

**Contextualizing the Participation and Challenges in Education for All:
The Case of Guam and Hong Kong**

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Abstract

Enormous variation exists among nations and regions in their inclusive education provisions. In addition to comparisons based on policy documents and figures, in-depth and contextually grounded comparative studies involving qualitative data based on stakeholder' experiences are needed, especially between western and Asian regions or nations where socio-economic and cultural contexts vary greatly. This article examined and compared how the conceptualization of inclusive education and elements that affected school leaders' decisions to participate in inclusive education in Guam and Hong Kong where vastly different socio-economic and cultural contexts were present. An interpretive qualitative approach of interviewing school leaders was adopted to permit an in-depth understanding of these contexts. Findings revealed that the legislation-based versus the cultural heritage of Confucianism and the geographical location versus the elite education system of Guam and Hong Kong were key contexts affecting conceptualizations and challenges in the two regions. Large scale cross-national qualitative studies are called for to examine contextual factors from other key stakeholders, to give meaning to statistical figures and policy documents, and to offer more meaningful interpretation of the relationship between national contexts and inclusive education provisions.

Keywords: inclusive education, leadership contexts, cross-national comparison, Guam, Hong Kong

In the effort of moving toward education for all, enormous variation has been noted in how nations around the globe provide education to students with disabilities with respect to funding, categorizations, identification and eligibility criteria, and placement (Anastasiou & Keller, 2011). Major aspects of cross-national comparisons conducted thus far have included how countries tackle inclusion issues (e.g., Barton & Armstrong, 2007), prevalence rate of specific disability categories and related issues (e.g., Hallahan et al., 2007), geographical differences (e.g., Forlin & Lian, 2008), and contextual factors (e.g., Anastasiou & Keller, 2014). Contextual factors tend to offer more multi-faceted and deeper comparisons than other aspects because elements, such as national values/cultures and socio-economic development, do not only offer contextual comparisons but also shape educational provisions (Anastasiou & Keller, 2014).

Comparative studies are particularly needed between Western and Asian regions or nations where socio-economic and cultural contexts vary enormously. For example, Western nations such as the U.S.A. and Britain tend to be legislation-oriented in inclusive education provisions (Poon-McBrayer & Wong, 2013). The U.S.A. led in legalizing integration for children with disabilities in general schools through the passage of the Education for All Handicapped Children Act of 1975 (Poon-McBrayer & Wong, 2013). Britain consolidated all relevant legislations into the Equality Act of 2010 (The National Archives, 2010). Meanwhile, a number of Asian regions, such as the People's Republic of China (PRC), instigated laws similar to the western nations but took a vastly different view on their enforcement (Deng & Poon-McBrayer, 2012). For example, both policymakers and school practitioners of the PRC perceived legal mandates as suggestions from a pragmatic point of view, taking into consideration the uneven economic development between urban and rural areas and among provinces in this most populous nation (Deng & Poon-McBrayer, 2012). Subsequently, the Chinese inclusive education model, 'learning in the regular classroom' was a primarily pragmatic approach to increase access to education for the large number of children with disabilities who were previously denied education (Xiao, 2007). Even though this inclusive education model derived from the Western concept of inclusion, Chinese stakeholders reconceptualized the purpose of inclusive education as a response to their unique socio-economic conditions (Deng & Poon-McBrayer, 2004). This example illustrates the significance of examining and placing these contexts in our effort to understand the actual situations behind numbers and correlations reported in country accounts.

Statistics-based contextual comparisons of inclusive education provisions across national borders provide insight into correlations between set variables (e.g., Anastasiou & Keller, 2014), but it is difficult to use such data to examine how each variable affects respective education systems (Harris, Jones, Adams, Perera, & Sharma, 2014). Meanwhile, contextually grounded comparative studies involving qualitative data can offer such insights (Harris, Jones, Adams, Perera, & Sharma, 2014). For example, Anastasiou and Keller's 143-country comparison (2014) found that 77% of the spread of disability education provisions is accounted for by economy and literacy rate, that is, higher affluence is correlated with a wider spread of provisions. However, such a conclusion is not applicable to Hong Kong. In spite of Hong Kong's US\$32,900 annual income per capita (World Bank, 2011), most elite schools do not participate in inclusive education under the current policy of voluntary participation (Legislative Council, 2013). Meanwhile, inclusive education is practiced in all schools of Guam, irrespective of its US\$12,864 gross national income per capita (Bureau of Labor Statistics, 2011) because of its legal obligations to practice inclusive education in all schools as an American territory. This example has illustrated the influence of contextual factors other than economy and literacy on the spread of inclusive education provisions.

This article thus reported findings from a study that aimed to qualitatively examine contexts that affected school leaders' decision to participate in inclusive education and

presented unique challenges to two regions of vastly different socio-economic contexts and cultural values: Hong Kong as a special administrative region of the PRC since 1997 and Guam as an American territory in the Pacific. Geographically, Guam is closer to Hong Kong than to any American state. These two regions are differently influenced by the American inclusive education legislations and policies in that Guam is required to comply with legal mandates of the Individuals with Disabilities Education Act (IDEA) including the adoption of the response-to-intervention (RTI) process. While Hong Kong has adopted the 3-tier intervention model underpinned by the same RTI model as a key feature of its inclusive education (Legislative Council, 2014), schools can choose not to practice it under the voluntary participation policy. Their different contexts together with the adoption of the same support model under different policies can offer valuable insight into contextual impact on the conceptualization of and challenges in implementing inclusive education. An interpretive qualitative approach was adopted to permit an in-depth understanding of these contexts. Views and experiences of principals of Guam and Hong Kong schools were solicited because of the significance of school leadership in implementing inclusive education and of the fact that varied contexts can shape their perspectives (Moos, 2013). The two main research questions to achieve the purpose were:

- (1) How do school leaders perceive inclusive education and what contextual factors have affected their conceptualization in the two regions?
- (2) What are the challenges and what factors have contributed to those challenges in the two regions?

Guam's Educational Context

As the largest island of Micronesia, Guam is the western-most territory of the United States, situated in the Pacific Ocean 3,700 miles west-southwest of Hawaii with 30 miles in length and 12 to 4 miles in width. The Chamorro people and their language are native to Guam. According to the most updated figures, 37.3% of the 159,358 Guam residents identified themselves as Chamorro, 26.3% as Filipino, 7.1% white, 7% Chuukese, 2.2% Korean, 2% other Pacific Islander, 2% other Asian, 1.6% Chinese, 1.6% Palauan, 1.5% Japanese, 1.4% Pohnpeian, mixed 9.4%, 0.6% other (Central Intelligence Agency, 2014). The official languages of Guam are Chamorro and English (Fee, Fee, Snowden, Stuart, & Baumgartner, 2012).

As an American territory, Guam's public school system is modeled on the U.S. system. The Guam Department of Education (GDOE) is a single unified school district serving over 30,000 students in 26 elementary schools, eight middle schools, five high schools and an alternative school. Because American education laws are to be complied in Guam, the IDEA mandates of free and appropriate public education for children with disabilities are enforced (U.S. Department of Education, 2004). The GDOE pledges full compliance with the IDEA and provides inclusive education for students with disabilities under the principle of free and appropriate education (Guam Department of Education, 2016).

Hong Kong's Educational Context

As a special administrative region of the PRC, Hong Kong is an autonomous territory south of China with 7.3 million residents in a total land and sea area of 2,754 square kilometers in 2015 (World Population Review, 2016). The Hong Kong population consists of 93.6% ethnic Chinese, 4% of foreign domestic workers from the Philippines and Indonesia,

South Asians, together with many Canadians, Britons, Americans, Koreans, and Japanese working in the city (World Population Review, 2016).

Following the worldwide trend, Hong Kong began the implementation of inclusive education on a voluntary basis in 1997 (Forlin, 2010). The service delivery model started with the American model of resource room teachers supporting, advising, and co-teaching with general education teachers in pilot schools for 2 years (Poon-McBrayer, 1999). The funding model and the support framework have been modified over time together. Beginning in 2004, the adoption of the 3-tier support model based on the American RTI model (Luk & Cheng, 2009) is required for schools seeking funds to practice inclusive education. Each participating school is given approximately US\$20,000 for one to six students qualified for services from 2014 on (Education Bureau, 2014). Each additional student qualifying for Tier 3 support services brings in approximately US\$3,300 and each additional student requiring Tier 2 services brings in approximately US\$1,700, up to annual recurring funds of about US\$200,000 (Education Bureau, 2014). This grant serves as a monetary incentive to encourage voluntary school participation.

The 3-tier support model is underpinned by the policy of whole-school approach (WSA) (Education Bureau, 2010) to serve as the main tool to make whole schooling a reality. Within the WSA framework, the government expects schools to achieve the following: (a) schoolwide consensus to address student needs; (b) differentiated teaching; (c) curriculum and assessment accommodations; (d) provisions of specialist and peer support; and (e) teacher collaboration. Reflecting the principles of whole schooling as defined by the Whole Schooling Consortium (2007), these expectations ultimately aim at including all students meaningfully and providing an equitable education through a supportive community with space for all, partnership among various stakeholders, and multi-level instructions and assessment.

Method

Qualitative Design

This is an interpretive qualitative research that sought to understand particular contexts critical for data interpretation (Willis, Jost, & Nilakanta, 2007). Thus, this article reported and analyzed the data of part of the initial phase of two larger studies conducted in Guam and Hong Kong. The larger studies centered on middle leaders (special educational needs coordinators in Hong Kong schools and assistant principals overseeing special education operations in Guam schools) who worked directly with both school leadership and teachers to implement inclusive education. For an in-depth understanding of their leadership and work, the two larger studies also involved principals for their conceptualization of education for all and their relationships with and influence on middle leaders' roles as well as teachers' experiences with middle leaders and perspectives on their leadership's impact on inclusive education practices. This article primarily focused on the in-depth understanding of principals' reasons for practicing inclusive education as the foundation to examine their conceptualization of what inclusive education was and challenges confronting them in the two targeted regions. Special attention was given to how the local contexts impacted their decisions to participate and challenges they experienced. Thus, semi-structured individual interviews of school leaders was adopted as the technique for this interpretive qualitative research.

Sampling Approach and Data Collection Procedures

The participants were purposefully sampled through the criterion sampling strategy (Patton, 2002) to ensure that participants were directly involved in decision making and building inclusive schools (Sharma & Chow, 2008). Thus, principals were targeted for this part of the studies. Because of the different systems and sizes, selection criteria for principals were not identical for the two regions.

The common criterion for both regions was to involve principals with rich experiences as school leaders. With Guam being a unified school district of 40 schools, all principals having served in this role for at least 5 years in Guam public schools were considered to have rich experiences and invited to participate as a strategy to increase the number of participants to improve data representativeness. All principals of Guam schools met the selection criteria were approached. With over 1,000 elementary and secondary schools in Hong Kong, only the 14 resource schools appointed by the government to support other schools to practice inclusive education during the school years of 2013-2015 were targeted. Principals of resource schools were chosen because their schools were appointed under the School Partnership Scheme either by the government's invitation or nomination based on demonstrative effective practices (Education Bureau, 2015; Forlin & Rose, 2010). Each school would serve a 2-year term in this capacity. All principals must also have at least 5 years of administrative experiences. Ten principals of the 40 Guam schools (four from high schools, one from middle school, and five from elementary schools) and 13 principals of resource schools (eight from elementary schools and five from secondary schools) in Hong Kong participated in this study.

I conducted semi-structured interviews to ensure that the responses to the questions would be abundant, in-depth and detailed (Punch, 2009). All participants chose to be interviewed in their schools and interviews lasted between one to two hours. All interviews were taped with participants' consent. Being a bilingual researcher, I used English for Guam and Chinese for Hong Kong interviews to ensure participants' comfort during interviews and accurate understanding of interview data.

Interview Protocol

To achieve the purpose of this study as specified in the research design, the interview guide included two broad questions with follow-up questions to examine (a) factors that have encouraged their decision to practice inclusive education and (b) persistent challenges that have adversely affected the goal of education for all. The responses to the first question were expected to provide insights into what and how cultural and national values shaped principals' conceptualization of inclusive education. The responses to the second question were expected to shed light in the common challenges across national borders and unique challenges associated with different educational contexts.

Demographics

All participants met the selection criteria of having rich experiences in leading schools to practice inclusive education. Half of the 10 principals of Guam schools had more than 20 years of teaching experience and/or 10 years of administrative experiences, including years as assistant principals. Six of the principals also had received training in special/inclusive education (see Table 1). Like their Guam counterparts, the 13 principals were very experienced practitioners with at least 10 years of teaching and administrative experiences

and had a slightly higher percentage than Guam principals with training in special/inclusive education (see Table 1).

Table 1.
School Leaders' Profiles

Principals' Profiles	Guam (N=10)	Hong Kong (N=13)
Years of teaching experience		
10-20	50%	39.5%
>20	50%	61.5%
Years of administrative experience		
5-10	10%	0%
>10-15	40%	39.5%
>15	50%	61.5%
Training in special/inclusive education	60%	61.5%

Data Analysis

Data of Guam participants were coded as G1 to G10 and Hong Kong participants as H1-H13. Such codes were used in theme development and in presenting excerpts from data in findings and discussions. All interviews were transcribed verbatim, totaling 45 pages of transcripts. The raw data from Hong Kong were translated from Chinese to English and moderated by two peer researchers in the field to confirm its accuracy. Transcripts were analyzed to produce a nonrepetitive list of significant statements made by each participant about their conceptualization of inclusive education and persistent challenges confronting them. The researcher and a graduate assistant independently grouped these statements into preliminary themes for each participant and across participants in each region for comparison, followed by the co-construction of composite themes by using the independently developed themes to identify patterns of experiences. To ensure data credibility, each participant was asked to approve the transcript and amend or modify the preliminary themes based on individual data.

Findings and Discussions

Two major themes emerged from the data in response to the research questions: (a) legislations based on the social model of disabilities as key contextual influence for Guam schools' participation in inclusive education versus social and cultural factors for Hong Kong; and (b) geographical locations along with the small population size as key challenges to Guam versus the elite education system and associated contexts as key concerns in effective practice of inclusive education. Each of these findings will be elaborated with relevant discussions of insight.

Legislations vs Socio-Cultural Influences

As an American territory, Guam was obligated to comply with relevant inclusive education legal mandates which formed the basis for school participation and shaped principals' views on what inclusive education was about. Even though Hong Kong set its policies reflecting much of the ideology of equality and equity behind the American legislations, policymakers made it a voluntary scheme with monetary incentives, reflecting the Confucian heritage of building a harmonious society and avoiding confrontations arising from mandatory participation. Specifically, the comparisons can be made in three aspects: foundations for beliefs toward inclusive education, legislation vs pragmatic needs, and legislation versus cultural emphasis on relationships.

Foundations for beliefs toward inclusive education. Given the worldwide trend of seeing inclusive education as the key equality indicator for education of students with disabilities, it was unsurprising that principals of both regions cited their belief in providing equal opportunities to education in inclusive settings as one of the key reasons for the need to practice inclusive education. However, their foundations for such beliefs were different. The participating Guam principals appeared to primarily connect their belief to the principles of IDEA while eight of the 13 Hong Kong principals to the Confucian principles of “educating all regardless of abilities” and seven of them to the Christian doctrine of “loving all”.

The IDEA serves as the most comprehensive law for education of students with disabilities (U.S. Department of Education, 2016a) and applicable to all American states and territories such as Guam. In congruence with the IDEA, Guam principals conceptualized inclusive education as a demonstration of supporting human rights and the social model of disability in that the society has a responsibility to remove obstacles that hinder the provision of equitable education for all (Farkas, 2014). Two of the excerpts from Guam principal interviews reflected their legislation-based conceptualization of inclusive education clearly:

All students, including those in special education, have the right to access general curriculum and participate in extracurricular activities as general education students; students in special education have the right to free and appropriate education. (G1)

“My vision is to make sure that the students are provided the services as protected by IDEA and law.” (G8)

Different from Guam principals, over half of Hong Kong principals mentioned the well-known Confucian principle of “educating all regardless of abilities” (Deng & Poon-McBrayer, 2004) in different wording as shown below:

Of course I support inclusive education. As Confucius said, we should educate regardless of abilities. (H2)

I firmly believe the Confucian teaching of educating all students without choosing what abilities they brought with them. (H9)

Simultaneously, seven of them also cited their Christian faith as another reason for their decision to participate. Christianity in this case refers to both Catholics and Protestants.

Christian missionaries from the west pioneered special education services in Chinese societies such as the PRC (Deng & Poon-McBrayer, 2004), Hong Kong (Poon-McBrayer, 2004), and Taiwan (Ministry of Education, 2006). Hong Kong as a British colony for over a century accounted for the influence of Christianity in its disability education. In the school year of 2013, there were 279 Catholic and 379 Protestant schools (Hong Kong Government, 2013), constituting over 65% of the 1,005 public elementary and secondary schools of that year (Education Bureau, 2016). Ten of the 13 participants' schools were affiliated with either Catholic or Protestant groups and most of the school staff members shared the same faith as their schools. As verified by participants' testimonies, valuing and loving each person were central to Christian educators. It is therefore understandable that their attitude toward inclusive education was also attributed to their faith as H1 expressed: "I am a Christian. I serve the larger society through supporting inclusive education as my way of showing love for all created by God."

Taken together, the above data revealed the heavy impact of legislation on Guam and of the Confucian and Christian heritage on Hong Kong. Although 85% of Guam's population was Catholics (Central Intelligence Agency, 2014), the religious impact did not appear to exert visible influence on school leaders' conception of inclusive education. The legislation-led and -governed American education system apparently outshined the influence of other factors. Such an orientation was further verified by the fact that the participating principals received a great deal of training on the details of the IDEA and their emphasis of complying with those legal requirements as revealed during interviews. This legislation-based education system, in and of itself, has at the least spread the equality attitude derived from the social model of disabilities among Guam educators.

Hong Kong, however, only has the Disability Discrimination Ordinance (DDO) of 1995 (Department of Justice, 2013) which had limited impact on education practices for students with disabilities until the Equal Opportunities Commission of Hong Kong developed the Code of Practice on Education (CPE) under this ordinance (Equal Opportunities Commission, 2001). The CPE stipulates that educational establishments cannot discriminate against a student with a disability. Furthermore, the Confucian culture of valuing interpersonal relationships also affected the government's action in that the government made a voluntary participation policy for inclusive education to maintain harmony with the school community. Meanwhile, the Confucian culture of "educating regardless of abilities" and the Christian principle of "loving all" played visible roles in school leaders' decisions to participate (Poon-McBrayer, 2012).

Legislation versus pragmatic needs. While the key reason for Guam schools' participation in inclusive education was to fulfill legal requirements, the increasingly low birth rate in Hong Kong was a unique social phenomenon also essential in principals' decision to participate. The impact of the low birth rate on schools was best manifested under Hong Kong's elite education system. Hong Kong schools began to suffer from the shortage of school-age students in the 1980s due to a continuous fall in the fertility rate from the average 1.68 children per woman in 1981 to 0.86 in 2014 (Hong Kong Monthly Digest of Statistics, 2015). Hong Kong's elite education system categorized schools and students into three levels, namely bands one to three. Band 1 schools has had the highest concentration of elite students, followed by Bands 2 and 3 schools. In 2003, the Hong Kong Government (2011) imposed a minimum enrolment rate policy for elementary one classes. In this ongoing low birth rate era, Band 3 schools have thus had unfilled school places which in turn made possible of school closure under the current policy. In fact, several elementary schools had to cease operation when they could not reach the minimum enrolment rate (Lee, 2004). A similar policy was applied to secondary schools a few years later when the shortage problem

extended to the secondary education sector (Liu, 2015). Admitting students with disabilities to practice inclusive education did not only bring in more resources to keep existing staff positions but also, in some cases, prevented schools from closure. A principal (H11) vividly expressed such a pragmatic motive: “We have had vacant classrooms due to the low birth rate and low student enrolment since the late 1990s. It is difficult not to accept special needs students given this wider environmental factors.”

Legislation versus cultural emphasis on relationships. As revealed earlier, complying with legal mandates of the IDEA was central to educators' attitudes toward inclusive education in Guam and surpassed other factors such as the Micronesian cultures of family cohesion and community hospitality (Schmitz & Christopher, 1997). Meanwhile, four of the 13 Hong Kong principals specifically added that practicing inclusive education in their schools would help maintain or enhance their schools' relationship with the Education Bureau of Hong Kong, a relationship that was highly valued.

Hong Kong inclusive education provisions are not only policy-driven but its policies may deviate from legal requirements. This deviation was to some extent affirmed by the Hong Kong government's policy of voluntary participation in inclusive education instead of legal mandates in accordance with the CPE of the DDO. In turn, school responses showed reciprocity to this gentle approach, valuing good relationships with the government in their decisions to participate. Such an interaction pattern mirrored the central principle of Confucianism that emphasized a warm human feeling between people and reciprocity (Deng & Poon-McBrayer, 2004; June Ock, 1988). The data revealed that the emphasis on relationships was manifested at both personal and organizational levels. At the personal level, a principal (H12) mentioned the need to have a good relationship with the Education Bureau when he decided to join inclusive education. At the organizational level, his school board urged him to accept the Education Bureau's invitation to become a resource school when his school had established reputation for effective inclusive practices as he stated: “I have established a good relationship with the EB in many projects including accepting students with disabilities. When my school was invited to be a resource school, the school board immediately urged us to accept it to maintain the good relationship.”

The above findings about beliefs toward inclusive education reflected contextual differences in that inclusive education on Guam was under a legal- and rights-based purview as elsewhere in the U.S. (Kugelmass & Ainscow, 2004) while decisions on the Hong Kong side were closely related to the local social phenomena and cultural heritage. In sum, findings affirmed the value of examining contextual factors qualitatively when examining the relationship between contexts and inclusive education provisions across societies.

Context-related Challenges for Implementation

Implementation challenges have been sought from both regions. Some of the common challenges, such as the need for more teacher training and resources, resembled those already confirmed in the existing literature (e.g., Otukile-Mongwaketse, Mangope, & Kuyini, 2016). Other challenges, however, arose from unique contextual differences and have thus been selected for elaboration and discussion in this section. For the small island of Guam, the context-related challenges included its isolated location with a small population coupled with non-attractive salary as well as difficulty in recruiting qualified personnel due to its location, immigration laws, and district policies. For the affluent city of Hong Kong, the contextual challenges included the elite education system and unstable staffing for students with disabilities pertaining to its current funding model.

Guam's contextual challenges. As participants had identified, Guam's contextual challenges were intertwined with one another. Eight of the 10 participating principals cited Guam's geographical isolation together with its small population size as a key challenge to effective implementation of inclusive education. With a huge physical distance from other American states, it was difficult for Guam schools to have beneficial interactions with effective schools that were under the same legal mandates for inclusive education. Its geographical isolation together with only one university to provide teacher education for the small population of just over 150,000 also left them with a lack of qualified personnel. The principals stated that such adverse impact was swelled when coupled with the non-attractive salary for professional staff (60% of principals), the immigration law that did not allow non-American residents or citizens to work in Guam (50%), and the district policy that required all teachers and professional personnel (50%) be on full-time employment. Each of these factors will be elaborated below.

Geographical isolation. Geographically, the flight distance is over 3,800 miles between Guam and the closest U.S. state of Hawaii and over 7,100 miles between Guam and the continental U.S. Thus, Guam is a lot closer to Asian countries/regions such as the Philippines (about 1,500 miles), Japan (about 1,600 miles), Taiwan (about 1,700 miles), and Hong Kong (about 2,100 miles). Principals stressed the restrictions caused by Guam's location in its interactions and collaborations with other American schools that were subject to the same legal mandates while different education systems severely constricted the benefit of interactions with nearby Asian countries as one principal (G1) said, "We got the worst, you know."

Restriction on employing non-American qualified professionals. The U.S. immigration law applied in Guam has unfortunately worsen the situation as a lack of American residency or citizenship prohibits one from working there. The non-attractive salary range also added to Guam schools' difficulty in recruiting qualified teachers and desperately needed personnel such as the speech/physical/ occupational therapists. At the time of data collection, there was no occupational therapist, one physical therapist, two speech therapists, one teacher for students with visual impairment, and two teachers for students with hearing impairment for all 40 schools. According to one principal (G1), "the only OT [occupational therapist] just quit to work for a hospital where he was more valued and paid a lot more." Another principal (G3) pointed out that there was no incentive for qualified teachers and professionals from the continental U.S. to come to Guam when "the salaries are not more than what they could get elsewhere and the living cost in Guam is much higher with very few choices of daily needs" due to its geographical isolation. Three principals mentioned that Guam used to offer study grants to Guam residents to receive teacher training from universities in the continental U.S. and that grant recipients were expected to work in Guam schools for a few years upon completing their training. However, because of its non-attractive salaries and living conditions, many of those individuals chose to "pay back the grant once they got a job and did not come back" as a principal (G1) stated. Another principal (G3) considered the district policy of full-time employment for teachers and other professionals a factor to increase difficulty in recruiting qualified professionals. Principal G1 gave the example of not being able to offer a part-time contract to a qualified Chinese language teacher who was also a full-time business woman in Guam and was willing to work on a part-time basis. This district policy left many students without the needed Chinese language skills that could have increased their job opportunities in tourism, the only industry in Guam.

All these contextual factors have together contributed to Guam schools being placed in the category of 'Needs Assistance' for non-compliance with the IDEA requirements as stated in a letter from the U.S. Department of Education (2016b) to the superintendent of Guam Department of Education. In fact, one of the participating schools delayed the interviews for almost 3 months because the principal was busy with resolutions for non-compliance. In sum, Guam's unique contextual challenges have posed clear barriers to its effective implementation of inclusive education.

Hong Kong's contextual challenges. On the contrary, Hong Kong has a sizable population of over seven million in an easier-to-reach location. Hong Kong also has a policy of voluntary participation for inclusive education. Hong Kong's challenges arose from its funding model and the persistent prevalence of elitism among school personnel and parents. Each of these two factors would be deliberated. The current funding model led to unstable staffing and the elitist mindset discouraged high performing schools from inclusive education participation.

Funding model leading to unstable staffing. Schools joining the inclusive education after 2004 are to be funded through the Support Learning Grant that provides funds based on the number of students qualified for various tiers of support. Schools are to place teachers and teacher assistants hired by these funds under temporary contracts which cannot be renewed until the student count for the following school year is confirmed shortly before the commencement of a new school year. Thus, nine of the 13 participants reported that many of these individuals looked for permanent positions elsewhere toward the end of their contracts and would leave if they were successful as one principal (H5) painfully expressed:

Two of my teacher assistants and one of my teachers who were all qualified teachers went to our sister schools for established teacher positions after working for us for 2 years. We provided a lot of on-the-job training for them. We cannot keep good teachers and keep having to train new ones under this funding model.

One of the participating schools joined the inclusive education scheme in 1999 and was able to remain under the earlier funding model that provided one teacher position for five students with disabilities and one teacher assistant position for a total of eight students admitted to the school. The principal (H7) made clear the benefit of the old funding model: “we chose to stay with the old funding model because our teachers can build skills and be more familiar with students and their needs over time.”

Persistent elitism. With Hong Kong being a well-known high-performing education system for decades (Harris et al., 2014), the elitist mindset has managed to prevail even when the government attempted to diminish its dominance with the launch of massive education reforms in 2001 (Education Commission, 2000). Schools traditionally recognized for high performance in public examinations strived to keep their status by joining the direct subsidy scheme (DSS), with which they received full government subsidy up to two and one-third of a normal subsidy unit for a student in public schools (Education Bureau, 2016). The DSS schools are also permitted to charge additional fees within set boundaries and could accept donations for its operation (Education Bureau, 2016). In 2001, the Hong Kong government also made essential policy changes to the DSS to attract more elite schools by allowing greater flexibility on curriculum, class size, student admission, and resource deployment (Yuen, 2006). These elite schools may choose students with high performance from families

that could pay tuition fees. Many of these schools offered more attractive remuneration than other public schools such as higher salaries, health insurance and overseas professional development funds. This scheme has been widely criticized as promoting social injustice and economic discrimination to permit students from affluent backgrounds with greater access to quality education (e.g., Tse, 2008; Yisu & Dan, 2016). Against the equality-based inclusive education policy, the DSS has served to enable the elite schools to keep their status with even more resources and operational freedom while they continue to receive funding from the government (Yuen, 2006).

Even though public examinations have been reduced from three to one, the school league table remains and the elitist tradition continues to create tension for inclusive education participation. It is thus unsurprising that six of the 13 school leaders expressed concern over inclusive education being the key factor to further decline the number of elite students and keep their schools in a lower banding as one principal (H7) stated: "Once the school is labeled as good in inclusive education, parents of academically more capable students will not choose us. Some teachers may also choose to leave."

Additionally, bringing in students with academic and behavioral challenges may also lead to teacher resignation in some cases as expressed above. This principal (H7) elaborated that one long-serving teacher protested to him for having students with disabilities as she believed those students were 'dragging the school down' and threatened resignation if this situation continued. He believed that a couple of other experienced teachers shared the same sentiment even though they did not explicitly convey it. In sum, the co-existence of inclusive education to promote educational equity and the DSS policy to preserve elitism in Hong Kong has hindered the goal of education for all (Poon-McBrayer, 2004).

Implications and Conclusions

Overall, the findings as presented and discussed above crystallized the value of examining social and cultural contexts with qualitative data for meaningful understanding of and insight into inclusive education provisions across national borders. The first example of crystallization was seen in the equality ground of inclusive education (Thomas, 2013) as a western human rights agenda (Winzer & Mazurek, 2009) which tended to rely on legislations to reach the goal of education for all as seen in Guam. Meanwhile, the Confucian ideology of educating all regardless of abilities and to achieve harmonious relationships brought the conceptualization and implementation of inclusive education to Hong Kong in a different manner. The second example of crystallization was seen in the correlation between legal mandates and the spread of inclusive education in Guam and between pragmatic needs (i.e., a low birth rate and maintenance of government-school relationship) and increased participation in inclusive education in Hong Kong. The correlations between contextual factors or variables not typically examined in the existing literature and inclusive education provisions were revealed by the qualitative data reported here.

Kugelmass and Ainscow (2004) argued that unusual social-cultural circumstances became the stimulus for us to reevaluate our thinking and practice in acquainted settings. The comparison between Guam and Hong Kong supported their argument. However, these findings only serve as a departure point. The generalization of analyses is limited as only experiences of a small number of principals were gathered. As Anastasiou and Keller (2014) concluded that aspects of culture, politics, and other factors may account for a substantial portion of the variation among nations, more cross-national studies are therefore needed to examine contextual factors qualitatively to explore factors influencing education for all and to give meaning to statistical figures and policy documents. The availability of both qualitative and quantitative data to complement each other and to contextualize cross-national

comparisons can offer more meaningful understanding of the relationship between national contexts and inclusive education provisions. This and other studies have together pointed to the value of understanding the contextual factors and their impact on inclusive education provisions.

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