide resources and expertise necessary to respond to demands of instructional reforms (Datnow, Hubbard, & Mehan, 2002; Firestone, 1989; Hatch, 2001; Honig, 2004; Marsh & Wohlsetter, 2013).

Although some research has portrayed school districts as obstructers of state and federal reform efforts that undermine, appropriate, or outright resist top-down policy directives (Malen, 1994; Marshall & Gertsl-Pepin, 2005), districts are increasingly being recognized as active mid-level implementers in the wake of increasing state reforms that target the instructional core of schooling (Datnow, 2006; Elmore, 1993; Elmore, 1996; Firestone, 1989; Fuhrman & Elmore, 1990; Rorrer, Skrla, & Scheurich, 2008; Spillane, 1998; Stein & Coburn, 2008). Furthermore, districts can play a crucial role in scaling reforms from isolated occurrences to systemic changes (Cohen-Vogel, Tichnor-Wagner, Allen, Harrison, Kainz, Socol, & Wang, 2015). As Rorrer and colleagues (2008) contended, school districts have “the power, authority, and influence to provide educational services that are equitable beyond the single school or ‘islands of excellence’” (p. 333). Therefore, they are important spaces for understanding how new global education policies ultimately become implemented in schools.

Yet, as any instructional innovation promoted but not mandated by state education agencies, global education must compete with a myriad of educational reforms targeting the instructional core (Hatch, 2001; Honig & Hatch, 2004; Kaufman & Stein, 2010). The education policy environment today “remains a shifting sea of multiple initiatives, fragmented intents, and

continually changing instructional foci” (Kaufman & Stein, 2010, p. 563). Despite this “turbulent” policy environment that has pulled district administrators in conflicting directions and has piled on various mandates and inducements for standards-based curriculum and assessments (Kaufman & Stein, 2010; Newmann et al., 2001; Wirt & Kirst, 2001), a number of school districts have become early adopters of global education initiatives. This study examines why and how two globally committed school districts have chosen to adapt a non-mandated instructional reform: global education.

I begin by defining global education, and follow with a review of the limited literature on global education implementation in school districts. I then introduce the theoretical framework of policy co-construction as a way to understand school districts’ agency in implementing global education. In this section, I explain the key dimensions of policy co-construction, connecting the theory to the broader literature on school districts as active implementers of instructional reform.

### **Defining Global Education**

While policymakers, policy advocates, and scholars have promoted ambiguous, cacophonous, and, at times, disparate visions of global education (Gaudelli, 2004; O’Connor & Zeichner, 2011; Parker, 2011), definitions have coalesced around three broad features of global education. First, global education *teaches about the world from a global perspective* (e.g., open-mindedness, seeing the world as one interconnected system, recognizing global universals and appreciating cultural differences, covering topics that transcend national boundaries, and promoting cross-cultural communication and understanding) (Case, 1993; Davis, 2006; Gutek, 2006; Hanvey, 1982; Kniep, 1986; Merryfield, 1998). Second, it does so through the use of *inquiry-based constructivist pedagogy*, as student-centered learning fosters the critical thinking, problem-solving, and collaboration skills that students need in order to take meaningful action in

local and global arenas (e.g., Gaudelli, 2003; O'Connor & Zeichner, 2011; Selby & Pike, 2000).

Third, while social studies has been the most common content area for implementing global education (Gaudelli, 2013; Merryfield, 1998; Thornton, 2005), supporters of global education contend that it should be *integrated* across all subjects and grade levels and incorporated into, not added onto, existing curriculum (Carlsson-Paige & Lantieri, 2005; O'Connor & Zeichner, 2011; Schweisfurth, 2006; Tye, 1990; Ukpokodu, 1999).

The goal of global education is to teach students the knowledge, dispositions, and skills needed to effectively participate as global citizens in an interconnected world (Zhao, 2010). *Knowledge* includes an understanding of a) world regions, conditions, and current events (Hanvey, 1982; Kniep, 1986; Kirkwood, 2001), b) how the world is interconnected and interdependent (Hanvey, 1982; Kniep, 1986; Merryfield, 1998; Zhao, 2010), and c) cultures and modes of communication different from one's own (Kirkwood, 2001; Merryfield, 1998; Zhao, 2010). *Dispositions* include open-mindedness towards and valuing of diverse perspectives (Case, 1993; Hanvey, 1982; Merryfield, 1998), empathy towards the world's inhabitants (Noddings, 2005), and a commitment to addressing global inequities and human rights (O'Connor & Zeichner, 2011; Merryfield, 1998; Noddings, 2005). *Skills* encompass intercultural communication (Anderson, 1982; Mahon & Cushner, 2007; Zhao, 2010), working cooperatively and collaboratively in diverse partnerships (Banks, 2008; Merryfield, 1998; Merryfield, 2002), and taking action on issues of global importance (e.g., Noddings, 2005). To instill these knowledge, dispositions, and skills in students requires that teachers develop those same competencies, along with the requisite pedagogical skills for teaching them (Merryfield, 1998; Tichnor-Wagner et al., 2015; Zhao, 2010). Therefore, global education initiatives in schools, districts, and states have targeted both students and teachers.

## **Global Education Implementation in Schools Districts: Possibilities and Challenges**

The majority of research to date on the implementation of K-12 global education has examined schools (e.g., Dill, 2013; Gaudelli, 2003; Tye, 1990; Tye & Tye, 1992) or classroom teachers (e.g., Merryfield, 1998) as the primary unit of analysis. In some of these studies, districts have reportedly taken a passive, supportive role (e.g., approving a program, appointing exemplary global education teachers to help write district social studies curriculum, granting educators time to attend global education training, providing small grants) rather than actively constructing global education programs and policies (Merryfield, 1998; Tye, 1990). In other cases, districts have granted permission for external organizations, such as foundations or universities, to provide all of the fiscal, material, and training support needed to incorporate global education into the mission of a school (Tye & Tye, 1992).

The only documented case study to date of global education that focuses on the district as the unit of analysis is the Global Awareness Project (GAP), a partnership from 1979 to 1994 between Florida International University (FIU) and Miami-Dade County Public Schools. Funded from a wide array of sources, including federal, state, local, and private foundation grants, GAP was developed to build school and district capacity to incorporate global perspectives into the instructional core. The comprehensive GAP program served over three-fourths of the district's schools, trained teachers to become global education leaders at their school sites, developed globally-oriented instructional materials for elementary, middle, and high school teachers, created interdisciplinary curricular units, and worked with school teams to construct a unique global education plan aligned with the needs of the school and the curricular framework of their school system (Kirkwood-Tucker, 2009; Tye, 2009). In addition to providing materials to support global education across the district, GAP built teacher capacity by providing global

education courses at FIU for pre-service and practicing teachers focused on classroom instruction and school-specific plans, in-service workshops and conferences for teachers and administrators, and teacher-exchange programs in Russia, England, China, and Japan (Cruz & Bermudez, 2009; Kirkwood-Tucker, 2009; Tye, 2009).

In retrospective chapters on the history of GAP, Cruz and Bermudez (2009) and Kirkwood-Tucker (2009) attributed the spread and sustainability of the program to the alignment between GAP and district goals, coherence across all levels of the district system, the infusion of global perspectives into extant curriculum, and strong leadership among external university partners, global facilitators (i.e., “coaches” external to the districts that provided technical support to school leadership teams), and global education school leadership teams (Cruz & Bermudez, 2009; Kirkwood-Tucker, 2009). Yet the perspectives of district leaders were missing from this analysis, resulting in an incomplete picture of how district leaders and school board members perceived global education and their role in its adaptation.

The dearth of research on district-level global education implementation may be, in part, a consequence of the reality that global content and perspectives remain on the margins of what students learn in U.S. schools (Gaudelli, 2004). A broader review of global education scholarship points to factors that may impede local education agencies from implementing global education: high stakes testing, a lack of resources, and nationalist values.

First, global education faces the competing demand of high stakes testing, which has narrowed curriculum and instruction towards tested content (Anagnostopoulos, 2005; Cruz & Bermudez, 2009; Zhao, 2010). Furthermore, high stakes testing has pressured teachers to adopt “drilling and skilling” instructional strategies that teach to a test rather than student-centered pedagogy that facilitates the development of a global perspective (Gaudelli, 2003; Tye & Tye,

1992). For example, in comparing three New Jersey high schools implementing a state-mandated world studies course, Gaudelli (2003) found that world studies teachers in the one school with low student passing rates on the state proficiency exam devoted a frequent amount of class time to teaching discrete reading skills rather than global content. In a comparative case study of global education legislation, policy statements, and speeches in Ohio and Indiana, Frey and Whitehead (2009) found global education to be viewed as an “add-on” or “luxury” that low-performing schools struggling to meet Adequate Yearly Progress in Ohio did not have time not implement. These two findings suggest that schools facing more accountability pressures would be less likely to implement global education policies or programs.

Second, districts have lacked sufficient fiscal, material, and human resources to implement global education. Multiple studies have reported state and federal government funding for global education to be inconsistent or insufficient (Butler, 1999; Cruz & Bermudez, 2009; Frey & Whitehead, 2009; Wiley, 2001). Furthermore, researchers have further pointed to a shortage of globally competent teachers (O’Conner & Zeichner, 2011; Zhao, 2010). Few teacher education programs have courses or programs that provide pre-service teachers opportunities to learn about the international aspects of their content area (Devlin-Foltz, 2010; Parkhouse, Tichnor-Wagner, Glazier, & Cain, 2015) or that provide opportunities for overseas student teaching experiences, experiences that numerous studies have found to contribute substantially to teachers’ global competency development (Cogan & Grossman, 2009; Cushner & Brennan, 2007; Mahon, 2010; Zong, 2009).<sup>11</sup> As such, the United States lacks a sufficient supply of teachers with the commitment and pedagogical content knowledge to teach with a global perspective in their particular subject area (Devlin-Foltz, 2010).

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<sup>11</sup>In a content analysis of teacher education institution websites, Mahon (2010) found only 18% of teacher preparation programs offered overseas student teaching opportunities.

Finally, in addition to testing and insufficient resources, global education is impeded by the historical purpose of public education in the United States of transmitting a national American identity (Banks, 2008; Frey & Whitehead, 2009; Gutek, 2006; Myers, 2010; Subedi, 2010). Consequently, a U.S.-centric perspective has long been institutionalized in curriculum while global perspectives and issues remain peripheral (Gaudelli, 2003; Myers, 2010; Subedi, 2010; Thornton, 2005). Furthermore, the nationalist slant of schooling embraces a singular national identity as opposed to a pluralistic citizenry where individuals feel strong connections to community/ethnic, national, and global communities (Banks, 2008; Gaudelli, 2009; Ladson-Billings, 2005). In reinforcing a narrow conception of national citizenship that fails to address students' ties to group identities, schools overall have been remiss in incorporating the voices and experiences of culturally and linguistically diverse students within the United States and the transnational identities of immigrant students (Banks, 2008; El-Haj, 2007; Subedi, 2010).

These competing policy demands, resource constraints, and values point to barriers that may impede district adoption and implementation of global education programs. Despite these obstacles, pioneering districts are actively implementing global education reforms. Previous literature has not explored the processes through which districts adopt and implement global education. To gain insight into how district actors may play an active role in adapting global education to local contexts, I turn next to the theory of policy co-construction. This theory, coupled with factors from the district implementation literature that support its key dimensions, serves as a framework for understanding the district role in global education implementation.

### **District Actors and the Co-Construction of Instructional Reform**

In this study, I build upon the theoretical framework of policy co-construction (Datnow et al., 2002) to understand how school districts have implemented global education policies in

North Carolina. Policy co-construction explains how groups from different levels of the education system work together, or not, to develop and implement reforms (Datnow & Stringfield, 2000; Levin & Datnow, 2012). It views policy implementation as an active, iterative process wherein local implementers continuously modify a given policy from an external source (e.g., state government, education NGO). Policy co-construction emphasizes the interrelationship between structure, cultural, and agency across multiple levels of the system as implementation occurs. Though the actions of individuals are constrained by the structures and cultures within their embedded contexts, individuals also have agency to shape those structures and cultures.

The theory of co-construction was first developed to explain the process of how school-level actors implemented comprehensive school reform (CSR) designs (Datnow et al., 2002; Datnow & Stringfield, 2000), with a primary focus on the relationship between teachers, principals, districts, state policies, and external design teams (or “vendors”) that provided schools with ready-made reform models<sup>12</sup>. Subsequent applications of the theory further illuminated the connections between federal and state CSR policies and district, school, and design team implementation (Datnow, 2006) and how district, teacher, and student actors mediated principal actions around data driven decision making (Levin & Datnow, 2012). These studies pointed to districts as important mid-level actors in the implementation chain.

This corroborates a growing number of studies in the past few decades that have identified school districts as active players in shaping state-sanctioned education reforms (e.g., Firestone, 1989, Honig, 2003). “Active” districts shape state policy by passing reforms in

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<sup>12</sup>Examples of externally developed reform designs include the Audrey Cohen College System of Education, the Modern Red Schoolhouse, Success for All, AVID, Core Knowledge, Coalition of Essential Schools, and the Comer School Development Program. These designs range from pre-packaged and highly prescriptive curriculum, instruction, school organization models, and professional development to those that are based on less specified guiding principles (Datnow et al., 2002).



advance of anticipated state legislation or implementing state policies in ways that exceed minimum compliance (Firestone, 1989). Furthermore, while teachers have long been recognized as “street level bureaucrats” that make the final decision in how reforms are implemented in classrooms (McLaughlin, 1990; Weatherly & Lipsky, 1977), district actors also play a role in “co-constructing” the conditions that influence implementation effectiveness. Previous literature has shown that district actors demonstrate agency in co-constructing instructional reforms by: creating coherence, building will and capacity among educators, and reo-orienting the organization.

As junctures where top-down state and federal directives and bottom-up school-level demands converge (Honig, 2004), district actors face the task of *creating coherence* across federal, state, and local policies (Honig & Hatch, 2004; Rorrer et al., 2008; Wirt & Kirst, 2001). They do so by strategically adapting external policy demands that fit local goals and visions (Berman & McLaughlin, 1976; Fuhrman, 1993; Honig & Hatch, 2004; Newmann et al., 2001; Rorrer et al., 2008; Marsh & Wohlsetter); engaging with reforms that complement other state directives, particularly accountability policies that have rewards and sanctions tied to them (Chrispeels, 1997; Datnow et al., 1998; Datnow et al., 2002; Hatch, 2001); and aligning resources – such as curricular frameworks, supplemental programs, assessments, and professional development – with reform objectives (Chrispeels, 1997; Cohen & Hill, 2001; Newmann et al., 2001; Rorrer et al., 2008; Spillane, 1998; Wong & Anagnostopoulos, 1998).

Districts also co-construct policy by *generating will* – which McLaughlin (1987) defined as “the attitudes, motivations, and beliefs that underlie an implementers’ response to policy goals or strategies” (p. 172) – and *building capacity*, or the knowledge, skills, personnel, and resources necessary to implement reform efforts (Firestone, 1989; Levin & Datnow, 2012; Rorrer et al.,

2008). District actors build will and capacity through various strategies, including instituting the vision and goals to support instruction (Levin & Datnow, 2012; Rorrer et al., 2008), building a critical mass of key stakeholder support (Berman & McLaughlin, 1976; Chrispeels, 1997), obtaining necessary resources (Firestone, 1989; Levin & Datnow, 2012; Rorrer et al., 2008), and providing learning opportunities for school personnel charged with implementing the reform, such as sustained professional development, onsite coaching, structures that foster professional networks, and reform-aligned curriculum and assessment materials (Cohen & Hill, 2001; Honig & Rainey, 2012, Kaufman & Stein, 2010; Stein & Coburn, 2008).

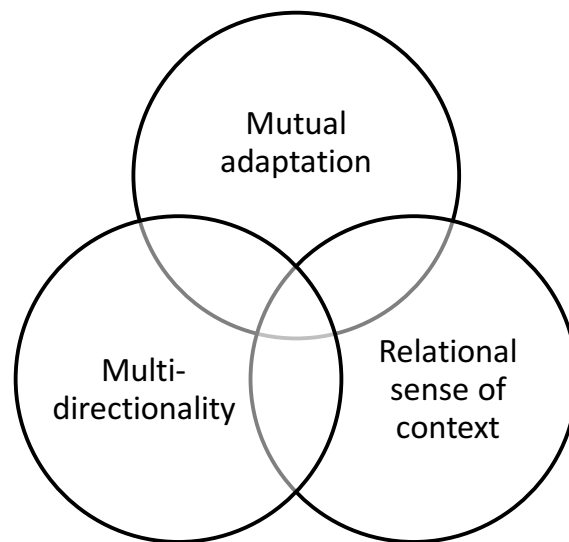
Third, district actors actively shape instructional reform implementation by *re-orienting the organization*, or, refining the structures, processes, and culture in the district to achieve a clearly articulated vision (Honig, 2003; Honig & Hatch, 2004; Kaufman & Stein, 2010; Levin & Datnow, 2012; Rorrer et al., 2008). Re-orientation has included changing district personnel by forming new administrative positions, re-directing current employees to new tasks, replacing administrators whose beliefs do not align with the reform vision, and eliciting increased participation in reform efforts from school leaders (Coburn & Russell, 2008; Datnow et al., 2002; Firestone, 1989; Fixsen et al., 2009; Honig, 2003; Kaufman & Stein, 2010; Rorrer et al., 2008; Stein & Coburn, 2008).

The actions of creating coherence, generating will, building capacity, and re-orienting the organization suggest that districts contribute specific roles that support the implementation of external instructional reforms. As such, policy co-construction is a fitting theory for understanding district-level actors as “active users” of global education policy reform, who act in advance of or above and beyond the call of state global education initiatives (Firestone, 1989) and in the ways listed above that support teaching and learning (Rorrer et al., 2008). The theory

of policy co-construction includes three dimensions: mutual adaptation, multi-directionality, and a relational sense of context. (See Figure 3.1). These dimensions underscore the dynamic, iterative process of policy creation and implementation. Each is described below with an explanation of how they complement the broader literature on district actors as mid-level policy implementers.

Figure 3.1.

*Key Dimensions of Policy Co-Construction*



### **Mutual Adaptation**

First, co-construction theory builds on the concept of *mutual adaptation* (Berman & McLaughlin, 1976; Datnow, 2006). Mutual adaptation is “the adaptation of a project and institutional setting to each other” (McLaughlin, 1990, p. 12). Put another way, adaptation occurs when “a policy is refined to fit local conditions and in which local conditions are sometimes adapted to fit policy” (Spillane, 1998, p. 35). Mutual adaptation recognizes that implementers modify policies based upon their local needs, circumstances, and resources and allows for opportunities for implementers to exert agency in project decisions and for negotiation,

flexibility, and adjustment between policymakers and implementers (Anagnostopoulos, 2003; Datnow, 2006; McLaughlin, 1990; Wohlsetter, Houston, & Buck, 2015).

Mutual adaptation stands in contrast to a top-down policy implementation approach, which starts with policy decisions, charts how those decisions work their way to the intended recipients to achieve the desired results, and answers whether and why the objectives of the policy were met (Odden, 1991; Sabatier, 1986). Whereas top-down implementation approaches view context as a variable that explains variation in implementation, mutual adaptation views context as a feature of the change process wherein local knowledge, values, beliefs, and resources mold a reform throughout the implementation process. Implementation research has long recognized that mutual adaptation is more likely to lead to program sustainability as compared to top-down implementation approaches (Berman & McLaughlin, 1976; Cohen-Vogel et al., 2015; McLaughlin, 1990; Honig, 2006).

In sum, mutual adaptation within a co-construction framework embodies a “top-and-bottom” approach, where implementers mold policy to fit their local contexts and policymakers reshape policy based on how those charged with implementing the policy would react (Elmore, 1985). As Datnow (2002) observed, “locally generated modifications urge us to see the reform implementation process as co-construction, not an imposition of policy from the top down, or as an organic bottom up process...Educators made reform in their local contexts” (p. 223). This multi-directional exchange between policymakers and policy implementers is explicated next.

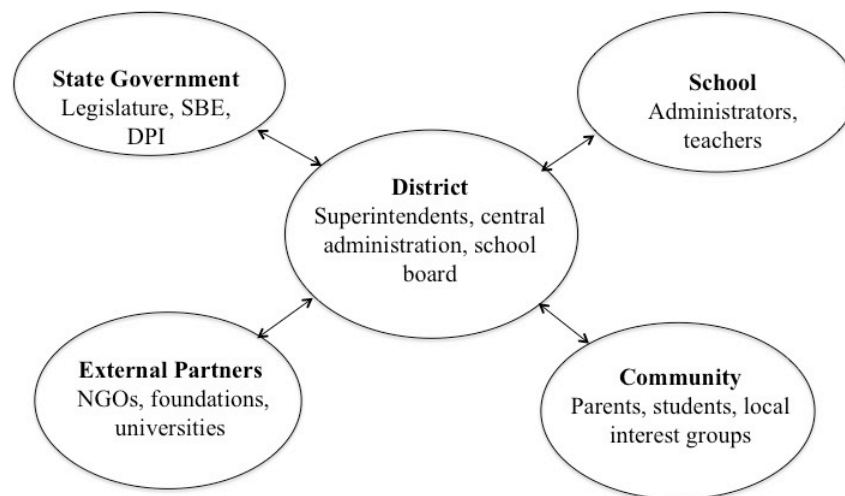
### **Multi-directionality**

Policy co-construction expands upon mutual adaptation by viewing education reform as a *multidirectional* “two-way street” between policy developers and local implementers as they jointly construct a policy change (Datnow et al., 2002, p. 43). As Datnow (2006) explained,

“Multiple levels of education systems may constrain or enable implementation;” likewise, local “implementation may affect those broader levels” (p. 107). In contrast to unidirectional views of implementation that perceive lower levels of the bureaucracy (i.e., policy implementers) as responding to the demands of upper levels of the bureaucracy (i.e., policymakers), a multi-directional perspective suggests that districts shape and are shaped by the contexts of the state, schools, external organizations, and the local community (Datnow, 2006). This is illustrated in Figure 3.2.

Figure 3.2

*Multi-directionality of District and Non-District Actors*



Prior research has documented that the multi-directional flow of policy ideas, adjustments, and refinements occurs with *official policy actors* outside of the district central office, such as those representing federal and state government and school sites (Spillane et al., 2002). Scholars have contended that power between state and local governance structures in education is bi-directional and not a zero-sum game (Cohen, 1982; Fuhman & Elmore, 1990). While local education agencies bear responsibility for carrying out federal and state initiatives,

they simultaneously influence what those initiatives entail (Chrispeels , 1997; Fuhrman & Elmore, 1990; Marsh & Wohlsetter, 2013)<sup>13</sup>. Multi-directional policy construction has been documented between the district central office and schools as well. For example, in a comparative case study of two districts undergoing math reforms, one district office engaged in bidirectional interactions between district math coaches and school leaders (Stein & Coburn, 2008). This shaped the district’s math instructional policies in ways that aligned with district administrators’ priorities and the needs of local school sites.

District actors can also interact with *non-system actors* as they adapt instructional reforms. External organizations that partner with districts, such as design teams, consultants, or professional developers, may influence how district actors interpret policy (Datnow et al., 2002; Honig & Hatch, 2004; Newmann et al., 2001). Districts that lack the internal capacity to learn about and mobilize personnel for new reforms may outsource to external organizations that provide necessary resources and expertise for implementation (Honig, 2004). Other external organizations “vend” pre-packaged reforms that districts can choose from (Datnow et al., 2002) or provide districts funding to implement foundation-specified reforms (Newmann et al., 2001; Wirt & Kirst, 2001). External partners have also collaborated directly with district members in designing reforms, as evidenced in design-based implementation research and continuous improvement research wherein district practitioners and researchers collaborate to develop and bring innovations to scale (Cohen-Vogel et al., 2015; Penuel, Fishman, Cheng & Sabelli, 2011).

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<sup>13</sup>As one example, Chrispeels’ (1997) longitudinal examination of the implementation of the California Learning Assessment System (CLAS) revealed that the developmental nature of the policy advanced “an interactive process of policy development between local districts and state policymakers” (p. 455). Local districts and schools identified as early adopters became exemplarily models that helped guide the states’ further development of the CLAS. As local actors interpreted and adapted policies to fit their local contexts, they provided feedback to the state, which then produced new versions of the assessment policy.

Finally, in addition to external partners that provide implementation support, other non-systems actors that influence district action include parent groups, community members, and local interest groups representing, for example, industry or religious organizations (Datnow et al., 2002; Newmann et al., 2001; Spillane, 1998; Wirt & Kirst, 2001).

Though relationships between state, district, school, and non-system actors are multi-directional, they encompass differential power structures, which can influence adoption and implementation (Datnow et al., 2002). Though a “loosely coupled system,” the U.S. education system is characterized by unequal power relations, with states wielding increasing control over districts, districts over schools, and principals over teachers (Malen, 1994; Weick, 1976; Wirt & Kirst, 2001). Therefore, co-construction theory attends to the distribution and application of power found in relationships across and within levels of governance. As Datnow and colleagues (2002) found, when those in public positions of power (e.g., a Superintendent of Public Instruction, district superintendent, school principal) supported a particular comprehensive school reform initiative (e.g., AVID, Success for All), schools tended to implement it.

### **A Relational Sense of Context**

Third, co-construction examines the contexts in which these multi-directional changes occur. Co-construction espouses a *relational sense of context*, meaning that “people’s actions cannot be understood apart from which the actions are situated, and reciprocally, the setting cannot be understood without understanding the actions of the people within it” (Datnow, 2006, p. 107). Because different settings (e.g., states, districts, schools) are connected to one another, the actions taken in one context become the conditions for actions taken in another context (Datnow et al., 2002). For example, Datnow and colleagues (2002) documented how external vendors of multiple comprehensive school reform programs changed their programs to become

more academically focused to align themselves with the standards-based accountability movement that had permeated state, district, and school policy contexts.

Furthermore, co-construction draws upon the sociocultural tradition that identifies interactions among actors at different policy levels as occurring in the embedded contexts of personal, interpersonal, and community (i.e., organizational) planes (Datnow et al, 2002; Rogoff, 2008). The meanings that people derive from the social world vary according to their *personal perspective*, which is influenced by their location in social institutions and cultural arrangements. Meaning is further derived from *interpersonal interactions* with others, and the broader *community*, or organizational, context in which those interactions occur. At the community level, implementers' decisions are constrained by organizational structures, particularly available information and resources (Datnow et al., 2002). This is akin to the application of sensemaking theories to the education policy implementation literature (Coburn, 2001; Levin & Datnow, 2012; Spillane et al., 2002), which provides similar insights into the personal, interpersonal, and contextual factors embedded in school organizations that shape why local implementers adapt policies in particular ways (Coburn, 2001; Spillane et al., 2002; Spillane, 2008).

District implementation literature focusing on the organizational arrangements of the workplace further complements the notion of embedded context in understanding co-construction. Districts are not monolithic organizations (Honig, 2003; Spillane, 1998). Within central administration, different organizational subunits hold varying responsibilities, jurisdictions, and specializations (Spillane, 1998). In addition, one's location within a district can dictate one's formal and informal social interactions within and across subunits, the access one has to new information, the professional identities that one takes on, and one's relative position of power (Honig, 2003; Spillane, 1998; Spillane et al., 2002). Organizational hierarchies within



district communities influence the power a district actor has to impact implementation decisions. The superintendent, school board members, and top-district administrators sit at the top where decisions are made, while other groups such as lower level administrators, teacher organizations, and community members influence decisions to a lesser extent (Firestone, 1989; Honig & Rainey, 2012). Therefore, positioning may impact values, understanding, and power over whether to adopt a reform (Datnow et al., 2002).

In summary, the dimensions of mutual adaption, multi-directionality, and a relational sense of context can illustrate how school districts are important mid-level actors that actively co-construct instructional reforms (Datnow, 2006, p. 120). Co-construction is a particularly useful heuristic for studying how districts have agency to shape state-level global education policies. With global education being a non-mandated, evolving, instructional policy in North Carolina, districts that choose to implement it have latitude to shape the reform to meet their needs and could help make policy by “serv[ing] as models of exemplary practice” that guide state policy development (Chrispeels, 1997, p. 462).

Although school districts have been recognized as active co-constructors of state-directed policy (Firestone, 1989) and key “architects” supporting school-level implementation of instructional reforms (Stein & Coburn, 2008), no research to date has examined why and how school districts actively construct global education policy. Research has examined global education with individual classroom teachers (Merryfield, 1998), schools (Gaudelli, 2003), and teacher preparation programs (Cushner & Brennan, 2007) as the unit of analysis. Yet, understanding the role school districts play in global education adaptation is paramount because of their influential role in facilitating the success of school-level instructional reforms.

## **Research Questions**

To provide insight into how “active” districts display the components of mutual adaptation, multi-directionality, and a relational sense of context in implementing global education initiatives, this study uses the theory of co-construction to explore how global education has been adapted by two globally committed school districts in North Carolina. To understand district-level adaptations, I begin by answering:

- a. How do district actors define global education? What specific global education policies has each district implemented?
- b. How has the district supported the implementation of global education (e.g., creating coherence, building will and capacity, reorienting the organization)?

Then, I use the concepts of multi-directionality and a relational sense of context to unpack why those adaptations took place, answering:

- c. Who has influenced district decisions and actions concerning global education?
- d. What contextual factors might account for similarities and differences in the ways that each district has “co-constructed” global education policy?

As district agency in global education implementation is an understudied phenomenon, the findings of this study will contribute new knowledge as to what global education looks like as a district-wide reform, how district actors can actively support global education in K-12 public schools, and the relational and contextual factors that influence how adaptations unfold.

## **Methods**

### **Research Design**

This study uses an exploratory, comparative case study design to study the co-construction of global education policy in two globally committed school districts in North

Carolina (Yin, 2009). Case studies answer how and why questions (Yin, 2009), thus it is an appropriate method for understanding *how and why* school districts adapt global education policy. Furthermore, the use of multiple cases allows for more robust analytic conclusions to be drawn from the data than from a single case (Yin, 2009). The unit of analysis is the school district, an unexplored unit in the recent surge of interest in global education. A case refers to a “unique, bounded system” (Stake, 2005, p. 447). For this study, each school district is bounded within the interconnected web of superintendents, school board members, central office administrators, and school leaders (Rorrer et al., 2008).

### **Setting and Policy Context**

North Carolina is a revealing context in which to study district co-construction of global education policy because of growing political support for global education. For over a decade, state- and district-level actors in North Carolina have been at the forefront of promoting, designing, and implementing K-12 initiatives aimed at developing global competence in students and building capacity in educators to teach with a global perspective.

Initial state support for global education included the formation of global education centers (e.g., the Center for International Understanding, World View) and the incorporation of global awareness into *The North Carolina Professional Teaching Standards* and teacher evaluations adopted in 2007. In 2011, the North Carolina State Board of Education (SBE) created a Global Education Task Force, whose 2013 report recommended five global education commitments upon which the North Carolina Department of Public Instruction (DPI) should act: 1) teacher support and tools, 2) language instruction, 3) new school models, 4) district networking and recognition, and 5) strategic international relationships.

*Teacher support and tools* included providing content for embedding global themes and globally-focused problem-based learning throughout the K-12 standards-based curriculum, a SBE-recognized badging process for teachers and administrators to support a professional development system for global content, and a teacher preparation institution requirement to train teacher candidates to use global content. *Leading-edge language instruction* included a plan for statewide access to dual language immersion opportunities, establishing a plan to increase K-12 world language teachers, and re-focusing traditional high school language courses to include a greater emphasis on studying global affairs, other nations' economies, societies, and cultures, and survival language skills. *New school models* emphasized developing school models focused on international education, such as internationally-themed residential high schools, transformation models for low-performing schools, global-themed charter schools, redesigned school-within-school models, virtual schools, and regional dual language immersion choices. *District networking and recognition* included the institution of a Global-Ready designation for schools and districts that provides a process and incentives. Finally, *strategic international relationships* included creating memoranda of understanding to form international relationships and naming partner countries to inform development of K-12 curriculum, teacher preparation, and professional development and to serve as a high priority source and destination for administrator and teacher exchanges and visits (NC SBE, 2013).

Under the leadership of a new Special Assistant to Global Education, North Carolina's Department of Public Instruction (DPI) is currently carrying out this work. In January 2015, DPI launched a Global Educator Digital Badge that recognizes teachers and administrators for completing 100 hours of global professional development. In May 2015, DPI introduced Global-

Ready School and Global-Ready District recognitions. Table 3.1 provides detailed descriptions of these recent North Carolina global education policies salient to school districts.

Within this receptive political environment, external organizations providing global education professional development and curricula have flourished, most notably the Center for International Understanding (CIU), VIF International Education, and World View. CIU has been an umbrella organization charged with making North Carolina a globally engaged state. Their K-12 global education initiatives include the Confucius Classrooms (or “Han Ban”) program that partners Chinese teachers with North Carolina schools for one to three years, the facilitation of international school partnerships, and the Cultural Correspondents program that pairs classrooms with North Carolina university students studying abroad.

VIF International Education is a for-profit education company whose offerings include: recruiting and placing international “cultural exchange” teachers to teach in North Carolina classrooms, a VIF Global Schools elementary school model wherein each grade level is assigned a region of the world to study with an international teacher from that region and all teachers complete a four-year global competency professional development sequence, a Spanish and Mandarin language immersion program for elementary schools called SPLASH, and the VIF Learning Center that includes online professional development, instructional resources, and a networked community of global educators. As of 2014, 22 school districts and 296 schools had access to these global school resources.

World View is a public service program at the University of North Carolina at Chapel Hill. It provides a variety of professional development opportunities and classroom resources for K-12 and community college educators, including an annual fall symposium focused on global themes (e.g., environmental sustainability, human rights and social justice, migration), spring

seminars focused specific regions of the world or cross-cultural concerns (e.g., Europe, the Middle East, East Asia, cultural respect and equity), a spring media workshop targeting media specialists, a Global Education Leaders Program (GELP), online courses on global education and cross-cultural skills, and international study visits for educators and administrators. They also have partnerships with over 145 schools and districts throughout the state, to whom they provide professional development and resources, including a one-day Partner Program professional development workshop held at different partner districts before the start of each school year. Appendix H provides a detailed description of each program that these three external partners offered to teachers, schools, and districts at the time of the study.

North Carolina policies have made clear that districts, schools, and teachers should prepare students for the globalized world. However, these policies do not prescribe how exactly that must be done. The state has broadly defined global awareness on teacher standards and evaluations but has not prescribed directives for how the global awareness portion of the evaluation must be implemented. Furthermore, the Global Educator Digital Badge, Global-Ready School, and Global-Ready District designations do not mandate districts to participate or provide inducements for districts to adopt global education. Given that state support for global education does not have stringent requirements or accountability measures attached, North Carolina serves as a prime location to understand how districts have “co-constructed” global education reform – as broadly defined in SBE policies and the guidelines set forth by DPI – into concrete practices that impact teacher and student global competency development.

### **Sampling Procedures**

Two districts within North Carolina were purposively sampled as extreme cases for their high level of global commitment. For the purpose of this study, these extreme cases, unusual in

that they exemplify a commitment to global education (Patton, 2002), represent “active users” who co-construct global education reform (Firestone, 1989). Because global education initiatives are encouraged but not currently mandated in North Carolina, and as such, only some districts have actively incorporated it, I could learn the most from extreme cases where it is known this work is being done (Patton, 2002). Since context plays a pivotal role in the co-construction of education policy (Datnow et al., 2002), exploring global education in more than one district allowed me to compare the factors within each district’s embedded contexts that constrain and shape co-construction (Datnow et al., 2002). This also helped to uncover “diverse variations” and “important common patterns” across districts to generate themes surrounding the district role in global education implementation (Marshall & Rossman, 2011, p. 111).

Districts committed to global education were identified by the NC DPI Special Assistant to Global Education and informants at VIF and World View, who have direct partnerships with school districts committed to global education. These entities were asked to recommend up to five districts. Four total districts were recommended. From this list, I cross-checked with the district website for evidence of each of the five state commitments to global education. All four districts were initially contacted to gauge interest; two agreed to participate in the study: Roosevelt and Maple<sup>14</sup>. Upon further examination, the superintendents of both districts were invited by NC DPI to participate in a two-day workshop for expert vetting the Global-Ready District designation rubric in the fall of 2014, thus confirming their place in the state as global education leaders and confirming evidence of partaking in the state commitment to district networking and recognition.

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<sup>14</sup>Pseudonyms for districts, schools, and participants are used hereon in to protect the confidentiality of participants.

Within each district, individuals were purposefully sampled using a snowball sampling technique (Marshall & Rossman, 2011). As Stake (1995) argued, the “best” people, places, and occasions “usually mean those that help us best understand the case, whether typical or not” (p. 56). Therefore, I first identified district administrators at the core of global education implementation through informants at DPI, VIF, and World View, who then identified additional individuals who played varying roles in supporting global education. The final sample ( $n = 36$ ) included a cross-section of actors within each district organization (i.e., superintendents, central office administrators, school leaders, school board members, and external partners). This cross-section of district actors, whose locations and professional roles within the district may influence their perceptions of global education, further captured the relational sense of context that impacts policy co-construction (Datnow et al., 2002).

### **Data Collection**

I used multiple sources of evidence – including semi-structured interviews, district documents, and observations – to answer how district personnel “co-construct” global education (Patton, 2002; Yin, 2009). Using multiple sources of evidence allowed for data triangulation, helping to develop converging lines of inquiry and to enhance credibility (Stake, 2005; Yin, 2009). Initial data collection occurred in the spring and summer of 2015. In the fall of 2015, follow-up interviews and observations were conducted to document global education events as they unfolded, refine themes, explore emerging phenomena, and ensure data saturation.

I conducted semi-structured interviews with individuals involved in the development and implementation of global initiatives in the two districts. This included superintendents ( $n = 2$ ), central office administration ( $n = 10$ ), school administrators ( $n = 12$ ), teachers ( $n = 2$ ), school board members ( $n = 2$ ), and external partners including VIF ( $n = 3$ ), World View ( $n = 3$ ), CIU ( $n = 2$ ),



and a superintendent from a different school district ( $n = 1$ ), each of whom played a role in providing district-level support or shaping the direction of district-level global initiatives. Table 3.2 provides a breakdown of participants by district. Interview questions captured background information about the participant's role in the district and experience with global education, specific global education policies implemented and accompanying district supports, the multidirectional influences of organizations and individuals that shaped global education implementation, and overall perceptions of successes and challenges in adapting global education. (See Appendix I for the complete interview guide). Interviews averaged 50 minutes in length, and ranged from 30 to 90 minutes.

I also observed district-sponsored events, meetings, and professional development pertaining to global education taking place throughout the spring, summer, and fall of 2015. These events were identified during initial rounds of interviewing. In Roosevelt, observations included an international teacher social, professional development conducted over the summer, and the district global team meeting. In Maple, observations included two professional development sessions held at the district's global-themed school and a district-led professional development for new teachers. During observations I wrote detailed field notes to capture evidence of the global education policies being implemented, strategies districts used to support the policies, influences of external system and non-system actors, and contextual factors that appeared to affect implementation. (See Appendix J for the field note log template). In addition to corroborating evidence from interviews, these observations provided a richer understanding of the context (Stake, 2005).

Finally, to triangulate with interviews and observations, I collected district documents pertaining to global education, including policy statements, strategic plans, school board meeting

minutes, budgets, curricula, professional development materials, mission/vision statements, program or course descriptions, press releases, and evidence of partnerships with external partners (e.g., NC DPI, VIF, World View). Policy statements, strategic plans, school board minutes, mission/vision statements, press releases, program or course descriptions, and evidence of partnerships were found on district websites. In addition, I also collected documents during interviews and observations, including materials passed out during meetings and professional development sessions and school-level curricular frameworks. These documents provided corroborating and additional information on each district's global education policies and how they have been adapted from the broad state guidelines.

To manage data and inform the gaze of subsequent data collection activities, throughout the data collection process I created contact and document summary sheets to record all interactions with participants along with any data collection issues, illuminating details, emerging themes, personal reflections, and names of additional participants to recruit (Miles & Huberman, 1994). These summary sheets enhanced the credibility of findings as they left an audit trail of how the research design evolved and the final analysis emerged (Marshall & Rossman, 2011).

### **Data Analysis**

Data was collected and analyzed in an iterative fashion using a constant comparative method to elaborate on the theory of policy co-construction at the district level (Corbin & Strauss, 2008). A constant comparative method can be used to generate original theory from data or elaborate or modify existing theory grounded in data (Strauss & Corbin, 1994). In this study, I elaborated on the theory of policy co-construction to understand an unexplored phenomenon: school district co-construction of global education (Marshall & Rossman, 2011). I used the

theory's components of mutual adaptation, multi-directionality, and relational sense of context as a basis for preliminary insight, direction, and list of initial concepts (Corbin & Strauss, 2008).

The complexity of case studies requires researchers to “pull attention to both ordinary experience and also to the disciplines of knowledge” (Stake, 2005, p. 448). Therefore, I used a combination of broad *a priori* codes to focus my initial gaze and *in vivo* coding to inform clustering of similar incidents into emerging codes, patterns, and themes that explained how districts actively engaged in policy co-construction (Marshall & Rossman, 2011). I used the computer software Nvivo to code and categorize all transcripts, field notes, and documents.

Pieces of data that uncovered what global education policies districts implemented were coded under *adaptation*. This initial *a priori* code captured the participants' *definitions* of global education (i.e., global competencies such cross-cultural communication, understanding global issues), perceived *purpose* of global education (e.g., cosmopolitan, neoliberal), and the global education *policy* as outlined by the state's five commitments (i.e., teacher support and tools, leading-edge language instruction, new school models, district networking and recognition, and strategic international partnerships). *District agency* captured the actions district actors took to support global education implementation, including examples of how they created coherence, built will and capacity, and re-oriented the organization. *Multi-directionality*, a third *a priori* code, captured who district actors interacted with and the directions in which they influenced one another in the formulation, adoption, and implementation of global education policy. A final *a priori* code, *context*, documented the various values, beliefs, norms, resources, occupational demands, organizational structures, community attributes, and professional relationships that constrained and enabled district actors' agency to develop and support global education. Context

also captured the challenges in implementing global education such as high stakes testing, limited resources, and nationalist values identified in former global education literature.

Meanings of how districts co-constructed global education policy under these broad dimensions were generated through constant comparisons of incidents to incidents and incidents to co-construction theory as a way to group incidents that were conceptually similar into inductive codes (Corbin & Strauss, 2008). I compared coded data to one another to search for similarities and differences; those that were similar were grouped together under the same descriptive concept. (For example, I combined the initial codes of “information,” “materials,” “VIF program subscription,” and “travel opportunities” to create the broader descriptive concept of *providing resources* under building capacity). Examples of descriptive codes within each of these broad categories and inferential pattern codes (comprised of emerging patterns, themes, and relationships in the data) that emerged from the data are listed in Table 3.3.

During analysis, I wrote analytic memos illuminating patterns and themes for individual district actors, followed by a whole-district analysis (Miles & Huberman, 1994). I paid attention to within-district variation before looking for variations across the two district cases. Because how a single school district responds to state policy may not be “internally homogenous” (Spillane, 1998), I examined individuals within district-specific analytic memos before aggregating cross-case analyses. This allowed me to search for corroborating or conflicting evidence among individuals holding different positions of power, and helped to “ensure that emergent categories and discovered patterns are grounded in specific cases and their contexts” (Patton, 2002, p. 57).

To avoid the “pitfall” of only focusing on the subunit of analysis and failing to return to the larger unit of analysis (Yin, 2009, p. 52), I created cross-case matrices “to gauge whether and

how the patterns identified in individual case narratives were evident in some or all of the [district] sites” (Rice et al., 2012, p. 902). The cross-case matrices displayed the content and structures of global education policies adapted, district actions to support implementation of those policies, influential actors within and outside of the district that supported (or challenged) implementation, and the contextual factors that influenced the co-construction of those policies.

In the following sections, I describe how global education unfolded in each school district. In separate district cases, I first depict the context that shaped district leaders’ decision to pursue global education. Then I answer 1) why and how each district adapted the state commitments to global education, 2) how the district supported the implementation of global education, and 3) who influenced district understandings and actions around global education. Then, I compare the co-construction of global education across the two districts, describing the relational and contextual factors that explain why Roosevelt and Maple shared similarities but demonstrated key differences in their respective interpretations and adaptations of global education. As the theory of policy co-construction would predict, key differences were found in how district personnel perceived the purpose of global education and how they implemented each commitment, which may be explained by unique district contexts and the external influences on their global education programs.

### **Global Education in Roosevelt County Schools**

#### **District Context**

Roosevelt School District is in a North Carolina county comprised of a small city urban core surrounded by multiple rural townships and a large military base. This mid-sized school district has multiple “townships” comprised of elementary, middle, and high school feeder patterns. Nearly all participants identified the district as being military-connected. With the U.S.

Defense being the number one employer in the county (NC Department of Commerce, 2015), multiple participants stated that about 60 percent of their student population was affiliated with the military. While in the last decade Roosevelt County has experienced population growth and a change in federal classification from rural to non-rural (NCES, 2006; U.S. Census Bureau, 2013), over half of participants continued to identify the county as rural. In the words of the former superintendent, “I have this rural military community that I’m trying to mesh.”

The population is approximately 75% white, 15% black, and 10% Latino/a, with about 10% of the population speaking a language other than English in the home (U.S. Census Bureau, 2013). District leaders described the English-as-a-Second-Language (ESL) population in the school as diverse, with students speaking a variety of home languages such as Arabic, Chinese, Farsi, French, and Spanish. According to participants, this diversity in home languages was connected to the military. A school board member and former district director explained, “I always refer to our community as the United Nations of North Carolina and I’m sure the army base can attest to that as well. You get people from all over the world here.”

Global education first came to Roosevelt County at the same time as a shift in district leadership took place in 2007 with the appointment of a new superintendent, associate superintendent, and district directors. The associate superintendent explained,

We were all brand new [to the central office] in 2007 and we were contacted by a rather dynamic young man who worked with the Center for International Understanding. He said, “Oh my gosh! Look at all this data! You are home to [Military Base]. You have people from these number of countries. You have people in this community who speak this many different languages. You have this number of people who are in and out of [Roosevelt] County going to other countries and other states every single day, and what are you doing to meet all of the needs and all of the gifts that they’re bringing back to this county?” Now if that doesn’t stop you dead in your track...The data spoke to us. I mean, we are global.

A principal concurred, saying, “Because we live in a military community, we have our own little melting pot here...So we thought global education is a nice compliment to the community that we live in.” As the majority of Roosevelt district leaders and external partners from CIU, VIF, and World View stated, the diversity of people and experiences intrinsic to the military community made global education an easy fit for Roosevelt.

### **Roosevelt’s Global Education Definitions and Purposes**

**Global education definitions.** Nearly every Roosevelt participant interviewed described global education as something meant to be integrated seamlessly into the daily enterprise of teaching and learning, using phrases such as “it’s just education” or “it’s just what we do” to describe global education. Sarah Kennedy, the recently retired Roosevelt superintendent, explained, “We used to say it in our initial meetings, we should not be talking about global education. We should be talking about education. It should just be part of what we do.” Principal Gina Monroe echoed this wording as well, saying that “It’s kind of funny that we even talk about a global education because everywhere else in the world it’s just education.”

While these participants alluded to global education as an everyday part of instruction, they also provided specific knowledge, skills, and attitudes they believed global education should teach. Nearly all Roosevelt district actors included *understanding and appreciating different cultures* as part of their global education definition. A district director shared,

I think about global education as being the skills, the traits, the qualities that you can have as a person that will give you the ability to understand other cultures, to be able to cooperate, collaborate, to work together in such an international world that we live in. To me, that cultural competence piece is probably more important than anything else because I have to understand your culture; I have to respect your culture.

Principals in particular emphasized teaching students to appreciate their own culture as well.

Principal Haley Jackson explained, “It’s important to understand yourself before you can

understand anybody else.” Principal Gina Monroe likewise stated, “We really focus on students having an understanding and an appreciation of their own culture and ethnicity first, and then being able to appreciate and work with students and teachers from other countries as well.”

Other competencies that a handful of Roosevelt participants included under the global education umbrella was *an awareness of the world, intercultural communication, and taking action on issues of global importance* through service. As district director Lana Washington stated, “service-learning is a huge component of global competency.” Principal Haley Jackson described various service projects that her students came up with, including, among others, advocating for a local organic food market to accept food stamps, creating an awareness campaign to support a Venezuelan teacher’s family, and raising money for an animal shelter, Doctors without Borders, and clean water for an African village. She explained, “To truly be globally minded you also have to have a heart for service... children taking action on what they learned is really important to us.”

**Global education purposes.** In Roosevelt, participants coalesced around three main purposes when asked why global competencies should be integrated into education: student competitiveness, cosmopolitan citizenship, and equity of opportunity. Most pervasive, reported by 13 of 16 Roosevelt district actors, was student competitiveness in a global marketplace. As district director Lana Washington stated, “It really is the underpinning of what we should provide for students, to be prepared for the workforce in a global economy.” Principals likewise commented that global education would make students “more marketable,” “competitive,” and “prepared to buy, sell, trade, invent products and services that are global worldwide.”

Though most participants made reference to this neoliberal notion of global competitiveness, school board members and district directors emphasized that this was a, but not



the only, rationale for global education. Two-thirds of Roosevelt participants – including principals and district directors – described a cosmopolitan purpose for introducing global education to students, stating that an important purpose of global education was “to help impart to children that they are citizens of the world and it is their job to care for the world and its people.” Neoliberal and cosmopolitan purposes were not mutually exclusive, as multiple participants referred to them both as important reasons for adopting global initiatives.

Equity of opportunity, a third purpose for global education that emerged from the data, was evoked by a third of participants, including the former superintendent. She explained,

I had this vision of opening doors to more students in what a lot of people would consider a rural, southeastern community...there's a perception I think that [our region] is more of a rural kind of a setting. It's not the city; it's not even suburbia. It's truly out there. Once I started seeing all the things that were out there and I realized as a child I lived in Roosevelt County and I didn't know about all of that, it was important for me that our students have the exposure that I knew students in Raleigh got because of the environment... For me, it was truly about opening opportunities for students that I knew other students across the state [had]. I was determined to level that playing field for them.

The opportunities that participants spoke of tended to relate back to jobs. As principal Richard Adams, whose elementary school taught Mandarin Chinese, shared, “Pretty soon China will be the number one English speaking country in the world and they're our business partner. We don't want to limit our opportunities for our students.”

### **Roosevelt's Global Education Adaptations**

Roosevelt adapted, or modified, each of the five broad state commitments to global education to fit their district's culture, needs, and resources. (See Table 3.4.) Roosevelt presented the five state commitments to global education as a buffet of offerings from which school sites could choose. First, for *teacher support and tools*, the district subscribed to multiple programs, including World View professional development conferences and resources, the VIF Learning Center platform, and International Baccalaureate (IB) programs. World View programs that

Roosevelt annually sent administrators and teachers to since 2006 included the Fall Symposium, spring seminars on different global regions, a media specialist seminar, the weeklong GELP leadership conference, and an online course on globalization. A World View staff member explained, “Roosevelt was one of the first global counties and a big supporter, so we’ve worked with them in different ways.” Between 2006 and 2008, the number of Roosevelt educators and administrators attending World View professional development rose from 101 to 303. When World View held their Partners Program in Roosevelt County to kick off the 2008-2009 school year, the number of participants totaled over 900. After 2009, Roosevelt continued to send smaller groups to World View conferences, workshops, and courses, on average sending between 24 to 48 educators and administrators any given year.

Regarding VIF’s Learning Center, all schools had full access to the online platform and modules. Schools used it, if they so chose to, in different ways. A VIF staff member explained, “There are actually no schools that are mandated to do the PD. [School name] for example is a very global school. They have access to our platform. How they use that, they determine... Their teachers don’t have to do the PD.” While only 130 Roosevelt teachers received completion badges for the VIF modules during the 2014-2015 school year, VIF staff acknowledged that teachers in the district received global professional development through multiple outlets, saying “I know that they’ve done probably other PD and I know they’re doing global instruction.”

A third outlet for teacher supports in school were the IB primary years, middle grades, and diploma programs. Adopted by one elementary, one middle, and one high school, these IB programs, as principal Haley Jackson emphasized, “require a tremendous amount of professional development.” This included online and face-to-face professional development on the IB units of inquiry and learner profiles in order for schools to receive IB certification and recognition. Haley

Jackson also provided World View and VIF professional development for her teachers as well, saying “[Teachers] get it [PD] from everywhere,” thus exemplifying the multitude of global professional learning opportunities that teachers could access. Because of the variety of professional development that Roosevelt offered, district director Lana Washington hoped that Roosevelt teachers would apply for the state’s Global Educator Digital Badge. She shared, “our teachers will be able to backtrack and use some of this years’ [PD] work because it’s always been in Roosevelt County School’s district plan.”

For the second state commitment of *language instruction*, the district implemented both language immersion and world language programs. Roosevelt offered VIF’s SPLASH Spanish immersion program at five elementary schools (where students were in full Spanish immersion in kindergarten and first grade, then switched to a 50-50 model for second grade onwards); Chinese language classes at five elementary schools, two middle schools, and two high schools through CIU’s Han Ban partnership; and world language programs, specifically Spanish and French, in nearly all middle and high schools and in half of elementary schools. With only one French teacher for the entire district, Roosevelt also used their virtual teaching platform to offer French to students in high school and middle school. In addition, students took higher-level language courses through NC Virtual Public Schools. Lana Washington explained, “This year was the first year that every middle school and high school had a world language teacher and every elementary school had either world language, SPLASH, or a [VIF International] teacher.”

Principals had autonomy to choose how language programs were structured. As the world language district director explained, “the way that’s approached at each campus is different for various reasons.” Principals suggested that schools tended to strategically choose one language, though one global-themed elementary school did offer Spanish immersion and Mandarin

Chinese. Language offerings were somewhat grouped by school feeder pattern. As principal Richard Adams described of the Mandarin Chinese program in his township: “There’s Chinese in the middle school and there’s Chinese in the high school. So it’s an articulation kind of thing. Elementary is very exploratory. They’re learning basic phrases, colors, hi, mom, I love you. When they go up to the middle school and high school I’m sure the programs become much more rigid and rigorous.”

The district also facilitated the state commitment to *strategic international partnerships* in a myriad of ways. First, individual schools or entire feeder pattern townships engaged in sustained partnerships with schools in other countries, including Belize, China, Denmark, Finland, and Mexico. These partnerships included both virtual and face-to-face exchanges. Roosevelt students virtually worked with students in their respective sister schools on learning activities (e.g., studying the night sky in their respective locations, comparing weather phenomenon, conducting and answering questions on social studies multimedia presentations, sending gifts to one another that students made out of recycled materials). Partnerships also provided exchange opportunities for teachers. Principal Gina Monroe shared, “We’re in our fourth year of a partnership with a school district in San Pedro, Belize, so I’ve sent probably close to 20 staff members to spend a week teaching in San Pedro.” In return, their partner district in Belize annually sent teachers to Roosevelt. District and school leaders also took trips through CIU and World View to build partnerships. For example, principals who hosted Han Ban teachers traveled to China with CIU and three principals and a district administrator attended a World View trip to Japan the previous summer to establish Japanese school partnerships.

In addition to partnering with schools abroad, the district hosted international teachers. Roosevelt began strategically hiring a handful of international teachers in 2011; by end of the

2014-2015 school year the district had over 50 international teachers in over half of their schools. In the prior year alone, their international staff grew by 60%. They hired VIF teachers to teach in regular or dual immersion classrooms, and partnered with CIU's Han Ban program to host Mandarin language teachers from China. District director Lana Washington shared that their international teachers represented "13 countries in six of the seven continents."

Schools varied in how they utilized international teachers as partners. Principal Gina Monroe explained that she first hired international teachers for each grade, K-5, as a form of ongoing PD wherein "every grade level had an international teacher on their team that they could plan with and collaborate with." Later, she hired international teachers for her Spanish immersion classrooms. Principal Haley Jackson went through the reverse process, explaining that she first hired teachers from Spanish-speaking countries for her Spanish immersion program, then "had the opportunity to hire more VIF teachers that were from other places to be in other positions besides just teaching language immersion." The former superintendent summarized the importance of international teacher partnerships for educators: "If I brought visiting teachers in who stayed with us for two years in a building, they share a wealth of global mindedness with a whole faculty. There is no better payoff on that one."

Along with forging face-to-face and virtual partnerships with schools in other countries and hosting international teachers, a third way in which Roosevelt encouraged partnerships was through CIU's Cultural Correspondents program. Denise Madison, the teacher-turned-assistant principal who coordinated the program, described how it provided a way for teachers to integrate global awareness and service-learning into their instruction. As one example, she shared

I was teaching ecosystems, and I had correspondents in different countries... We all shared our ecosystems from our area and the science scores on ecosystems were 100%. It was because the kids actually got to see the rainforest and hear about it firsthand from

someone who lived there or someone who's been there, [which] you can't get from a textbook.

Of these various strategic international relationships, international school partnerships and hosting international teachers were brought up by nearly all Roosevelt participants interviewed, while three participants mentioned the Cultural Correspondents programs.

Reflecting the state commitment to *new school models*, four elementary schools decided to embrace a global theme, one of which became a magnet IB world school. Global-themed schools encapsulated the teacher tools and supports, language instruction, and international partnerships commitments, as all had an explicit focus on integrating global content, language learning opportunities, and hosting international teachers. Principal Gina Monroe explained all of the components of international partnerships, teacher professional development, and language learning that went into her school's global theme label:

I knew [our global theme] had to have meat behind it. You just can't say, 'We're a global learning school.' What does that really mean? It was important to me that there was substance to the program. We found that substance in the VIF teachers. Having an international colleague is an unparalleled experience to professional development because they're able to plan daily with that colleague and say, "This is how we do it in Jamaica" or "This is how we do it in Australia." That's where the theme initiated. The next jump, which is huge, is actual cross-content integration ... Our teachers have actively engaged in [VIF's Learning Center] program for professional development to help them with that content integration... We were accepted for a Chinese guest teacher, so we'll have a Chinese elective next year as well as everything else.

The principals of other global-themed schools described similar school-level conversations in defining the global core framework. Each school had unique emphases, ranging from global stewardship to the IB model's six themes of inquiry: who we are, where we are in place and time, how we express ourselves, sharing the planet, how the world works, and how we organize ourselves. Three of the global-themed schools also adapted a variation of the VIF Global Schools model, where each grade level was assigned a continent of focus (e.g., North America for

kindergarten, Australia for first grade, Asia for second grade, Africa for third grade, Europe for fourth grade, and South America for fifth grade) and, if possible, had an international teacher from that continent on the grade level team. Finally, one school had applied and a second expressed intent to apply to the NC DPI Global-Ready School Designation.

One additional adaptation that the district made beyond the state commitments was instituting and promoting *global events*. For example, district administrator Scott Polk explained that the township that first introduced the Han Ban program hosted parades and celebrations for the Chinese New Years at the elementary school and hosted end-of-the-year “culminating” events at the high school, where they “bought traditional costumes, traditional instruments, traditional food, traditional calligraphy, had people teach Tibetan dancing, and had calligraphers come in to teach Chinese strokes and the letters.” The district also organized an annual global innovation fair, which delved deeper into global issues. District director Ben Hoover described: “every year students showcase a project based on a big idea and an enduring understanding that’s globally relevant. We’ve had four: kindness, scarcity, transformation, and sustainability.” Approximately 100 elementary, middle, and high school students participated annually.

A second additional global education adaptation was that a handful of middle schools and high schools offered *global studies courses*. Middle school elective offerings included “Global Gateway,” a “curriculum designed to provide students with essential attitudes, skills, and knowledge for global citizenship, while exploring the complexity of current global issues” (Middle School Course Descriptions). One high school offered IB courses, and one high school offered a global cultural studies course. Yet, global courses were not a major thrust of the district as they were only “part of the middle and high school curriculum at certain schools” (Interview, Samuel Harrison). Furthermore, not all students attending schools with these electives could

participate. For example, a middle school principal described how he used global studies as an enrichment class while students “with math or reading deficits” attended intervention courses.

In sum, Roosevelt County Schools provided multiple options for how school sites might integrate global concepts, provide language instruction, forge international partnerships, and re-orient their school around a global theme. District actors also framed these aspects of global education as being intertwined (i.e., increasing world language and language immersion opportunities went hand-in-hand with hiring international teachers and forming sister school partnerships; students investigated specific content area topics with international partners). The following section describes the district supports that participants reported as encouraging the implementation of these initiatives.

### **Roosevelt District Agency in Supporting Global Education**

Consistent with prior literature that has examined district agency in adapting instructional reforms (e.g., Firestone, 1989; Levin & Datnow, 2012; Rorrer et al., 2008), global education leaders in Roosevelt supported the implementation of these global education initiatives by strategically generating will, building capacity, re-orienting the organization, and creating coherence with other reforms. These are listed in Table 3.5.

**Generating will.** Roosevelt district leaders generated will for global education among school board members, school administrators, teachers, and community members in a myriad of ways. They included stakeholders in the planning and development of global initiatives, reached out to the community, championed global education with forward-thinking leadership, and slowly built pockets of success while not mandating any particular initiative.

**Stakeholder inclusion.** About three-fourths of participants reported that district leaders included a variety of stakeholders in making decisions around global education. When global



education was first introduced to the district, the former superintendent Sarah Kennedy shared how she held focus groups that asked teachers, student teachers, county government representatives, community business leaders, and military base personnel to help shape “what international education would look like and what would [stakeholders] want out of it” and share “the value in our teachers and our students having this kind of exposure.” As she explained, “Everybody was in on it. Obviously it helps make it a little bit smoother.” Sarah Kennedy further emphasized the importance of including the school board to build political will among community members, stating,

I could not have gotten [global education] rolling without my board support. We included them in some of those meetings. We had them engaged, and we did presentations at the board meetings so that they could be televised and the public could see them and understand it.

District and school administrators “sat at the table” for “shared visioning” around global education as well. A district director shared that the associate superintendent, principals, human resources, and “the whole instructional division” played a role in global education implementation. Corroborating this, Sarah Kennedy explained,

If everybody isn’t sitting at the table things start falling apart and it gets hairy. From the district perspective everybody knew exactly what we were doing the whole way we were doing it. But in terms of actually making things happen at the classroom level it became very focused on myself, the curriculum and instruction associate superintendent, and the principals because that was the leadership chain that was going to really be focused on what was going to happen in the classroom.

This “leadership chain” around global education is consistent with Rorrer and colleagues’ (2008) review of district instructional leadership, which stated “district instructional leaders generate will by being personally engaged in all aspects of...instructional-related reform” (p. 316).

***Community outreach.*** In addition to bringing stakeholders around the table in shaping the direction of global education, about two-thirds of participants described how global

education leaders in the district “marketed” global education to build will among community members. For example, the former superintendent and multiple principals explained that they spoke with, surveyed, and advertised to parents before implementing new language programs. Principal Jacob Johnson, for example, explained that his marketing strategy for his school’s Spanish immersion program – including making yard signs, hanging a big banner, advertising on the school Facebook page, and sending out flyers to all of the local preschools –led his school to fill two new kindergarten immersion classes. He shared, “We promote the class, so I think that’s why we’re very successful with it.”

District actors also “advertised” to parents and community members through school-specific and district-wide events that showcased global learning. For example, a district director shared, “our sustainability fair, our international fairs and those types of things, they really get the community involved a little bit more.” School board members, superintendents, and principals explicitly pointed out the importance of educating community members and organizations about the value of specific global programs. A school board member shared, “My role is to work with our board members to help them understand the need for the programs that we have. I am more of a liaison between the community, chamber of commerce, the economic development, [and] the civic clubs about the things that we do.” Principal Gina Monroe, who sent teachers on international professional development exchanges in Belize, shared:

There have been pockets of resistance throughout the district. ‘How are you paying for teachers? Why are teachers going to Belize? Are they going on vacation?’ Because people don’t truly understand it. We’ve just taken those and turned them into opportunities to educate them about why it’s money better spent to spend a week teaching in a third world country than it is to stay at the Embassy Suites in Charlotte.

Another district director concurred that “We’ve done a good job of frontloading the information ahead of time and making sure people know what we’re doing, why we’re doing it, and how this

will help your child.” As these examples suggest, community outreach was key in responding to potential critiques of global programs.

***Forward-thinking leadership.*** In addition to stakeholder inclusion and community outreach, nearly all participants agreed that the district also built will by championing global education via “forward thinking”, “visionary” leadership. As one principal shared, “I’m very fortunate to work in a district that has a great vision. They have great forethought into what’s on the horizon in education.” District directors, school administrators, school board members, and external partners concurred that the former superintendent and longstanding associate superintendent of curriculum and instruction Elizabeth Lincoln were the “driving force” behind global education in Roosevelt County. A school board member shared:

Most superintendents don’t really attend all of these [meetings]; Sarah Kennedy attended. She was fully committed to it. She didn’t just go over there, sit and read the paper, and do the crossword puzzle. She was actively involved in that discussion. She believed in it and she put her money where her mouth was all the time.

A district director similarly described the associate superintendent as “the biggest cheerleader in the world of everything, but from a global perspective she very much has been the person who has continually made this a priority and made it a continued topic of focus and conversation.” A principal summarized the sentiment of most participants in explaining, “Sarah Kennedy and Dr. Lincoln, they have led the charge and been passionate about it [global education]. They themselves have immersed themselves in it, and have had been leaders in finding those different ways of presenting it to us so that we see the importance of it.”

***Slowly building pockets of success.*** A final way in which the district generated will was by making global education optional while at the same time slowly building pockets of success. Over half of participants, including district and school administrators, emphasized that all of these global initiatives were dependent upon whether school leaders and the local community

that the schools served chose to adopt them. The majority of district leaders interviewed expressed that they made a conscious effort to not force schools to adopt global programs, but let them wait until they felt ready. Summarizing the district position, district director Eugene Carter stated, “We from the district are going to say ‘This is a really great opportunity, we’re really going to encourage you.’ But if they’re not going to support it at the school-level then maybe it’s not time yet.” Associate Superintendent Elizabeth Lincoln further explained how they expected everybody to get on board with global education but did not enforce a timeframe:

We used the analogy of going to a party. If people are invited to a party, a fourth of your people are going to be early, a fourth of your people are going to be right on time, a fourth of your people are going to be fashionably late, and unfortunately a fourth of your people left to their own accord are never going to show up. So the only non-negotiable in this school system is, we’re not going to have that 25% that doesn’t show up. You may be an early arriver, you may be right on time, or you may be late... When you arrive and how you arrive is completely up to your leadership and your school’s strategic plan. You’re going to get there but we’re going to help you along the way.

A school board member corroborated this point, and explained that the philosophy behind not forcing initiatives on schools was to build buy-in:

Because you have to get buy-in, you can’t force it on any school. You have to get buy-in from the principal, from the teachers, from the parents. Once you get that buy-in, that commitment, you start off and then it gradually grows. One size doesn’t fit all and that’s what we’ve done... Nothing is forced on principals. Other than what the state decides to do. And that’s where you get a lot of resistance.

School leaders, along with external partners from VIF, concurred that Roosevelt gave schools “autonomy” over whether and how to implement global programs. As principal Richard Adams shared, “The nice thing is it that the district offers but doesn’t mandate, so we can pick up or leave off as much as we choose to.”

Reflective of the improvement science literature on bringing reforms to scale (Cohen-Vogel et al., 2015), district actors believed that slowly building pockets of success would inspire other schools to implement global education. For example, former superintendent Sarah

Kennedy stated: “I tell people all the time, if you can build a pocket of success, you can expand a pocket of success, because most people want to be part of something successful.” A school board member similarly described how the Chinese Han Ban program got off the ground, “When it first started, everybody just loved it. And from that pilot, it went to the other [schools], and so it worked.” A second school board member, along with multiple principals and district directors similarly described implementation as “an evolution” in “incremental steps.” He shared, “We do our homework. We don’t jump in headfirst. Start out as a pilot program, see how it works. You learn from that and plan accordingly.” This suggests that being deliberate in showing school staff and community members the benefits of global initiatives, through research and pilot programs, was a strategy for generating a systemic commitment to global education.

**Building capacity.** Every participant stated that the district built capacity through the provision of resources, including funding, materials, professional development for teachers and administrators, information, international travel opportunities, and technology support. As the Title I district director summarized when describing the supports that the district provided for implementation: “Two things that come to mind immediately are professional development opportunities, whether it be World View or [the VIF Learning Center], and resources.” A principal agreed, saying, “When we don’t have enough money to pay for the resources and the materials, there’s definitely a financial support component that’s happening... certainly with professional development, the district offers a lot of professional development after school for principals or teachers.” Though most participants did note that schools were responsible for paying the bulk of professional development and international travel costs, the district paid for VIF Learning Center online platform access and accompanying technical support, IB certification costs, and select World View programs. As Lana Washington reported, “At the

district level we have funded GELP, we have funded the media, we have funded some of their study abroad trips... Usually I'm going to build capacity and take principals and assistant principals." Additionally, the district provided in-house professional development opportunities; for example, hosting global PD conferences through World View and Race to the Top funds and sending instructional coaches to train teachers on the VIF Learning Center at the request of school principals.

Along with professional development, the district helped cover the cost of certain global programs. Due to the expenses associated with Spanish immersion program materials (multiple participants noted that SPLASH costs about \$20,000 dollars per classroom, or as principal Jacob Johnson noted, "these days that's probably half of my instructional money"), during the 2014-2015 school year the district began to "synchronize" the Spanish immersion materials by purchasing books at the district level. The district similarly helped cover the tab for the IB programs, specifically by paying IB schools' yearly certification fee and providing an annual allotment from the Title II training materials budget. As the elementary IB world school principal stated: "I was very fortunate that the executive office ... supported us as we went through the IB process because the certification and authorization process to become an IB world school is an expensive process."

Along with providing instructional materials and training opportunities, district directors, principals, and school board members described that the district built a technology infrastructure to support virtual learning with international partner classrooms and world language distance learning. District director Lana Washington elaborated: "epals, Skype, virtual lessons, we have a pretty expensive district-wide connection... We also use it for distance learning because right now we only have one French teacher in the county, so we push out French to all our high

schools.” Principal Haley Jackson summarized how the district built capacity in schools: “[The district] can bleed a turnip so to speak. They apply for grants, they access as many resources as possible, and they are wonderful about funneling any resources that they have to the school level.” The elementary district director agreed, saying “We’ve not just said we’re going to be a global district. I think we’ve backed it up by always providing staff development, coaching, follow-up, [and] resources ... That’s to me how you truly support it.”

**Re-orienting the organization.** Alongside building will and capacity, three-fourths of participants described ways that the district supported global education implementation through re-orienting the organization. Re-orienting activities included: re-organizing responsibilities within the central office, creating a district global action plan and committee, integrating international teachers into school staff district-wide, and creatively re-directing funds.

***Re-organization of central office positions.*** First, participants explained that a re-organization of district director responsibilities within the central office took place to support global education. As part of her responsibilities, district director Lana Washington oversaw global initiatives including international school partnerships, visiting international teachers, language immersion programs, global professional development, and providing resources and supports to schools as needed. When applying for the state’s Global-Ready School Designation, a principal shared, “I talked to Lana 18 times a day... She’s my partner in that I’m constantly throwing things off of her... We’re in constant communication.” External partners at VIF and World View also recognized her as the district-level point person for global initiatives. Along with including global initiatives as a part of Lana Washington’s responsibility, the Director of Innovation and Gifted Programs oversaw the IB schools and Celine Coolidge’s director role evolved from Director of Arts to Director of Cultural Initiatives, which encompassed “all areas

of arts education programs, world language programs, and English as a Second language programs.” As Celine Coolidge emphasized, “Prior to Lana and I, there wasn’t really a district level personnel base to let [global initiatives] be a focus point.”

Not only did the district create new responsibilities for district directors that highlighted a focus and commitment to global education, but these responsibilities spread across district-level leadership as well. This was evidenced in the multiple district administrators attending district action team meetings and the VIF professional development over the summer, including the Title I director, secondary director, director of cultural initiatives, career and technical education director, and associate superintendent (Observations, 6/13/15 and 9/21/15). Further, district directors described ways that they shared responsibilities for global initiatives. As district director Celine Coolidge shared of how she and Lana Washington collaborated:

We really see our roles as tandem in supporting global education. Whereas she’s really looking at it predominantly from the lens of global and cultural infusion and I’m really looking at it from the language lens, there’s no way to really completely silo those two things. They’re extremely integrated. So we try really hard to maintain constant communication and awareness of what’s happening on those sides of the coin so that we’re streamlining our work and communicating the same messages and goals.

The associate superintendent further explained that explicitly assigning a district director to oversee global initiatives led to a broader shift in the district office:

One of the major shifts that we have seen is global education really breaks down those silos because it’s no longer kindergarten verses 11<sup>th</sup> grade services. Now you’re looking a K-12 continuum, and we have really been able to do that...specifically with that curriculum, research, and development piece... Whether it’s language, whether it’s travel, whether it’s technology, Lana is our universal break down the silos.

In this regard, the district central office modeled for schools their definition of global education as being seamlessly integrated into “a part of our work.”

***Creating a district action plan and committee.*** The district also re-oriented the organization through the creation of a district action plan and committee to oversee its



implementation. The *Global District Action Plan: 2010-2016* had “5 big areas”: 1) make global education a district priority, 2) train teachers and administrators in the use of global education practices, 3) increase integration of global issues and world regions in all classes and all grade levels, 4) use information technology and media resources to expand students’ knowledge of world regions and issues, and 5) promote student participation in culturally and ethnically diverse events and activities. Lana Washington described this plan, devised in 2010, as being very “trendsetting” and “forward-thinking” for 2010. Elizabeth Lincoln further emphasized that “the whole kind of global, this is we are, this is who we are, really went into effect when we wrote that 2010-2016 district strategic plan.”

Furthermore, the district created a global action team to monitor, provide resources for, and revise the district’s global action plan. Members, who met about once a quarter, held a diversity of perspectives: elementary school principals with and without SPLASH programs, a middle school principal, high school principal, multiple district directors, the associate superintendent of curriculum and instruction, and two student representatives. The elementary district director explained, “We have so many staff that we’ve added onto [the global team], the information is getting out there to everyone about the expectations of how to grow and maintain global education.”

***Internationalizing teaching staff.*** A third way that the district re-oriented the organization was through increasing the number of international educators, and creating support systems to make new international hires feel welcome and a part of the district organization. As one principal succinctly noted when discussing changes to Roosevelt, “Clearly there is a presence of international personnel.” Individual school leaders provided initial support to international teachers by helping them find housing, secure drivers’ lessons, get to and from

work, and find a doctor, among other facets of daily living. In addition, the district hosted monthly social gatherings (e.g., dinners, hay rides, bowling) with international teachers, principals, and district administrators as an “outlet” for professional and personal support. As principal Richard Adams described: “It’s usually a fun thing...Chinese, VIF, anybody international that’s being housed in Roosevelt County has the opportunity to go...It is nice for [international teachers] to see that they’re not alone and that there are strength in numbers.”

Of note, a handful of participants brought up challenges of cultural acclimation associated with hiring new international teachers. As district director Celine Coolidge stated:

There are challenges that come along with international teachers because of cultural differences... We have a lot of folks that have done really thankless daily work just to acclimate our international teachers to our culture, our school culture, just the day in and day out tasks of living in our community. Everyone has people that are solely committed to making sure that these people are getting access to everything they need... I think it’s not anything that any one person can do. I think having that constant leadership support is absolutely necessary, but then having all the people underneath that continue taking the charge and marching forward with it is what makes it work and grow.

As this quote suggests, participants believed it was important for all levels of the system, from district leadership to school personnel, to provide support for international teachers.

***Re-direction of funds.*** Hiring international teachers represented a creative re-alignment of resources as well. With the exception of the Han Ban teachers from China whose salary, teaching materials, and professional development were paid for by the Chinese government, international teachers took up a teacher allotment. Therefore, principals chose to spend a teaching position on an international teacher. As one principal described,

When a teacher comes to me from Jamaica, London, France, wherever, it counts as one of my average daily membership positions...They find out how many kids you got, they divide by this magic number and that’s how many teachers you get. I use one of those slots to pay for the VIF teachers.

A second principal corroborated, “I can choose as the principal to either get a local teacher or to get an international teacher, but they’re not giving me an extra teacher spot, an extra salary to fill that. That’s an internal thing that we decide to do as a school.”

Likewise, school-level leaders found ways to prioritize global professional development with little budgetary means. Assistant principal Denise Madison shared how she had five people from her school present at a World View conference because “if you can speak at an event, they pay for your registration.” Principal Gina Monroe, who spearheaded the Belize school partnership, also found that

It’s cheaper to send a teacher to do a week exchange than it is to send them to a conference in North Carolina. It costs about a thousand dollars for me to send a teacher for a week to do that, which is a life-changing experience. To go to the North Carolina Elementary Conference for three days, Charlotte’s more expensive than Belize.

Although many participants complained of a lack of human and fiscal resources as a result of the state education budget, these principals showed that when there’s a will, there’s a way. As a district director summarized, “If you want to make it work, you can find out the way to make it work. It’s logistically challenging, sure. Is it time challenge, sure. But, if you’re in for the long haul, then you just make it happen.”

**Creating coherence.** In addition to building will and capacity and re-orienting the organization, Roosevelt supported global education by creating coherence between global education and other district initiatives. Participants noted that global education “fit hand in hand” with the curriculum and instruction team’s focus on concept-based instruction, the district initiative for themed elementary schools, the AVID program, and technology reforms. For example, regarding technology and global education, Sarah Kennedy explained that she saw

a very nice marriage between the two... I already had started this digital work, and I’m thinking, I can’t overwhelm everybody. I can’t say this is the new thing we’re going to do because we’re already so embedded in this digital. So we had to find a way for people to

understand that this was a part of what we were already doing. And it was about opening access and opportunities now so that everybody could learn from each other.

As explained during summer professional development training, the VIF digital badges complemented the district's new push for digitally badging all professional development (e.g., STEM, Positive Behavioral Interventions and Supports). Furthermore, district leaders aligned global education with state and federal policy, specifically the NC Teacher Evaluations, the Common Core, and SPLASH as a Title I reform model. This perception of global education as fitting with concurrent district, state, and federal reforms once again reflected district leaders' definition of global education as just being education.

### **Multi-directionality in Roosevelt**

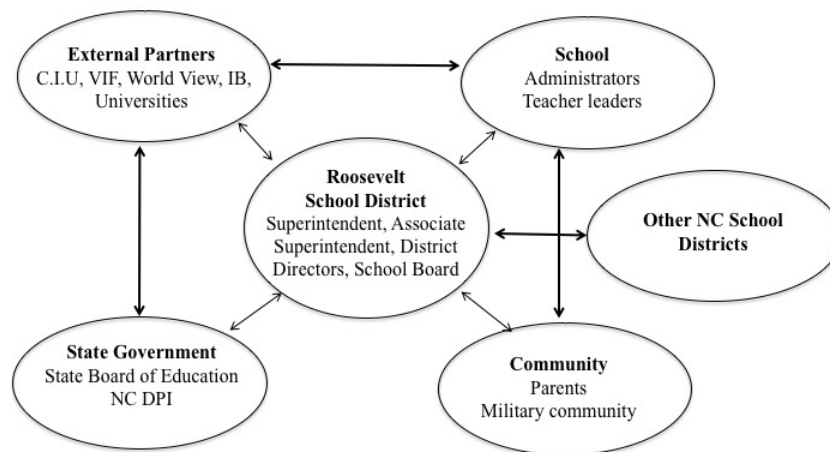
As the theory of policy co-construction would predict (Datnow et al., 2002), Roosevelt's numerous global education offerings in the form of language, international partnerships, and teacher tools appeared to have been influenced by the variety of organizations and individuals with whom district actors interacted. This is illustrated in Figure 3.3. These influences were bi-directional, with inspiration, ideas, and implementation supports moving vertically and horizontally across different levels of the system and outside the system.

**Non-system actor influences.** Organizations external to the school system, including VIF, CIU, World View, and, to a lesser extent, the IB program and local universities, all provided programmatic opportunities for Roosevelt schools. CIU, World View, and local universities facilitated travel opportunities that helped administrators form international partnerships with sister schools. VIF and CIU provided opportunities for international educators to teach in Roosevelt schools and provided language opportunities in the form of VIF's SPLASH immersion program, VIF's ability to recruit qualified world language teachers from Central and

South America, and CIU’s Han Ban partnership with China. VIF, World View, and IB also provided different professional development resources for global content integration.

Figure 3.3

*Multi-directionality in Roosevelt School*



Exemplifying how Roosevelt district actors utilized multiple external partners to fit their vision of global education, one principal stated, “The school’s long term vision will be to have a VIF teacher in every grade level. So we’ll have Chinese offered from the People’s Republic of China [Han Ban]. They pick up most of the bill for that, and then we will be hosting VIF teachers from all over the world.” Another principal shared how important VIF and World View were in providing teachers technical support to integrate global content, saying “I think it would be very disheartening to want to do global education and not have that immediate and accessible support that we get through VIF and World View.”

District actors did communicate with different external partners in different ways. The district communicated with VIF most often, as they provided technical support for the SPLASH

and the Learning Center programs, and brokered international teacher recruitment. As Lana Washington described,

VIF we talk often, probably once every two weeks because they provide ongoing support to our dual immersion classrooms... Especially this time of year when we're recruiting international teachers I talk to them often. World View, I probably talk to [the executive director] at least twice a semester and email. The Center for International Understanding, typically I don't talk to them unless there is a kink in the program. That is typically just an email.

Principals and other district directors corroborated that they frequently communicated with VIF about SPLASH and the Learning Center through video-chats or face-to-face meetings with instructional coaches. External partners corroborated this, as VIF staff members discussed how they provided ongoing "coaching" and school site visits (either virtual or face-to-face) as needed. World View also checked in with school partners twice a year beyond their programming. As a World View staff member explained, during these check-ins they shared "what we have going on" and asked "how can we help."

Although participants suggested that CIU was in the least frequent communication with the district, the former superintendent, associate superintendent, and principal leaders suggested that CIU, along with World View, provided district leaders the initial impetus to pursue global education. As Sarah Kennedy stated, "The Center for International Understanding and World View... were just tremendous partners for us in getting us started. That got the ball rolling." Principal Haley Jackson described how "[A CIU staff member] wanted to pilot the cultural correspondents program... He called [my school] and that is how we got started with North Carolina in the World. Then they told us about World View, and we started doing World View." Scott Polk, one of the two principals who initiated the Chinese language program in the district, similarly shared that a CIU staff member presented at a district-led principals meeting about taking a group to China to form school partnerships. He explained, "[CIU] approached us, but

they didn't come and say 'Hey Scott, you want to go?' It was 'Does anybody want to go? Come see us.'" As this example suggests, district leaders elicited awareness and provided connections between external organizations and school leaders, yet gave school leaders agency in determining whether and how they would work with external partners.

**Official policy actor influences.** Within the educational system, a gamut of actors influenced Roosevelt's global initiatives. This included influences from official state policy actors and official district policy actors.

**State policy actors.** Over half of participants suggested that the State Board of Education (SBE) and the North Carolina Department of Public Instruction (DPI) influenced the global vision of the district. District director Lana Washington explained that their district goals "mirror the state;" therefore, global education was a part of Roosevelt's strategic plan because it was a part of the state's strategic vision. Principal Gina Monroe agreed:

The state has been very clear about their expectations for how they want [global education] to trickle down to the districts and how they want to the districts to trickle that down to the schools. I think anyone that's followed what's developed in DPI would see that is one of the biggest reasons that the [Roosevelt] district has pursued it because...we've followed the state model of what the State Board has expected us to do.

The state's influence was evident in the district's global action team meeting in the fall of 2015. Members, charged with updating the district's Global District Action Plan, spent a large portion of the meeting aligning the five main objectives and sub-objectives of the district's plan to the state's ten attributes of a global-ready district (Observation, 9/21/15). A school board member further explained how the state influenced the countries with whom Roosevelt partnered, saying "North Carolina has [an economic] partnership with Finland, so it was natural for us to do that." Likewise, North Carolina's economic partnership with China was principal Richard Adams' rationale for wanting his school to partner with China. Finally, participants also explicitly

connected district initiatives with the state's new Global-Ready School and Global-Ready District designation requirements. For example, Lana Washington stated, "As part of that new Global-Ready Schools designation, schools have to have a global schools action team, so we've been doing some work up here at the district level encouraging people... We're really pushing, now's the time to have your global schools action team."

*District policy actors.* A bi-directional flow of ideas was evident between official actors within the district as well. While district leaders provided the vision, many district partnerships were formed from the bottom-up, that is to say, through school-level administrators' research and piloting of programs and partnerships. For example, VIF's SPLASH Spanish immersion program made its way into Roosevelt schools after a small group of principals visited a SPLASH school in a neighboring county. A district director explained, "We've had principals that were interested in SPLASH. That's why we've done SPLASH. It was a totally principal-driven decision." Likewise, Scott Polk recalled how he and another principal approached the district with the idea to pilot the Chinese language Han Ban program:

The district was great. Once [another principal] and I approached [the district] and said, "We're interested in doing this [C.I.U.'s Han Ban program]. What can we do?", they were the ones that got the application going... [The district was] very supportive, very dedicated to helping us out. As you see from where we are now, that becomes part of the culture of what Roosevelt is all about, bringing more Chinese teachers. I think Lana told me that we have the most Chinese teachers in one district in the whole state right now.

Likewise, the IB elementary school principal Haley Jackson introduced the idea of becoming an IB World School to the district. She explained, "I stumbled upon the IB program for primary years program (PYP). I began to look at PYP schools, really study IB, and it was a beautiful way to add an instructional framework to what we were already doing."

In addition to influencing district-wide initiatives, principals influenced one another through formal and informal channels. District directors in part helped to facilitate principal



communication around global initiatives during formal monthly principal meetings; district director Eugene Carter also facilitated quarterly “IB roundtables” with IB school leadership. Principals themselves informally communicated about SPLASH and other global initiatives. Denise Madison described how she used social media to share global integration ideas with other principals. Principal Haley Jackson further explained,

We call each other, we email each other, we’re at workshops together, we went to Japan together. Those of us who are really forward thinking in regards to globalizing our schools, we talk a lot... We’re a very tight-knit district to be as large as we are. We’re really a very close school family.

A school board member likewise shared that “we certainly encourage collaboration between schools... We are not very selfish in Roosevelt county. We are pretty good at sharing ideas and working together.”

Given the evidence of principal initiative in introducing global programs into Roosevelt schools, not surprisingly, participants listed two principals of elementary global-themed schools as the primary go-to people for global education, alongside the Associate Superintendent of Curriculum and Instruction and the district director who oversaw global education. That most participants listed both district leaders and principal leaders as who they communicated with about global education suggests multi-directional influences from the top and bottom. As a World View informant commented, “I think it’s one of the districts that has really high administrative support and teacher buy-in.”

Finally, as reported by just under half of participants, other school districts influenced Roosevelt district leaders and vice versa. In some instances, these relationships were brokered through the SBE’s Global School Network or through external partners such as World View and VIF. District director Celine Coolidge listed multiple counties with whom Roosevelt personnel had conversations and visited regarding global education:

When we started immersion, we did a lot of visiting in [Neighboring] County because they had long established programs, and we even did some dual language visits in [Another] County. We've done a lot of conversation with [three other counties]. We want to share the wealth and we also are smart enough to know that if somebody's done it before us not to try to recreate a wheel, to try to have those conversations and say, "Hey, how do you do this? What did you find worked?"

Former superintendent Sarah Kennedy who participated in the Global School Network meetings shared how "sitting in those rooms and having conversations" with people from other districts helped provide new ideas and supports, saying, "That was probably one of the benefits of being in the Global Schools Network group...I got to hear from a couple of other districts from their perspective of how they were able to move some things forward." Other districts also learned from Roosevelt schools. Gina Monroe described how VIF arranged visitors from different school systems interested in global initiatives to tour her school about "once every other month." A school board member corroborated this, saying, "We get quite a few visitors from other school districts. Big school systems that learn of what we're doing come and visit us."

To summarize the multidirectional global education influences in Roosevelt County, multiple people at multiple levels external and internal to the school system influenced Roosevelt's global education adaptations. District administrators provided school leaders with opportunities to interact with external partners, school leaders spearheaded new initiatives with external partners, and district leaders provided support to sustain and spread those initiatives. Internal to the system, ideas tended to flow vertically and bi-directionally between the district and schools and the district and the state. Ideas also flowed horizontally across different schools within Roosevelt and districts also pursuing global initiatives. These various influences reflect the multiple initiatives that Roosevelt pursued in adapting each state commitment and reflect how Roosevelt district leaders built will by bringing in multiple stakeholders, provided an array of capacity-building resources, and created coherence with local and state initiatives.

## **Global Education in Maple County Schools**

A two-hour drive from Roosevelt County down flat country roads that wind through farmland and quiet towns leads you to Maple County, where school district actors have adapted global education in a different way. In the section that follows, I describe the district context, global education definitions, purposes, and adaptations, supports in place, and key influencers that characterize how the world made its way into Maple County Schools.

### **District Context**

Maple is a small district with less than 20 schools, characterized by the National Center for Education Statistics as a “rural distant” school. The population is approximately 40% white, 55% black, and 4% Latino/a (U.S. Census Bureau, 2013). For school-age children, the Latino/a population was growing, with principals describing the Latino/a populations in their schools as ranging from 10 to 20 percent. As one participant who had taught in the district for almost 20 years observed, “Our Hispanic population has gotten a little larger...the Hispanic and white population is pretty much equaling out now.”

Three-fourths of Maple participants described the county as being a high-poverty area (70% of schools were classified as Title I) and as having a history of struggling schools, with high teacher turnover (between 15% and 25% over the previous five years) and low student achievement. As one principal shared, “When you look at our overall scores as a district, we are a school system in general that is not very high performing. The vast majority of our schools in this district on the new state report card received D or F schools.” In fact, in the 2013-2014 and 2014-2015 school years, 70% of schools received a D or F for the state’s School Performance

Grade designation<sup>15</sup>. Adding more angst to the district, a charter school had opened up in the town, which drew “a large influx” of over 700 students away from the public school system. Seven of 12 Maple participants suggested that the mass outflow of students from the district into the charter school provided an impetus for Maple County Schools to make changes. As principal Hank Ash explained, “When there are charter schools that can pop open around you and take students away from you, we needed parents in this district to see that in Maple Country Schools, there were options available to them.”

New Maple superintendent Frank Pine, hired in 2012, introduced global education to Maple. He summarized the condition of the school district that ignited this decision:

I’ve been the primary facilitator of trying to bring global education here. First off, we’re a small rural county with a high poverty rate. Our poverty rate is about 85 percent. Historically, we have some very struggling schools. We’ve previously had high discipline rates, low student achievement rates, and so part of my goal is to create a foundation of success in each school but also to locate some innovative approaches.

A superintendent and former State Board of Education member who mentored Superintendent Pine twice a week for a year and a half initially suggested the idea of global education to him.

The mentor explained,

[Frank] had two things going on. He had a charter school that had taken about 700 kids, and he had a middle school that was as bad as any middle school I’d ever seen in my life. I was actually doing some work for VIF at the time, consulting for them two or three days a month. [Frank] said, “Is there anything we can do that can attract kids back from the charter school that the charter school can’t do?” And I told him, “Call the people from VIF. Reconstitute that school as a K-5 school, start with immersion program and do this global stuff.”

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<sup>15</sup>School Performance Grades are based on 80% student achievement and 20% student growth. Achievement is calculated using annual end-of-grade assessments for reading and math in grades 3-8, science assessments in grades 5 and 8, annual EOC assessments in Math I, Biology, and English II, Math III, Algebra II, or Integrated Math III completion with a passing grade, the percentage of grade 11 students who achieve the minimum admission ACT score for The University of North Carolina, Career and Technical Education concentrators who meet the Silver Certificate or higher on the ACT WorkKeys assessment, and a high school’s four-year graduation rate. Student growth is measured using an EVAAS model. More details can be found at: <http://www.ncpublicschools.org/accountability/reporting/>

Driven by the need to address declining enrollment and persistently low-performing schools, the Maple superintendent heeded this advice and chose to adopt global education as an “innovative approach.”

### **Maple’s Global Education Definitions and Purposes**

**Global education definitions.** When they defined global education, district leaders in Maple emphasized an awareness of the world, understanding and celebrating different cultures, and taking action on global issues. Nearly all participants, including the superintendent, district administrators, principals, and teachers interviewed defined global education as *awareness of the world around us*, using phrases such as “being more in touch with what’s going on in the world” and “informing students of what’s out there beyond where we’re at.” As Global Teacher of the Year John Poplar shared, “I think global education is a way of educating kids, not only in terms of the world they live in... but it’s bringing the world to kids through education.”

Second, three-fourths of Maple district global actors also emphasized *understanding of different cultures and celebrating diversity*, defining global education as teaching students “intercultural competence,” “to share and accept other cultures,” and to be “culturally responsible.” Principal Sarah Willow shared, “I think the most important outcome is for kids to be able to understand that there is diversity in this world, we need to celebrate that, we need to embrace that.” The emphasis on culture was corroborated in professional development observations, where, for example, teachers were asked to take a “cross-cultural quiz” on “hidden cultural norms that you may not be aware of” (Observation, 10/21/15).

Other, less prominent, definitions of global education included inquiry-based learning, integration, and taking action. Five participants equated global education with *inquiry-based learning*, including the superintendent, three administrators, and a district director. Four

participants defined *integration* as a part of global education. For example, global school coordinator Cara Cypress stated that she wanted global education to be “routine” and “what we do.” Principal Patricia Cedar agreed that “we’re not doing global education; it’s infused in what we do.” Finally, three participants, Sarah Willow, Cara Cypress, and John Poplar, included *taking action* as an aspect of global education. Principal Sarah Willow shared,

I want our kids to understand that they can be difference makers in the world. To understand that they need to understand that there are wonderful things happening all over this world... They also need to understand that there are challenges here in our community, in our state, and throughout the world. I want them to understand what some of those challenges are, how they all fit together, and what kinds of differences they can make right here in Maple that could impact our broader world.

John Poplar sought to instill that mentality in his high school students as well, and spearheaded “two global projects” – clothes donations for Planet Aid and a donation drive to benefit victims of human trafficking in Cambodia – to show that “Maple High School can be successful in impacting the world.”

**Global education purposes.** Participants coalesced on three main purposes for global education in Maple County: student competitiveness in a global market, student exposure, and school reform. First, the rationale for making students globally competitive for work was stated by nearly all participants. The superintendent summarized his position by saying that the purpose “should be to prepare students to be more college and career ready, and more ready to go into the workforce and be successful in diverse situations... Our ultimate goal is to prepare students to be more competitive.” John Poplar shared this same sentiment, saying, “We realize that in the 21<sup>st</sup> century you’re not just competing against the kids on your block, you are competing against kids in another state, you are competing against kids from all over the world.” Teacher Selena Evergreen concurred, saying “We need to produce those bilingual students for the future, because they will be prepared workwise, they will be earning more.”

Three-fourths of district administrators and school leaders expressed that an equally important purpose of global education was to expose students “to life outside of Maple.”

Principal Patricia Cedar shared, “[Global education] it’s just opening their eyes and giving them experiences and letting them know what’s out there beyond their town or beyond their county or beyond their state.” District director Amber Dogwood concurred:

Our kids in Maple County have not had many experiences outside of Maple County. Living here we’re very close to the beach and unfortunately a lot of our kids have never stepped on the beach...Globalizing has given our kids the opportunity to travel the world, and not only travel the world but travel the United States. It has really broadened their perspective... to give our kids the opportunity to see that there is a world beyond Maple County, and then for them to want to take the next step to go see the world. I also think it makes them globally competitive when they go to college, and I think it gives them the excitement, the will, and the desire to actually go to college.

As this quote suggests, exposing students to the world was a purpose unto itself and a means of making students globally competitive.

A third purpose for global education that two-thirds of participants brought up was school reform. The superintendent explained that he perceived global education as a way to improve Maple student achievement:

We went to study the data of VIF International, which has been serving in North Carolina for 20 plus years, and saw great success that they were having in programs where students were learning two languages at one time and were being a part of the global education based school...Part of my work was to bring the research back that showed significant student achievement.

At school board meetings, the superintendent made presentations that highlighted how dual immersion programs increase student achievement, self-esteem, and enjoyment at school (School board meeting minutes, 11/15/13). Principals, district directors, and a teacher corroborated the notion that global education should increase student achievement, or at the very least improve schools. As principal Georgina Birch said, “That’s the main reason why our school district decided to fully pursue global education, because of the direct correlation between increases in

student achievement.” Principal Sam Aspen further suggested that the school system needed to go through a period of “renewal and renaissance” and that global education became “the rebranding for the district.”

### **Maple’s Global Education Adaptations**

As with Roosevelt, Maple adapted the state’s five global commitments: teaching support and tools, leading edge language instruction, new school models, strategic international relationships, and district networking and recognition. (See Table 3.4). They did so largely by adapting a pre-packaged global education model through VIF that provided a clear framework and suggestions for how to globalize while allowing for local flexibility.

Of the five commitments, every Maple participant agreed that the district’s two biggest global education pushes centered on teacher supports and tools and new school models. For *teacher supports and tools*, the superintendent mandated global education professional development (PD) in the form of completing the VIF modules in the Learning Center on a quarterly basis. By the end of the 2014-2015 school year, nearly every participant reported that the district was at a nearly 100% completion rate for completing all four Year 1 modules, with plans for a “four year roll-out” to complete the entire VIF module sequence.

Before starting each module, all teachers were also required to attend a three-hour face-to-face PD session, which the associate superintendent of curriculum and instruction and the global district director developed and each school principal (or another administrator or teacher that the principal appointed) conducted. This took place during a designated district professional development day each quarter. As Mara Elm, the district director who co-created the face-to-face PD, explained, topics covered “brought out bigger concepts” from the VIF modules and provided teachers guidance on “how to implement those things.” These topics included a global look and



feel, culturally responsive teaching, global leadership, local and global connections via technology (i.e., Skype, Google Hangout), blogging in your classroom, and social entrepreneurship. The end of each PD also had time built in for teachers to begin working on their modules. Mara Elm shared the district office's rationale for adding face-to-face PD to compliment the online modules:

We didn't want to say, "Get online and do the modules." So we teamed together to develop professional development that was in-house, where we could actually meet with teachers and do PD that was live and help teachers understand that this is not just something that's going to go away or something that you just do for 15 minutes...It's really a way of changing kids' way of thinking about things.

Very much in the same manner in which they had created additional PD around the modules to be more "hands on" and "applied," the district encouraged flexibility at the school site in how the Learning Center modules and resources could be used. Principals who facilitated the PD corroborated this flexibility. For example, Hank Ash considered the trainings to be "a scaffold of what you can use. Then the teachers have to use their own curriculum and the Common Core for math or for reading, or the Essential Standards for the rest of the subjects, and try to figure out ways to take that base and plug their own curriculum into it to make it effective for the students."

A handful of participants discussed having teachers apply for the state Global Educator Digital Badge on account of the 40-plus PD hours all Maple teachers accrued through VIF's Learning Center. As district director Mara Elm described, "We went to a leadership forum where DPI was talking about the badging...When they actually do start with the badges we'll be ahead of everybody on that end because we already have our first four [modules] under our belt."

Global school coordinator Cara Cypress, who learned about the state Global Educator Digital Badge through VIF, explained,

I've been getting [details on the state badge] together for our staff so that they know about it, because our staff has a huge advantage...I'm really hoping we'll get several of

them that are ready to sign that memorandum. It's a great opportunity for them. I would hate to see them not do it.

Yet, unlike the mandated VIF PD, district and school leaders encouraged teachers but made applying for the badge optional. As Cara Cyprus acknowledged "Nobody's being forced to do it at this point. I don't know if that will change but at this point it's all optional for teachers to sign up for that." Principal Sam Aspen likewise "hoped" that his teachers would apply for the Global Educator Digital Badge, but made no mention of making it a requirement.

The second cornerstone of the district's global education initiative aligned with the state's commitment to *new school models*, specifically the opening up of a K-8 global school of choice in the 2014-2015 school year. The global school principal and global school coordinator described the different components that made the school "global": 1) VIF's Global Schools model, wherein "an international teacher [is placed] at each grade level K-5 and the kids study a different region of the world at each grade level"; 2) "the integrated global studies course" for grades 6, 7, and 8; 3) VIF's SPLASH Spanish immersion program, wherein enrollment was open to kindergarten and first grade students the first year, and 4) global leadership. Global leadership was something that the school staff designed themselves and implemented through monthly global themes (e.g., leaders around the world, human rights, the environment, the arts). As principal Sarah Willow described,

I firmly believe that it's really critical that our kids, if they're going to be able to work with diverse people and be able to be world changers, they're going to need leadership skills. It's not enough just to know what foods people eat in China or the sports they play in Europe... So we've been focusing on leadership here, and each month we've selected a different theme. These themes have really unified our school from K-8... Within each theme we've given the kids opportunities to do a deeper dive into those topics, to really do some research and then opportunities to present what they've learned.

As the principal concluded, the incorporation of these monthly themes "was a way to make [what it actually means to be a global school] concrete."

The K-8 global school was also the sole beneficiary of programs that embodied the state commitment to *leading-edge language instruction*. They offered VIF's SPLASH Spanish immersion for incoming kindergarteners and a Mandarin Chinese enhancement class for all students. (Two additional elementary schools had offered Spanish immersion to kindergarten students, but not enough parents enrolled students in those classes for them to be carried out.)

In addition, the district focus on the state commitment to *strategic international partnerships* resided largely with the hiring of international teachers in the K-8 global school. According to the superintendent, "The thrust has been hiring international teachers at [the global school]." Similar to many of the global-themed elementary schools in Roosevelt, the Maple global school used VIF's Global Schools model where each grade level had an international teacher from the continent of focus. Spanish immersion and Mandarin Chinese teachers came from different countries as well, for a total of 15 international staff from Central and South America, New Zealand, Jamaica, the Philippines, the United Kingdom, and China. International teachers, whether teaching immersion or traditional classrooms, were integrated in all staff activity, from grade level planning to PLCs. Principal Sarah Willow commented, "The international teachers have added a lot because they're people who can say, 'I lived there and this is my experience'. I think that's been very, very interesting."

Like Roosevelt, Maple found other ways beyond the state commitments to implement global education. One was through *global events* that individual schools planned independently, such as "culture fests" or "global nights." For example, an elementary school principal described a "Global Passport Night" his school held as "something that was obviously appreciated and [the district] wanted us to do, to expose not only the students but the parents to what we're trying to

do in this school district.” High school principal Sam Aspen described how his school staff “put their heads together” to create a Global Fest as a way of enriching the fourth VIF module:

[The history teacher] organized a global fest project that was inquiry-based and focused on developing countries, social problems that they were facing, and how creative solutions could be made to those problems. He set up some project parameters; all the teachers implemented that project together. We had basically a gallery walk where the kids got to see each other’s projects, but parents came in and staff members and even some district leaders. It was a thread that tied everyone together.

Another way that a few schools adapted global education beyond the state commitments was through *global studies courses*. Two global studies courses were offered in the district. One was required for middle school students at the global K-8 school and the other offered as an elective in one of the district’s high schools. The global school’s course was a whole grade “seminar class” with project-based inquiries. Cara Cypress explained that the course was “very flexible. VIF has the different curriculums that you can use. It has lesson plans and everything there. But [teachers also have the flexibility...to go and do any certain country, or culture, or however they want to base it.” Global Teacher of the Year John Poplar independently developed the district’s only high school global studies course. The semester-long elective comprehensively examined four primary regions of the world: Asia, Africa, the Middle East, and South America. As John Poplar explained, students learned “geographic skills, social characteristics of that region, cultural aspects of that region, and sociopolitical things: the political systems, the economics systems, social crisis’ that have happened, and if there’s any wars or any ongoing tensions that might hinder the country or may have played a role in that country’s development.”

While most Maple district actors and VIF external partners described the global school as the district’s “flagship” global education school, Mara Elm summarized the district’s global education initiatives: “You’ll find that in all of our schools across the district there are global

initiatives going on. They'll have different types of educational programs that support global learning.”

### **Maple District Agency in Supporting Global Education**

District leaders in Maple played an active role in supporting the implementation of global education initiatives, including the VIF Learning Center professional development and the K-8 global school with its affiliated international teachers and language programs. As described below, district actors generated will, built capacity, and re-oriented the organization in a variety of ways that supported global education. (See Table 3.5).

**Generating will.** Maple district actors and external partners identified a number of ways that the district generated will for global education, including having a superintendent champion, community outreach, providing access for all students, and publically recognizing good global work.

***Superintendent champion.*** An overwhelming majority of Maple participants and external partners pointed to the superintendent as the champion who brought global education to Maple and provided ongoing support for it. Participants made comments such as “he’s been the mastermind around the whole thing” and “this is a mission and vision of our superintendent, so he has really led the way with this.” Maple veteran Cara Cypress expressed, “[I’ve] been through lots of superintendents, but our current one now, Mr. Pine, is doing an amazing job. I really feel like he has a true vision for Maple so it’s exciting.” District director Amber Dogwood concurred, saying, “Our superintendent has been absolutely phenomenal. This was his vision, and I would say without his leadership, I don’t know if it would have gone as far as it has because he has been behind this one hundred percent.” As further evidence, the school board recognized Mr. Pine in May 2015 because he “provided outstanding contributions toward our goals,

implemented the global initiative and is leading Maple County Public Schools to being a successful school district” (School Board Meeting Minutes, 5/15/15).

***Community outreach.*** An important way in which the Maple superintendent championed global education was through community outreach. Over half of participants, including district directors and principals, described ways that the superintendent reached out to school board members, parents, teachers, school administrators, and community members to garner support for global education over a full year before implementing any global initiative. He held speaking engagements in locations across the county and brought buses of educators and community members to a neighboring district to tour existing global schools. The superintendent explained:

We had a series of about 35 community meetings for about a six-month period of time, and every time that we had a community meeting we invited parents to go and visit these schools that had either global education or dual immersion programs. Stakeholders, parents went, teachers, we even took a couple of students, board members, key administrators across the county. There’s a difference when you go and see it live as opposed to someone telling you about it [or] reading about it. When we went to these schools, our stakeholders were astonished with what they saw. Kids were on task, excited about learning, high energy schools, six year olds who were speaking two languages. The program really sells itself when you can see it live. So the commitment to market and to literally take about 20 bus trips two hours to [Neighboring] County in particular, helped sell the program and probably fast-forwarded facilitating the process.

The superintendent’s mentor shared how these visits ignited buy-in: “Frank spent a year and a half planning...to get people to buy in. He took teachers, he took board members down to visit other schools and by the time it was time to start everybody wanted a piece of it.”

The superintendent also held community meetings strategically across the entire county to ensure all parents had access. District director Amber Dogwood explained:

We tried to hit every area of the county so that parents from all parts of the county could come and hear what was going on... [The superintendent] would speak at social organizations, the Rotary Club, any event that would listen... Videos were created so that if you couldn’t come you could go to the website and see the video. We tried to hit it with media as much as possible, and in different formats so that any parent could access it from anywhere.

Another district director, Fiona Redwood, added that the superintendent's prolonged planning and thoughtful engagement with community members built will. She explained that meetings with civic and community organizations

Definitely gave us a step up, because people were involved. They had the opportunity to ask questions...and have their concerns validated or squelched. And they felt like they knew what was going to take place. I think it was because of that very thoughtful planning of implementation that we encountered little resistance.

School board meeting minutes also insinuated that this "Global Tour" strategy was effective in garnering community support. Minutes from a February meeting read:

It would not be a success even though it's a great program if we did not inform our parents because not all parents read the newspaper, use the Internet to follow the schools, or read the notes that are sent home. [The board chair] stated that because Mr. Pine continuously went out into the community to meet the people to inform them is what has made this program grow" (School Board Meeting Minutes, 2/17/14).

As another strategic move to garner community support, the superintendent opened up registration for the global school on a first-come-first-serve basis as opposed to using a lottery system. This allowed parents to vote with their feet. He stated,

The community doesn't necessarily vote, but opening up a registration process to the community, parents were then weighing in because they had the ability to register the children or not. Parents in the end really made the decision based upon high interest. A part of my strategy there was to create some buzz and excitement for people to be motivated, and that worked. We registered 500 kids for the school within seven weeks.

Furthermore, once the school opened, he continued to garner school board and community support for global education throughout the 2014-2015 school year. A district director, three principals, and school board meeting meetings corroborated that at each monthly board meeting a different school presented something related to global education occurring at their school.

*Access for all students.* Another way that the superintendent built will for global education across Maple County was by stressing that all students had access to the K-8 global

school and the VIF Learning Center lessons. Over half of Maple district actors interviewed attributed this equal access of opportunity to initial community buy-in. District director Fiona Redwood shared that one factor that facilitated the opening of the global school was that “as long as we had slots, [students] could come, and we would provide transportation from any point in the district. That was one district support that was put in place that allowed every child equal access to this unique concept.” The global school coordinator corroborated this, explaining “We have a lot of families that come from right here, locally...and then we do have 10 buses that go out throughout the district and pick up students. No student is denied because of transportation.” The district also strategically ensured all teachers had access to global professional development. District director Mara Elm explained, “We wanted to expand [the Learning Center] to our other schools because even though they’re not global schools those strategies are still important for all kids.” The superintendent believed that providing access for all students to the global school and all schools access to the same VIF Learning Center PD was key to generating will throughout the community and “preventing a lot of criticism.” He reflected that “Those were probably the two smartest moves along the way that avoided problems.”

**Recognition.** As reported by two-thirds of participants and corroborated in observations, district leaders sustained will by providing recognition. District-wide recognition included a Global Teacher of the Year, one selected for each school and one for the entire district, and a Global Principal of the Year. The district central office also planned a global celebration at the end of the first year of implementation, which was unfortunately canceled due to a local tragedy.

VIF also provided global education recognition for teachers and schools. VIF gave out awards that recognized global educators and model schools, which school and district leaders encouraged teachers to win. Principal Hank Ash reported, “VIF constantly sends out different



things as far as little contests to try to inspire the teachers to want to participate and to get the students involved.” Cara Cypress urged teachers at the Global School to be “active on the VIF website” in order to become recognized as a global educator (Observation, 8/12/15). Amber Dogwood further stated that she wanted Maple middle schools to become model schools for VIF.

**Building capacity.** Every single participant pointed to the district-mandated professional development as the way the district helped build educators’ capacity to integrate global elements into school. As described above, the mandated professional development had two elements: the face-to-face training created by district administrators and the VIF online modules. With this professional development came resources and technical support. Access to the VIF Learning Center platform was paid for by the district. As one principal shared, because the district bore the cost, “funding for the rest of us is really free; they’ve opened up the PD part to us for free.” The VIF Learning Center included the online modules, standard-aligned lesson plans, a social media platform to connect with other global teachers, and other curricular resources.

Participants also emphasized that the district provided teachers the resource of time for completing VIF modules. About half of participants explained that the VIF modules were the primary focus of the district PD plan and that their plates were cleared of other mandates. As Mara Elm shared, “As far as at the district level, anything that we’ve done with other initiatives, we have put those as a secondary focus.” Principal Sarah Willow agreed that

Probably the best thing the district did to support that was to take a bunch of other stuff off of our plates. I know in a lot of districts there are like 8 million initiatives going on at any given time, and I think one thing that the district has done well is to say, “This is going to be our focus. We’re going to really dig into global education.”

District director Amber Dogwood further explained how “we put [early release days] in our calendars to carve out time for the professional development and for [teachers] to be able to work on their modules because we know they’re busy... if we could give them more time we would.”

The vast majority of participants reported that with free access and time for mandated PD came technical support to help build capacity. The superintendent, district directors, principals, and VIF staff explained that district administrators used a “train the trainer” model: training principals to train their teachers for the district-designed PD. Mara Elm explained: “We made the master set, and every principal got a PowerPoint, they got all of the resources they would need... We would have a little training with the principals to make sure they felt comfortable with the materials, then they would train their staff with the materials.” A script was provided to principals for each presentation as well. Mara Elm explained that the script was meant to be for support, rather than for fidelity purposes, saying “You can tweak it to fit your own, but if you get nervous they have a hard copy.” Principal Hank Ash agreed, saying, “The district actually helps prepare us as far as the administrators, the idea of how to go through and do that PD. They give us a lot of the ideas, and how to present the initial PD to the staff.” Along with co-designing the face-to-face PD, Mara Elm also served as the district director who provided technical assistance to administrators and teachers. She shared, “If [teachers] need additional resources or help they just email me. We’re small, so I can go right out to your school and help you.”

VIF provided the most day-to-day technical support for Maple educators. Supports that nearly all participants reported included coaches for Spanish immersion teachers, virtual support through webinars and Google Chats, video-chatting during monthly principal meetings, making school visits if teachers or administrators requested help, and leadership training for district and school administrators. Nearly every district participant also reported that VIF personnel were always available via email, chat, or telephone. As principal Sam Aspen shared, “VIF has a couple of folks who have been involved and supportive. You know they’re a phone call away if we need them.” VIF personnel also attended school board meetings and community meetings the

year before the opening of the global school to answer questions about the immersion program and global school curriculum (School Board Meeting Minutes, 4/14/14), and helped virtually moderate the district-designed face-to-face PD. For example, each face-to-face PD began with the slide, “Throughout the session, any questions can be send to [staff name] from VIF, who is moderating the PD live from the link <https://todaysmeet.com/>.”

As a final form of technical support, district director Mara Elm, with the assistance of VIF staff, monitored professional development completion. The district monitored face-to-face PD by teacher sign-in, and VIF provided documentation of online module completion for every teacher in all schools. Mara Elm explained, “[VIF staff] sends me the report, and I go back and report to the principals, ‘This is your percent for the whole school; these are the teachers that still need to complete your modules.’” Principal Sam Aspen confirmed,

They’ve given us some space, not a whole lot of mandatory direct oversight other than keeping track of how many badges our teachers earn... We get spreadsheets fairly often that say ‘80% of your teachers have earned badge 3’ and there are district-wide spreadsheets so I know how many teachers at every school have gotten... There’s just that friendly transparency of information that probably translates into competition and accountability.

In sum, participants agreed that VIF, along with point people in the district central office, provided technical support in implementing the global professional development. As principal Hank Ash reported, “[Global education] hasn’t really had any major roadblocks because the district had laid out the plan for us... Had we not had the supports of VIF, or had the supports of the district who gave us the roadmap, I could see that being a much more difficult process.”

Yet beyond mandated professional development, participants differed as to whether they perceived the district as providing enough resources and funding. Central office administrators, those interviewed at the global school, and the Global Teacher of the Year thought that funding was an important resource that the central office provided. For example, the global school

coordinator stated, “Mr. Pine has been a huge support of finding additional funding for us... I really feel if there is something we are really in need of... he would be able to support us.” Mara Elm at the district office also shared,

Mr. Pine did some things with funding to make sure that all schools had certain resources in their school. One thing I know you’ll see at every school is they have a large global map displayed somewhere in their building with the different time zones and things like that... So if there’s something that we see is needed in all schools we make sure that we have funds available for that.

However, three participants at other schools suggested that school resources were limited to the VIF Learning Center and “a map of the world.” Beyond that, Selena Evergreen noted “It was to come out of your own pocket if you want something to be changed.” Sam Aspen summarized this line of argument by saying, “This was kind of a non-funded initiative. There was not any particular cost to the schools but there also weren’t any particular funds for the schools for doing this, that I know of.” Even the superintendent admitted that he made sure that in implementing the global initiative he did not “stretch the budget.” This may have served to limit what schools were capable of doing beyond what was mandated.

**Reorienting the organization.** In addition to using various strategies to building will and capacity, the district also re-oriented the organization through a) creating a K-8 global school, b) reorganizing district and school positions, and c) an emphasis on sustainability.

***School reconfigurations.*** As almost all participants reported, Maple’s new K-8 global school opened as the result of three different school re-configurations. A K-3 elementary school became a K-5 elementary school, a grade 4-6 middle school became a 6-8 middle school, and a grade 7-8 middle school became the K-8 school. Amber Dogwood described this as “a big organizational change.” Notably, the superintendent reported that the opening of the new school did not stretch the capital improvement budget because no new facilities had to be built.

***Reorganizing central office and school positions.*** The district also shifted responsibility of current district and school staff to cover global initiatives. Between the 2014-2015 and 2015-2016 school year, the district director of Home Base’s position evolved to include the district global learning coordinator as well. Her responsibilities entailed coordinating global PD with the associate superintendent, communicating with VIF, and updating the district on NC DPI’s global badging and designations.

A global school coordinator position was also created at the global school. The superintendent explained that, “we felt like we needed to have a point person who could serve as liaison between VIF and the school...and add value to the administrative team.” The K-8 global school coordinator, a veteran teacher and reading specialist in the district, listed her responsibilities as helping with developing the global theme, global integration in classrooms, heading the global school committees, instructional coaching particularly with K-2 immersion teachers, enrollment, school tours, and leading the VIF Learning Center PD. The global school principal described the position as “akin to a magnet coordinator”, sharing, “That position has been critical for us to have somebody solely focused on global integration in our school.”

Yet another way in which new positions were created at all schools was through the creation of global action teams, which VIF encouraged through their training. According to district director Amber Dogwood, “Every school should have a global committee, composed of teachers usually, possibly the principal.” As John Poplar, Selena Evergreen, Cara Cypress, and Patricia Cedar reported, configurations and responsibilities of the global teams differed by school.

***Planning for sustainability.*** Finally, Maple leaders re-oriented the organization by planning for sustainability. District leaders were transparent about planning for sustainability

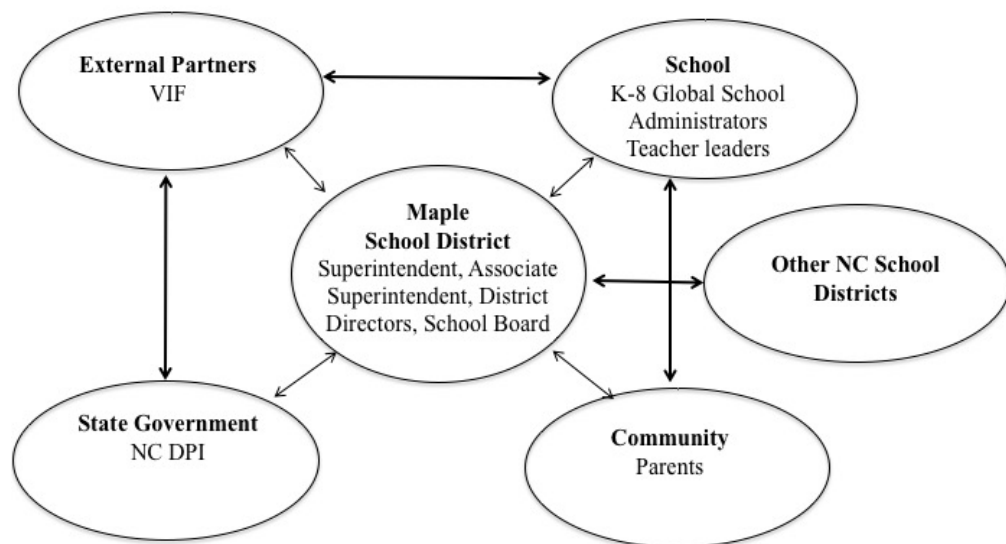
with their global education vision. Regarding the VIF online modules, Mara Elm explained, “everybody knows that global is our focus for the next four years.” The “focus” included completing the full four-year set of VIF modules, and setting plans in place to ensure that new teachers started from Year 1, Module 1. The superintendent concurred that it “helps with sustainability and motivation to teachers and people knowing we’ve got a plan and we’re seeing it through.”

### **Multidirectionality in Maple**

As with Roosevelt, in Maple actors across different levels of the education system influenced district adaptations and implementation supports. This is illustrated in Figure 3.4. Yet, unlike Roosevelt, global education was primarily a top-down initiative from the district in partnership with VIF. Below, I discuss the non-system and system actors that influenced global education in Maple County.

Figure 3.4

*Multidirectionality in Maple School District*



**Non-system actors.** Every single participant mentioned VIF as the external district member with whom they worked regarding global education. The direction of ideas flowed mostly from VIF to Maple, as evidenced by the VIF Learning Center, SPLASH, and VIF international teachers. District and school leaders positively described how VIF provided the resources and technical support needed to integrate global education into the schools, listing the online modules used for districtwide professional development and the K-8 global school's VIF Global Schools model, SPLASH program, and global studies course materials. As principal Patricia Cedar shared, "One of the things that has supported us as a district in moving forward is that we did have that framework of going through VIF."

VIF made the district feel comfortable adapting resources to Maple's needs and context, and local adaptations of VIF programs did occur (e.g., the delivery of the districtwide PD being a blend of VIF resources and the district's face-to-face training.) As the superintendent explained,

They [VIF] don't try to shove things down your throat. They try to let you pick and choose. For example, the professional development, they didn't come in and say, 'This is how we do things, back up and let us take over.' They said, 'Let us get in; you know what you're doing. We'll give you access.' And if it's school-led professional development, there's a lot more ownership and the opportunity to sustain versus top-down.

VIF staff concurred. One member of their implementation support team shared, "Part of the services that we offer to schools, there's a wide variety of possibilities, and it's individualized for what every district or individual school is looking for." Likewise, in describing the secondary VIF global studies curriculum that the global school drew upon for their middle school course, a different VIF staff member said, "We designed it that way, so it could be flexible."

**Official policy actors.** As previously described, Maple's vision for global education largely emanated from the superintendent, with support from the central office. As principal Sarah Willow described, "The global stuff has definitely been driven by the district." This top-

down flow was evident in that Maple participants most frequently reported that the associate superintendent and district global coordinator Mara Elm, followed by the superintendent and the global school principal, supported schools in implementing global initiatives. This suggests that influence was more vertical than horizontal. Further corroborating this, VIF staff reported that their “regular contact people” in Maple were those in positions of power: the superintendent, associate superintendent of curriculum and instruction, and the district global coordinator.

Along with basing their global initiatives off of VIF programs, over half of district actors in Maple also looked to schools in other districts for ideas and inspiration. Other districts served the role of influencing Maple’s decision to initially adopt global education and inspiring what global education might look like in the schools. These relationships with other districts were also predominantly brokered through VIF. The districts in North Carolina that the superintendent and busloads of Maple stakeholders visited partnered with VIF, as did the superintendent’s mentor who had initially suggested that Maple look at VIF as a model for school reform. Once the district adopted global education, district actors continued to visit other districts to inspire school practice, with the VIF as the broker. As one district director explained,

We have visited some schools that have implemented global. I’ve taken principals along with [VIF staff]. She’s done tours for us. We’ve then tried to bring it back and implement it in the schools and give teachers ideas...Now we think we’re at the point of doing some visits for some teachers...because we want to make those model schools here in Maple.

Principal Georgina Birch corroborated that

A few principals had a chance to go to [Neighboring] County to visit schools that are full global schools. I visited two middle schools...just so that we can get an idea of what it looks like. We could ask questions to the principals who had been in that role for awhile, to give us some pointers on how to have success for implementation at our schools.

During a global team planning session, Cara Cyprus alluded to schools in different district as they planned their first monthly theme on making their mark on the world: “When we were at



[school name] they talked about their bench as a sacred place. We could make the rock garden that place” (Observation, 8/19/15). This suggests that visiting other districts provided ideas for Maple practitioners as they implemented global initiatives in their schools.

Though multiple participants expressed that the impetus for global education came from the district central office, they also shared instances of bottom-up influence from teachers and community members. The global school faculty decided to make monthly global themes a part of instruction for all students K-8 through organic conversation at a staff retreat, and subsequently developed the accompanying monthly activities distinct from any global program offered by VIF. As the principal emphasized, “As an administrative team we felt really strongly that [the global themes] be driven by the teachers in terms of the decisions about what we would actually do.” A social studies teacher came up with the idea of “Global Fest” at principal Sam Aspen’s high school. The Global Teacher of the Year also developed his own global studies course for his high school; a district director considered looking to him for support on spreading global studies courses to other high schools in the future. Parents also expressed voice through registration, specifically around the opening of the global school and instituting new immersion programs. Spanish immersion registration at the global school filled up quickly, yet when two elementary schools opened up registration for Spanish immersion programs at their schools, not enough parents expressed interest for the program to run.

Unlike Roosevelt, which used the state vision to guide their own global vision, Maple district leaders saw the new Global Educator Digital Badge and Global-Ready School and Global-Ready District designations as something that happened to complement the work that they were already doing. Superintendent Pine shared that his vision for Maple and the SBE’s global designations “all fell together while we were working through this process” and that he

“didn’t know it was coming until we really had [the global school] up and going.” As such, while Maple mandated 50 hours of VIF-related PD a year, the district decided not to require teachers to apply for the state Global Educator Digital Badge. Likewise, the global school coordinator explained that she was not particularly aware of the Global-Ready School application, but stated that they would apply for VIF’s global school award.

Overall, Maple actors were predominately influenced by one external partner, VIF. This reflects the ubiquitous presence of VIF programming in Maple’s global education adaptations. Within the district, individuals in positions of power, such as the superintendent, associate superintendent, and district director were communicated with the most around global education, suggesting that global education was more of a top-down district initiative that gained traction at lower levels of the system due to strategic district supports.

### **Cross-District Comparison: The Role of Context in Shaping Global Initiatives**

As the two case studies revealed, Roosevelt and Maple school districts co-constructed global education in different ways, while sharing some common threads (See Tables 3.4 and 3.5 for a full comparison of interpretations, adaptations, and district supports in each district). Regarding differences, Roosevelt participants emphasized cosmopolitan citizenship and equity of opportunity in their interpretations of why global education was important to adopt, whereas Maple participants underscored exposing students to the world and school reform.

The two districts also differed in how they adapted the state global commitments. Roosevelt offered multiple options for teacher supports and tools, language instruction, strategic international relationships, and new school models from which school sites could choose, while Maple primarily focused on two major initiatives: the VIF Learning Center PD and the opening of a global school, the latter of which included international teachers and innovative forms of

language instruction. Roosevelt and Maple also differed in a few of the supports they utilized to facilitate implementation. For example, to build capacity, Maple mandated all teachers to complete global education PD, whereas Roosevelt provided all teachers access to global education PD but did not require it. A second major difference was that Roosevelt sought to create coherence between global education and other district initiatives whereas Maple did not.

Amidst differences in how Roosevelt and Maple interpreted, adapted, and supported global education, similarities were also found. Participants across both districts defined global education as encompassing an understanding of different cultures, awareness of the world, and, to a lesser extent, taking action on issues of global importance. Across both districts, participants also acknowledged global integration and inquiry-based learning as pedagogical principles for teaching global education. Participants in both districts also overwhelmingly emphasized student competitiveness in the global marketplace as a purpose for implementing global education. Regarding adaptations, they both experienced bottom-up creation of global events and global studies courses.

The two districts also had similar supports for generating will and re-orienting the organization. Both districts had a “visionary” superintendent and district leadership team who championed global education, included a diversity of community stakeholders as they rolled out their global education visions, and re-oriented the organization using resources they already had (e.g., placing global education as a responsibility of an existing district director; using extant funds to hire international teachers instead of local teachers).

As multi-directionality and a relational sense of context in the theory of co-construction posit (Datnow, 2000; Datnow et al., 2002), who influenced district actors and the embedded contexts wherein they worked helps to explain the similarities and differences in both districts’

co-construction of global education. The section that follows delineates the district influences and contexts that explain the differences between Roosevelt and Maple followed by the shared contexts that may have influenced district similarities.

### **Roosevelt: Military, Multiple Partnerships, and Site-based Management**

Personal and interpersonal experiences shaped why Roosevelt and Maple differed in some of their interpretations of why global education was salient. First, in Roosevelt, many participants evoked a cosmopolitan rationale for global education. These participants also describing having more “worldly” experiences (e.g., living and working abroad, serving or having family serve in the military, marrying spouses from other countries, attending educational international programs) and acknowledged that their students had exposure to other cultures as well as a result of their military connections. In addition to VIF, they partnered with World View and CIU, whose individual staff members emphasized cosmopolitan purposes for global education while acknowledging the importance of global competitiveness. For example, a World View staff member described the purpose of global education as involving “three C’s”:

competition, collaboration, and compassion. She explained:

One is to keep the U.S. competitive on the global stage...The second is collaboration: being able to work across borders...We want to have great education in our country, but I also think that we should want the entire world to be lifted up. We want to work together. Third is compassion. It comes back to caring about the world, to not think that the things that happen in the U.S. don't matter elsewhere and the things that happen elsewhere don't matter here. To think of us all as a shared human race that cares about one another.

Roosevelt’s international connections and partnerships with multiple organizations stood in contrast to district actors in Maple, where all but two participants reported having little to no international experiences prior to their experiences with VIF.

Second, Roosevelt’s organizational culture of site-based management may help explain why Roosevelt offered an array of options for teacher professional development, international

partnerships, and language learning in their adaptations of the state commitments. As reported by half of Roosevelt participants, “Our district believes strongly in what we call site-based management. The principal pretty much gets to decide how their campus is to include initiatives” (Lana Washington, Interview). Principal Haley Jackson agreed, saying, “We’re very fortunate to work for a district that empowers principals and schools. If there is something that you think is going to be good for your school, for your students, and your staff, they support that.” This allowed a multitude of external partnerships to flourish at individual school sites, which led to more global education options opening up to the district as principals introduced new ideas (e.g., language immersion, Cultural Correspondents) that other school sites emulated. This culture of site-based management further explains why global education activities in Roosevelt were optional whereas the Maple superintendent mandated teachers complete global PD.

### **Maple: In Search of Effective Reforms**

In Maple, embedded community, organizational, and interpersonal contexts shaped participants’ interpretations of why global education was important and the specific adaptations they made that differed from Roosevelt. First, multiple participants connected global education’s purpose of exposing students to the world with students’ isolated high-poverty rural location. As principal Sarah Willow shared,

[The global theme] was just really appealing for folks in this community because it is such a small place, and it is so challenging for our kids to have opportunities outside of Maple for financial reasons and other reasons. This would give them this opportunity to experience the world without having to leave the community.

Secondly, many participants associated the school reform purpose of global education with low student achievement and the loss of hundreds of students to a new charter school. District director Mara Elm explained, “We just needed something extra for our kids because we knew where we were with test scores.” District director Fiona Redwood, expressing the same

sentiment of other central office and school administrators, noted that the realities of the new charter school signaled to the district that the community needed to “put their faith back in us.” She continued, “The implementation of global education...has helped us to earn the trust of our community back...We had a need for a strong leader to bring something innovative into our district, and Mr. Pine filled that need.”

Maple’s focus on a K-8 global school with international teachers and leading-edge language programs further reflected Superintendent Pine’s search for an innovative reform to increase student achievement and win back students from the charter school. The superintendent was particularly concerned with re-organizing the K-3, 4-6, 7-8 feeder pattern to reduce student transitions, as multiple principals and district directors reported that those schools had particularly low student performance and high behavior problems. Furthermore, he explained that “my strategy also was in opening up a K-8, the local competition, which was a charter school, was also at the time a K-8.”

This search for a new reform to turn Maple schools around perhaps explains why Maple district actors did not try to create coherence between global education and other district initiatives. Maple was looking for something “innovative” and people “were excited to see something positive coming in to the district,” so it made sense that district leaders did not intentionally align global education with previous initiatives. The only inkling of coherence with other policies was that Maple’s school reform purpose for global education aligned with the broader test-based accountability context in the state, which stands in contrast to previous literature that has found testing to be a barrier to global education implementation (Frey & Whitehead, 2009; Gaudelli, 2003).

While the local politics of school performance and choice influenced the K-8 global school model, district leaders' strong relationship with VIF as their sole global education partner influenced the specific programs that occupied the space within the global school and in schools across the district. The district took on each program that VIF offered: the Learning Center for district-wide PD and VIF international teachers, the Global Schools Model, and the SPLASH Spanish immersion program for the global school.

### **Shared State and Rural Contexts**

Though the two districts differed in some of their global education interpretations, adaptations, and implementation supports, the shared state education policy context and similar rural communities that they served may explain similarities in how Roosevelt and Maple participants defined global education and provided implementation supports. First, similarities in definitions may be explained by the broader state context wherein external influencers operated. Policy and guidance documents from the North Carolina Department of Public Instruction (DPI) along with external partner interviews and websites revealed that these statewide global education policy actors defined global education as including integration of global content into all areas of the curriculum, inquiry-based learning, an awareness of global issues, cultural competence, and taking action. For example, the Global-Ready School and Global-Ready District rubrics approved by the State Board of Education (SBE) and created in partnership with CIU, VIF, and World View, included elements such as “inquiry-based learning,” “global themes embedded into the standard curriculum,” and “cultural diversity within schools.” These components were all reflected in district participants' understanding of global education.

In addition, the SBE and the state's global education external partners emphasized global competitiveness as a major purpose for global education, and education more broadly. The SBE,

which, as described previously, was a major influence on Roosevelt district decisions around global education, had the “mission and vision of producing globally competitive students.” A DPI staff member explained that this vision of global competitiveness was a major impetus for the SBE’s adoption of global education policy (see also Chapter 2). Similarly, VIF, the organization who primarily influenced Maple County, linked their global education programs to student global competitiveness. In a presentation to the Maple School Board, the VIF CEO shared, “The VIF International Education vision for global learning is committed to supporting the public schools and helping them to compete, to be attractive, to build the programs where students can gain the skills and competencies, and the ability to compete in a global economy and market” (School Board Meeting Minutes, 4/14/14).

Second, while implementation research has described districts as being “fragmented” and working in siloes (Spillane, 1998), Roosevelt and Maple district actors worked across organizational lines as they re-oriented the organization and built will and capacity. This could be related districts’ organizational context influenced by their rural communities. Working in a small, rural district, Maple district leaders had to play multiple roles rather than specialize (Howley et al., 2014). In Roosevelt, over half of participants (including school board members, district directors, and principals) emphasized a culture of collaboration within the district central office, using words such as “cohesive,” “tight-knit,” and “teamwork” to describe district and school leadership, another documented characteristic of rural districts.

Both districts also generated will by including a wide array of community members and education stakeholders in discussions and decisions around global initiatives. Districts’ rural identities may account for why district leaders emphasized the importance of including community stakeholders, as rural research shows that rural communities tend to be both more



traditional and involved in the schools (Harmon & Shaft, 2009; Howley et al., 2014; Jacobson, 1986; Johnson & Howley, 2015).

### **Shared Contextual Challenges**

Nearly all participants across both districts overwhelmingly reported little resistance from school staff and community members in implementing global education. However, the few challenges that participants did report were similar across districts. This, again, could be attributed to rural and state contexts.

First, district actors, including nine in Roosevelt and seven in Maple, reported the barrier of teachers' personal resistance to any change due to "initiative fatigue" and "too much work to do." Roosevelt district director Ben Hoover explained,

Anytime you are implementing a change or focusing on a new initiative, some people don't see the relevance or the need and want to maintain where they are. So you do have that element, but I see that less and less as we continue to build that support.

Maple teacher Selena Evergreen likewise shared, "Some of them [teachers] are excited, but some of them are, 'I'm too old for this; I don't need to start this.'" District participants attributed teacher resistance to teachers' resisting any new change as opposed to resisting aspects specific to the global initiatives. As Maple district director Amber Dogwood shared "I think with anything there's always going to be some resisters."

This reported resistance may have also contributed to the emergence of global studies courses and global events. For example, some participants suggested that these adaptations served as a way to bring global education into secondary schools without riling up teacher resistance among those who focused on a specific content area. Roosevelt's Eugene Carter acknowledged, "It's a little bit easier to infuse global education in fifth grade than it is once you get down to real heavy content areas." Maple's Mara Elm agreed that "the high school's on a

different level to where they have cultural celebrations where they invite communities. In your elementary classrooms is where you actually see [global integration strategies].” Furthermore, although three participants suggested that global fairs were a way to build community support for global initiatives, district global education leaders in Roosevelt did not perceive one-time scheduled events as being “inclusive of what we hoped to accomplish” regarding global education (Observation, 9/21/15). This raises the question of whether school-level actors perceived it easier to add-on rather than integrate global content and perspectives.

Participants across both districts also reported that a handful of community members resisted global education initiatives, particularly language programs and to a lesser extent international teachers, for reasons reflective of the traditional nationalist purposes of public school in the United States (Banks, 2008; Subedi, 2010). Roosevelt district director Scott Polk explained that the Chinese language was initially a “tough sell” because “some parts where we [taught] were insular. They have been doing things the same way for four generation or more.” He further elaborated that they had “some pushback because China is still a communist country, which apparently some people had a huge problem with... We had some people go back to the McCarthy era of the Red Scare and being worried about the communists.” Roosevelt principal Jacob Johnson similarly shared of his school neighborhood, “It really is a ruralish community and sometimes there’s resistance to that sort of change, especially bringing foreign language and foreign employees into a rural area. I felt some of that push.”

About half of participants from Maple also provided example of resistance to Spanish immersion. As one district director shared, “We’re trying to actually implement having a Spanish class in each one of the schools. Some of the barriers that we have seen is sometimes the community is not quite ready for that type of jump yet... The common thread is, ‘If my child’s

only learning Spanish in school, when are they going to learn English?’” Principal Sarah Willow similarly shared, “Particularly in a rural community where this whole concept is very new, we have some parents that are very, understandably so, hesitant about making that leap to immersion.” As these quotes from both districts suggest, the small amount of resistance to globalizing students’ education was linked to the rural setting.

A final contextual challenge reported by the majority of participants across both districts was a lack of state funding and resources. This hindered the ability of both districts to pursue global initiatives to their full potential. Both districts were creative in supporting global education despite funding challenges. This was particularly apparent in how they re-oriented the organization. Participants emphasized minimal to no additional costs outside of their allocated budgets for hiring international teachers, making a district director responsible for overseeing global initiatives, and opening Maple’s global school. This may have reflected the budgetary constraints and challenges of the state political context.

However, in Maple, participants acknowledged the challenge of teacher shortages, particularly for languages. The Maple superintendent had concern with the state’s Global-Ready District designation foreign language requirement, contending that “putting districts in a position where every student would have to have access to a foreign language...is in these days and times with budget cuts inconceivable.” In addition, Maple district director Fiona Redwood shared, “I think some of the challenges have probably been the same challenges that people are having around the state in the reduction of teacher assistants, the reduction of budgets. Those are challenges that every school has in our district and probably in the state.” This same sentiment was shared in Roosevelt, as multiple district directors and principals described difficulties in

expanding language programs due to funding and staffing shortages. For example, Celine Coolidge, holding back tears, shared,

It feels like the same state that sends us the guidance documents for what a great global education program looks like is the same state that is not providing us the resources to be able to do it. That's when you get really frustrated and say, look we can do this. We want to do this. We could meet all 10 of these tenants of what an amazing global district is, if we just had the means.

As Roosevelt principal Haley Jackson summarized, “The only roadblocks that I see have to do with decisions made at the state level in regards to human and material resources... They just don't support us with the money.”

### **Cross-District Summary**

System and non-system actors, along with personal, interpersonal, and community contexts helped shape how Roosevelt and Maple County district actors adapted the state commitments to global education. DPI and the state's external global education partners (CIU, VIF, and World View) disseminated the global education definitions and the purposes of global competitiveness and cosmopolitan citizenship that district actors parlayed. External partners also provided the professional development, international staff, international school partnerships, global school models, and language programs that both districts utilized as they adapted the state commitments, though districts differed in which programs they used depending on the non-system actors they partnered with.

The embedded contexts wherein districts were situated also influenced district actors' reasons for adapting global education and how they supported global education. Organizational cultures and structures within each district shaped how actors adapted the state commitments, generated will, and re-oriented the organization (e.g., site-based management at Roosevelt influenced how Roosevelt offered an array of global education options). Community contexts

(e.g., rurality, a new charter school) explained why and how districts adapted and supported implementation, as did the broader state political context wherein districts were embedded.

Yet context was a double-edged sword. Although the rural context in both districts provided an impetus for exposing students to the world and utilizing will-generating activities such as community outreach, it also provided local pockets of resistance as some community members preferred “traditional” instruction and held nationalistic values that challenged the teaching of non-English languages by non-American teachers. Concerning the state-level context, the SBE provided a vision for global education, yet was constrained by the lack of resources due to budget cuts from the North Carolina General Assembly. In sum, due to the unique convergence of embedded system contexts and non-system actors within each district, global education was co-constructed in ways that fit each district’s local needs and capacity while remaining aligned to the state’s global education commitments.

### **Discussion**

The cases of global education co-construction in Roosevelt and Maple County Schools shed light on how districts exert agency in implementing non-mandated instructional reforms and illuminate specific ways in which global education, as one such instructional reform, is operationalized in two unique district contexts. Just as prior literature has identified district-level actors as having agency in supporting math, reading, and other standards-based instructional reforms (e.g., Spillane, 1998; Stein & Coburn, 2008), district leaders had agency in supporting the implementation of global education initiatives.

Corroborating prior research, Maple and Roosevelt participants demonstrated agency in that they adapted global education to fit their local vision and needs; generated will through visionary leadership and building a mass of stakeholder support; built capacity in the provision

of resources and professional development; and re-oriented the organization by re-directing current employees to new tasks and current monies to new programs and personnel (Chrispeels, 2007; Honig & Hatch, 2004; Levin & Datnow, 2002; Rorrer et al., 2008). District actors in Maple and Roosevelt supported global education in comparable ways and similarly defined global education around the constructs of global awareness, understanding different cultures, taking action, and integrating global content into daily instruction. Yet what district actors supported in Maple and Roosevelt differed, as district actors adapted initiatives in different ways. Those differences were shaped by who influenced districts and the particular contexts in which district actors were embedded.

Given the diverse purposes ascribed to global education (Gaudelli, 2009; Parker, 2011), the findings of this study also revealed why district leaders found global education salient, and worth implementing, amidst competing instructional state mandates. Roosevelt and Maple participants confirmed that neoliberal (i.e., student competitiveness in a global marketplace) and cosmopolitan (i.e., helping students understand that they are citizens of the world) rationales prominent amongst state policymakers and state external partners were most salient for them as well. This suggests that ideas for why initiatives are important – in addition to specific programs– permeate districts along with the reform itself. Findings also shed light on new rationales borne from districts’ local contexts, particularly related to geography, poverty, and student achievement: equity of opportunity, exposure to the world, and school reform. This suggests that beliefs around global education’s importance influence district actors from the top-down and from the bottom-up.

Equally important were the purposes for global education that district actors did not discuss. Although both districts had a growing population of immigrant students, participants

generally did not suggest that their global education initiatives were specifically meant to help that population. For example, participants largely framed language immersion programs as a way to increase students' cognitive skills and test scores or to help a school fulfill a global theme. Out of all of the interviews, only one participant – an ESL district coordinator – mentioned research on the benefits of dual immersion program for heritage language speakers (Garcia, 2009; Thomas & Collier, 2004). This brings up issues of power, and questions of who global education actually benefits and whose experiences it validates or ignores. If global education initiatives are only framed as a way to help native English speakers who have never left the county succeed in a global economy, then they may fail to accommodate the needs of those students who are global, for example, those whose families have immigrated from a different country or who speak multiple languages (Valdes, 1997; Varghese & Park, 2010).

### **Theoretical Implications**

These findings have theoretical implications for understanding policy co-construction at the district level. First, this study confirms the legitimacy of using the theory of co-construction and its constituent components of mutual adaptation, multi-directionality, and a relational sense of context to explain how school districts support implementation of non-mandated state instructional reforms such as global education (Datnow et al., 2002; Datnow & Levin, 2012). Findings revealed that districts adapted a state global education initiative and supported local implementation in ways that fit the needs of their local contexts, and pointed to a relational sense of context and multidirectional influences as providing important insights as to why districts made sense of global education in particular ways. This shows that all three components of co-construction are important constructs for researchers to identify when studying district adaptations of state reforms.

Second, these findings expand our understanding of one particular component of co-construction: who is involved in the multi-directional flow of ideas as district actors exert agency in implementing global education reforms. The theory of co-construction emphasizes the bi-directional, top-and-bottom *vertical* flow of ideas between state and external organizations, district administrators, and school leaders (Datnow et al., 2002). Yet, in this study, school and district administrators in Maple and Roosevelt also pointed to *horizontal* influences, specifically those in other districts also engaging in global education reforms. These horizontal exchanges took place between superintendents, district administrators, and school leaders across different districts. This suggests a need for documenting cross-district networking and collaboration in supporting innovative reform work in addition to vertical exchanges of ideas.

### **Practical Implications**

The comparison of these two districts' co-construction of global education also provides insights into the actions district actors and global education policy entrepreneurs might take to ensure global education initiatives take root. First, the differences in how each district adapted the state commitments to global education suggest that there is not one way to do this work. Therefore, global education initiatives should be designed for adaptation, and not scripted. Districts actively and intentionally adapted global education initiatives to fit the needs, demands, and capacities of their county, schools, and classrooms. The right way to "go global" depends on how districts and communities connect global content, languages, and partnerships to their local environments. As decades of implementation research would suggest (e.g., Honig, 2006, Odden, 1991), local context does indeed matter for global teaching and learning.

A second practical implication is the importance of forming partnerships with external organizations to support districts in global education work. While some global education



adaptations were homegrown (e.g., the monthly themes at Maple's global school), the majority of adaptations affiliated with global teacher supports and tools, leading-edge language instruction, strategic international relationships, and new school models came from external organizations. World View, VIF, and IB provided districts professional development; VIF provided structures and supports for Spanish immersion programs; CIU and VIF brokered the hiring of international teachers; CIU, World View, and local universities provided international travel opportunities that facilitated the formation of international school partnerships; and VIF and IB provided models for what global-themed schools could look like. Partnering with a range of external organizations may be particularly relevant for global education. Prior research, along multiple participants in the present study, have underscored the fact that few teacher and school leadership preparation programs in schools of education have trained practitioners with the content and pedagogical expertise to be globally competent instructional leaders (e.g., Cogan & Grossman, 2009; Devlin-Foltz, 2010). Therefore, district leaders may need to rely on external partners to provide technical expertise.

A third implication for practitioners is that global education adaptations should be introduced systemically, as they necessitate changes in instruction, personnel, and organizational structures. Districts did not simply drop in one particular component of global education: they introduced global education as a comprehensive vision of how to do education. This involved sustained professional development opportunities to shift instructional practices, the re-configuration of schools to integrate language immersion programs and globally-themed instruction, and the hiring of international faculty to bring the world to students and staff and fill roles as language teachers. Furthermore, district leaders themselves shifted their formal responsibilities to support schools and teachers in this work. Instituting such a comprehensive

plan signaled to school staff and community members that district leaders were committed to the initiative; it also provided multiple avenues through which teachers and their students could develop global competencies.

Fourth, district leaders and administrators should take time to garner will across educator, administrator, school board, parent, and community-level stakeholders and to gather capacity-building resources before diving in to implementation. Participants across both districts emphasized that they used a variety of strategies to foster stakeholder will: hosting information-sharing community meetings, including school-level personnel in global education district leadership committees, highlighting pockets of success, and providing equal access for students (Datnow et al., 2002; Fixen, 2009; Levin & Datnow, 2012). District administrators also secured partnerships with VIF, World View, and CIU, who in turn provided the necessary experiences, technical expertise, materials, and personnel to foster learning opportunities for imparting global competencies in students (Firestone, 1989; Rorrer et al., 2008). Because no state currently mandates global education, districts do have the luxury to proceed at a deliberate pace that gives them time to generate will and form partnerships that will help build implementer capacity.

### **Limitations and Directions for Future Research**

This study is limited in a few ways. First, districts were strategically sampled to understand the phenomenon of why and how two “active” districts have adapted global education in one state. Therefore, missing from this research are the voices from school districts that have chosen not to implement global education or from school districts in states with different global education policy environments and players. Furthermore, both active districts served rural locales, whose distinct characteristics related to geographic isolation, strong community attachments, “traditional” values, poverty, less access to specialized education

positions, and small size seemed to impact districts' co-construction of global education (Johnson & Howley, 2015). Therefore, findings are limited in the extent to which they are transferable to urban or suburban school districts with different characteristics related to community identity, student demographics, district size, and available resources.

In addition, this study explored the processes through which district leaders understand, adapt, and support state-sanctioned global education reforms, but did not explore how adaptation occurs within schools and classrooms from the perspectives of teachers and students. Nor does it examine the extent to which the different adaptations and supports found in each district changed teacher behavior and, ultimately, student outcomes. Finally, as the purpose of this study was to examine how districts operationalized global education, this study does not detail the multi-directional impact that district actors had on external partners' programs or state policy.

Future research might address these limitations in a number of ways. First, researchers could conduct similar studies in different contexts. For example, research could test whether similar understandings, adaptations, and district supports concerning global education are found in a) urban districts with higher proportions of cultural and linguistic diversity, access to international activities, more large-scale, bureaucratic, and specialized district central offices, and different challenges related to urban poverty and b) in other states – or countries – with different global education policies and resources available.

Future research should also dive deeper into understanding how district-level adaptations and support for global education impact school-level implementation. Research might examine how district adaptations unfolded in classroom settings, as measured by depth, spread, shift of ownership, and sustainability (Coburn, 2003). For example, depth of implementation could examine which global competencies teachers actually cover in classroom instruction (e.g., world

regions, conditions, current events, and cultures; local and global interdependence; intercultural communication), the pedagogical strategies used (e.g., surface-level introductions via “flags, festivals, and food” versus creating environments where students inquire about and take action on global issues), and the frequency with which global topics are integrated into the standard curriculum. As a second example, spread might examine how many teachers and schools are engaging in the various global initiatives offered by each district and which students are being impacted by each initiative (e.g., how many and what demographic of students are enrolled in dual immersion programs). Because some have framed global education as a way to improve the educational experiences of an increasingly diverse student population (e.g., Banks, 2008; O’Connor & Zeichner, 2011), particular attention should be paid to the experiences of immigrant and other culturally and linguistically diverse students within globally-oriented classrooms and schools, and the extent to which their needs, perspectives, and experiences are included or marginalized.

Future research might also examine the effects of global education adaptations on student outcomes. Not only could this research measure students’ global competence development, but could also focus on the outcomes that district leaders considered important reasons for pursuing global education in the first place. For example, as both districts emphasized the importance of student competitiveness for college and careers, outcomes could include “college and career ready” skills such as critical thinking and problem-solving, communication, collaboration, and creativity and innovation (Partnership for 21<sup>st</sup> Century Skills, 2015) or distal outcomes related to high school graduation rates and postsecondary education enrollment. Likewise, districts that emphasize cosmopolitan purposes could also measure student outcomes such as local and global civic engagement.

While the theory of policy co-construction notes that external partners and policymakers are shaped by local implementers while at the same time shaping local implementers' actions and contexts (Datnow et al., 2002), this study focuses on the latter. Therefore, future research should turn its gaze on external partners as the focal unit of analysis, to better understand a) the role external partners play as boundary spanners and social network hubs in implementing global education reforms in North Carolina and b) how the personal, interpersonal, and organizational contexts in which these organizational actors are embedded influence their sensemaking around global education and the services they provide to globally committed school districts.

### **Conclusion**

Zhao (2010) stated, “to ensure a better society for all...requires us to prepare our students to become global citizens” (p. 61). This research takes a first step by demonstrating that school district actors do have agency in adapting policies aimed to help educators prepare a globally competent citizenry. It points to how district actors can provide concrete supports that bring the world to locales that are, in the words of a Maple teacher and Roosevelt superintendent, “out there.”

Table 3.1.

*North Carolina Global Education Policies*

Year	Policy	Description
2007	Teacher Evaluation and Professional Standards	<p>“Global awareness” is integrated across the six professional teaching standards as a “21<sup>st</sup> century skill”. “Global awareness” is defined as:</p> <ul style="list-style-type: none"> <li>• Using 21st century skills to understand and address global issues.</li> <li>• Learning from and working collaboratively with individuals representing diverse cultures, religions and lifestyles in a spirit of mutual respect and open dialogue in personal, work and community contexts.</li> <li>• Having the ability to utilize non-English languages as a tool for understanding other nations and cultures.</li> </ul> <p>Standards integrated into on the Teacher Evaluation include:</p> <ul style="list-style-type: none"> <li>• <b>Element IIb. Teachers embrace diversity in the school community and in the world.</b></li> <li>• <b>Element IIIc. Teachers recognize the interconnectedness of content areas/disciplines.</b> (Includes “Teachers promote global awareness and its relevance to subjects they teach.”)</li> <li>• <b>Element Vb. Teachers link professional growth to their professional goals.</b> (Includes “Teachers participate in professional development that reflects a global view of educational practices; includes 21st century skills and knowledge.”)</li> </ul>
2013	Global Education Task Force	<p>Determined 5 state commitments:</p> <ol style="list-style-type: none"> <li>1. <u>Robust teacher support and tools</u> <ul style="list-style-type: none"> <li>- Embedding global themes and problem-based learning focused on global issues throughout the K-12 standards based curriculum</li> <li>- SBE-recognized badging process</li> <li>- Teacher preparation to include global content</li> </ul> </li> <li>2. <u>Leading-edge language instruction</u> <ul style="list-style-type: none"> <li>- Dual immersion programs</li> <li>- Increasing K-12 World Language Teachers</li> <li>- Emphasizing global affairs, international societies, economies, cultures, and survival language skills into world language classes</li> </ul> </li> <li>3. <u>New school models</u> <ul style="list-style-type: none"> <li>- Development of new school models with international themes</li> </ul> </li> <li>4. <u>District networking and recognition</u> <ul style="list-style-type: none"> <li>- Global-ready designations for schools and districts</li> </ul> </li> <li>5. <u>Strategic international relationships</u> <ul style="list-style-type: none"> <li>- Partner countries to inform development of K-12 curriculum, teacher preparation, professional development, and administrator</li> <li>- Principal and teacher exchanges and visits</li> </ul> </li> </ol>

<b>Year</b>	<b>Policy</b>	<b>Description</b>
2014	Global Educator Digital Badge for Teachers (GEDB)	A Global Educator Digital Badge candidate works with principal to create a professional development plan focused on embedding global education in instruction. Requirements include completing 100 hours or 10 CEUs of global educational professional development and meeting a Capstone Project requirement within two years. Upon completion, the teacher is issued a digital badge at the state level, with the designation documented in the teacher's Home Base Educator's Professional Development Profile.
2015	Global Ready School and Global-Ready District Recognitions	Designation includes the following Global-Ready Attributes: <ol style="list-style-type: none"> <li>1) A site-based global education strategic plan is in place.</li> <li>2) A site-based global education committee or advisory council is in place.</li> <li>3) Professional development on embedded global education curriculum.</li> <li>4) Embedded global themes and problem-based learning throughout the curriculum.</li> <li>5) Global experiential learning experiences (face-to-face and virtual) for each student and teacher.</li> <li>6) Alignment of student global competency development with career and/or postsecondary pathways.</li> <li>7) Leading-edge language instruction.</li> <li>8) Authentic assessment and demonstration of global competence.</li> <li>9) Global education strategic plan is communicated.</li> <li>10) Business/industry, nonprofit, and community partnerships for Global Education opportunities that extend the classroom walls.</li> </ol>

*Note.* Teacher Evaluation and Professional Standards retrieved from <http://www.ncpublicschools.org/docs/effectiveness-model/ncees/instruments/teach-eval-manual.pdf>. Task Force report retrieved from <http://www.ncpublicschools.org/docs/globaled/final-report.pdf>. GEDB and Global-Ready School and Global-Ready District recognitions retrieved from <http://www.ncpublicschools.org/globaled/action>.

Table 2. *Participants by District*

<b>Roosevelt</b>		<b>Maple</b>	
<b>Pseudonym</b>	<b>District Position</b>	<b>Pseudonym</b>	<b>District Position</b>
<i>Lana Washington</i>	Director of Curriculum, Research, & Development	<i>Frank Pine</i>	Superintendent
<i>Gina Monroe</i>	Elementary Principal, District Global Team Member	<i>Sarah Willow</i>	K-8 Global School Principal
<i>Haley Jackson</i>	Elementary Principal, District Global Team Member	<i>Mara Elm</i>	Home Base, Secondary Schools, and Global Coordinator Director
<i>Richard Adams</i>	Elementary Principal, District Global Team Member	<i>Georgina Birch</i>	Middle School Principal
<i>Jacob Johnson</i>	Elementary Principal, District Global Team Member	<i>Sam Aspen</i>	Early College Principal
<i>Scott Polk</i>	CTE Director	<i>Hank Ash</i>	Elementary Principal
<i>Elizabeth Lincoln</i>	Associate Superintendent of Curriculum and Instruction	<i>Patricia Cedar</i>	Elementary Principal
<i>Samuel Harrison</i>	Director of Elementary Education	<i>Cara Cypress</i>	K-8 Global School Coordinator
<i>Eugene Carter</i>	Director of Academic Innovation and AIG	<i>John Poplar</i>	High School Social Studies Teacher, Global Teacher of the Year
<i>Ben Hoover</i>	Director of Title I	<i>Selena Evergreen</i>	High School Teacher; VIF Teacher Local Advisor
<i>Celine Coolidge</i>	Director of Cultural Initiatives	<i>Amber Dogwood</i>	Middle Grades and Title I Director
<i>Sarah Kennedy</i>	Retired Superintendent	<i>Fiona Redwood</i>	Elementary Director
<i>Brice Filmore</i>	Middle School Principal, District Global Team Member		
<i>Denise Madison</i>	Elementary Assistant Principal, Cultural Correspondents Coordinator, District Global Team Member		
<i>Teresa Reagan</i>	School board member		
<i>Thomas Eisenhower</i>	School board member		

*Note.* All principals in Maple County were considered a part of the district leadership team. All names are pseudonyms.



Table 3.

*Final Codes*

<b>Code</b>	<b>Subcodes</b>
<b>I. Adaptations</b>	
Definitions	Integrated, Global perspectives, Culture, Taking action, Culturally responsive teaching, International experiences, Inquiry, Technology
Purposes	Cosmopolitan, Student competitiveness, Equity of opportunity, Exposing students to the world, School reform, Environment, Transformative, Technological, Inciting student passion
Global Education Policies	Teacher support and tools, Leading-edge language instruction, New school models, District networking and recognition, Strategic international relationships
<b>II. District Agency</b>	
Generating will	Superintendent champion, School board support, Access for all students, Community outreach, Stakeholder inclusion, Promoting principal champions, Allowing flexibility, Visionary leadership, Providing recognition
Building capacity	Mandated PD, Providing PD opportunities, Providing resources, Technical support, Technology support, Communication channels
Creating Coherence	Alignment with other policy, Integrated into everything
Re-orienting the organization	New schools, New district administrative positions, New school positions, New courses, Global action plan, Global action teams, Funding, Planning for sustainability
<b>III. Multidirectionality</b>	
Influencers	Asia Society, CIU, District personnel, IB, Other Districts, P21, Parents, SBE-DPI, Students, UNESCO, Universities, US Department of Education, VIF, World View
Idea Flow	Community to district, District to community, District to district, District to external partner, District to school, District to state, External partner to district, School to district, School to school, State to district
<b>IV. Context</b>	
Personal	Teacher preparation, Family connections, International experience, Prior education
Organizational	Available resources, World language teacher shortage, Full plate, Staff turnover, NC political climate, Testing, Collaboration, District size, Home-grown leadership, Instructional coach structures, Site-based management
Community	Nationalist, Cross-cultural differences, Fear of controversy, Misconceptions of teacher travel, Resistance to any change, Charter school, ESL student population, Low-income, Military, Population changes, Racial diversity, Rural, Student achievement

Table 4.

*Global Education Interpretations and Adaptations*

	<b>Roosevelt</b>	<b>Maple</b>
<b>Interpretations</b>		
<i>Definitions</i>	Global integration; Understanding different cultures; Taking action; Intercultural communication; inquiry-based instruction; Awareness of the world	Awareness of the world; Understanding different cultures; Taking action; Inquiry-based instruction; Global integration
<i>Purposes</i>	Student competitiveness; Cosmopolitan; Equity of opportunity	Student competitiveness; Exposing students to the world; School reform
<b>Adaptations</b>		
<i>Teacher support and tools</i>	VIF Learning Center World View conferences and leadership programs IB programs NC DPI Global Badges	VIF Learning Center plus face-to-face PD NC DPI Global Badges
<i>Language instruction</i>	Spanish immersion Confucius classrooms Expanding world languages	Spanish immersion Chinese enhancement
<i>New schools model</i>	Global-themed elementary schools Global-Ready Schools designation	Global K-8 School VIF global school recognition
<i>District networking and recognition</i>	Applied for Global-Ready District designation Global School Network	Considering applying for Global-Ready District designation
<i>Strategic international relationships</i>	International school partnerships Hosting international teachers Cultural Correspondents	Hosting international teachers
<i>Other</i>	Global events Global studies courses	Global events Global studies course

Table 5.

*District Implementation Supports*

<b>District Supports</b>	<b>Roosevelt</b>	<b>Maple</b>
<i>Generating Will</i>	Stakeholder inclusion; Community outreach; Forward-thinking leadership; Slowly building pockets of success	Superintendent champion; Community outreach; Access for all students; Recognition
<i>Building Capacity</i>	Providing information, PD, materials, and international travel opportunities	Mandated PD, with resources, principal training, and technical support
<i>Creating Coherence</i>	Alignment with other district initiatives	
<i>Reorienting the Organization</i>	Re-organization of central office positions; Creating a district global action plan and committee; Internationalizing teaching staff; Re-direction of funds	Re-organization of central office and school positions; School reconfiguration; Planning for sustainability

## APPENDIX A: CHAPTER 1 DATA SOURCES

No.	Policy Entrepreneur	Title	Target	Document Type	Year
1.	The American Association of Colleges for Teacher Education (AACTE)	Integrating a global perspective into teacher education. Position statement of the American Association of Colleges for Teacher Education	Teacher Education	Position Statement	2005
2.	AACTE and Partnership for 21 <sup>st</sup> Century Skills	21 <sup>st</sup> Century Knowledge and Skills in Educator Preparation	Teacher Education	Report	2010
3.	ACTFL	Global Competence Position Statement	n/a	Position Statement	2014
4.	ACTFL	Foreign Language Enrollments in K-12 Public Schools: Are Students Prepared for a Global Society?	Federal	Report	2011
5.	American Forum for Global Education	American Forum for Global Education Checklist for Teachers, Schools, School Systems, and State Education Agencies	State, District, School, Teacher	Guidance Document	2002
6.	ASF	ASF Intercultural Programs: Educational Goals	Teachers, Parents, Students	Website	2013
7.	ASCD	Schools for the Global Age: Creating New Possibilities	School	Position Statement	2005
8.	ASCD	Policy Priorities: Teaching in a Global Context	State, District, School, Teacher	Position Statement	2003
9.	Asia Society	Asia Society. Partnership for Global Learning	State, District, School, Teacher, Teacher Education	Website	2015
10.	Asia Society	A GPS for Success: Updated and Improved for 2015.	Teachers	Website	2015
11.	Asia Society	Funding Global Learning	School Leaders	Report	2011
12.	Asia Society	State Advocacy Statistics	State	Talking Points	2011
13.	Asia Society	Global Competence in Expanded Learning Time: A Guide for School Leaders	School Leaders	Guidance Document	2011
14.	Asia Society	Ready for the World: Preparing Elementary Students for the Global Age	School Leaders	Report	2010
15.	Asia Society	Expanding Horizons: Building Global Literacy in Afterschool Programs	School and afterschool program leaders	Report	2009
16.	Asia Society	Going Global: Preparing Our Students for an Interconnected World	State, District, School, Teacher	Report	2009

No.	Policy Entrepreneur	Title	Target	Document Type	Year
17.	Asia Society	Global Competence Planning Rubric: District Strategies for Preparing Globally Competent Students	District	Guidance Document	n.d.
18.	Asia Society	Talking Points on Global Competence	State	Talking Points	n.d.
19.	Asia Society and Council of Chief State School Officers (CCSSO)	Global Competence Matrices	Teacher	Guidance Document	2012
20.	Asia Society and CCSSO	Educating for Global Competence: Preparing Our Youth to Engage the World	State, District, School, Teacher	Report	2011
21.	Asia Society and CCSSO	Putting the World into World-Class Education: State Innovations and Opportunities	State	Report	2008
22.	Asia Society and Longview Foundation	International Education Planning Rubric: State Strategies to Prepare Globally Competent Students	State	Guidance Document	n.d.
23.	Avenues	Avenues: The World School	Parents	Program Brochure	2014
24.	Council of Chief State School Officers (CCSSO)	Global Education Policy Statement	State	Position Statement	2006
25.	Committee for Economic Development (CED)	Education for Global Leadership: The Importance of International Studies and Foreign Language Education for U.S. Economic and National Security	Federal	Report	2006
26.	Council on Foreign Relations	U.S. Education Reform and National Security. Independent Task Force Report No. 68	Federal	Report	2012
27.	Choices	About the Choices Program	Teachers	Website	2015
28.	Facing History and Ourselves	For Educators	District, School, Teacher	Website	2015
29.	Facing History and Ourselves	Get to Know Us	District, School, Teacher	Website	2015
30.	Facing the Future	Approach: Engage Students with Relevant Learning	Teacher	Website	2015
31.	Facing the Future	Global Issues We Address	Teacher	Website	2015
32.	Facing the Future	Mission	Teacher	Website	2015
33.	Facing the Future	Engaging and Empowering Students: Framework for Teaching About Global Issues and Solutions	Teacher	Report	2004
34.	Facing the Future	Taking Stock of Our Future	Teacher	Website	2004
35.	Global Concerns Classroom	About Us	School	Website	2015
36.	Global Kids	Mission and History	School, Teacher	Website	2015
37.	Global Nomads	Global Nomads		Website	2015

No.	Policy Entrepreneur	Title	Target	Document Type	Year
38.	Global Teacher Education (GTE)	Global Competence	Teacher Education	Website	2015
39.	GTE	Mission	Teacher Education	Website	2015
40.	GTE	Strategies	Teacher Education	Website	2015
41.	GTE	International Experiences Benefit Preservice Teachers	Teacher Education	Report	2013
42.	GTE	Internationalizing Colleges of Education	Teacher Education	Report	2013
43.	GTE	World Language Study for All Teachers	Teacher Education	Website	2013
44.	GTE and Longview Foundation	K-16 and IFLE: Teacher Development and Resource Delivery Today	Teacher Education	Report	n.d.
45.	Global Youth Leadership Institute	About GYLI	Teachers	Website	2015
46.	International Baccalaureate (IB)	Benefits: Why the IB is Different	State, District, School	Website	2015
47.	IB	IB Mission	State, District, School	Website	2015
48.	IB	What is an IB education?	State, District, School	Report	2013
49.	IB	The IB Career-related Programme	School	Program Brochure	2012
50.	IB	The Diploma Programme	School	Program Brochure	2012
51.	IB	Primary Programme Brochure	School	Program Brochure	2012
52.	iEARN	About	Teachers	Website	2015
53.	IVECA	About	School, Teachers	Website	2015
54.	Joint National Committee for Languages-National Council for Languages and International Studies (JNCL-NCLIS)	Fact Sheet	Federal	Talking Points	2014
55.	JNCL-NCLIS	Letter to the American Academy of Arts and Sciences	Federal	Position Statement	2014
56.	JNCL-NCLIS	Legislative Priorities	Federal	Position Statement	2014
57.	JNCL-NCLIS	Language Advocacy Day	Federal	Website	2014
58.	JNCL-NCLIS	Languages are Vital to U.S. STEM Competencies	Federal	Position Statement	2013

No.	Policy Entrepreneur	Title	Target	Document Type	Year
59.	JNCL-NCLIS	U.S. Global Competence: The Role of International and Foreign Language Education Programs. Remarks for Staff House of Representatives	Federal	Speech	2013
60.	JNCL-NCLIS	Language and National Security	Federal	Position Statement	n.d.
61.	JNCL-NCLIS	Language and Innovation	Federal	Position Statement	n.d.
62.	Longview Foundation	Innovations in Internationalization	School, Teacher, Teacher Education	Website	2015
63.	Longview Foundation	Internationalizing Teacher Preparation	Teacher Education	Website	2015
64.	Longview Foundation	Mission; History; Partner Organizations	State, Teacher Education	Website	2015
65.	Longview Foundation	Teacher Preparation for the Global Age: An Imperative for Change	Teacher Education	Report	2009
66.	NAFSA: Association of International Educators	Viewing the InTASC Standards through a Global Preparation Lens	Teacher Education	Report	2015
67.	NAFSA	Global Classrooms, Global Teachers: Building Cross-Cultural Competence through Experiences Abroad	Teacher Education	Report	2013
68.	NAFSA	Preparing Globally Competent Teachers	Teacher Education	Report	2012
69.	NAFSA	Toward Globally Competent Pedagogy	Teacher Education	Report	2012
70.	NAFSA	Public Opinion Supports International Education: Languages, Global Knowledge Seen as Essential	Federal	Report	2012
71.	NAFSA	Renewing America's Global Leadership	Federal	Position Statement	2009
72.	NAFSA	Teaching the World	Teacher Education	Report	2009
73.	NAFSA	International Education: The Neglected Dimensions of Public Diplomacy	Federal	Position Statement	2008
74.	NAFSA	Securing America's Future	Federal	Report	2003
75.	National Council for the Social Studies (NCSS)	Position Statement: What are Global and International Education?	Teachers	Position Statement	n.d.
76.	NCSS	Advocacy Handout: Today's Social Studies...Creating Effective Citizens	Federal	Website	n.d.
77.	National Geographic	About Us	Teacher	Website	2015
78.	National Geographic	National Geographic-Roper Public Affairs 2006 Geographic Literacy Study	Federal	Report	2006
79.	NEA Foundation	Global Learning Fellowship	Teachers	Website	2015

No.	Policy Entrepreneur	Title	Target	Document Type	Year
80.	OxFam	Global Citizenship	School, Teacher	Website	2015
81.	OxFam	Education for Global Citizenship: A Guide for Schools	School	Guiding Document	2006
82.	OxFam	Maths and Global Citizenship: Why Teach Maths with a Global Citizenship?	Teacher	Position Statement	n.d.
83.	Partnership for 21 <sup>st</sup> Century Skills (P21)	P21 Common Core Toolkit: A Guide to Aligning the Common Core State Standards with the Framework for 21 <sup>st</sup> Century Skills	State, District	Guidance Document	2011
84.	P21	Our Vision and Mission	n/a	Website	2015
85.	P21	Congressional 21 <sup>st</sup> Century Skills Caucus	Federal	Website	2015
86.	P21	P21 Framework Definitions	State, District, School	Guidance Document	2015
87.	P21	K-12 Global Education Indicators	Teacher	Guidance Document	2014
88.	P21	Reimagining Citizenship for the 21 <sup>st</sup> Century: A Call to Action for Policymakers and Educators	Federal, State, District, School, Parents	Report	2014
89.	P21	Framework for State Action on Global Education	State	Guidance Document	2014
90.	P21	Framework for 21 <sup>st</sup> Century Learning	State, District, School	Guidance Document	2011
91.	P21 and Parent Teacher Association (PTA)	What is 21 <sup>st</sup> Century Learning and Citizenship All About? Education for a Changing World – A Parent’s Guide for 21 <sup>st</sup> Century Learning and Citizenship	Parent	Report	n.d.
92.	P21 and PTA	Parents’ Guide for 21 <sup>st</sup> Century Learning and Citizenship: Tips and Strategies for Families	Parent	Guidance Document	n.d.
93.	Rethinking Schools	Educate for Global Justice: A Key Lesson from Sept. 11	Teachers	Report	2002
94.	Rethinking Schools	Rethinking Globalization: Introduction	Teachers	Report	2002
95.	TeachUNICEF	About Us	Teachers	Website	2015
96.	TeachUNICEF	Exploring Our Roles as Global Citizens: An Educator’s Guide (Grades 3-5)	Teachers	Guidance Document	2013
97.	TeachUNICEF	Global Citizenship: A High School Educator’s Guide	Teachers	Guidance Document	2013
98.	United Nations	Model UN: About	State, School, Teacher	Website	2015



No.	Policy Entrepreneur	Title	Target	Document Type	Year
99.	United Nations	Global Education First Initiative: An Initiative of the United Nations Secretary-General	Federal, Teachers, Teacher Education, Parents	Report	2012
100.	UNESCO	Themes: Democracy and Global Citizenship	Federal, Schools	Website	2015
101.	UNESCO	Global Citizenship Education: Preparing Learners for the Challenges of the 21 <sup>st</sup> Century	Federal, State, School Teachers	Report	2014
102.	UNESCO	Education for 'Global Citizenship': A Framework for Discussion. Education Research and Foresight Working Papers	Federal, State, School Teachers	Report	2013
103.	UNESCO	Global Citizenship Education: An Emerging Perspective. Outcome document of the Technical Consultation on Global Citizenship Education	Federal, State, School Teachers	Report	2013
104.	UNESCO	UNESCO Associated School Network (ASPnet): Historical Review 1953-2003	Federal, School, Teacher	Report	2003
105.	U.S. Congress	114 Cong. Rec. E1666 (daily ed. Nov. 19, 2015)(statement of Rep. Price)	Federal	Speech	2015
106.	U.S. Congress	114 Cong. Rec. H1285 (daily ed. Feb. 26, 2015)(statement of Rep. Brownley)	Federal	Speech	2015
107.	U.S. Congress	Teaching Geography is Fundamental Act of 2013, S. 370, 113 <sup>th</sup> Congress Teaching Geography is Fundamental Act of 2013, H. 822, 113 <sup>th</sup> Congress	Federal	Bill	2013
108.	U.S. Congress	Foreign Language Education Partnership Program Act of 2013, H.2170, 113 <sup>th</sup> Congress Foreign Language Education Partnership Program Act of 2013, S. 1036, 113 <sup>th</sup> Congress	Federal	Bill	2013
109.	U.S. Congress	After School for America's Children Act of 2012, H. 3821, 112 <sup>th</sup> Congress	Federal	Bill	2012
110.	U.S. Congress	112 Cong. Rec. E1760 (daily ed. Nov. 15, 2012)(statement of Rep. Farr)	Federal	Speech	2012
111.	U.S. Congress	Global Education Nexus in U.S. Act of 2011, H.1109, 112 <sup>th</sup> Congress	Federal	Bill	2011
112.	U.S. Congress	Excellence and Innovation in Language Learning Act of 2011, H.1994, 112 <sup>th</sup> Congress Excellence and Innovation in Language Learning Act of 2010, H.6036, 111 <sup>th</sup> Congress	Federal	Bill	2011 2010
113.	U.S. Congress	111 Cong. Rec. H5682 (daily ed. July 19, 2010)(statement of Rep. Loeb sack)	Federal	Speech	2010

<b>No.</b>	<b>Policy Entrepreneur</b>	<b>Title</b>	<b>Target</b>	<b>Document Type</b>	<b>Year</b>
114.	U.S. Congress	111 Cong. Rec. H8882 (daily ed. July 28, 2009)(statement of Rep. Sanchez)	Federal	Speech	2009
115.	U.S. Congress	U.S. and the World Education Act of 2009, H. 3359, 111 <sup>th</sup> Congress U.S. and the World Education Act of 2008, H. 7063, 110 <sup>th</sup> Congress	Federal	Bill	2009
116.	U.S. Congress	International Leadership Act of 2008, H.5179, 110 <sup>th</sup> Congress	Federal	Bill	2008
117.	U.S. Congress	110 Cong. Rec. E2043 (daily ed. September 27, 2008)(statement of Rep. Sanchez)	Federal	Speech	2008
118.	U.S. Congress	110 Cong. Rec. E2290 (daily ed. Oct. 31, 2007)(statement of Rep. Holt)	Federal	Speech	2007
119.	U.S. Congress	110 Cong. Rec. S14277 (daily ed. Nov. 13, 2007)(statement of Sen. Feingold)	Federal	Speech	2007
120.	U.S. Congress	109 Cong. Rec. S10867 (daily ed. Nov. 13, 2006)(statement of Sen. Feingold)	Federal	Speech	2006
121.	U.S. Congress	109 Cong. Rec. S10867 (daily ed. Mar. 8, 2006)(statement of Sen. Sarbanes)	Federal	Speech	2006
122.	U.S. Congress	109 Cong. Rec. E748 (daily ed. April 21, 2005)(statement of Rep. Hinchey)	Federal	Speech	2005
123.	U.S. Congress	109 Cong. Rec. S12709 (daily ed. Nov.10, 2005)(statement of Sen. Frist)	Federal	Speech	2005
124.	U.S. Congress	109 Cong. Rec. S8207 (daily ed. July 13, 2005)(statement of Sen. Akaka)	Federal	Speech	2005
125.	U.S. Congress	109 Cong. Rec. H10233 (daily ed. Nov. 16, 2005)(statement of Rep. Holt)	Federal	Speech	2005
126.	U.S. Congress	H. Con. Res. 100, 109 <sup>th</sup> Congress	Federal	Bill	2005
127.	U.S. Congress	Year of Study Abroad, S. Res. 308, 109 <sup>th</sup> Congress	Federal	Bill	2005
128.	U.S. Congress	108 Cong. Rec. S2448 (daily ed. Mar. 9, 2004)(statement of Rep. Feingold)	Federal	Speech	2004
129.	U.S. Congress	H. Res. 636, 108 <sup>th</sup> Congress S. Res.313, 108 <sup>th</sup> Congress	Federal	Bill	2004
130.	U.S. Congress	9/11 Commission Report Implementation Act of 2004, H. 5040, 108 <sup>th</sup> Congress	Federal	Bill	2004
131.	U.S. Congress	Foreign Relations Authorization Act of 2004, S.925, 108 <sup>th</sup> Congress	Federal	Bill	2004
132.	U.S. Congress	108 Cong. Rec. S10259 (daily ed. July 30, 2003)(statement of Sen. Kennedy)	Federal	Speech	2003
133.	U.S. Congress	Cultural Bridges Act of 2002, S. 2505, 107 <sup>th</sup> Congress	Federal	Bill	2002
134.	U.S. Congress	H. Con. Res. 201, 107 <sup>th</sup> Congress S. Con. Res. 7, 107 <sup>th</sup> Congress	Federal	Bill	2001

<b>No.</b>	<b>Policy Entrepreneur</b>	<b>Title</b>	<b>Target</b>	<b>Document Type</b>	<b>Year</b>
135.	U.S. Congress	107 Cong. Rec. S3768 (daily ed. April 6, 2001)(statement of Sen. Dewine)	Federal	Speech	2001
136.	U.S. Congress	107 Cong. Rec. S1022 (daily ed. Feb. 1, 2001)(statement of Sen. Kerry)	Federal	Speech	2001
137.	U.S. Congress	H. Con.Res.342, 106 <sup>th</sup> Congress	Federal	Bill	2000
138.	U.S Department of Education (U.S. DOE)	Statement on International Education Week 2014 by U.S. Secretary of Education Arne Duncan	Federal	Policy Statement	2014
139.	U.S. DOE	Statement on International Education Week 2013 by U.S. Secretary of Education Arne Duncan	Federal	Policy Statement	2013
140.	U.S. DOE	Succeeding Globally Through International Education and Engagement: U.S. Department of Education International Strategy 2012-2016	Federal	Report	2012
141.	U.S. DOE	Statement on International Education Week 2012 by U.S. Secretary of Education Arne Duncan	Federal	Policy Statement	2012
142.	U.S. DOE	Statement on International Education Week 2011 by U.S. Secretary of Education Arne Duncan	Federal	Policy Statement	2011
143.	U.S. DOE	Statement on International Education Week 2010 by U.S. Secretary of Education Arne Duncan	Federal	Policy Statement	2010
144.	U.S. DOE	International Education Programs: Access to the World and Its Languages	Federal	Program Brochure	n.d.
145.	U.S. DOE/ National Research Council of the National Academies	International Education and Foreign Languages: Keys to Securing America's Future. Committee to Review the Title VI and Fulbright-Hats International Education Programs.	Federal	Report	2007
146.	World Savvy	Impact	District, School, Teacher	Website	2015
147.	World Savvy	Letter from Executive Director	District, School, Teacher	Website	2015
148.	World Savvy	What is Global Competence?	Teacher	Website	2015
149.	World Savvy	Global Competence Matrix	Teacher	Guidance Document	2014

## APPENDIX B: CHAPTER 1 FINAL CODE LIST

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### Discourse

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#### Cosmopolitan

- a) Universal values, problems, conditions
- b) Helping others, making the world a better place

#### Critical

#### Environmental

#### Nationalist

- a) Security (military)
- b) Diplomacy (international relations)
- c) Competitiveness
- d) Other U.S. interests

#### Neoliberal

- a) Jobs (benefiting individuals)
- b) Workforce that benefits employers
- c) Economic trade indicators

#### Personal growth

#### Technological

#### Transformative

- a) Global migration/diverse local populations
- b) Recognizing differences
- c) Participation in local, national, global arenas

#### World justice and governance

#### Stacking

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### Policy Entrepreneur Strategies

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#### Social acuity

- a) Specific policy entrepreneur reference
- b) Target audience

#### Defining problems

- a) Urgency
- b) Numbers/statistics
- c) Global comparisons – noting which countries
- d) Quotes (of people in power)
- e) Metaphors: Sept. 11, global marketplace

#### Team-building

#### Leading by example

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**APPENDIX C: CHAPTER 2 DOCUMENTS**

<b>Policy Actor</b>	<b>Year</b>	<b>Title</b>
1. SBE	2004-2015	State Board of Education Highlights ( <i>n</i> =22)
2. SBE and DPI	2002-2004	Biennial Report: Building on Success for Superior Schools
3. SBE and DPI	2004-2006	Biennial Report: Future Ready Schools: Preparing Students for the 21 <sup>st</sup> Century
4. SBE	2006	GCS-F-016: Policy Defining Academic Rigor
5. SBE	2006	State Board of Education Strategic Plan
6. SBE	2007-2015	State Board of Education Meeting Minutes ( <i>n</i> =55)
7. SBE and DPI	2008-2010	Biennial Report: Service for Success: Supporting 21 <sup>st</sup> Century Learning in North Carolina
8. SBE and DPI	2010-2012	Biennial Report: North Carolina Public Schools: Great Teaching and Learning
9. SBE	2010	TCP-A-002: Policies on Routes to Licensure
10. SBE	2010	TCP-A-004: Policies on the Beginning Teacher Support Programs
11. SBE	2012	Vision of Public Education in North Carolina: A Great Public Education System for a Great State
12. SBE and DPI	2012	North Carolina Teacher Evaluation Process
13. SBE	2013	Preparing Students for the World: Final Report of the State Board of Education’s Task Force on Global Education
14. SBE	2013	TCP-A-001: Policies on General Licensure Requirements
15. SBE	2013	TCT-C-006: Policy on Standards and Criteria for Evaluation of Professional School Employees
16. SBE	2014	State Board of Education Strategic Plan
17. SBE	2014	TCP-H-001: Global Educator Digital Badge Criteria for Teachers
18. SBE	2015	GCS-L-007: High School Diploma Endorsements
19. DPI	2013	NC Educator Evaluation System User Guide
20. DPI	2013	Fostering global awareness: NCEES Connections
21. DPI	2015	North Carolina Global Educator Digital Badge for Teachers: Implementation Guide
22. DPI	2015	Global Educator Digital Badge for Teachers: Teacher Webinar
23. DPI	2015	Memorandum of Agreement for the Global Educator Digital Badge for Teachers
24. DPI	2015	Frequently Asked Questions on Global Educator Digital Badge
25. DPI	2015	NC Global-Ready School Designation Rubric
26. DPI	2015	NC Global-Ready School Application and Guidance Document for 2015-2016
27. DPI	2015	NC State Board of Education Global-Ready School Designation: Designation Application Process and Guidance (Presentation)

<b>Policy Actor</b>	<b>Year</b>	<b>Title</b>
28. DPI	2015	NC State Board of Education Global-Ready District Designation: Designation Application Process and Guidance (Presentation)
29. DPI	2015	NC Global-Ready District Designation Rubric
30. DPI	2015	NC Global-Ready District Application and Guidance Document for 2015-2016
31. DPI	2015	NNC State Board of Education Global-Ready District Designation: Designation Application Process and Guidance (Presentation)
32. DPI	2015	NC Global Education: Students Ready for the World ( <a href="http://www.dpi.state.nc.us/globaled/">http://www.dpi.state.nc.us/globaled/</a> )
33. NC General Assembly	2005	The Studies Act of 2005: Global Education Committee, H.413, 2005 Session
34. NC General Assembly	2005	Global Education for Students/Study, S.898, 2005 Session
35. NC General Assembly	2007	Global Connections for N.C. Schools/Funds, H.1463, 2007 Session
36. NC General Assembly	2009	Create Global Engagement Commission, H.1258, 2009 Session
37. NC General Assembly	2011	Create Global Engagement Study Commission, H.23, 2011 Session
38. NC General Assembly	2011	Senate Rules and Operations of the Senate Committee, H.773, 2011 Session
39. NC General Assembly	2011	Expand Duties of Economic Dev. Oversight Committee, S.14, 2011 Session
40. NC General Assembly	2013	Common Core Standards Study, H.777, 2013 Session
41. NC General Assembly	2013	Education and Workforce Innovation Act, H.902, 2013 Session
42. NC General Assembly	2013	Innovation Through Local Schools, H.969, 2013 Session
43. NC General Assembly	2013	Broaden Successful AP Participation, H.969, 2013 Session
44. NC General Assembly	2013	Appropriations Act of 2013, SL2103-360, 2013 Session
45. NC General Assembly	2014	An Act to Facilitate Economic Development in the State, H.1031, 2014 Session
46. NC General Assembly	2014	Appropriations Act of 2014, SL2014-100, 2014 Session
47. CIU	2004	North Carolina in the World: A Plan to Increase Student Knowledge and Skills About the World
48. CIU	2005	The Red Thread: Promising Practices from the North Carolina-Sweden Early Childhood Study Program

<b>Policy Actor</b>	<b>Year</b>	<b>Title</b>
49. CIU	2006	North Carolina and the World: Preparing North Carolina Teachers for an Interconnected World
50. CIU	2007	North Carolina in the World Report 1: Aligning K-12 International Education Efforts with State Economic Development Priorities (legislative report)
51. CIU	2009	Engaging North Carolina to Engage the World
52. CIU	2011	Global Leaders: China
53. CIU	2013	Global Teachers: India
54. CIU	2013	Global Leaders: India
55. CIU	2013	Global Leaders: China
56. CIU	2014	Global Leaders: Germany
57. CIU/Coalition for Global Competitiveness	2015	A World of Opportunity: North Carolina Blueprint for Global Engagement
58. CIU/Coalition for Global Competitiveness	2015	North Carolina Coalition for Global Competitiveness Website Posts
59. Public School Forum NC	1996	Learning from Japan
60. Public School Forum NC	1999	Learning from England
61. Public School Forum NC	2001	Learning from Netherlands
62. Public School Forum NC	2002	Learning from South Korea
63. Public School Forum NC	2003	Learning from Denmark
64. Public School Forum NC	2006	Creating Internationally Competitive Schools: The Public School Forum's Study Group XII
65. Public School Forum NC	2008	Learning from Singapore
66. Public School Forum NC	2009	Learning from Ireland
67. Public School Forum NC	2011	Learning from Finland
68. Public School Forum NC	n.d.	Learning from China
69. Public School Forum NC	n.d.	Learning from India

## APPENDIX D: STATE POLICY ACTOR INTERVIEW PROTOCOL

1. What has your involvement been with global education in North Carolina?
  - a. Probe for role in agenda-setting/formulation
  - b. Probe for role in policy adoption
  - c. Probe for role in implementation
  - d. Probe for dates of involvement
2. Why did you become involved in the activities you just mentioned?
3. What are you/your organization's top three global education policy priorities?
4. What resources do you/your organization have to advocate for global education?
5. What strategies have you/your organization used to advocate for global education?
6. What groups or individuals do you/your organization work with in your efforts to advocate for/adopt/implement global education?  
[Probe] What specific global education policy issues have you collaborated on?
7. Can you think of any particular events that helped propel the global education movement forward in North Carolina?  
[Probe] When did these events occurred.
8. What successes have you had in advocating for global education in North Carolina?
9. What setbacks or obstacles have you faced advocating for global education in North Carolina?
10. What groups or individuals in North Carolina have opposed global education? Why do you think that is the case?
11. Where do you see the direction of global education in North Carolina headed? Why?
12. Do you have recommendations for other individuals I should interview who support global education?
13. Do you have recommendations for other individuals I should interview who oppose global education efforts?



## APPENDIX E: STATEMENT OF POSITIONALITY

In qualitative research, the researcher is the instrument (Marshall & Rossman, 2011). As such, throughout the data collection and analysis process I kept personal notes in the form of reflective notes after each interview. This allowed me to reflect on my own biases, perspectives, and experiences with global education in North Carolina that could potentially impact my analysis of the data. As Marshall and Rossman (2011) elucidated, personal interest and involvement often propels researchers to embark on a particular study; therefore, researchers must take caution to make sure that personal interest and involvement does not “preordain the findings or bias the study” (Marshall & Rossman, 2011, p. 63).

My personal interest in global education stems from my experiences as an elementary school teacher in a predominately immigrant community. I connected many aspects of globally competent teaching with best practices for teaching this population of students, so have come into this work with positive perceptions of global education. Personal biases may also stem from my involvement in the state-level global education subsystem. I have worked with and accepted invited presentations with the Special Assistant to Global Education at the North Carolina Department of Public Instruction (NC DPI) and with World View. As such, I may subconsciously view the intentions of informants favorably and informants may view me as a global education ally. Personal notes were a way for me to reflect on and keep check of these biases as I collected data and analyzed participant responses (Marshall & Rossman, 2011).

NC DPI, World View, and VIF participants did indeed explicitly say that they considered me and my colleagues their “partners” or “allies.” Though I anticipated that being perceived as an ally could cause participants to provide more positive responses when discussing global education, I found that participants – particularly those who were familiar with my own global competency work - were openly candid in speaking candidly about challenges, opposition, and contentions within the global education coalition. One example of how reflecting on my own personal political biases shaped data collection occurred when I assumed that a participant who represented a socially-conservative think tank would oppose global education. When I went for the interview, my questions assumed that this individual was in opposition to the global education coalition. However, after the first question, he clarified that he supported global education. Thus, I had to re-frame my interview questions to ask why he “advocated for” rather than “opposed” global education. In sum, these personal notes informed subsequent data collection activities and themes that emerged during the memo-writing process. Thus, they served as a tool to document, or leave an “audit trail” of any changes made throughout the study.

**APPENDIX F: NC GLOBAL EDUCATION ADVOCACY COALITION MEMBERS**

<b>Level</b>	<b>Organization</b>	<b>Mission</b>	<b>Global Education Activities</b>
National	Asia Society  (mentioned by 14/26 participants)	“To develop global competence in students, young leaders, and educators as the foundation for understanding between people in the Asia Pacific region and throughout the world.”	<ul style="list-style-type: none"> <li>- Facilitates an International Studies School Network, a Confucius Classroom Network of model Chinese language programs, and, in conjunction with the Longview Foundation, a States Network for International Studies.</li> <li>- Provides tools, reports, and additional resources that define and measure students’ global competence, which NC district leaders and external partners such as CIU and World View report using (See <a href="http://asiasociety.org/education/initiatives">http://asiasociety.org/education/initiatives</a>).</li> <li>- Leaders have spoken at NC summits and testified for NC task forces.</li> <li>- Played catalyzing role in NC’s initial statewide <i>North Carolina in the World</i> project. An external partner shared that the former CIU executive director “went to several conferences and met people with Asia Society and was convinced that North Carolina really ought to take an active role in trying to get access to the money and try to develop a new initiative to strengthen global education in the schools.”</li> <li>- Participants described the Asia Society as “nationally the strongest organization to support global education efforts in the country,” “the driving force behind everything at the national level,” and “the reason why there is anything global in this country.”</li> </ul>
	Longview Foundation  (mentioned by 9/26 participants)	“Today's students need opportunities to gain broad and deep global knowledge and the language and intercultural skills to engage effectively with people around the corner and around the world.”	<ul style="list-style-type: none"> <li>- As a national foundation, provides grants of \$30,000 or less to projects that support building global perspectives in teachers and students in K-12 education. Categories of funding support include state networks, internationalizing teacher preparation, and innovations in internationalization.</li> <li>- Facilitates the State Network for International Education with the Asia Society.</li> <li>- Awarded CIU \$17,750 to create K-12 educational resources from Mapping the Nation heat map; awarded North Carolina State University \$32,377 to facilitate a state-wide effort to implement the internationalization of teacher education.</li> </ul>

Level	Organization	Mission	Global Education Activities
National	Partnership for 21 <sup>st</sup> Century Skills (mentioned by 5/26 participants)	“P21's mission is to serve as catalyst for 21st century learning to build collaborative partnerships among education, business, community and government leaders so that all learners acquire the knowledge and skills they need to thrive in a world where change is constant and learning never stops.”	<ul style="list-style-type: none"> <li>- Framework for 21<sup>st</sup> Century Learning proposes that 21<sup>st</sup> century interdisciplinary themes, among them global awareness, be woven into core subject areas.</li> <li>- Under direction of Governor Easley, North Carolina was the first state to join the 21<sup>st</sup> Century Partnership.</li> <li>- In the past five years, the VIF CEO has become a leader in P21, and helped them write a “The State Framework for Global Education.” As a VIF participant explained, “There are global competencies that VIF developed over the years that we basically gifted to P21.”</li> </ul>
State	Center for International Understanding (CIU) (mentioned by 21/26 participants)	“CIU serves North Carolina by promoting awareness, expanding understanding, and empowering action through global education. CIU’s programs for business, policy and education leaders aim to make North Carolina the most globally engaged state in the nation.”	<ul style="list-style-type: none"> <li>- A public service program of the University of North Carolina (UNC) founded in 1979 by Carolyn Hunt to engage NC with the rest of the world, originally through international exchanges. Since 1995, CIU began principal and teacher exchanges to focus efforts on K-12 global education.</li> <li>- CIU’s international programs aim to educate state and local policymakers and educators to forge partnerships between North Carolina and international educational, economic, and other governmental entities.</li> <li>- K-12 educational programs include international school partnerships between North Carolina schools and those in China, India, Denmark, and Mexico, the Confucius Classrooms (Han Ban program) that brings guest Mandarin Chinese teachers to to start Chinese language and culture programs in districts across the state, and a global teacher program that sends NC teachers on two-week study trips abroad.</li> </ul> <p>Has facilitated statewide global engagement initiatives, including <i>North Carolina in the World</i> (funded through foundation grants and a NC General Assembly A appropriation) and the <i>Coalition for Global Competitiveness</i>.</p>

Level	Organization	Mission	Global Education Activities
State	Governors  (mentioned by 13/26 participants)	n/a	<p>-Governor Hunt (1977-1985, 1993-2001) and his wife Carolyn started CIU in 1979. As one external partner explained, “The reason Governor and Mrs. Hunt [started CIU] is because they are global. When he was right out of law school he lived in Katmandu...as an attorney helping the Katmandu government, and so Carolyn Hunt taught school in Katmandu. I really believe it was that experience that pushed our state forward... He was always a big believer in North Carolina connecting with the world.”</p> <p>- In the early 2000s, Governor Hunt sat on the Board of the Asia Society; CIU and NC DPI representatives attributed his national leadership role with the Asia Society board as the reason why North Carolina received a grant to start the <i>North Carolina in the World</i> project in 2003.</p> <p>- With support from Governor Hunt, Governor Easley (2001-2009) created the <i>North Carolina in the World</i> initiative. The deputy education advisor to Governor Easley served on the <i>North Carolina in the World</i> executive committee and coordinated efforts to bring the Partnership for 21<sup>st</sup> Century Schools to North Carolina. After his appointment with the governor ended, he continued to play a role as an advisor who worked on CIU’s 2007 legislative report and helped write the SBE 2013 Global Education Task Force report.</p>
State	Legislators  (mentioned by 9/26 participants)	n/a	<p>- A handful of legislators, representing Democrats and Republicans, have supporting global education by trying to push through appropriations in support of CIU, World View, and VIF programs or more funding for world language programs generally.</p>
State	Public School Forum of NC  (mentioned by 9/26 participants)	“To shape a world-class public school education that supports all children in reaching their full potential and drives a vibrant North Carolina economy”	<p>- This non-profit organization instituted in 1986 partnered with CIU to lead about a dozen “Learning From” abroad programs, which brought legislators, education leaders, university professors and administrators, and teachers to learn best educational practices from countries around the world.</p> <p>- As a part of the NC Teaching Fellows program, Fellows between their sophomore and junior year could choose overseas programs for their mandatory summer experience.</p>

Level	Organization	Mission	Global Education Activities
State	State Board of Education/ Department of Public Instruction  (mentioned by 18/26 participants)	“Every public school student will graduate ready for post secondary education and work, prepared to be a globally engaged and productive citizen”	<ul style="list-style-type: none"> <li>- State Board of Education Chairmen from 2003 to 2015, though each appointed by a different governor, have supported global education. Chairmen Howard Lee (2003-2008) chaired <i>North Carolina in the World</i> and oversaw the passage of resolutions supporting global education; Chairman Bill Harrison (2009 – 2011) established the Task Force on Global Education; and Chairman Bill Cobey (2012 – present) established a Special Committee on Global Education to oversee that the Task Force commitments were carried out.</li> <li>- Two additional SBE members (both serving on the Board for two terms) have been described by participants as being “instrumental” and “committed” to driving forward global education by chairing and/or serving on various global education task forces and committees.</li> <li>- The SBE has passed policies including resolutions in support of global education, MOUs with international countries and provinces, international teacher licensure regulations, teacher standards and evaluations that infuse global elements, and the Global Educator Digital Badge (GEDB), Global Ready School Designation (GRS), and Global Ready District Designation (GRD).</li> <li>- DPI created a Special Assistant to Global Education, charged with overseeing development and implementation of the state commitments to global education. As of 2015, the Special Assistant devised the policy language and rubrics for the GEDB, GRS, and GRD with consultation from state external partners CIU, VIF, and World View.</li> <li>- A national global education advocate explained, “The involvement of your State Board of Education is above average and positive...It [also] helps to have a [Superintendent of Public Instruction] in place for a while that understands this and is supportive. You have a rare instance where you have a Chief and a State Board of Education that gets it, supports it, and really pushes it to the forefront.”</li> </ul>

Level	Organization	Mission	Global Education Activities
State	University of North Carolina System  (mentioned by 21/26 participants)	“A public, multi-campus university dedicated to the service of North Carolina and its people...Each shares in the overall mission of the University. That mission is to discover, create, transmit, and apply knowledge to address the needs of individuals and society.”	<ul style="list-style-type: none"> <li>- Developed a system-wide vision for internationalization and a University Council on International Programs to implement the vision.</li> <li>- Originally “fostered” the <i>Coalition for Global Competitiveness</i> plan answering: “How do we connect with other state agencies that have interest in deeper connections between North Carolina and the rest of the world?”</li> <li>- Individual universities provide K-12 instructional resources, such as professional development materials through federally-funded Title VI Centers and CIU’s original Cultural Correspondents Program, which connects study abroad students with North Carolina classrooms.</li> <li>- Schools and Colleges of Education within the UNC system have organized around internationalizing teacher education, initially through a task force initiative by CIU and lead by the Dean’s Council, which published the report “North Carolina in the World: Preparing North Carolina Teachers for an Interconnected World” (2006). This report and subsequent committee meetings evolved into a second working group of UNC system teacher educators, state external partners CIU, World View, and NC DPI Special Assistant to Global Education, funded through the Longview Foundation in 2013.</li> </ul>
State – expanded nationally	VIF International Education  (mentioned by 17/26 participants)	“VIF International Education supports global educator development through cultural exchange.”	<ul style="list-style-type: none"> <li>- For-profit education service provider that inaugurated its first cohort of 12 international exchange teachers in 1990; by the early 2000s had placed over one thousand exchange teachers in classrooms across the state to teach language and other content areas.</li> <li>- Since mid-2000s, has provided professional development through the VIF Learning Center (including online modules for teachers of all grade levels to integrate global concepts into instruction, intensive coaching, classroom resources, and a social network community) and Spanish and Mandarin immersion programs.</li> <li>- Extended school partner network nationally to more than 200 schools in NC, TX, CA, MS, WA, IL, VA, and SC.</li> </ul>

<b>Level</b>	<b>Organization</b>	<b>Mission</b>	<b>Global Education Activities</b>
State	World View (mentioned by 19/26 participants)	“World View, a public service program at the University of North Carolina at Chapel Hill, equips K-12 and community college educators with global knowledge, best practices and resources to prepare students to live in an interconnected and diverse world.”	<ul style="list-style-type: none"> <li>- Founded by an endowed professor at UNC-Chapel Hill in 1998 as a public service program of UNC-Chapel Hill.</li> <li>- Provides professional development services to K-12 and community college faculty and administrators through symposiums, seminars, an online globalization course, study abroad programs, participation in statewide conferences, onsite workshops and presentations to schools and school systems, a global education leaders program for school and district administrators, and a teacher leadership institute.</li> </ul>
Local	Business (mentioned by 14/26 participants)	n/a	Representatives from companies with headquarters/offices in North Carolina (e.g., SAS, Lenovo, IBM, Mount Olive Pickles), the Department of Commerce, the Economic Development Partnership of NC, the Department of Agriculture, and the North Carolina Business Committee for Education (a non-profit formed as a part of the governors’ offices) have spoken at global education summits and served on external partners’ boards.
Local	Foundations (mentioned by 12/26 participants)	n/a	Foundations such as the Kenan Trust, Burroughs Welcome Fund, and the Hewlett Foundation funded CIU and Public School Forum of NC global education programs and events.
Local	School Districts (mentioned by 15/26 participants)	n/a	<ul style="list-style-type: none"> <li>- School districts across the state have partnered with CIU, VIF, and World View to implement their programs.</li> <li>- About a dozen school districts were selected to participate in the SBE Global School Network; exemplary district leaders were also invited to present to the SBE/DPI and to participate in creating the rubrics for the GRD designations.</li> </ul>

## **APPENDIX G: KEY REPORTS FROM GLOBAL EDUCATION COALITION MEMBERS**

**Title:** *North Carolina in the World: A Plan to Increase Student Knowledge and Skills about the World.*

**Year:** 2005

**Commissioner:** Center for International Understanding

**Participants:** Elementary schools, middle school, school districts, universities, World View, VIF, DPI, SBE, state representatives, Ted Fiske, Department of Commerce, business, Public School Forum ( $n=200$ )

**Key Recommendations/Goals:**

I. Increasing teacher knowledge about the world

Obj. 1: By 2012, all teachers will earn at least one renewal credit from activities with an international focus.

Obj. 2: By 2010, at least 10 percent of teachers will have participated in a travel study abroad program overseas.

Obj. 3: By 2015, all teacher education students will take at least one course with international content before graduation.

II. Expanding world language skills

Obj. 4: By 2020, every school district will offer at least one language instruction program that starts at an early age.

Obj. 5: By 2015, enough NC school districts will have world language programs in place so that 10% of the students entering school that year will demonstrate proficiency in a language other than English by the time they graduate from high school.

III. Building international school partnerships and exchanges

Obj. 6: By 2008, every school district will have at least one international school partnership.

Obj. 7: By 2010, every school will have at least one international cultural exchange teacher.

IV. Connecting North Carolina teachers and V: K-12 students with higher education resources

Obj. 8: By 2012, all teachers will participate in university-sponsored international programs.

Obj. 9: By 2006, a pilot project will place high school students in domestic and international internships.

Obj. 10: By 2006, a pilot program will be launched to link public school students with North Carolina university students studying abroad.

V. Infusing international content into existing programs

Obj. 11: By 2006, 30,000 preschoolers will participate in a global education preschool curriculum piloted in North Carolina by Sesame Workshop.

Obj. 12: In 2005, the Young Scholars Program will pilot two programs to incorporate international content into after-school programming.

Obj. 13: By the 2005-06 academic year, one international high school will be fully operational in North Carolina and serve as a model for other schools.



**Title:** *Creating Internationally Competitive Schools: Providing Adequate Instruction in Foreign Languages and Other Courses in the Understanding of How Other Cultures Impact the Economic Future of the United States*

**Year:** 2006

**Commissioner:** The Public School Forum

**Participants:** CIU, World View, state legislators, SBE, Ted Fiske ( $n=27$ )

**Key Recommendations/Goals:**

I. Envisioning Schools with a More Global Focus

1. A focus on foreign language instruction
2. Connectivity through technology
3. Connectivity through exchanges
4. Using resources other than traditional textbooks
5. Global education is woven throughout the curriculum
6. Planning is continuous
7. Student performance is high
8. The international focus is supported by parents and policymakers

II. Create an Expanding Network of Global School Pilot Projects

III. Emphasize Global Curriculum at the State Level

**Title:** *Preparing Students for the World: Final Report of the State Board of Education's Task Force on Global Education*

**Year:** 2013

**Commissioner:** North Carolina State Board of Education

**Participants:** 5 SBE members, DPI, external stakeholders, Ted Fiske, JB Buxton, educators, business, Public School Forum, universities ( $n = 12$ )

**Key Recommendations/Goals:**

I: Robust and cutting edge teacher support and tools

- 1.1 Develop content for embedding global themes and problem-based learning throughout the curriculum.
- 1.2 Implement an SBE-recognized badging process for teacher and administrator global professional development.
- 1.3 Require teacher preparation institutions to prepare teacher candidates to use global content.

II: Leading edge language instruction

- 2.1 Institute a plan for statewide access to dual language/immersion opportunities beginning in elementary school and continuing through high school.
- 2.2 Partner with institutions of higher education (IHEs) to establish plans to increase the supply of competent K-12 World Language teachers.
- 2.3 Refocus traditional high school credit World Language courses to include a greater emphasis on the study of global and international affairs and the economies, societies and cultures of other nations and on survival language skills.

### III: New school models

- 3.1 Develop new school models focused on international education that would include, but not be limited to, an internationally-themed residential high school, preferences for international themes in the charter school approval process, transformation models for low-performing schools, virtual schools-within-a-school and, regional dual language/immersion schools.
- 3.2 Partner with non-governmental partners to assist school districts with implementation.

### IV: District networking and recognition

- 4.1 Expand the *North Carolina Global Schools Network* to support district implementation of global content, teacher development, cutting-edge language instruction, and new school models.
- 4.2 Institute a Global-Ready designation for schools and districts that provides a process and incentives for K-12 second language opportunities for all students; pathways for teachers to achieve SBE-recognized badging; and career-ready employer requirements, among others.
- 4.3 Task an entity to collect and communicate lessons learned on international education.

### V: Strategic international relationships

- 5.1 Where appropriate, work with the North Carolina Department of Commerce, business and other external partners to:
  - Renew existing and explore new Memoranda of Understanding with international partners; and,
  - Identify other priority nations for international relationships. Name partner countries that serve as the priority source of information about skill requirements and K-12 curriculum and teacher professional development, as well as priority focus for educator exchanges and visits.

**Title:** *A World of Opportunity: North Carolina Blueprint for Global Engagement*

**Year:** 2015

**Commissioner:** Center for International Understanding

**Participants:** Business, commerce, agriculture, universities, community colleges, SBE, CIU, World View ( $N = 40$ )

**Key Recommendations/Goals:**<sup>16</sup>

I. Leadership

II. Global brand identity

III. Global infrastructure & logistics

IV: Global economic development

V: Cross cultural competence

5.1. Number of international scholars at higher education institutions

5.2. Number of international students (undergraduates and graduate) at higher education institutions

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<sup>16</sup>Only K-12 global education objectives are listed.

- 5.3. Number of high school students studying abroad and incoming international exchange high school students
- 5.4. Number of N.C. undergraduate and graduate students in studying abroad
- 5.5. Degrees awarded to international students at N.C. independent colleges, UNC system colleges, and community colleges
- 5.6. K–12 foreign language enrollment for public schools
- 5.7. AP language test takers
- 5.8. Number of ESL courses
- 5.9. Number of universities with international programs
- 5.10. Number of students earning UNC Global Certificate
- 5.11. Number of schools and districts globally badged/certified
- 5.12. Number of Sister City relationships
- 5.13. Number and country of origin for UNC international students by academic field and level
- 5.14. Number and country of origin for UNC international scholars by academic field and level
- 5.15. Number of UNC students who participate in study abroad or exchange programs by location, academic field and level
- 5.16. Number enrolled in Global Logistics & Distribution Management Technology Curriculum
- 5.17. Number enrolled in Travel and Tourism Technology Curriculum
- 5.18. Alternative Transportation Technology Number Diplomas
- 5.19. Number of international guest teachers in N.C. public schools

VI: Collaboration & research

## APPENDIX H: STATE EXTERNAL PARTNER PROGRAMS

<b>Program</b>	<b>Program Description</b>
<b>Center for International Understanding (CIU)</b>	
Confucius Classrooms (Han Ban)	Pairs a Chinese teacher with North Carolina schools for one to three years to teach the Chinese language; teacher salaries are subsidized. North Carolina principals and teachers visit China to learn about its culture, history, and education system and to form partnerships with schools in China.
Global Teachers	Sends North Carolina teachers on two-week study trips abroad to study the culture, economy, and education systems of different countries.
International School Partnerships	Facilitates individual schools to build partnerships with international schools so that students can “learn with” the rest of the world. Partnerships have included schools in China, India, Denmark, and Mexico.
Cultural Correspondents	Pairs North Carolina classrooms with university students from specific UNC institutions studying abroad. Study-abroad students video-chat with classrooms about the country where they are studying and how it relates to topics K-12 students are learning about in school.
<b>VIF International Education</b>	
International Cultural Exchange Teachers	Recruits and places certified, experienced teachers from all over the world to teach in elementary school, world language, dual immersion, and ESL classrooms to teach for three years in a U.S. K-12 classroom. VIF provides a 3-part orientation series, online professional development focused on global integration, and instructional classroom support as requested.
VIF Global Schools	Global-themed elementary school model where each grade level is assigned a region of the world to study and, for schools in the southeast, has a VIF teacher from that region. In addition, all staff complete a four-year sequence of online professional development modules focused on integrating globalizing strategies and inquiry-based instructional approaches into the classroom, with intensive coaching available as well.
SPLASH Language Immersion	Provides the curricular framework, lists of recommended materials, native Spanish or Mandarin teachers, and ongoing technical support in setting up immersion programs in schools.
VIF Learning Center	Integrated online platform for K-12 educator professional development, lesson plans and classroom resources, digital badging for achievements and participation,

	assessment tools, virtual and face-to-face workshops, and a social network community of global educators. Professional development includes 4 online modules per year in a four-to-five year sequence focused on the learning spirals of understanding, investigating, connecting, and integrating, and covering outcomes related to integrating global content, inquiry-based instructional approaches, guiding conversations, intercultural competence, global interconnections, and action research. Subscription also includes online and face-to-face training and coaching, along with resources for school leaders on successful PD implementation.
<b>World View</b>	
Fall Symposium	Annual day-and-a-half conference featuring plenary sessions and content-focused breakout sessions around a global theme.
Spring Seminars	Two-day conference that examines regions of the world and significant global issues while providing opportunities for helping practitioners develop a vision for integrating global content.
Media Workshop	Helps K-12 school librarians and technology specialists create a global media center, support teachers in all content areas, and use technology to make global connections.
Global Education Leaders Program	Brings together K-12 and community college administrators to learn about pressing global issues impacting students and their communities. In 2015, this was expanded to include a separate Teacher Leaders Institute.
International Study Visits	Two-week international professional development experiences to teach educators and education leaders about the culture and educational institutions in the destination country. Activities involve rich community activities, such as home stays, important cultural sites, and visits to K-12 and higher education institutions.
Partners Program	One-day global education workshop held annually at a different partner school district to kick off the school year.
Online Course	Six-week online course for K-12 educators that explores global topics such as the economy, environment, diverse populations, the U.S.'s place in the world, and cultivating 21 <sup>st</sup> century skills and has participants create an action plan for their classroom or school.

## **APPENDIX I: DISTRICT POLICY ACTORS SEMI-STRUCTURED INTERVIEW PROTOCOL**

1. Please describe your position/role in the school district.
2. How long have you been in your current position?
3. What professional experiences did you have before taking on your current position?
4. Please describe any international and cross-cultural experiences you've had.
5. In your own words, how would you describe global education?
  - a. What do you think the purpose of global education is?
6. What has your role been in developing and/or implementing global education in the district?
7. Please describe in detail the global education policies and programs implemented in your district.
  - a. Probe about how long the policies/programs have been in place, the specific content they address, and the students and teachers who have access to them
8. For each of these policies/programs, what has the district done to support implementation?
9. For each of these policies/programs, what challenges has the district faced in implementation?
10. In what ways have these policies/programs evolved from when they were first introduced?
11. Why did the district decide to adopt global education?
  - a. Who has been particularly supportive within the district? Why do you think that is?
  - b. Who has been resistant within the district? Why do you think that is?
  - c. Do you support the district's decision to pursue global education? Why/why not?
12. Who within the district do you work or communicate with about global education programs?
  - a. Please describe what you communicate about.
13. Who outside of the district do you work or communicate with about global education programs?
  - a. Please describe what you communicate about.
  - b. Probe about state-level actors, external partners (i.e., VIF, World View), and community members
14. In what ways has the district made changes to accommodate global education initiatives?
  - a. Probe about new organizational arrangements, staff turnover, school restructuring, re-distribution of resources
15. Overall, what successes have you seen in your global education policies?
16. Overall, what roadblocks or setbacks have you faced in implementing global education policies?
17. What plans concerning global education does your district have in the future?
18. Do you have recommendations for anyone else I should get in contact with for an interview?
19. Do you have any upcoming district-sponsored events, meetings, or professional development pertaining to global education that I could attend?

**APPENDIX J: DISTRICT OBSERVATION PROTOCOL**

<b>Event Name</b>	
<b>Date</b>	
<b>Duration</b>	
<b>Location</b>	
<b>Participant Description</b>	

<b>Activity</b>	<b>Time Duration</b>	<b>Evidence of global education policies, district implementation supports, influences of system and non-system actors, context</b>

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