

ABSTRACT

Title of Dissertation: INVESTMENT AND SUSTAINABILITY IN HERITAGE LANGUAGE EDUCATION: INSIGHTS FROM A COMMUNITY-BASED CANTONESE SCHOOL

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Scholarship on heritage language (HL) education and heritage language learners (HLLs) have recently gained an immense and increasing amount of recognition in research while still being a relatively new field. This uptick is largely due to the increasing immigration in the United States and, with that, a steady increase of people speaking languages other than English. Chinese is currently the second most populous community language in the United States, with approximately 5.4 million identifying as Chinese American, according to Pew Research Center. As this migrant population continues to grow, along with the rise of China (Duff et al., 2015; Zhou, 2019) as a global power, Chinese as a HL (CHL) is becoming an increasingly important topic of research and practice, particularly in the context of where and how CHL is learned.

One educational setting where CHL children can learn and participate in their heritage culture and language is community-based HL (CBHL) programs. However, these schools have historically encountered numerous challenges when working with second+ generation CHL children. In recent decades, there has been a notable shift in the Chinese diasporic communities impacting language patterns of Chinese-speaking diasporas in the United States. This shift has

led to reported evidence of denigration and stigmatization of CHL learners who do not speak the hegemonic variety—Mandarin Chinese, or *Putonghua* ('the common language'). Furthermore, prior studies have reported negative learning experiences in CHL classrooms due to pedagogical issues based on Confucian values or social/cultural mismatch between teachers, who may come from and may have schooling experiences from China, and Chinese/Taiwanese/Hongkonger American students born or raised in the United States.

Research to explore and inform solutions to these challenges is sparse but necessary. Some scholars have called for research and evaluation studies that seek to understand key stakeholders of programs, how programs work, and what impacts programs may have on the HL communities. Conducting a research-practice partnership (RPP) as a collaborative effort between researchers and practitioners could provide detailed insight into what issues and needs exist and how to develop a sustainable path toward mitigating these challenges and providing opportunities for HL investment. Despite numerous sociopolitical and pedagogical problems, these programs are vitally important to the sustainability of Chinese cultures and languages. Nonetheless, these programs must be scrutinized to reveal how to better support *investment* and *sustainability* in CHL education for HL learners and their families.

This papers-based dissertation stems from a larger ethnographic case study of a Cantonese CBHL school that will be divided into three papers: 1) a research synthesis of Chinese CBHL schools; 2) a family language policy (FLP) study that examines HL family's investment in a local Cantonese CBHL school; and 3) a conceptual piece that proposes the implementation of RPP in conjunction with CBHL schools, as well as a reflective demonstration of how a doctoral researcher collaborated with practice partner organization to work toward sustainability of the school and the target heritage language using an RPP framework.

INVESTMENT AND SUSTAINABILITY IN HERITAGE LANGUAGE EDUCATION:
INSIGHTS FROM A COMMUNITY-BASED CANTONESE SCHOOL

by

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Dedication

I dedicate this dissertation to my mum, who raised us in a household fortified with Cantonese language and culture, and who forced me to endure Cantonese school for many years even through my endless resistance (and eventual trauma). And I dedicate this to Goma, who I could not have completed this program without, and to Uber, who came before.

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List of Abbreviations

CBHL: Community-Based Heritage Language (followed by schools or programs)

CHL: Chinese as a Heritage Language

FLP: Family Language Policy

HL: Heritage Language

HLL: Heritage Language Learner

HLM: Heritage Language Maintenance

LCTL: Less-Commonly Taught Language

LM: Language Maintenance

P.R.C.: People's Republic of China

RPP: Research-Practice Partnership

Chapter 1: Introduction

1.1 Purpose and rationale

Scholarship on heritage language (HL) education has recently gained an immense and increasing amount of recognition in research while still being a relatively new field (Carreira & Kagan, 2018). This uptick is largely due to the increasing immigration in the United States (Ryan, 2013) and, with that, a steady increase of people speaking languages other than English. Fry et al. (2015) have projected that in the next five decades, immigrants and their children will increase from one-fourth to one-third of the total U.S. population. Previous studies of HL learning and teaching have predominantly been conducted at the university level and with Spanish in the United States. This should not be surprising considering Spanish is the most spoken community language other than English in the U.S., with 18.5% of the total U.S. population identifying as Hispanic or Latino (Dietrich & Hernandez, 2022). However, by 2065, the representation of heritage languages in the U.S. will change with immigrants from Asian countries likely to outnumber those coming from Spanish-speaking countries (Fry et al., 2015). That being said, Chinese is currently the second most populous community language in the United States (Xiao, 2016), with approximately 5.4 million identifying as Chinese American, according to Pew Research Center (Budiman & Ruiz, 2021). As this migrant population continues to grow, along with the “rise of China” (Duff et al., 2015; Zhou, 2019) as an “expanding geopolitical and economic power” (Duff, 2022, p. 261), Chinese as a HL (CHL) is becoming an increasingly important topic of research and practice, particularly in the context of where and how CHL is learned.

One educational setting where young Chinese American children can learn and participate in their heritage culture and language is community-based HL (CBHL) programs, also

known as complementary or community language schools. However, these schools have historically encountered numerous challenges when working with second+ generation Chinese American youth. In recent decades, there have been changes in the Chinese diasporic communities—with the new wave of Mandarin-speaking Chinese from Mainland China (or the People's Republic of China, P.R.C.) impacting language patterns of Chinese diasporas in the United States. This shift has led to reported evidence of denigration and stigmatization of CHL learners who do not speak the hegemonic variety—Mandarin Chinese, or *Putonghua* ('the common language'). Furthermore, prior studies have reported negative learning experiences in CHL classrooms due to pedagogical issues based on Confucian values (Clark & Gieve, 2006; Jin & Cortazi, 2006; Lawton & Logio, 2009) or cultural/historical mismatch between teachers, who may come from and may have schooling experiences from China, and (Chinese) American students born or raised in the United States (e.g., Jia, 2009; Li & Pu, 2010; Liao et al., 2017; Xiang, 2016; Zhou & Li, 2015). Examples of Confucian-inspired models of teaching include teacher-centeredness, rote memorization, repetition and drills, and passive thinking, which are common pedagogical methods in many parts of East Asia. Moreover, in the British context, Li Wei (2014) discusses how many CHL teachers have relatively short experiences living in the U.K., and in contrast, the British students who are ethnically Chinese in these programs have limited knowledge of China, often causing sociocultural tensions and conflicts between teachers and students in CBHL schools (Li Wei, 2014; Li Wei & Martin, 2009).

Research to explore and inform solutions to these challenges is sparse but necessary. Some scholars have called for research and evaluation studies that seek to understand key stakeholders of programs, how programs work, and what impacts programs may have on the HL communities (e.g., Elder, 2009; Son, 2017). Conducting research-practice partnerships (RPPs) as

a collaborative effort between researchers and practitioners could provide detailed insight into what issues and needs exist and how to develop a sustainable path toward mitigating these challenges and providing opportunities for HL investment. The current study adopts the theoretical framing of investment (Norton Peirce, 1995; Norton, 2000) and sustainability (i.e., heritage language maintenance) to better understand how a Cantonese CBHL program operates.

While there are numerous sociopolitical and pedagogical problems in CHL education, these programs are vitally important to the sustainability, or maintenance, of Chinese culture and languages. In order to strengthen these Chinese CBHL programs, I argue that these programs need to be scrutinized to find out how to better support *investment* and *sustainability* in CHL education for Chinese American youth. For this paper-based dissertation, I conducted a larger ethnographic case study project of a local Cantonese CBHL school that will be distributed into three papers: 1) a research synthesis of scholarship on Chinese CBHL schools; 2) a family language policy paper to investigate the interaction between language ideology and language management for Cantonese HL parents and children in the program; and 3) a conceptual paper on using an RPP framework to promote the sustainability of HL programs and subsequently HLs.

Before I discuss the papers, I will introduce the larger project—an ethnographic case study of the Cantonese CBHL program. First, I will describe the theoretical or conceptual frameworks utilized in Papers 2 and 3. Following that, I will detail the research methodology I used, which will explain my data collection and analysis. Then, I will go over a brief historical background of CBHL schools, as well as the history of Chinese as a HL in the United States.

1.2 Theoretical framework

1.2.1 Investment and heritage language learners

The construct of *investment* was initially developed in the mid-1990s by Bonny Norton (then Norton Peirce, 1995), and later expanded throughout years of her work related to identity and investment (e.g., Darvin & Norton, 2015, 2017, 2023; Norton, 2000, 2013). Investment was intended to be the sociological complement to the psychological construct of *motivation* in SLA studies (see Dörnyei, 1994, 2001; Dörnyei & Ushioda, 2009). Norton (2013) claims these theories assumed that “motivation was a character trait of the individual language learner and that learners who failed to learn the target language were not sufficiently committed to the learning process” (p. 6). These traditional characterizations of ‘motivation’ place the onus on individual language learners rather than taking a wider look at the social, historical, and political context for which language learning exists. As someone who has experienced self-blame in my “failures” of heritage language learning—at one point in my life I went as far as explicitly rejecting my HL at my Cantonese CBHL program—I can personally relate to the distinction of these two constructs. For most of my late teen and adult life, I blamed myself for my lack of motivation and my disinterest in my cultural and linguistic heritage, which has, retrospectively, caused a lot of harm to my ethnolinguistic identity. Only when I started understanding sociocultural theories of language learning (i.e., investment) did I begin to realize the influential role that the social context around me had on my language learning experiences. When I started to learn about the impact of hegemonic and standard language ideologies (i.e., mainstream English dominance) and other raciolinguistic ideologies (i.e., White assimilationism), I then had a clearer understanding of why I resisted my HL the way I did in my adolescence, which is also evident in much of the literature on HLLs’ experiences.

While instrumental in much of the work in SLA studies, the L2 motivation research tends to neglect the sociocultural experience of language learners, and thus, Norton developed the construct of investment to “complement constructs of motivation in the field of language learning and teaching” (2013, p. 6). To make the distinction between ‘motivation’ and ‘investment’ even clearer, Norton and Toohey (2001) illustrate an example of a learner who was highly motivated in their language learning (in a traditional, psychological sense) but, at the same time, were excluded from the language practices in the classroom and was then positioned as an ‘unmotivated’ language learner. This is the case of many HLLs—whether they explicitly use *investment* as their framework—where HL students are positioned as ‘lazy’ and ‘problematic,’ or as speakers of “kitchen sink” varieties (Valdés et al., 2006) in a HL classroom, and are therefore stigmatized and punished for it (e.g., Abdi, 2009, 2011; Wiley, 2008).

Norton’s work was inspired by that of Bourdieu (1977, 1984, 1991), which relates investment to the social and historical relationship that learners have with the target language. In theory, if learners “invest” in their language learning, and vice versa, they will gain *symbolic resources* (e.g., language, education, relationships) and *material resources* (e.g., jobs, money), which will in turn increase their cultural and linguistic capital. These investments are strongly tied to the identities of learners. However, Darvin and Norton (2023) have recently cautioned that previous scholarship using these constructs have been misinterpreted and reduced to transactions (i.e., neoliberal perspective). Instead, they argue that the construct of *investment* “accentuates how in the social world learners with diverse identities and unequal access to resources are positioned in different ways,” and extending that “investment is a tool that enables us to probe these inequalities and to challenge the dominant ideologies that perpetuate these inequalities. Herein lies perhaps the main distinction between investment and motivation”

(Darvin & Norton, 2023, p. 37). They further argue that the onus of language learning is not exclusively on the learners themselves, but rather, that teachers—and others who are in privileged positions of power—have the responsibility to reflect on their own perspectives and how they encourage (or discourage) investment in the educational experiences of their students (Darvin, 2020), particularly of those who are often marginalized in the classroom.



Figure 1. Darwin and Norton's (2015) Model of Investment

Two decades and numerous empirical studies after its introduction, Darwin and Norton (2015) developed a model of investment to show how various aspects of our sociocultural existence impact the investment of language learners (see Figure 1). A few scholars have utilized *investment* as their conceptual framework, such as Wu and her colleagues (2014), who examined investment among Asian American middle schoolers who studied Mandarin Chinese as a HL in a charter school in the northeastern U.S.; Chen and Wang (2024), who used identity theory from a poststructuralist perspective in conjunction with Norton's construct of investment to examine how six dialect-speaking university students construct their identity while learning Mandarin; and Liang's (2020) dissertation cross-case study, which investigated the investment and identities of four adult Chinese HLLs in the United States. These three studies all had different approaches for how they defined investment in their studies, connecting it with various other constructs (e.g.,

agency, identity, language ideologies), but they all examined participants that mostly shared one common trait—they were all “heritage” language learners of Mandarin from non-Mandarin backgrounds. And while the motivations for learning Mandarin varied across participants and across studies, it is undeniable that these specific types of learners are uniquely positioned in their HL education. In my second paper, I will use Norton’s *investment* framework alongside Family Language Policy (FLP) to examine the interaction of language ideologies and language management between HL parents and children.

1.2.2 Heritage language maintenance and sustainability

Language maintenance (LM) has long been studied in sociolinguistics (Fishman, 1970), particularly in response to language shift and contact. Fishman (1964) defined language shift and maintenance scholarship as being “concerned with the relationship between change or stability in habitual language use on one hand, and ongoing psychological, social or cultural processes, on the other hand, when populations differing in language are in contact with each other” (p. 32). In short, language maintenance refers to the policies and practices that are implemented to reverse language shift. Heritage language maintenance (HLM) generally refers to perceptions and behaviors related to the maintenance of a specific heritage language used by the immigrants who have cultural connections to this language other than the dominant language (Kelleher, 2010).

While Ross Kleinz originally defined the field of LM in the early 20th century, it was the late Joshua A. Fishman, a renowned sociolinguist, who contributed decades of his work into scholarship and advocacy for HLM, among other important fields, and greatly impacted our modern understanding of language contact, shift, and maintenance through a sociolinguistic lens. In HL research, language shift and language loss take place as early as the second generation or, if by chance, in the third or fourth generation. Many studies have indicated that this most often

occurs by the third generation in the United States (Alba et al., 2002; Rumbaut, 2004; Rumbaut et al., 2006). Primarily due to the assimilationist language policies of the U.S. education system, HLs are “lost” once a generation becomes monolingual in the hegemonic language—English. This can happen differently between individual families, local communities, and larger diasporas. For example, some families may experience HL loss by the second generation, but other members of the local community may have maintained their HL; and further, one local community may have had no access to world/heritage language programs in their public schools or local CBHL programs, but members from a diasporic community in a larger city may have had a lot more access to those resources. There are numerous factors that contribute to language shift and loss: immigration patterns, linguistic and societal status, perception of instrumental value, resource availability, national and state-wide language policies, among others.

The goals of CBHL programs are to prevent HL loss and promote intergenerational HLM, and while there are many challenges with existing CBHL schools and within specific language communities (see previous sections), they are vitally important to the sustainability of HLs in the United States. While HLM can vary between families and the communities involved, it is generally understood that generations become less and less proficient in the HL. This understanding of HLM places native, monolingual proficiency of a target language as the benchmark. In our modern understanding of multilingualism, native proficiency is not the goal nor is it an accurate depiction of what HLLs can attain. By acknowledging that HLLs are, in fact, multilingual learners have multilingual proficiencies and, by definition, use language differently than monolingual speakers, the research that studies how languages are “maintained” should be seen through this lens. Moreover, we now have advanced technological innovations and various modes of language use (i.e., multiliteracies) that simply cannot be compared from one generation

to the next. In other words, how we use language and how we learn language is not indicative of “more” or “less” proficiency in the HL, but rather, that the next generation is going to use language *differently* than the last. Therefore, what is being maintained in HL maintenance should not be measured by our simple understandings of language proficiency that is based on a scale comparing 2nd+ generation HLLs to monolingual, native speakers. That being said, I believe *sustainability*, a construct that is primarily discussed in environmental research, can account for the dynamism that exists in intergenerational heritage language learning.

King and her colleagues (2008) edited a book, entitled “Sustaining Linguistic Diversity: Endangered and Minority Languages and Language Varieties,” where they take on difficult topics related to language loss and maintenance. In the first chapter, Romaine (2008) says that we have three options in response to the loss of linguistic diversity: 1) do nothing, 2) document endangered languages, and 3) sustain/revitalize threatened languages. The work of language sustainability takes the third position to combat the cultural and linguistic “homogenization” in the United States. The author argues that “[m]aintaining cultural and linguistic diversity is a matter of social justice because distinctiveness in culture and language has formed the basis for defining human identities” (p. 19) and that the way to sustain languages is by “empowering local communities” (p. 14). In a later chapter of the same edited volume, Peyton et al. (2008) discusses the importance of HL education in the U.S. and emphasizes that we need reconceptualize and restructure the ways that minoritized languages are developed here. They include a list of recommendations to develop HLs and conclude by stressing the need for “joint collaboration across all sectors of the nation” to advance the goals of HLM in the United States (p. 183).

In a recent article, Hult (2023) investigates the United Nations’ Sustainable Development Goals (SDGs) and UNESCO’s position on multilingualism in relation to the SDG for education.

Hult specifically highlights the minimal explicit inclusion of language and multilingualism in the SDGs, or as he calls it “a major missed opportunity for broad consciousness-raising about multilingualism in general and multilingual education in particular” (p 69). He adapts the United Nation’s report on the World Commission on Environmental Development’s (1987) of sustainable development to his understanding of sustainable multilingualism as “linguistic practices that meet the needs of the present, without compromising the linguistic diversity future generations will require to meet their needs” and adding that “truly accessible and inclusive social, economic and cultural development requires the cultivation of robust multilingual repertoires” (p. 71). Perceiving HLM as HL sustainability allows us to go beyond comparing HLLs to monolingual, native speakers (i.e., deficit orientation) and toward a model that accounts for, as Hult has stated, “[the] linguistic practices that meets the needs of the present” (p. 71).

The second and the originating reason why I am choosing to use the term *sustainability* is because the lead administrator of the Cantonese CBHL school that I have worked closely with has used that term on numerous occasions when referring to the longevity of the program. Her role in the program has guided many changes in how the school operates, such as converting from a traditional top-down administration to a CO-OP structure, where all parents are responsible and have a role in the CBHL program’s operations. Although my discussions with her about sustainability were primarily based on programmatic issues (e.g., school structure, funding, retaining teachers and students), it really made me consider about how the school itself acts as a nexus of linguistic and cultural sustainability for 2nd+ generation Cantonese Americans. Many of the students in this site are 3rd generation and have little to no exposure to Cantonese outside of the school, and so heritage language *maintenance* does not accurately or holistically depicts what the goals of the school are for these students; whereas heritage language

sustainability can account for the dynamism of language practices that this generation needs to “sustain” their HL. In the third paper, this study contributes to providing a more defined understanding of HL sustainability as a construct through an RPP with me and the CBHL program. This work aims to extend and expand the conversation beyond the existing HLM scholarship, rather than negate or refute the long history of monumental work done by Dr. Fishman and others who have contributed to our contemporary understanding of the field.

1.3 Definition of key terms

A ‘heritage language’ can generally be defined as any language other than the dominant language—which is English in the U.S.—that is used by an individual, a family, or a community. These include immigrant languages (e.g., Spanish, Chinese), Native American languages (e.g., Navajo, Choctaw), or colonial languages (e.g. French, German). Additionally, HL users have various levels of proficiency and connection to the language and culture. I will first define who is a heritage language learner (HLL), followed by a distinction between types of HLs.

1.3.1 Heritage language learners

Defining and qualifying a heritage language learner is an additional concern for researchers, teachers, and students, and deciding who falls under this label can have numerous implications. HLLs tend to have different intrinsic needs that “stem from their bicultural and bilingual experiences and set them apart from L2 learners (Beaudrie et al., 2014; Leeman, 2015)” (as cited in Carreira & Kagan, 2018, p. 155). Carreira (2004) identifies three major elements that can define an HLL: identity, language, and family background, which help differentiate between: 1) HLLs and L2 learners, 2) HLLs and L1 learners, and 3) different types of HLLs. For the third type of differentiation, Polinsky and Kagan (2007) indicate two sides of the spectrum for defining HLLs—ranging from *broad* to *narrow*. The wide array of definitions comes from the

fact that bilinguals are simply more heterogeneous as a group than monolinguals (de Bot, 2007), especially in the case of HLLs. Depending on the purpose of the research, definitions range from a focus on languages, societal status, linguistic proficiency, or cultural competency (Leeman, 2015). The various characteristics of HLLs have pertinent pedagogical implications for language education (e.g., curriculum, placement) (Carreira, 2004). While definitions of who qualifies to be labeled as a HLL have varied across the field, the work of previous scholars in this field has contributed to our collective understanding of HLLs and their language learning experiences.

Broad definitions. Joshua A. Fishman (2001), a prominent scholar in the field of heritage languages and language maintenance, defined a HLL broadly as anyone who has cultural or ancestral ties, thus influencing the identity development and motivations of these learners (Van Deusen-Scholl, 2003; Hornberger & Wang, 2008). In the broad definition, an individual's HL is defined as "part of that person's family or cultural heritage, the language may not have been spoken in the home, and the person has no functional proficiency in the language and would most likely have to study that language as an L2 learner" (Wiley, 2014, p. 21). Those who follow this broader definition of HLL have stressed familial connections "irrespective of the level of linguistic proficiency" (Lee & Suarez, 2009, p. 138).

Narrow definitions. On the other hand, a narrow definition describes an HLL as someone "raised in a home where a non-English language is spoken who speaks or at least understands the language, and who is to some degree bilingual in that language and in English" (Valdés, 2001, p. 38). In this narrow characterization, a HLL brings some proficiency of the HL—whether it be productive or merely receptive—to the classroom that is derived from the home and/or community. This proficiency-based definition is supported by many researchers who try to study the differences between HLLs and L2 learners (e.g., Carreira & Kagan, 2011; Polinsky & Kagan,

2007). Typically, researchers, educators, or administrators ascribe these labels and definitions regarding whether or not the learners belong to this group on the individuals, not taking into account the learners' self-identification. More research needs to be conducted on how HLLs perceive and position themselves in terms of their identities.

1.3.2 Types of heritage languages

There are numerous types of heritage languages that have been discussed in previous scholarship: colonial languages, indigenous or Native American languages, and immigrant languages. For the purposes of this dissertation proposal, I will narrowly focus on detailing research on immigrant heritage languages in the context of the United States.

Immigrant languages. As previously mentioned, immigration is on the rise, which has correlated to the increasing number of speakers of immigrant heritage languages. Immigrant HL speakers differ from other types of HL speakers because these are individuals and families who voluntary or involuntarily migrate to the U.S., typically with proficiency in a language other than English. The difference between these two types of immigrants is nuanced, but in simple terms, voluntary immigrants freely choose to move from their home country to a new country, whereas involuntary immigrants have little agency in making the decision to leave their home (Lynn & Lea, 2003). Ogbu (1993) further distinguishes the latter type between 'refugees' and 'migrant workers.' He also discusses involuntary, nonimmigrant minorities as those who were colonized or forced to migrate without any will or agency (e.g., enslaved Black people, Native Americans, early Mexican Americans in the Southwest, Native Hawaiians).

Immigrant communities, whether voluntary or involuntary, often bring their HLs with them, but not all immigrant communities will handle HL maintenance similarly. Each HL community will have varying degrees of status and resources, depending on HL country of

origin, the HL's status or value in society, the relationship between nations associated with the HL and the U.S., the resources available for the HL, the community's ethnolinguistic vitality (high or low), among many other factors. While the study of HLs has become increasingly popular in field of applied linguistics and language education, the complexities involved need to be stated because of "the fact that different languages are placed in different hierarchical orders of need and importance based on their real or perceived economic, political, and socio-historical-cultural relationships with the USA and the world" (Wang, 2008, p. 169).

1.4 Sociohistorical context

1.4.1 Community-based heritage language schools/programs

Community-based heritage language programs are typically "non-profit organizations founded and operated by parents from the respective immigrant or heritage language community for the purpose of maintaining and teaching the language and culture of their heritage" (Coalition of Community-Based Heritage Language Schools, 2018, para. 1). These HL programs have also been referred to as Saturday/Sunday schools, weekend schools, ethnic schools, mother tongue schools, community schools, and complementary schools. Lee and Chen-Wu (2021) indicate that there are several types of CBHL programs that currently exist in the U.S.: weekend programs, religious-affiliated programs, after-school programs, language camps, expatriate schools, and online programs/tools. When mentioning CBHL programs for the remainder of this proposal, I am referring programs that run regularly throughout the school year—those that function after mainstream K-12 schooling or on weekends—and that usually operate through rented space on public or private school premises or in churches.

These specific CBHL programs are vitally important to world language education in the U.S. because mainstream world language education rarely offers opportunities for bilingualism

with less commonly taught languages (LCTLs), or “languages other than English and the commonly taught European languages of German, French and Spanish” (National Council of Less Commonly Taught Languages, n.d.). Even dual language and immersion (DLI) programs, for which there are more than 3,600 program across 44 states (as of 2021), primarily operate with teaching Spanish ($N=2936$), Mandarin Chinese ($N=312$), and French ($N=182$), along with English (American Councils Research Center, 2021). In other words, nearly 97% of DLI programs, which only account for under 3% of all public K-12 schools (based on National Center for Educational Statistics data), teach only these three languages—and typically the standardized, hegemonic variety of those languages. Therefore, these CBHL schools “have long existed to fill this void and help maintain immigrant languages and cultures” (Beaudrie, 2016, p. 81). Unlike world language programs that are a part of the mainstream educational system, CBHL programs typically do not have a standardized curriculum and are not subject to the regulations of public K-12 education. The curriculum, materials, and assessments used in these programs are decided by the individual programs themselves, with many using materials created outside of the local context (e.g., Cantonese schools taking textbooks from Taiwan for traditional characters).

Chinese CBHL schools (or ‘Chinese schools,’ as they are commonly referred to) have existed in the U.S. since 1886, when the first Chinese language school was established in San Francisco, CA (Liu, 2010). Until the early post-WWII decades, the Chinese American diasporas were predominantly Cantonese speaking, so most Chinese CBHL programs in the U.S., and in other countries with large Chinese diasporas, primarily taught Cantonese (Pan, 1997). According to Wong and Lopez (2000), the original purpose of these CBHL schools in the late 19th century and early 20th century was to promote patriotism toward China and to educate immigrant children about Chinese language and culture in preparation for their eventual return to the

homeland. Predictably, these goals conflict with who the CHL students attending these schools usually are—that is, second+ generation Chinese *Americans*. Chinese CBHL programs can also be problematic in that they have historically have a reputation of practicing monolingual language ideologies in an attempt to “replicat[e] the language repertoires of the first generation” (Song, 2018, p. 3). They often engage implicitly in “one language only (OLON), usually the minority ethnic language of course, or one language at a time (OLAT)... treat[ing] the pupils as if they were the same as those from their ancestral countries” (Li Wei, 2014, p. 164-165). In sum, the ideologies present in these CBHL programs have traditionally encountered numerous conflicts between those who operate or teach the program and the students who attend them.

In addition to these issues around language ideology, the classroom practices of the language teachers are also a challenge that has been documented in the literature. Because these programs typically “hire” volunteer teachers, who are often parents of children attending the schools themselves, many of them are inadequately trained to teach Chinese language to this specific student population. Yang and Tochon (2022) claimed that after public schools opened to Chinese communities after the 1950s, many Chinese teachers became less valuable, adding that “[teachers] represented an old-fashioned teaching style and outdated materials, which were incompatible with mainstream culture for young Chinese American students (Zhou & Li, 2003)” (p. 2). Many times, this results in low quality of HL instruction, “dominated by repetitive drills and exercises coupled with memorization of texts”, which these volunteer teachers resort to because these are the “pedagogical methods used while they were growing up in their Chinese-speaking countries” (Li, 2005, p. 203).

Nevertheless, these schools are important sites to observe because they are still often explicit in their goal to “promote, instill, preserve or foster a sense of ‘Chineseness’ among

second and third generation Chinese diasporic communities (Lu, 2001; Mau et al., 2009)” (Archer et al., 2010, p. 408). While the goals of some Chinese CBHL schools have changed as well as the exponential increase in the number of programs in the U.S., their educational quality and long-term impact on Chinese HLLs are uncertain. Thus, more research needs to be done to further examine the efficacy and impacts of these programs on Chinese American youth.

1.4.2 Chinese as a heritage language in the United States

A historical perspective of the Chinese language and of Chinese speakers needs to be taken into account when considering ‘Chinese’ as a heritage language in the United States. In the late 19th and early 20th century, numerous laws were created to discriminate against Chinese immigrants—1870 Nationality Act, 1875 Page Act, 1882 Chinese Exclusion Act, 1885 Foran Act, 1917 Asiatic Barred Zone Act, and 1924 National Origins Act. These racially discriminatory legislations were both defined by and have defined the subordination of Chinese/Asian Americans as *perpetual foreigners*. While the slow resumption of immigration and naturalization of Chinese/Asian Americans have been passed in the last century (e.g., 1943 Magnuson Act, 1952 Walter McCarran Act, 1965 Immigration and Nationality Act Amendments), the lasting impact of perceiving Asian Americans as perpetual foreigners has forever stained the racial dynamics of Chinese/Asian Americans in the United States. Only in recent times has there been an interest and investment in Chinese language education. With the rise of China (Duff et al., 2015; Zhou, 2019) and consequent interest in U.S.-China relations, ‘Chinese’ has become a popular and trendy language to study, and subsequently, more research has been conducted in Chinese language learning and teaching in the last few decades (Duff et al., 2015). However, this also comes with numerous complicated implications for CHL education.

The ‘Chinese language’ is a complicated notion because, due to sociopolitical matters, it has become synonymous with the specific hegemonic variety—Mandarin Chinese, or *Putonghua* (the standard variety based on the Beijing dialect). The language label itself is problematic because, in reality, it encompasses seven or eight major dialects and many more minority varieties (Zhou, 2019), which are not mutually intelligible with *Putonghua*. Additionally, with the latest wave of migration from Mainland China, the de facto Chinese language taught in U.S. schools has become Mandarin Chinese. For CHL programs, this is especially problematic because young Chinese American children are coming into these (Mandarin) Chinese CBHL programs having little or no exposure to Mandarin Chinese at all. Thus, it is important to delve deeper into the linguistic variation and the sociohistorical context of CHL in the United States.

Dialects and varieties. Officially, there are approximately 56 recognized ethnic groups in China (Teng & Weng, 2001), and some claim that there are seven major mutually unintelligible spoken dialects, or *Fangyan*, of Chinese: Beifang (northern, or Mandarin), which is native to about 70% of the Chinese population in Mainland China; Yue (Guangdong province, Hong Kong), which is native to about 5%; Kejia (Hakka), 3.7%; Min (Fujian, Taiwan, and the Hainan Islands), 4.1%; Wu (lower Changjiang region, Shanghai), 8.5%; Xiang (south central region), 4.8%; and Gan (southeastern inland provinces), 2.4% (Li Wei, 1994). When it comes to regional spoken dialects of Chinese, these seven groups are mutually unintelligible, but they do share a common written form of which “only Mandarin has a corresponding written form, which is shared by all literate Chinese whatever *Fangyan* they may speak” (Li Wei, 1994, p. 41). Others have argued that there are at least eight, along with numerous other languages all encompassed in the nation-state of the P.R.C.:

... China is linguistically diverse. It has, at least, over one hundred thirty languages other than Chinese (Sun, Hu, & Huang, 2007). These languages belong to five large families,

including the Sino-Tibetan, Altaic, Austroasiatic, Austronesian, and Indo-European (Ramsey, 1987, pp. 157–172; Zhou, 2003, pp. 21–27). Even with the Chinese language, there is extensive diversity (Norman, 1988, pp. 1–6; Ramsey, 1987, pp. 10–18). There are at least eight major dialects and numerous minor dialects, many of which are not mutually intelligible. (Zhou, 2019, p. 16)

Wong and Xiao (2010) further point out that “the notion of a singular ‘Chinese language’ is more politically motivated than factually based” due to Mainland China’s nation-state ideology (p. 156). In reality, these different “dialects” of Chinese have been analogous with comparing English and Dutch or Spanish and French, both sets of languages that share similar roots (Germanic and Romance, respectively), but are essentially mutually unintelligible. The authors illustrate the vastness of the Chinese language by showing differences between dialects and variations that are commonly spoken within Chinese households in the United States:

Each dialect group is comprised of many variations; Cantonese is part of the Yue group that covers the Guangdong area, for example. It preserves the fullest complement of Middle Chinese tones and word-final consonants (such as p, t, k) that do not exist in Mandarin (Chao, 1943; Norman, 1988). Taiwanese belongs to the Min family that is regarded linguistically as the furthest removed from standard Mandarin and includes various forms in Fujian, Hainan, Teochew (Chaozhou), and Southeast Asia (known as Hokkien) (Cheng, 1985). Overriding all the oral differences is the unified written form of Han characters (Ramsey, 1987). However, dialect communities may write according to their own grammatical rules or even create their own characters and words. In the vernacular press in Hong Kong and Taiwan, it is easy to find writing that is incomprehensible to other Chinese readers. The authors of the Dictionary on Cantonese of Guangzhou, for instance, list over 300 regional characters that are illegible to people from other regions (Rao, Ouyang, & Zhou, 1981; Wang, 1997). (p. 156)

Because of all these mutually unintelligible varieties, CHL education is further complicated by all varieties being categorized simply as ‘Chinese.’ These linguistic varieties of the Chinese language require discrete attention as it pertains to CHL education in the United States.

Sociohistorical context. In addition to the complexity of ‘Chinese’ variation, it is also critical to understand the sociohistorical context of language varieties within the U.S. and other

overseas Chinese diasporas. The status of what is considered ‘Chinese’ has a history related to migration that has changed the dialectal usage spoken within these overseas communities. Duff and Doherty (2019) illustrate the evolution of Chinese home dialects over time, which can be seen in Figure 2.

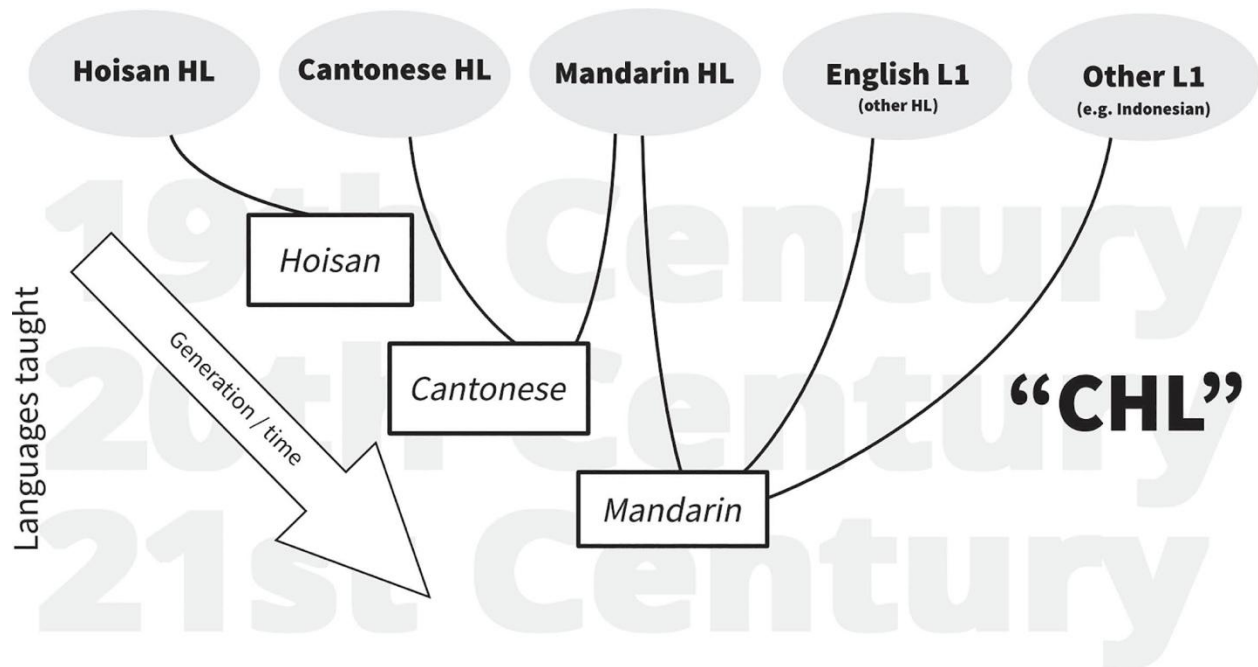


Figure 2. North American “Chinese” learners’ changing linguistic backgrounds/habitus (Duff & Doherty, 2019).

According to Liu and Wiley (2014) and Wang (2008), there were three major waves of immigration that led to the dominant dialect variety in the United States. The first wave, taking place between the mid-19th century up until the mid-20th century, consisted of the majority of the Chinese diaspora in the United States who spoke Taishanese (Toisanese/Hoisan-wa), a variation of Cantonese spoken in Taishan, Guangdong, which is relatively unintelligible with standard Cantonese (Leung, 2012). It should be noted that the Chinese Exclusion Act of 1882 essentially restricted immigration and limited the basic rights of Chinese immigrants in the U.S., and the only non-labor Chinese immigrants (e.g., diplomatic officers) were granted entry into the U.S., but even this particular status was difficult to prove (National Archives, n.d.).

After the Magnuson Act was passed in 1943, Chinese immigration resumed. From the mid-20th century up until the 1970s, a second wave of anti-Communist Chinese immigrants from more elite (educated, wealthy) backgrounds, typically from Hong Kong or Taiwan, migrated to the U.S., settling down around universities and suburbs rather than Chinatowns (Liu & Wiley, 2014; Wang, 2008). This happened post-World War II, after resumption of immigration was permitted and previous racially discriminatory laws were retracted. This second wave is sometimes blurred with the third wave as the immigration patterns from the mid-late 1900s were more complex. During the late 1970s until the 1980s, Chinese refugees fleeing from other countries, such as Vietnam, were also migrating to the United States. With this new, predominantly refugee, migration coming from southern China and elsewhere, the diasporas of Chinese communities in the U.S. and other countries that sponsored these refugees began speaking standard Cantonese, the language variety or ‘dialect’ largely spoken in Hong Kong and the Guangdong province of Mainland China. This may not be considered a technical ‘wave’ of immigration because these Chinese heritage immigrants fled or migrated from Southeast Asian countries, who were going through their own sociopolitical challenges, and not Mainland China.

Lastly, a third wave of migration has been occurring since the 1990s, with many students and migrants coming from Mainland China that are often more socioeconomically privileged. This was a result of a normalization of U.S.-China relations and the new immigration quotas for China and Taiwan, individually. According to Liu and Wiley (2014), by the end of the 20th century, the Chinese population “constituted the largest group of foreign students in the United States... most spoke standard Chinese as well as other dialects and used simplified Chinese characters” (p. 6). However, according to some scholars, there is considerable nuance within the third wave of Chinese migration. Zhou (2021) suggests that the third wave can further be divided

into two. The new “third” wave, between the 1980s and early-2000s, was a wave of immigrants coming from Mainland China who were scholars and graduate students, all holding degrees from their home country. This group spoke *Putonghua*, other Chinese varieties, and minority languages. This migration group differed from what Zhou calls the “fourth” wave of international students and scholars, which is a group of immigrants who have been coming over to the United States since the early 2000s, when the P.R.C. began gaining economic prosperity. Most of these immigrants are students, ranging from elementary school to graduate school, and coming from higher socioeconomic status families who wish to send their children to receive better education abroad. This population primarily speaks *Putonghua*, likely due to the impacts of national state policies (National Common Language and Script Law, 2000) and recent nation-state enforcement of standard language ideologies.

Migration patterns of Chinese and Chinese-speaking immigrants in the U.S. have fluctuated since the mid-19th century during the Gold Rush. As described above, many scholars and migration policy experts have labeled specific “waves” of Chinese migration, but these waves are arbitrarily determined and differ from source to source. Therefore, a historical summary of Chinese migration based on dates can be found below (see

Table 1). While these dates are seemingly sequential, many of these sub-group migration patterns overlap with each other, particularly after the Immigration and Nationality Act of 1965.

Table 1. Summary of Chinese immigration patterns.

Time period	Immigration patterns	Immigration policies
1849 - 1882	Taishanese-speaking Chinese immigrants (mainly laborers) arriving to the U.S. during Gold Rush	
1882 - 1943	Chinese immigration was restricted, only non-laborers were granted entry into U.S.	Chinese Exclusion Act of 1882 Geary Act (extension) of 1902
1943 - 1970s	Chinese immigrants (elite) from Hong Kong and Taiwan began migrating to U.S.	Magnuson Act of 1943 Immigration & Nationality Act of 1965

1970s - 1980s	Chinese heritage immigrants (mainly refugees) from Southeast Asia were migrating to U.S.	Taiwan Relations Act of 1979
1980s - 1990s	Chinese scholars and graduate students (less elite) from P.R.C. began migrating to the U.S., many after Tiananmen Square protests	
1990s - now	Chinese international students (more elite) from P.R.C. began migrating to U.S. for better educational and work opportunities	

Impact on CHL education. The conflation of all Chinese varieties being consolidated into one Chinese language creates several complications as it pertains to CHL education. These unique complications have led to many CHL scholars' investigation of how these issues impact CHL programs, teachers, and learners. Depending on the time, the different varieties of Chinese can hold more prestige or power in a given context. By the end of the 20th century, Mandarin gradually replaced Cantonese in these CHL programs, a sign of the "changing hierarchies amongst varieties of the Chinese language as a result of the rising politico-economic power of mainland China" (Li Wei, 2014, p. 166). By the mid-1990s, approximately "eight out of ten pupils in Chinese schools were taught in Mandarin; Cantonese remained the language of instruction for only one of every eight students (Lai, 2004)" (Liu, 2010, p. 2). Given the current trend of continued increasing migration from Mainland China and the *rise of China* (Duff et al., 2015; Zhou, 2019), many CBHL programs teach Mandarin exclusively, or on rare occasion, offer Cantonese as an option (Duff et al., 2017), which differs from the dominant variety of Chinese CBHL schools just a few decades ago. This has resulted in many Chinese families "enroll[ing] their students in Chinese heritage schools even though Mandarin is not their home or community language. In such cases, Mandarin may function as a "surrogate" heritage language, which can connect ethnic Chinese children with Chinese culture" (Wiley, 2014, p. 20). Numerous studies have investigated these issues (e.g., Leung & Wu, 2011; Luo et al., 2019; Wiley, 2008; Wong & Xiao, 2010).

In summary, this section described the complicated concept of a singular “Chinese” language label, followed by a detailed description of the sociohistorical context of language change in the Chinese diasporas of the United States. As Wiley (2008) suggests, research in language attitudes toward Chinese language varieties (and language diversity more broadly) needs to be further investigated, especially from administrators, teachers, parents, and students of community-based programs.

1.5 Methodology

This study will use ethnographic case study as the methodology, which is the most common research design for research conducted on CBHL schools. Ethnographic research can be defined as a qualitative approach to describe, analyze, and interpret a cultural group’s shared patterns of behaviors that develop over time. The central phenomenon behind ethnographies is *culture*, which we can define as “everything having to do with human behavior and belief” (LeCompte et al., 1993, p. 5). The patterns of behavior and belief can include “language, rituals, economic and political structures, life stages, interactions, and communication styles” (Creswell & Guetterman, 2018, p. 474). A researcher, or ethnographer, will typically spend an extensive amount of time with their participants and research site in order to better understand the patterns of behaviors, beliefs, and language within a culture-sharing group. Additionally, ethnographies can also be conducted to investigate a cultural group to better understand a larger issue.

While ethnographies are now commonly conducted in educational research, its origins stem from and are shaped by cultural anthropology, which focused on issues of writing about cultural groups (Bogdan & Biklen, 2007; Denzin, 1997; LeCompte et al., 1993; Wolcott, 2008). While contemporary methods and approaches to ethnographic research greatly differ from the historical practices—where anthropologists explored “primitive” cultures in the late 19th and

early 20th centuries—the practices of data collection in the field are similar. Observations and interviews were standard procedure for data collection, and in the early to mid-20th century, much ethnographic research emphasized studying single cases (i.e., individuals, groups, sites). According to LeCompte et al. (1993), educational ethnographers began to crystallize between the mid-20th century through the 1980s, developing and refining procedures borrowed from anthropology and sociology. Since then, interdisciplinary scholars have identified and developed data collection methods geared toward studying cultural groups through conducting observations, analyzing data, and writing research reports (e.g., Fetterman, 2010; Wolcott, 2008).

However, Denzin (1997) recognized that there were two major “crises,” or deviations, from traditional, historical ethnographic research and contemporary ethnographic work that stem from Clifford and Marcus’s (1986) book, *Writing Culture*: 1) the crisis of representation, and 2) the crisis of legitimacy. Regarding the first crisis, they claimed that the research can no longer be seen as an “objective reporter who makes omniscient pronouncements about the individuals being studied” (Creswell & Guetterman, 2018, p. 475). Rather, the researcher is just one of many voices in an ethnography that need to be heard, along with the reader and the participants. I will discuss this issue in further detail in relation to *researcher reflexivity*. The second crisis indicates that ethnographic research cannot abide by the same standards of positivistic and quantitative scholarship (e.g., validity, reliability, objectivity). Instead, ethnographic, qualitative research should be evaluated with flexible standards that are “embedded within the participants’ lives, historical and cultural influence, and the interactive forces of race, gender, and class” (Creswell & Guetterman, 2018, p. 475). Denzin (1997) extended that contemporary ethnographic research is neither generic nor formulaic, and it can find itself in various forms (e.g., poems, novels, narratives). In the interdisciplinary field of educational research, the three most common forms

of ethnographies are: *realist* ethnography, ethnographic *case study*, and *critical* ethnography. For the purposes of this paper, I will detail the second most mentioned type of qualitative research in the CBHL studies: *case study*.

Unlike traditional ethnographers who search for shared patterns of behaviors or beliefs, case study scholars are less likely to identify cultural themes of a culture-sharing group, and instead, their goal is aimed at detailed investigation of the “case” (Yin, 2014). Over the last few decades, case study experts (Merriam, 1998; Stake, 1995; Yin, 2014) have helped define and refine the methodological approach. Robert Yin is an oft-cited scholar for case study methodology, which he defines as “an empirical inquiry that investigates a contemporary phenomenon in depth and within its real-life context...” (2014, p. 18). The salient feature of a case study is that it is holistically investigating a confined, *bounded* entity—a person (or small groups of persons), a school, an organization, or something larger—and that the nature of the inquiry is explanatory or exploratory. The term *bounded* in case study means that the case is “separated out for research in terms of time, place, or some physical boundaries” (Creswell & Guetterman, 2018, p. 478), and that the researcher identifies this “case” within their larger context (e.g., geographical, political, social, economic), which is pertinent to the focus of the study (e.g., Yin & Davis, 2007). Additionally, case study methodology requires multiple sources of evidence for data collection (Creswell & Poth, 2018) in order to develop an in-depth, detailed understanding of the case, and it is recommended to have multiple approaches to data analysis. Lastly, when reporting case study research, scholars illuminate their “case” and use it to speak back to theory.

Creswell and Guetterman (2018) states that there are three different types of case studies: *intrinsic* case study, *instrumental* case study, and *multiple instrumental* (or *collective*) case study.

An *intrinsic* case study is one where the case itself is of interest, perhaps because it is unusual or unique. An *instrumental* case study is when the case illuminates a particular issue or theme by providing greater insight into that issue. Lastly, *multiple instrumental*, or *collective*, case study (Stake, 1995) investigates several cases to be described and compared to a particular issue. It is worth noting that in any type of case study, data collection and data analysis tend to be similar to that of any qualitative study. Case study “methodology” is merely denoting a focus on a bounded entity (or entities) and requires multiple points of evidence, all while using said entity to speak back to theory. It does not necessarily have a unique method for the act of collecting or analyzing data. This is why researchers usually attach case study to larger methodological frameworks, such as ethnography or phenomenology. For this larger dissertation project, which will encapsulate Papers 2 and 3, I will be utilizing ethnographic case study methodology. The bounded entity for this case study is the target research site—a local Cantonese CBHL school, which consists of various stakeholders.

1.5.1 Research site: Rockland Cantonese School

The target research site for this dissertation project is a Cantonese CBHL program, henceforth referred to as Rockland Cantonese School, which operates on Sunday afternoons during the academic school calendar. Rockland Cantonese School, located in the Mid-Atlantic region of the United States, was founded by two parents in 2012 who were essentially pushed out of a previous Chinese school in the area. These two parents, now board members of Rockland, repeatedly told me that they created this program because the principal of the previous Chinese school no longer wanted to have a Cantonese strand, and so all the parents who wanted their children to learn their HL—that is, Cantonese—were pushed out of the school. Through attending regular board meetings and interviews with these two founders, I gained a perspective

that, while these two parents knew nothing about running a cultural and educational non-profit organization, they created this space for a LCTL community that continues to be neglected in mainstream Chinese language education.

As of Fall 2024, the school holds two-hour Cantonese classes every Sunday for approximately 65-70 Cantonese HL students, ages 4-12, across five classes—Cantonese Beginner (CB) 1-3, Cantonese (C) 1-2. Many of the students who come into the program are from third generation Cantonese- and/or mixed- American families (their Cantonese grandparent/s migrated to the U.S., Cantonese parent/s were born here), although some are second generation Cantonese-/mixed- American (Cantonese parent/s migrated to the U.S.). And because these are HL families with highly varying range of exposure to the Cantonese language at home, the students often come into the classroom with low to minimal language proficiency.

1.5.2 Data collection and participants

During spring 2025, I collected data at the target Cantonese CBHL program, henceforth referred to as Rockland Cantonese School. Depending on the target stakeholder group, I collected different types of data. The various stakeholders include: board members, administrators, teachers, parents, and current and past students. It is important to note that this school operates as a CO-OP (or cooperative) school, so parents and administrators work very closely together to co-construct the school. In fact, every board member, administrator, and most of the teachers have children currently or previously enrolled at Rockland Cantonese School. Parents sign an agreement to indicate that, beyond having their children attend class, they themselves will be part of various committees (e.g., social, marketing, fundraising, health and safety) and/or take on administrative roles (e.g., principal, vice principal, academics). This is to say that while I have these participants labeled as categorical stakeholder roles, the majority of

parents wear multiple hats and are typically involved more than just dropping their kids off at Rockland every Sunday. I collected qualitative data to help respond to the schools' needs, see Table 2 for details. Survey and interview protocols can also be found in Appendices I-IV.

Table 2. Data Collection

Participants	Types of Data	Mode of Data Collection
All participants	Observations	Recordings, Observation notes
Parents	Semi-structured interviews, Focus groups, Meetings	Recordings, Meeting notes, Memos
Students (current & past)	Semi-structured interviews, Focus groups, Classroom observations	Recordings, Observation notes
Teachers	Semi-structured interviews, Classroom observations, Meetings	Recordings, Observation protocol/notes, Meeting notes
Administrators & Board members	Semi-structured interviews, Observations, Meetings	Recordings, Observation notes, Meeting notes

While this larger ethnographic case study is collectively gathering these various data sources from each participant group, Paper 2 and Paper 3 utilizes each data type differently. Paper 2, which investigates two aspects of FLP—language management and language ideologies—primarily examined the data collected from parents and their children (current/past students). Paper 3, which delves into RPP and CBHL sustainability, used most of the data collected holistically while focusing on how the researcher and practitioners (i.e., stakeholders) work together to promote sustainability for the school and, subsequently, for HLM. Most of the data for Paper 3 came from communications, interviews, focus groups, and observations with the board members, administrators, teachers, and parents of Rockland.

1.5.3 Researcher reflexivity and positionality

When researchers conduct ethnographic inquiries—and arguably with most types of qualitative research—it is best practice to indicate the researcher's reflexivity due to the interpretive and subjective nature of this work. Denzin (1997) notes that it is necessary for

ethnographers to explicitly position themselves in their work in order to identify their perspectives and interpretations of the research. In many ways, a researcher's reflexivity is having awareness of their role in a research site in a manner that "honors and respects the site and participants" (Creswell & Guetterman, 2018, p. 486). Further, reflexivity is "generally understood as awareness of the influence the researcher has on what is being studied and, simultaneously, of how the research process affects the researcher. It is both a state of mind and a set of actions" (Probst & Berenson, 2014, p. 814). Exposing researcher reflexivity, as someone who comes from a culture and a history, allows us to be transparent about the realization that your interpretation and understanding is only one of many possibilities, and that our reporting of these interpretations do not have any higher authority over others' (e.g., participants, readers). Often in ethnographic scholarship, the researcher will openly talk about their own culture, history, and experiences, and frame their discussion about their findings accordingly.

Francis et al. (2010) is one example from CBHL research, illustrating the researchers' conflict over their interpretations of the data in comparison to their participants' experiences and perspectives. In examining the perspectives from parents and teachers from Chinese CBHL schools in the U.K., they experienced a 'dilemma' where they were conflicted with their own perspectives and that of their participants. They were particularly troubled by the essentialist narratives coming from the participants when it came to their constructions of a fixed and transmittable culture and identity. In their discussion and conclusion, they revealed:

Our reading of these discursive productions as 'problematic' reveals our own political, theoretical and ethical constructions and investments that we bring to bear in our analysis: our analysis is informed by our feminist, largely post-structuralist, anti-racist, approach. But also—as two of us are White Britains and the other has lived for many years and undergone education in the US and Britain—our position is inevitably imbued with enlightenment constructions which impact our concerns with equality and so on [...] Relations of power between the White majority and the exoticized and minoritized

other... characterize the discursive environment in which these responses are produced; and we are attuned to the replication of such unequal and 'raced' relationships between White researchers and the researched in our study. (p. 115)

Nevertheless, the researchers stated their own interpretations of the findings based on their position and reflexivity, clearly indicating that they are "White researchers" coming from a "feminist, largely post-structuralist, anti-racist" framework. While they justify both their interpretations of the findings and the constructions of their participants through different means, it is important to note that having reflexivity means that our interpretations and conclusions are "often tentative and inconclusive" (Creswell & Guetterman, 2018, p. 486), and that new questions may arise from these discussions for readers to consider.

In my scenario, I have been extra careful and sensitive about my position with the CBHL school. As a doctoral student and researcher, I am constantly aware that despite being a second-generation Cantonese heritage speaker who myself attended a Cantonese school in my youth, various stakeholders may perceive me as an outsider coming into the school. However, I have also been able to build relationships with Rockland's community and stakeholders by volunteering with the school, by showing up to important meetings and social events, and by being a part of the school's advisory board. Thompson and Gunter (2011) inform us that the notion of the "insider-outsider" is multilayered and fluid, and that it can shift throughout the duration of the study. I have found this to be very true in my scenario because while I see many of the stakeholders as my own culture-sharing community, I am also aware that I am a researcher conducting an ethnographic case study on this community, and so I have had to straddle the line between my multiple roles and identities—as a doctoral student, researcher, Cantonese heritage speaker, board member, and community member.

My positionality in this ethnographic case study is what Herr and Anderson (2015) call an *insider in collaboration with other insiders*. This is because there are consistent power relations at play throughout my time being a part of this community, and that the participants of the study mostly see me as a non-parent insider who is working with them to help their school (this has been voiced to me by numerous participants). While I am a Cantonese community member, my position as a doctoral student from a renowned university, as an expert in HL education, as a board member with a close relationship with the administration team, among other hierarchical positions of power, I am fully aware that my various statuses may cause participants some hesitancy to share with me at times. However, I have done my best to make sure they are aware that I am here for the benefit of the school and that my various experiences and resources are at their disposal. As an ethnographer and a community member, I am aware that I am regularly engaging in this work as a *participant observer*—being both part of the research myself and being the researcher conducting the study, as well as developing close relationships with *key informants* (Herr & Anderson, 2015).

As I collected, analyzed, and report the findings of these studies, my participants and readers should be aware of my positionality and my biases toward Rockland. I want to be completely transparent that I am not an outsider detached from the research by any means, and I do not aim to appear completely unbiased in this work. This is my community, and I am very upfront that I want them to succeed, and so the data collection, data analysis, and reporting of this work is meant to be *for, with, and by* the community. Therefore, readers should know that my multiple identities that make me an insider of Rockland Cantonese School have granted me access to this community, and that my findings should be interpreted with that in mind. As previously mentioned, ethnographic case studies are typically conducted with the understanding

that our interpretations—as ethnographic researchers—are only one possibility that is based on our own history, culture, and experiences, and that our conclusions are often tentative (Creswell & Guetterman, 2018).

1.6 Organization of the dissertation

The remainder of the dissertation will be organized as follows: Chapter 2 (Paper 1) is a research synthesis on scholarship of Chinese CBHL programs or schools, Chapter 3 (Paper 2) utilizes the theoretical frameworks of investment and family language policy to examine the reasons behind why families making the decision to participate in a Cantonese CBHL school; Chapter 4 (Paper 3) is a conceptual paper on conducting a research-practice partnership between me (research partner) and a CBHL school (practice partner organization), emphasizing a need for programmatic and heritage language sustainability. Following the three main papers of the dissertation will be a discussion section that ties everything together and concluding statements.

Chapter 2 [Paper 1]: Chinese community-based heritage language schools: A research synthesis

Chinese community-based heritage language schools: A research synthesis

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Abstract

Heritage language (HL) education in the United States is greatly limited by mainstream or public spheres of world language education, which primarily caters to commonly taught languages (i.e., Spanish, French, German). Neglected by mainstream education, HL communities of less commonly taught languages (LCTLs) have had to sustained themselves through community-based HL (CHBL) programs. As Chinese-speaking communities continue to grow in the U.S., Chinese HL education has encountered many challenges. To have a better understanding of the context of Chinese CBHL programs, we need to consider the scholarship that has been conducted over the last few decades.

This research synthesis will give insight into numerous aspects of scholarship conducted in, about, or with Chinese CBHL programs in the U.S.—the region, the focal participants or stakeholders, the theoretical framework or methodology utilized, the language varieties of the programs. Further, it will highlight some common themes and gaps that still exist in the field. The purpose of this research synthesis is to answer the overarching research question: *What can we learn from past research conducted with Chinese CBHL programs?* More specifically:

- 1) What purpose do these programs serve?
- 2) What problems or challenges do these programs face?

Keywords (up to 6): Chinese, heritage language education, language maintenance, community-based schools, complementary schools, research synthesis

Introduction

Scholarship on heritage language (HL) education and heritage language learners (HLLs) have recently gained an immense and increasing amount of recognition in research while still being a relatively new field (Carreira & Kagan, 2018). This uptick is largely due to the increasing immigration in the United States (Ryan, 2013) and, with that, a steady increase of people speaking languages other than English. Fry et al. (2015) have projected that in the next five decades, immigrants and their children will increase from one-fourth to one-third of the total U.S. population. Previous studies of HL learning and teaching have predominantly been conducted at the university level and with Spanish in the United States. This should not be surprising considering Spanish is the most spoken community language other than English in the U.S., with 18.5% of the total U.S. population identifying as Hispanic or Latino (Dietrich & Hernandez, 2022). However, by 2065, the representation of heritage languages in the U.S. will change with immigrants from Asian countries likely to outnumber those coming from Spanish-speaking countries (Fry et al., 2015). That being said, Chinese is currently the second most populous community language in the United States (Xiao, 2016), with approximately 5.4 million identifying as Chinese American, according to Pew Research Center (Budiman & Ruiz, 2021). As this migrant population continues to grow, along with the “rise of China” (Duff et al., 2015; Zhou, 2019) as an “expanding geopolitical and economic power” (Duff, 2022, p. 261), Chinese as a HL (CHL) is becoming an increasingly important topic of research and practice, particularly in the context of where and how CHL is learned.

One educational setting where young Chinese American children can learn and participate in their heritage culture and language is community-based HL (CBHL) programs, also known as complementary or community language schools. However, these schools have

historically encountered numerous challenges when working with second+ generation Chinese American youth. In recent decades, there have been changes in the Chinese diasporic communities—with the new wave of Mandarin-speaking Chinese from Mainland China (or the People's Republic of China, P.R.C.) impacting language patterns of Chinese diasporas in the United States. This shift has led to reported evidence of denigration and stigmatization of CHL learners who do not speak the hegemonic variety—Mandarin Chinese, or *Putonghua* ('the common language'). Furthermore, prior studies have reported negative learning experiences in CHL classrooms due to pedagogical issues based on Confucian values (Clark & Gieve, 2006; Jin & Cortazi, 2006; Lawton & Logio, 2009) or social/cultural mismatch between teachers, who may come from and may have schooling experiences from China, and (Chinese) American students born or raised in the U.S. (e.g., Jia, 2009; Li & Pu, 2010; Liao et al., 2017; Xiang, 2016; Zhou & Li, 2015). Examples of Confucian-inspired models of teaching include teacher-centeredness, rote memorization, repetition and drills, and passive thinking, which are common pedagogical methods in many parts of East Asia. Moreover, Li Wei (2014) discusses how many CHL teachers have relatively short experiences living in the U.K., and in contrast, the British students who are ethnically Chinese in these programs have limited knowledge of China, often causing sociocultural tensions and conflicts between teachers and students in CBHL schools (Li Wei, 2014; Li Wei & Martin, 2009).

While there are numerous challenges in CHL education, these programs are vitally important to the sustainability, or maintenance, of Chinese culture and languages. This research synthesis aims to uncover what happens in Chinese CBHL schools with the goal of supporting *investment* and *sustainability* in CHL education for Chinese American youth. The research

questions this research synthesis aims to address are: 1) What purpose do these programs serve? and 2) What problems or challenges do these programs face?

Heritage language education

Heritage language (HL) education has long been studied as a form of language maintenance (LM) in response to language shift and contact. Fishman (1964) defined language shift and maintenance scholarship as being “concerned with the relationship between change or stability in habitual language use on one hand, and ongoing psychological, social or cultural processes, on the other hand, when populations differing in language are in contact with each other” (p. 32). In short, language maintenance refers to the policies and practices that are implemented to reverse language shift. Heritage language maintenance (HLM) generally refers to perceptions and behaviors related to the maintenance of a specific heritage language used by the immigrants who have cultural connections to this language other than the dominant language (Kelleher, 2010).

Heritage languages are “lost” once a generation becomes monolingual in the hegemonic language—English. Language shift and language loss most often occurs by the third generation in the U.S. but can happen as early as the second generation (Alba et al., 2002; Rumbaut, 2004; Rumbaut et al., 2006). This can occur differently between individual families, local communities, and larger diasporas. For example, some families may experience HL loss by the second generation, but other members of the local community may have maintained their HL; and further, one local community may have had no access to world/heritage language programs in their public schools or local community-based programs, but members from a diasporic community in a larger city may have had a lot more access to those resources. There are numerous factors that contribute to language shift and loss: immigration patterns, linguistic and

societal status, perception of instrumental value, resource availability, national and state-wide language policies, among others.

“Chinese” as a heritage language

Only in recent times has there been an interest and investment in Chinese language education. In Chinese HL scholarship, minoritized varieties of Chinese “have rarely been the explicit focus in heritage language research” (Jiang & Troyan, 2024, p. 135) With the *rise of China* (Duff et al., 2015; Zhou, 2019) and consequent interest in U.S.-China relations, ‘Chinese’ has become a popular and trendy language to study, and subsequently, more research has been conducted in Chinese language learning and teaching in the last few decades. However, this also comes with numerous complicated implications for CHL education. The ‘Chinese language’ is a complicated notion because, due to sociopolitical matters, it has become synonymous with the specific hegemonic variety—Mandarin Chinese, or *Putonghua* (the standard variety based on the Beijing dialect). The language label itself is problematic because, in reality, it encompasses seven or eight major dialects and many more minority varieties (Zhou, 2019), which are not mutually intelligible with *Putonghua*. Additionally, with the latest wave of migration from Mainland China, the de facto Chinese language taught in U.S. schools has become Mandarin Chinese. For Chinese schools, this is especially problematic because “Chinese” American children are coming into these (Mandarin) Chinese CBHL programs having little or no exposure to Mandarin at all.

The conflation of all Chinese varieties being consolidated into one Chinese language creates several complications as it pertains to CHL education. These unique complications have led to many CHL scholars’ investigation of how these issues impact CHL programs, teachers, and learners. In addition to the complexity of ‘Chinese’ variation, it is also critical to understand the sociohistorical context of language varieties within the U.S. and other overseas Chinese

diasporas. The status of what is considered ‘Chinese’ by default (i.e., holding more prestige or power) has a history related to migration that has changed the dialectal usage spoken within these overseas communities. Duff and Doherty (2019) illustrate the evolution of Chinese home dialects over time, which can be seen in Figure 3.

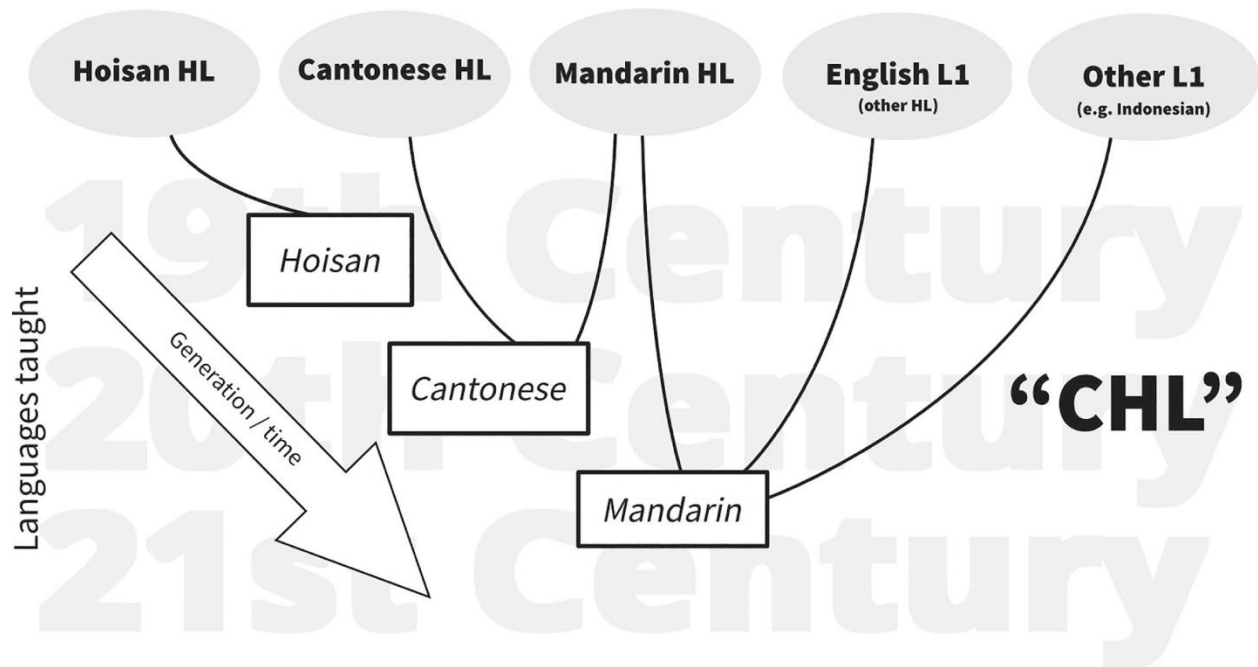


Figure 3. North American “Chinese” learners’ changing linguistic backgrounds/habitus (Duff & Doherty, 2019).

By the end of the 20th century, Mandarin gradually replaced Cantonese in these CHL programs, a sign of the “changing hierarchies amongst varieties of the Chinese language as a result of the rising politico-economic power of mainland China” (Li Wei, 2014, p. 166). By the mid-1990s, approximately “eight out of ten pupils in Chinese schools were taught in Mandarin; Cantonese remained the language of instruction for only one of every eight students (Lai, 2004)” (as cited in Liu, 2010, p. 2). Given the current trend of continued increasing migration from Mainland China and the *rise of China* (Duff et al., 2015; Zhou, 2019), many CBHL programs teach Mandarin exclusively, or on rare occasion, offer Cantonese as an option (Duff et al., 2017), which differs from the dominant variety of Chinese CBHL schools just a few decades ago. This has resulted in many Chinese families “enroll[ing] their students in Chinese heritage schools

even though Mandarin is not their home or community language. In such cases, Mandarin may function as a “surrogate” heritage language, which can connect ethnic Chinese children with Chinese culture” (Wiley, 2014, p. 20).

Community-based heritage language schools

Community-based heritage language (CBHL) schools are typically “non-profit organizations founded and operated by parents from the respective immigrant or heritage language community for the purpose of maintaining and teaching the language and culture of their heritage” (Coalition of Community-Based Heritage Language Schools, 2018, para. 1). There are several types of CBHL programs that currently exist in the U.S.: weekend programs, religious-affiliated programs, after-school programs, language camps, expatriate schools, and online programs/tools (Lee & Chen-Wu, 2021). These programs have also been referred to as Saturday/Sunday schools, weekend schools, ethnic schools, mother tongue schools, community schools, and complementary schools.

The goals of these programs are to prevent HL loss and promote intergenerational HLM, and while there are many challenges with existing CBHL schools and within specific language communities (see previous sections), they are vitally important to the sustainability of HLs in the U.S. because mainstream world language education rarely offers opportunities for bilingualism with less commonly taught languages (LCTLs), or “languages other than English and the commonly taught European languages of German, French and Spanish” (The National Less Commonly Taught Languages Resource Center, n.d.). Even dual language and immersion (DLI) programs, for which there are more than 3,600 program across 44 states (as of 2021), primarily operate with teaching Spanish ($N=2936$), Mandarin Chinese ($N=312$), and French ($N=182$), along with English (American Councils Research Center, 2021). In other words, nearly 97% of

DLI programs, which only account for under 3% of all public K-12 schools (based on National Center for Educational Statistics data), teach only these three languages—and typically the standardized, hegemonic variety of those languages. Therefore, these CBHL schools “have long existed to fill this void and help maintain immigrant languages and cultures” (Beaudrie, 2016, p. 81). Unlike world language programs that are a part of the mainstream educational system, CBHL programs typically do not have a standardized curriculum and are not subject to the regulations of public K-12 education. The curriculum, materials, and assessments used in these programs are decided by the individual programs themselves, with many using materials created outside of the local context (e.g., Cantonese schools using textbooks from Taiwan for traditional characters).

Chinese CBHL schools (or ‘Chinese schools,’ as they are commonly referred to) have existed in the U.S. since 1886, when the first Chinese language school was established in San Francisco, CA (Liu, 2010). Until the early post-WWII decades, the Chinese American diasporas were predominantly Cantonese speaking, so most Chinese CBHL programs in the U.S., and in other countries with large Chinese diasporas, primarily taught Cantonese (Pan, 1997). According to Wong and Lopez (2000), the original purpose of these CBHL schools in the late 19th century and early 20th century was to promote patriotism toward China and to educate immigrant children about Chinese language and culture in preparation for their eventual return to the homeland. Predictably, these goals conflict with who the CHL students attending these schools usually are—that is, second+ generation Chinese *Americans*. Chinese CBHL programs can also be problematic in that they have historically have a reputation of practicing monolingual language ideologies in an attempt to “replicat[e] the language repertoires of the first generation” (Song, 2018, p. 3). They often engage implicitly in “one language only (OLON), usually the

minority ethnic language of course, or one language at a time (OLAT)... treat[ing] the pupils as if they were the same as those from their ancestral countries” (Li Wei, 2014, p. 164-165). In sum, the ideologies present in these CBHL programs have traditionally encountered numerous conflicts between those who operate or teach the program and the students who attend them. It is therefore important to understand what we can learn from past research conducted on, with, or in CBHL programs. More specifically, this research synthesis aims to address the following research questions: 1) What purpose do these programs serve? and 2) What problems or challenges do these programs face?

Methodology

Data collection

Using academic databases (e.g., EBSCOhost: Academic Search Ultimate, Education Source, ERIC, Psychology and Behavioral Sciences Collection), this research synthesis was conducted by using a combination of search terms for CBHL programs and Chinese language varieties (see Table 3). This resulted in limited findings related to the search terms and search criteria, so subsequently, Google Scholar was used with these search terms, leading to a more comprehensive search result. After finding all relevant articles in both search methods, I then used a snowball method, or a backward reference search, by finding articles in the References section of each paper. This allowed me to find additional articles and book chapters that were relevant to Chinese CBHL programs and schools, which did not show up in the search.

Table 3. Search terms.

CBHL programs synonyms	Language (variety)
community (language) school OR heritage (language) school OR complementary (language) school	Chinese OR Mandarin OR Cantonese OR Taiwanese

Note: Terms searched using (AND) between each category.

To further narrow the selection of final articles used in the synthesis, the collection of studies were filtered with the following criteria: 1) the paper must be an empirical study; 2) the study must be published in a peer-reviewed research journal; 3) the study must be published after 2000, which is when a lot of the contemporary scholarship on heritage language studies began (e.g., Brecht & Ingold, 2002; Peyton et al., 2001); 4) the study must be relevant to stakeholders in the CBHL context and not in the context of K-12 foreign/world language education, dual language/bilingual education, or tertiary foreign/world language education. The exclusion criteria helped narrow studies that were relevant to the current study, in that they were empirical studies: 1) conducted on a Chinese language variety; 2) conducted in, on, or with a community-based heritage language school and not other contexts. This research synthesis included 19 studies, published between 2001 and 2025, in the analysis.

Data analysis

After finding the studies (N=19), thematic analysis (Braun & Clarke, 2006) was conducted to find thematic codes related to the research questions. In line with Braune and Clarke's (2006) thematic analysis phases, I first familiarized myself with the data, or the peer-reviewed empirical studies (Phase 1: Familiarize yourself with your data), and then generated initial codes with excerpts and descriptions attached (Phase 2: Generating initial codes), while simultaneously organizing them into the research questions. As I began to look through each code and their attached excerpts, I began searching for tentative, emergent themes (Phase 3: Searching for themes) related to the research questions. When reviewing the tentative themes and the initial codes, I began mapping and defining the codes and naming the thematic categories, revising along the way (Phases 4: Reviewing themes, and 5: Defining and naming themes). This last phase was an iterative and recursive process as it required going back to sources and

redefining codes and thematic categories. The results of these cycles of thematic analysis can be found in the findings below (Phase 6: Producing the report).

Findings and Discussion

In the findings, I will first discuss the general characteristics of the studies included in the research synthesis, which can be found in Table 4. After which, I will synthesize the research studies in response to the research questions. The location with the highest number of studies conducted on Chinese CBHL programs were in the Mid-Atlantic and Southwestern regions of the United States (N=6 each), followed by the Northeastern U.S. (N=4), Midwestern U.S. (N=3), Southeastern and Southern U.S. (N=2 each), and Western U.S. (N=1). While most studies focused on a Chinese CBHL school(s) in one region, some published articles were cross-regional study (looking at multiple CBHL programs) or were in a city that overlaps between regions (e.g., Philadelphia is considered both Northeastern and Mid-Atlantic). Additionally, published articles may have used the same data from a larger project and were therefore in the same region. For example, Zhang (2010, 2012) and Zhang and Slaughter-Defoe (2009) were three separate published articles on the same larger ethnographic study (and were counted three separate times).

For languages and language varieties that were included, there were a total of 25 mentioned target languages (and varieties) of the ‘Chinese’ CBHL programs, with some studies indicating two or more language varieties. The most common language variety of focus in these studies was ‘Mandarin’ (N=15), which included three studies that specifically mentioned ‘Taiwanese American speakers of Mandarin’ (Lawton & Logio, 2009; Liao et al., 2017; Wu et al., 2011). Five studies simply studied CBHL programs of ‘Chinese’ with no specific language variety. Three studies mentioned both ‘Mandarin’ and ‘Fujianese’ (N=3; Mandarin included in previous N), and two studies mentioned both ‘Mandarin’ and ‘Cantonese’ (N=2; Mandarin

included in previous N). In the latter, again, Zhang (2010, 2012) and Zhang and Slaughter-Defoe (2009) were part of a larger ethnographic study conducted on the same population in Philadelphia (triple-counted).

For the target stakeholders that were investigated in each study, a total of 36 different stakeholder groups were mentioned, with 13 of the 19 included studies indicating two or more stakeholder groups. It should be noted that administrators or teachers in many CBHL programs play a dual role as a parent, as is noted in some studies included in this synthesis. The most common stakeholder groups examined were ‘Parents’ (N=11) and ‘Teachers’ (N=9) of the Chinese CBHL programs, followed by ‘Students,’ or HL children (N=8), ‘Administrators’ (N=5), ‘Grandparents’ (N=1), and ‘Past Students’ (N=1). Again, Zhang (2010, 2012) and Zhang and Slaughter-Defoe (2009) investigated both Parents and HL Children (Students) stakeholder groups in their two studies (triple-counted).

The theoretical or conceptual frameworks varied by each study, and therefore no meaningful patterns or counting could be done for these. Each framework can be found in the fifth column of Table 2. Lastly, the research methodology used for the studies were predominantly ‘Qualitative’ (N=16), which included ‘Ethnography’ (N=6; triple-counted for Zhang, 2010, 2012; Zhang & Slaughter-Defoe, 2009), ‘Case Study’ or ‘Multiple Case Study’ (N=5), ‘Narrative Inquiry’ (N=1), ‘Conversation Analysis’ (N=1), and no mention of specific methodology—simply stating qualitative methods (N=3). Two of the studies included were Mixed Methods studies (You & Liu, 2011; Zhu et al., 2020). One research article (Fang, 2015) had no explicit methodology mentioned, nor was it clear what they did to collect data for their study. This study simply investigated and provided detailed, and quite informative, descriptions of various suburban “Chinese” schools in the Mid-Atlantic region of the United States.

The next sub-section of the findings will attempt to respond to the overarching question: *What can we learn from past research conducted with Chinese CBHL programs?* For each research question below, the responses were thematically organized and synthesized with examples from the various empirical studies.

RQ 1: What purpose do these programs serve?

The first research question aims to get at the primary purpose that various stakeholders view for Chinese CBHL schools, rather than for learning Chinese as a HL broadly. As described in the introduction, these Chinese CBHL schools claim to serve purposes of intergenerational transmission and preservation of Chinese *culture* (i.e., history, values, practices) and *language* (i.e., oral, aural, literacy) (He, 2004; You & Liu, 2011; Zhou 2014) in order to prevent language shift and promote language maintenance (You & Liu, 2011), but that is further complicated, depending on which stakeholder group this question is asked. There were two larger thematic categories that arose throughout the 19 studies responding to RQ 1: 1) for bilingual and bicultural (ethnic) identity development, and 2) to develop Chinese literacy skills (e.g., print literacy).

Bilingual and bicultural identity development

While nearly all the studies described the various purposes and importance of learning Chinese as a heritage language (e.g., communicating with grandparents, future job prospects, etc.), the first RQ is attempting to answer what the purpose of the Chinese CBHL programs are. Many studies found the Chinese CBHL space to be one that is representative of a hybrid or third space (Bhabha, 1994). Rather than the initial intentions of these Chinese schools, which was to transmit Chinese language and culture onto the next generation, these studies have described this hybrid space as one for bilingual and bicultural identity development of both the HL students and

in some cases for parents and teachers. Whereas first-generation parents and teachers tend to be more connected with the target HL culture, He (2004) has pointed out that HL students “have a dual and dubious identity as people who are both similar to and different from members of the target heritage culture because they are socio-historically connected with the target heritage culture yet experientially displaced from it” (p. 575). Similarly, Song (2018) asserts that in the context of the two “Chinese” schools in the SF Bay Area, these programs are not just sites of CHL transmission between one generation to the next, but rather, the participants of the schools are questioning, reinventing, and appropriating what being “Chinese American” means, particularly in schools that navigate “emergent, hybrid language practices” and identities with Mandarin CBHL programs for Cantonese HL communities (p. 18).

In another study, Li and Pu (2010) highlight the tensions in interactions between Chinese teachers and Chinese American students in a CHL classroom at a local school in Southwestern United States. Using conversation analysis (CA), they argue that it is not simply that Ms. Zhou, the CHL teacher, attempted to enforce these cultural norms into students, but using CA, the author illustrates how complicated and co-constructed these thematic findings are regarding intercultural competence. For example, in power relations, the classroom excerpts illustrated that power was actually negotiated between Ms. Zhou and her students and that she “did not always hold ‘power’ as expected by the Chinese norms of teaching” (p. 135). Despite her interview response expressing frustration on her students’ disorderly behaviors, she did not have a concrete plan when tensions or conflicts arose in the classroom. Similarly in the other two themes, while Ms. Zhou attempts to enforce traditional Chinese norms, the students regularly negotiated, sometimes contentiously, by pushing back against her requests for them to behave “Chinese.” In framing their study under the framework of intercultural competence (ICC), they conclude that

“the goal of CHL schools should not be limited to teaching and maintaining Chinese language and culture but extend to build up Chinese American students’ intercultural competence. In order to achieve this, it is also necessary to help CHL teachers develop their intercultural competence” (p. 140). This study demonstrates that the CBHL space is not only designed for the bicultural and bilingual identity development of Chinese American students but also for other stakeholders, like teachers, who are involved in the program.

Similarly, and in the same region of Southwestern U.S., Cun (2024) found that in the context of an online Chinese CBHL classroom (during COVID-19), Chinese CBHL programs are multilingual spaces that provide opportunities for bilingual children to engage in translanguaging practices—a pedagogical model for teachers to reconsider CHL education and promote bilingual children’s language learning and identity construction. The teacher in this study, Ms. Yan, utilizes translanguaging pedagogy purposefully to engage bilingual children’s full linguistic repertoire and to create translanguaging space. This is also demonstrated by Ms. Yan’s understanding that her students are coming to the (virtual) classroom with varying degrees of proficiency, so she intentionally uses translanguaging practices to ensure that all her students are able to participate.

In a larger ethnographic study, Lu (2001) studied the cultural identity development of third-wave Chinese immigrant parents about their HL children. The results were organized among themes that aligned with each of the questions asked. The interview data illustrated that, while this specific community of new wave immigrants from Mainland China desires cultural preservation, bilingual identity development, biculturalism, and an engagement with larger society, they explicitly mentioned that they did not want to be associated with the identity of “old school” Chinatown, which deemed as “very isolated from the rest of society,” where people “do

not speak English and receive very little education” and are “traditional and old-fashioned” (p. 213). The author concludes by emphasizing that these participants did not wish to isolate themselves from greater society but, in fact, made a conscious effort to develop biculturalism for their children. While earlier Chinese immigrants were restricted in their identity development and deprived of their voices due to ethnic separation, resulting in their isolation into Chinatowns, the new wave immigrants from Mainland China, often coming from higher socioeconomic status, tend to be more “globally oriented” and free to “create their own discourses and articulate their own experiences” (p. 217). This exclusive ideology and attitude, influenced by the different immigration wave and socioeconomic status, will be discussed further in RQ2. However, in this study, rather than the teachers’ development of bilingual or bicultural identity, the parents in this study were being socialized into American culture as well, expressed by one parent: “The function of the Chinese school is not simply kids learning about Chinese characters. In a multicultural America, we must be bilingual and bicultural. The Chinese school helps us reach this goal” (p. 213). This illustrates that the purpose of the Chinese CBHL school is beyond just HL children’s ethnic identity development but also for community members to be socialized into their bicultural identities as well.

From the administrators’ perspectives, two studies (Sun & Kwon, 2025; You & Liu, 2011) found that these schools really do more than just teach Chinese language(s). In the Phoenix metropolitan area, You and Liu’s (2011) mixed methods study found that the principals of several Korean and Chinese CBHL programs expressed the view that the schools’ role was focused more on the nonlinguistic development—that is, to promote students’ “sense of cultural ethnic identity, and develop character” (p. 365). Sun and Kwon (2025) found in their study with administrators that their Chinese CBHL program also acts as a *counterspace* (Solórzano et al.,

2000) that sustains transnational social capital, facilitates civic and political socialization, engages HL children in positive identity development. Beyond language and culture, they found this space also participated in “organizing events to share information about elections, creating an online chat group to foster immigrant families’ knowledge and resource sharing, and organizing cultural events not only for immigrant families but also for a broader community” (Sun & Kwon, 2025, p. 14).

Lastly, some scholars found that another purpose of Chinese CBHL related to bilingual and bicultural identity was for co-ethnic socialization. Fang (2015) discovered that some stakeholders, such as one alumna student in their study, felt that the program she attended as a child helped forge an ethnic identity and bond with other co-ethnic children. Another, Teddy Lu, shared that “[s]ome of my best friends in life to this day are folks who I met at [RCS]... Personally, I think it was a time well spent for me as it was a place where you could ... figure out with other kids your age how to fit into American society” (p. 63). Further, the author found that the stakeholders in the CBHL programs she investigated believed that these “schools acted as sites where American culture and Chinese traditions intermingled and where classroom instruction and social interaction were of equal importance” (p. 67). Zhang’s (2012) study also revealed that the first-generation, recently arrived Chinese immigrant parents identified other co-ethnic Chinese immigrants as their significant ties and distinguished them as “friends” as opposed to “non-friend acquaintances” (p. 211). This friendship qualification was also seemingly influenced by language issues that were encountered by the first-generation immigrants from Mainland China with non-Chinese-speaking Americans. This co-ethnic socialization was one where immigrant families seek “emotional solace in the same cultural heritage while living in the culturally different host society” (p. 212). However, Zhang does warn that just because a

seemingly “co-ethnic” group of people coming from the “Chinese” diasporic community does not indicate that all Chinese immigrants are the same, a challenge for CBHL programs that will be discussed later in RQ 2.

Developing Chinese (print) literacy skills

Another subtheme that emerged in reviewing the literature was that these Chinese CBHL schools are designed to help develop literacy skills. As part of their larger dissertation study, Jia (2009) examined the HL literacy teaching practices of three instructors at a Mandarin Chinese CBHL program in Southwestern U.S., as well as the perspectives of the instructors and parents on HL teaching and learning. All participants felt that the purpose of the school was to socialize values onto children through print literacy. For example, one teacher, Mr. Guo, saw literacy “as an avenue toward the development of values, i.e., as a means, not an end...” (p. 69). Through highly different methods, the CHL teachers in this program had varying approaches to teaching Chinese literacy in this context, which we will further explore in RQ 2. The parents did not really care about how much or how well the students learned Chinese. Rather, they put more importance on the values that were being passed down onto their children (e.g., the importance of being hardworking and thrifty). The author concludes the article by stating that Chinese literacy learning is “inextricably linked to a long complex history of educational and cultural practices, traditions, and perspectives,” which creates a discrepancy between the traditional and contemporary teaching approaches of CHL educators (p. 73). She continues to say that CHL teaching is about more than just language, and that HL educators are placed in difficult positions as they navigate between worlds of Chinese literacy instruction for CHL youth.

Liang and Shin (2021) discovered that it is not always the case that parents, or other stakeholders, cared much about students’ literacy development. Framed under family language

policy (FLP), they found that many of their parents did not put much importance into reading or writing Chinese. One parent, Penny, “did not expect her children to write Chinese characters and essays. However, she stressed the importance of oral communication, expecting her children to communicate smoothly in Chinese” (p. 27). Penny’s HL daughter, Elsa, also echoed the sentiment that “writing Chinese was of the least importance... asserted that Chinese character writing as more important for Chinese children in China than those in the United States, foregrounding her Chinese American identity” (p. 27). On the other hand, a parent from another family, Sandy, emphasized the importance of all four language skills in Chinese, but differentiating between the importance of typing rather than handwriting Chinese characters. Sandy felt that learning written Chinese is much easier to learn these days with digital technology, which is assisted by being able to identify and select characters based on sound (i.e., pinyin), rather than traditional rote memorization.

To return to the original research question (RQ 1: *What purpose do these programs serve?*), empirical scholarship based on various stakeholder voices in Chinese CBHL programs has demonstrated that these *counterspaces* (as labeled in Sun & Kwon, 2025) go beyond the simple purpose of intergenerational transmission of language and culture from grandparents and parents to HL children. In fact, these studies found that it is a hybridity (Bhabha, 1994) that these schools are attempting to nurture—a multilingual, translanguaging space for CHL youth to discover and develop their bilingual and bicultural identities (Cun, 2024; Song, 2018). Furthermore, a couple of studies discovered that it was not only the students that were constructing their hybrid identities but also parents (Lu, 2001) and teachers (Li & Pu, 2010) who were being socialized into their own bilingual and bicultural identities. In each of these studies, the scholars found that identity was a major factor and reason for Chinese CBHL programs and

schools to exist, and that co-ethnic socialization was vitally important for positive ethnic identity development (Fang, 2015; Zhang, 2012). Finally, a few studies also mentioned that print literacy was another goal for these school as a method for teaching values (Jia, 2009), although this was not necessarily the sentiment for all stakeholders involved (Liang & Shin, 2021). Needless to say, these Chinese CBHL programs also encounter numerous complications as they attempt to fulfill these meaningful purposes, which will be discussed in the next section.

RQ 2: What problems or challenges do these programs face?

When combing through the literature to identify challenges that Chinese CBHL programs face, three thematic categories emerged: 1) diversity challenges; 2) pedagogical and sociocultural tensions; and 3) operational issues.

Diversity challenges

Prior research suggests that the most significant of the challenges that Chinese CBHL programs face is that of diversity. While *diversity* itself is not an issue, it does bring many challenges that Chinese CBHL program deal with pertaining to their operations. This thematic category will further be broken down into different types of diversity-related challenges: sociopolitical issues, language diversity, socioeconomic diversity, and racial or ethnic diversity.

Sociopolitical issues. In the first set of diversity issues lies the issues related to the language label of *Chinese* (Wong & Xiao, 2010) and how the notion of this language has been extrapolated and conflated to belonging to forcefully standardized form of a language in a single nation—that is, the common language, *Putonghua* (Mandarin Chinese), belonging to People’s Republic of China. These sociopolitical and boundary-drawing issues have caused conflicts within Mandarin Chinese CBHL programs. For example, Fang (2015) described how parents, school officials, and other school organizers would translate and inscribe “their political and

national allegiances into school curricula,” exacerbated by sociopolitical issues between those from China and Taiwan: “Because the conflict between mainland China and Taiwan politicized many aspects of Chinese society and culture, the infusion of political beliefs into heritage language education often happened without any explicit intention of politically indoctrinating the students” (p. 64). However, they noted that all schools had political affiliations, although some schools made an exerted effort to stray away from political or national affiliations and instead to focus on *Chinese* language and culture. However, when it comes to the erasure of minoritized varieties of *Chinese* that is intentionally conducted by the P.R.C.’s language policy and planning (LPP), it is arguable that any form of Chinese language education is inextricably political. For example, Taiwanese schools teaching Mandarin, will choose to use materials and textbooks from their own government for a number of reasons. In You and Liu’s (2011) comparative study between the Chinese and Korean schools, they found one Chinese parent discovered that the Taiwanese government materials supported HL teachers with resources and training, whereas textbooks from Mainland China were generally lacking in relevance and they did not provide training in teaching HL. It is not only the materials and resources of “Chinese” that are politicized but the content, the script, and even the language variety being taught in CBHL schools that is politicized, which leads to the issues of language diversity.

Language diversity. Historically, China as a nation has encountered numerous issues with language diversity, both in written and spoken form. In fact, it took many decades after post-Qing Dynasty, modern China (then, Republic of China) of attempting to unify a greatly diverse country through language standardization. In 1949, the People’s Republic of China was created, and the P.R.C. attempted a Soviet-model multinational state building, recognizing 55 minority ethnic groups, that is, until the mid-1990s to present. Attempt to promote economic

development and mobility, China's new model of language order became one nation with diversity and *Putonghua* as the national language for all (Zhou, 2019). However, Chinese language diversity still exists, despite great efforts by the P.R.C., and these issues have extended to overseas Chinese diasporas that migrated out of Mainland China, Hong Kong, Taiwan, speaking various language varieties that may or may not be mutually intelligible with *Putonghua*. This set of diversity issues will synthesize studies that address language diversity—both of language variety and of written characters (i.e., traditional vs. simplified).

In Fang's (2015) study suggests that the choice of using traditional vs. simplified characters was indeed a matter of politics in the local CBHL schools. In fact, many schools even split because of these tensions, noting that there were many CBHL schools in the area that catered to Taiwanese students more at the time of their study, and so many from Mainland China ended up leaving and starting their own school. The author shares that, Tommy Lu, the then current principal of the Chinese School of Delaware, explained the two schools in tension “do recognize differences. And we do accept those differences. But we have an unspoken agreement: those things we cannot settle, we do not talk about. If we can collaborate [on the Chinese culture festival], we will” (p. 72). While stakeholders may feel very strongly about these issues, humility and saving face are major cultural dispositions for most Asian cultures, and evidently, this deeply politicized nature of the *Chinese* language can indeed be swept under the rug.

Li's (2005) study of Chinese CBHL schools in the metropolitan Phoenix area found that the language variety of the local Chinese community that attends each school determines what form of written and oral Chinese is taught at a particular program. They found that two of the six Mandarin schools taught simplified character instruction, two provided both simplified and traditional character instruction, one offers both Cantonese and Mandarin, and one focuses on

traditional Chinese writing and Mandarin speaking. Wu et al. (2011) shared in their study that even parents were indecisive about whether to use *Zhuyin* (Bopomofo) or *Pinyin* due to having increased number of non-heritage learners in the program, another diversity issue that will be discussed in a later section.

However, it is not just the written character form or the transliteration system for Mandarin Chinese pronunciation that is problematic within Chinese CBHL schools, it is also the very language variety that can be problematic. Song's (2018) study comparing two Chinese CBHL schools in the San Francisco Bay Area highlights the tensions of heritage language surrogacy with one specific school (Saint John's), which questions, despite it being a Mandarin-focused CBHL school, what really is the heritage language at this community—Cantonese or Mandarin? HL surrogacy (Wiley, 2014) is when a HL family or community attempts to promote HLM by learning a HL that is as close to their home language (variety) as possible. For example, in Zhang and Slaughter-Defoe's (2009) study, they discovered that "[a]lthough most of the Fujianese parents spoke Fujianese as their first language, they nonetheless emphasized the importance of maintaining Mandarin in their children" and further explaining that "[t]he emphasis is partly due to the superiority of Mandarin over Fujianese as the national, standard language of power in China that has more speakers, and partly attributed to the fact that Fujianese exists only in the spoken form" (p. 83). This is the case for most Chinese varieties, where Mandarin is the only Chinese language variety that has the P.R.C. has invested in having a single corresponding written form, conveniently reinforced by the 2000 National Common Language and Script Law. However, as is indicated in Song (2018) and Zhang and Slaughter-Defoe's (2009) studies, the language variety of choice is also tied to recent migration from

Mainland China of Mandarin-speaking immigrants who come from higher socioeconomic status, as opposed to previous immigration waves that came from necessity rather than flexible choice.

Socioeconomic diversity. With the P.R.C. becoming increasingly prosperous over the last three decades, immigrants from Mainland China have rapidly migrated to the U.S. with higher educational and socioeconomic status. While this is related to “Chinese” immigrants, immigrants from Chinese-speaking backgrounds migrated with different waves, for varying reasons, and from a diversity of cultural and linguistic backgrounds. For example, Zhang’s (2010, 2012) study found that in the Greater Philadelphia area, there were two distinct separations of socioeconomic status—Mandarin-speaking parents from Mainland, on the one hand, who achieved high functional bilingualism due to their socioeconomic and educational status and “followed a pattern of young scholar or professional coming to the United States to seek higher academic degrees or better career development opportunities” (Zhang, 2012, p. 209), and Fujianese parents, on the other hand, who had disadvantageous educational and socioeconomic backgrounds and “spoke virtually no English at all” (p. 49). The latter immigrant group largely migrated to the U.S. in the 1980s and 1990s, prior to China’s economic boom and only shortly after opening its doors to outside world in the late 1970s. Many of the Chinese-speaking immigrants prior to the *rise of China* (Duff et al., 2015; Zhou, 2019) had little to no exposure to English language education, unlike the newly-arrived generation of immigrants (at the time of this study), who have had access to English language education from a very young age, along with higher level of human capital to help them learn it. Furthermore, the working-class Fujianese parents in this study perceived their “inability to speak English as the key factor that prevented them from participating in mainstream society” (pp. 54-55). They therefore were more likely to put their children in public schools to learn English well in hopes of achieving

social mobility, and subsequently, further themselves from Fujianese, which held low social status and deemed inferior by the parents. In their later study with the same participants, Zhang (2012) pointed out a clear demarcation between these two similarly ethnic “Chinese” groups that held different social statuses within the Chinese diasporic community. In the words of one of the Fujianese mothers: “We are different animals” (p. 214).

Similarly, Song (2018) highlights the vast socioeconomic differences between a Chinese CBHL program in Silicon Valley and Chinatown, where community resources are highly disparate within the co-ethnic community of a highly diverse “Chinese Americans.” This also leads to major pedagogical differences:

Among an affluent community [Silver Hills], formal learning takes the form of play, experimentation, and constructivist activity where students are encouraged to display individual creativity, while among poor and working-class communities [Saint John’s], it takes the form of ordered, disciplined activity, emphasizing teacher-student relations over student-student ones” (p. 19).

While both considered “Chinese” CBHL schools, Silver Hills and Saint John’s is essentially two different communities, from different socioeconomic statuses and immigration waves.

Racial or ethnic diversity. As mentioned briefly in Wu et al.’s (2011) study, there is also increasing racial or ethnic diversity with mixed-raced/-ethnic families entering Chinese CBHL programs, and there are also third+ generation CHL students now entering these programs as well. Lawton and Logio’s (2009) study on parental perspectives of a weekend Chinese CBHL school run by the local Taiwanese community in the Mid-Atlantic region of the U.S. indicates that with changing demographics, there are different needs from different sets of parents (HL vs. non-HL), and schools will have to serve a more diverse student body. In their study, the school was organized into two separate tracks: Track A was designated for children whose parents selected that they were HLLs, and Track B was for children whose parents selected that they

were non-HLLs. They conclude by reiterating that these schools are vitally important because “with the increase in non-HLLs because of adoption and inter-racial marriages, schools that offer Chinese instruction will serve a more diverse student body” (p. 153). Song’s (2018) mentions that the more affluent school (Silver Hills Learning Center) in the suburbs of Silicon Valley as having more multi-racial or mixed-ethnicity students, allowing more resources and pedagogical training for teachers to teach with creativity and play; whereas the less-resourced school (Saint John’s Chinese Language School) which lies in a major Chinatown and serves primarily Chinese-origin students who come from Cantonese backgrounds, with some from Taishanese or Mandarin backgrounds, has a more traditional method of CHL teaching.

Although not mutually exclusive, the previously mentioned diversity challenges are correlated with having higher diversity of proficiency-levels as well, which is another challenge for Chinese CBHL schools. As one teacher in Cun’s (2024) study voiced:

If I use only Chinese all the time, it can waste time. In my class, I have students who are at the advanced level of Chinese language, but I also have emergent heritage language learners. I need to include them (emergent heritage language learners) in class and consider their need. (p. 12)

High variation of proficiency levels across similar age groups means that CHL teachers in Chinese CBHL classrooms—mixed with both advanced Chinese users and emergent HLLs—need to consider all the needs of these highly variable HL students. This can be difficult to manage, particularly because many teachers in these programs are typically volunteers with high proficiency in the target language variety and not professionally trained language educators.

Pedagogical and sociocultural tensions

In this theme, we address another major challenge that Chinese CBHL programs have faced—pedagogical and cultural mismatch between first-generation *Chinese* teachers and second+ generation *Chinese* American students. Numerous studies have identified teaching

styles and cultural tensions between different schools and even with different teachers within the same program. Many of these classroom tensions come from the fact that much of Chinese education, textbooks, and cultural content follow traditional Confucian values (Clark & Gieve, 2006; Jin & Cortazzi, 2006; Lawton & Logio, 2009), which have “definitive views on parental control, obedience, strict discipline ... respect for the elder, care for the younger...” (p. 130). While this may be an essentialist perspective of Chinese culture, it is evident in some scholarship that CHL teachers in Chinese CBHL programs do embrace this pedagogical approach in their classrooms.

In a qualitative study on Chinese and Taiwanese adults, Liao and colleagues (2017) found that even though HL children who are now adults may show hindsight appreciation for their parents forcing them to attend Chinese schools in their youth, they nonetheless all have trauma-laden experiences of unaligned pedagogical practice that is driven by Confucian values (i.e., teacher-centered, authoritarian classrooms that focus on drills and rote memorization). In Liang and Shin’s (2021) family language policy study, parents expressed that the Chinese CBHL school was “boring” because of the tedious and outdated teaching style, with one parent expressing that “children were routinely forced to do unwanted assignments from the CHL school” (p. 29).

Even within the same Chinese CBHL school (Lu Xun Chinese Heritage Language School), Jia (2009) discovered that there were separate approaches to teaching from three teachers that they observed: on the one hand, a student-centered approach (Ms. Meng and Mr. Guo), which encouraged group discussion of meanings conveyed in the texts rather than emphasizing repetition and rote memorization; and on the other, a teacher-centered approach (Ms. Young), in which the teacher dominated by lecturing most of the time. Ms. Meng and Mr. Guo were observed as using contemporary teaching practices that centered the students’

experiences, interests, and needs. Their perspectives on HL literacy teaching came from their own educational experiences, which impacted how they taught their classes. Ms. Meng, for example, experienced many group activities aimed at understanding and expressing ideas, rather than traditional methods, like “reciting and copying the text” (p. 68). Mr. Guo saw literacy as a way of developing values and felt that it was his job to raise their awareness of racial issues to combat discriminatory language that the students showed. On the other hand, Ms. Young taught in a traditional, teacher-centered manner where she dominated the classroom with teacher talk, using mechanical drills (e.g., character writing, reading and reciting texts, and doing assignments out of the textbook). She perceived that “memorization was necessary when students were not motivated in learning, and to some extent, it was the “memorized” text such as a poem, proverb, and fable that lasted forever” (p. 69). Ms. Young implemented this traditional teaching style because it was how she grew up learning from her father in the 1960s in a small county in northwestern area of China. The author concludes the article by stating that Chinese literacy learning is “inextricably linked to a long complex history of educational and cultural practices, traditions, and perspectives,” which creates a discrepancy between the traditional and contemporary teaching approaches of CHL educators (p. 73). CHL teaching is about more than just language; CHL educators are often placed in difficult positions as they navigate between worlds of Chinese literacy instruction and all the lived histories that come with Chinese American students.

In Li and Pu’s (2010) study, they found that Ms. Zhou, despite not behaving in a “traditional” authoritative manner, as aligning with traditional Chinese pedagogy, did draw a contrast between how she expected students to behave (obediently) and how they actually behaved in their mainstream classrooms (freely). However, Ms. Zhou never really knew how to

“maintain control” of her classroom, and instead just redirected “disobedient” children to other topics and also attempted to promote student-centered approaches to classroom dynamics, despite feeling that students were “misbehaving.” While Ms. Zhou expressed a traditional belief about what Chinese education entails, she also understands that these students need to be motivated to learn and participate and not scare them away with strict practices, thus the role of the classroom can be seen as more a site of symbiotic learning of intercultural competence—where both teachers and students are learning and negotiating their roles together.

In many schools, textbooks and materials often resemble a cultural mismatch between what children from China or Taiwan are learning and what Chinese or Taiwanese American children are interested in. Li (2005) found content numerous content issues with textbooks from Mainland China or Taiwan, sharing in their discussion:

Students growing up in the United States are baffled when they see a picture in a textbook depicting an ambulance that looks totally different from one in the United States. If the text talks about a 12-year-old girl’s shopping experience in a Chinese city, heritage language students may have difficulty relating to that experience, and they may feel alienated when exposed to such text content. (p. 203)

This is echoed in Lawton and Logio’s (2009) findings where schools struggled to find resources and instructional approaches that would meet the needs of both HLL and non-HLL families. As the proficiencies and backgrounds that Chinese heritage children are coming into CBHL schools with are becoming increasingly diverse, they authors found that these Chinese CBHL schools needed to rethink “Confucian-inspired Chinese ‘culture of learning’ [...] to explain the predominance of rote memorization, passive thinking, and student unwillingness to participate in or question teachers in Chinese classrooms (Clark & Gieve, 2006; Jin & Cortazzi, 2006)” (p. 142). Rather than the *banking model* (Freire, 1970) of education, they suggest that CHL teachers need to teach in a more learner-centered manner rather than a one-size-fits-all approach. These

pedagogical and cultural tensions are supported in Liang's (2018) literature review of 17 studies that explored parental perspectives on HLM, finding that HL children tend to resist attending CBHL schools, particularly around adolescence for the numerous reasons mentioned above.

Who run the world? Parents do: Operational issues

This final theme highlights a reoccurring challenge that many Chinese CBHL schools run into, a practical one: operational issues of these non-profit organizations. The first sub-theme highlights issues that arise from CBHL schools' overreliance on parents to fund, operate, teach, and do all the above for these schools to exist and function. And this subsequently leads to the second sub-theme, which is that because teachers are often also parents of children attending the school, they are usually volunteers who get paid little to no money to do this work and therefore tend to be underqualified and under-resourced to do their jobs well. These cumulative issues have led to numerous logistical issues in operating these schools, including teacher shortages, high teacher turnover, and inadequate facilities (Chao, 1996; Lee, 2014; Li, 2005; Wang, 1996).

Overreliance on parents to run schools. One reoccurring sub-theme in the literature on Chinese CBHL schools is that they rely heavily on parental volunteerism. In fact, Li (2005) found that parents are so highly involved in Chinese schools that their service contributes to almost all aspects of its operations, including administration, teaching, and community service. They share their professional skills with the schools and provide volunteer services. Chinese school administrators, who are often community members and parents, tend to recruit teachers from among parents rather than from among non-parent members of the Chinese community or Chinese international students at the university level. Li writes:

Chinese schools have depended largely on parents in terms of the financial standing, human resources, and form of written and oral Chinese taught in the schools. [...] However, Chinese schools fail to reach Chinese people other than parents in the

community. The excessive dependence on parents creates several problems [...] suffer[ing] from teacher shortages, high turnover rates, and unqualified teachers. (p. 202)

They conclude their study by recommending that the Chinese CBHL schools should tap into resources at universities, where many of the students graduated from top-tier universities in their Chinese-speaking home countries, and that they need to see themselves not as a single CHBL program but as part of a larger movement for language rights: “These schools need to envision themselves as powerful institutions involved in the national heritage language movement, rather than as schools only serving parental communities or the Chinese community alone” (p. 204).

Many of these studies have discovered how much influence and impact parents—and parents alone—have on Chinese CBHL schools, in the various decision-making processes for school operations. While parental involvement is indeed an asset, the sole reliance on parents can often be overwhelming and cause parents and teachers to burn out. On top of running these schools, parents are also caretakers of their own HL children with their own struggles with HLM in their families. Liang and Shin (2021) found that parents in their study really struggled to find language learning services and resources that could motivate their CHL children to continue learning and speaking Chinese. They highlight a lack of resources and time, particularly at the start of adolescence, due to other extracurricular activities that are more demanding, such as music, sports, dance, etc. Children then stopped listening and watching Chinese media content due to time constraints. Maintaining interests and motivation in learning Chinese became increasingly difficult with age; as children became busier, their motivation to learn Chinese lessened. Despite deeply valuing Chinese as their HL, families faced challenges related to limited time and energy as well as children’s motivations to learn Chinese. While CBHL programs can be a great resource for their families, as their schedules get busier, they find that their time is constrained and resources outside of these programs are scarce.

Wu and colleagues (2011) found in their study that even teachers, who are often parents as well, rely on parents to support them in their teaching. When encountering tensions or conflicts with parents who wanted them to do something different in their classrooms, teachers often avoided confrontation and just complied with whatever the parents wanted. This is mainly due to the fact that teachers are also volunteers and parents who happen to be high-proficiency Chinese speakers. Additionally, they are not doing this as their primary professional duty—they see this as their second “job” and not as professional teachers and therefore do not have high investment in this position as they would in their primary jobs, which leads to the next operational issue that CBHL programs encounter.

Underqualified and under-resourced teachers and staff. Scholarship in CBHL schools have noted a challenge in teacher shortages, teacher retention, and teacher training/professional development (Chao, 1996; Lee, 2014; Li, 2005; Wang, 1996) because many teachers and administrative staff are also parents who have full-time day jobs during the week that are not typically related to education. Wu et al. (2011) expressed that the Chinese teachers in their study do not have a strong professional teacher identity because they perceive this position as a secondary job, as one teacher put it, “I teach in Chinese school basically because I have time. I want to spend time not being a housewife” (p. 51). Teachers who are not teachers by trade but merely have time to contribute to the school do not have strong teacher identities, not to mention the lack of training, professional development, and resources for teachers. Often times, these teachers are paid hourly at a wage not much higher than minimum wage. Another teacher wrote: “If you see this as a full-time occupation, it’s impossible. First, it cannot support a family” (p. 51). The teachers in this study strongly felt the need for some type of professional training, which would then help them invest more in their own work and take agency and ownership in

their teaching, which they evidently do not feel, as they capitulate to other parents' needs and desires whenever conflicts arise.

In a narrative inquiry study about a dedicated and passionate teacher and principal, named Hayley, Yang and Tochon (2022) discovered that teaching and administrative staff can sometimes feel undervalued despite volunteering their time and efforts into these CBHL programs. The authors found that this teacher often needed to persuade the parents at Oriental CBHL School to participate in their students' experiences and that parents were not voluntarily involved in their students HL learning. In this example, Hayley, the principal of the school felt much less social- and self-recognition here in the U.S. than when she had been running a school in China. Concluding that CBHL teachers are "motivated agents who continuously deal with problems" and that they "need social and cultural support" (pp 17-18). While teachers may put a lot of effort into their CHL students learning, they cannot sufficiently sustain meaningful HL learning with only a few hours per week on a Saturday or Sunday, and it therefore needs to be supplemented with parental support at home. You and Liu (2011) revealed that while teachers can "plant seeds of language," they understand that they have little direct impact on students' achievements of HL proficiency. Because there is a lack of teacher education in CBHL programs, their practices are often left to what they know best—teaching how they learned (e.g., authoritative teachers, repetitive drills, memorization of texts).

In responding to the second research question (RQ 2: *What problems or challenges do these programs face?*), the studies on CBHL programs found that there is a plethora and variety of issues that these non-profit organizations run primarily by volunteer parents face. Pertaining the first theme of diversity, while diversity itself is not necessarily problematic, how CBHL programs navigate and make decisions based on these issues can be quite challenging. The

various diversity challenges—sociopolitical issues, language diversity, socioeconomic diversity, and racial or ethnic diversity—each require *Chinese* CBHL programs to make specific determinations based on community needs that are inextricably tied to sociopolitical and sociohistorical contexts: What kind of school? Which language (variety) is being taught? Which writing system is being used—traditional or simplified? What pedagogical methods are employed? And perhaps most importantly, *who* (or which community) is being served? All these diversity issues are further exacerbated by the notion of a singular Chinese language and unified written form that has become synonymously aligned with *Putonghua* (‘the common language’), for which these restrictive, dominant language policies from the P.R.C. has extended onto overseas CBHL programs of “Chinese.” Of course, these decisions also have influence on the teaching style or pedagogy that teachers practice in the classroom, which can often stem from their own ideologies (i.e., experiences, attitudes, beliefs), which we saw in several studies (Jia, 2009; Lawton & Logio, 2009; Li & Pu, 2010; Liang, 2018; Song, 2018). Lastly, operational challenges are something that every Chinese CBHL program faces—particularly that of teacher shortages, teacher retention, and teacher training (Chao, 1996; Lee, 2014; Li, 2005; Wang, 1996). These operational issues stem primarily from the fact that these non-profit organizations are founded, envisioned, built, expanded, and sustained by volunteer parents of the community. While parental involvement can be a true asset to these language learning communities, it can also be a double-edged sword, as demonstrated in these studies.

Conclusion and Future Directions

Overall, this comprehensive research synthesis reveals that Chinese CBHL programs serve many purposes for the CHL community but encounter numerous challenges related to micro and macro factors. The studies collectively reveal that it is more than the target language

proficiency that these programs attempt to nurture, and instead, it is bilingual and bicultural development of these CHL students and their families. This finding acknowledges the complex, hybrid identities of Chinese American families and that they are not simply transplanted Chinese learners from China in a U.S. setting, despite what these programs were originally designed for.

This study also found that CBHL programs face numerous challenges both at the micro-level (e.g., operations, pedagogy) and at the macro-level (e.g., socio -political, -linguistic, -cultural, and -historical tensions). While it has been found that parents run nearly every aspect of these CBHL programs, they also bring in their language ideologies (e.g., experiences, attitudes, and beliefs), which can cause tension due to historical and modern-day issues between HL populations from China, Taiwan, and Hong Kong. Future studies should pay more attention to these sociopolitical and sociolinguistic issues as they examine parents' motivations for their children's CHL development.

Future scholarship on CBHL programs should also investigate not just first-generation adult stakeholders (i.e., parents, administrators, teachers) and second-generation CHL students but also second+ generation adult CHL stakeholders and third+ generation CHL students. While it is important to understand what is happening with heritage language maintenance in these programs between first- and second-generation immigrant families, as most of the studies have done, it is also important to have a better understanding of what happens when these second-generation HL students have their own HL families and how they try to sustain HLs.

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Table 4. Studies included in research synthesis (with characteristics)

Author(s) (Year)	Location	Language (Groups)	Participants	Framework (Theoretical or Conceptual)	Methodology
Cun (2024)	SW US	Mandarin	Teacher, Students	Translanguaging	Qualitative - Case Study
Fang (2015)	Mid-Atlantic (DC, DE)	Chinese	N/A	N/A or Not mentioned	N/A or Not mentioned (Historical Narrative?)
Jia (2009)	SW US	Mandarin	Teachers, Parents, Students	Sociocultural Theory, Language Socialization	Qualitative - Ethnography
Lawton & Logio (2009)	Mid-Atlantic	Mandarin (Taiwanese)	Parents	Identity theory	Qualitative
Li & Pu (2010)	SW US	Chinese	Teacher, Students	Intercultural Competence	Qualitative - Conversation Analysis
Li (2005)	SW US (Phoenix)	Mandarin, Cantonese	Teachers, Administrators	N/A or Not mentioned	Qualitative
Liang & Shin (2021)	MW US	Mandarin	Parents, Students	Sociocultural Theory, Family Language Policy	Qualitative - Case Study (Multiple)
Liao et al. (2017)	South US (Houston)	Mandarin (Chinese & Taiwanese Americans)	(Past) Students	Ethnic Identity Development Theory	Qualitative - Case Study
Lu (2001)	MW US (Chicago)	Chinese	Parents	Cultural Identity, Cultural Adaptation, Bicultural Identity Development	Qualitative - Ethnography
Song (2018)	West US (SF Bay Area)	Mandarin, Cantonese	Students, Teachers, Administrators	Ethnic Capital Theory	Qualitative - Ethnography
Sun & Kwon (2025)	SE US	Mandarin	Parents, Administrators	Counterspace, Transnational Social Capital	Qualitative - Case Study
Wu et al. (2011)	South US (Texas)	Mandarin (Taiwanese)	Teachers	Teacher Professional Identity	Qualitative - Case Study (Multiple)
Yang & Tochon (2021)	MW US	Chinese	Teacher (Administrator)	Authentic Learning Model, Theory of Habitus, Language Teacher Identity	Qualitative - Narrative Inquiry
Yang (2007)	Mid-Atlantic & NE US (NJ, PA, NY)	Mandarin	Parents	N/A or Not mentioned	Qualitative

You & Liu (2011)	SW US (Phoenix)	Chinese, Korean	Administrators, Teachers, Parents	Language Maintenance, Language Shift	Mixed Methods
*Zhang (2010)	Mid-Atlantic/ NE US (Philadelphia)	Mandarin, Fujianese	Parents, Students	Language Maintenance, Language Shift	Qualitative - Ethnography
*Zhang (2012)	Mid-Atlantic/ NE US (Philadelphia)	Mandarin, Fujianese	Parents, Students	"HL as identity"; Social Networks, Transnationalism	Qualitative - Ethnography
*Zhang & Slaughter-Defoe (2009)	Mid-Atlantic/ NE US (Philadelphia)	Mandarin, Fujianese	Parents, Students	Language Attitudes, Language Ideologies	Qualitative - Ethnography
Zhu et al. (2020)	SE US (Mississippi)	Mandarin	Teachers, Parents, Grandparents	Cultural-Ecological Theory	Mixed Methods

Note: *Three separate studies that were part of the same larger ethnographic study with the same data (participants, methodology), but the three articles used different theoretical or conceptual lenses and foci.

Chapter 3 [Paper 2]: Investment in heritage languages of less commonly taught languages:
Family decisions to attend a community-based heritage language school

Investment in heritage languages of less commonly taught languages:
Family decisions to attend a community-based heritage language school

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Abstract

Heritage language maintenance (HLM) has been a consistent struggle for many immigrant families and communities, with increasing challenges after the second generation (Alba et al., 2002; Rumbaut, 2004; Rumbaut et al., 2006). In multilingual family language policy, families' decisions to promote heritage language maintenance for their children are influenced by numerous factors—both micro and macro (Curd-Christiansen, 2014, 2018). One form of language management that families decide on is through community-based heritage language (CBHL) schools. This study investigates why parents choose to send their children to a Cantonese CBHL school on weekends as a form of heritage language management.

Using the theoretical framework of investment (Norton Peirce, 1995) and family language policy (Curd-Christiansen, 2014, 2018; King et al., 2008; Spolsky, 2009, 2012), this ethnographic case study investigates what stakeholders—primarily parents and children—take into consideration when making the decision to participate in this Cantonese CBHL program. Data collection included interviews, focus groups, meeting observations, classroom observations, and classroom observations debriefs. Using thematic analysis (Braune & Clarke, 2006), the findings revealed three themes: CBHL school as a site of resistance, tensions in Cantonese language and literacy, and personal regrets to inform future HLM.

Keywords (up to 6): heritage language education, language maintenance, less commonly taught languages, community-based heritage language schools, investment, family language policy

Introduction

Heritage language (HL) shift and loss happens at a rapid pace in the U.S., most often occurring by the third generation but can happen as early as the second (Alba et al., 2002; Rumbaut, 2004; Rumbaut et al., 2006). Many bilingual families make decisions for their children's HL maintenance and bilingual development through many avenues. Some may choose to enroll their children in a bilingual daycare, hire an au pair from the HL host country, attend a dual language/immersion school, or wait until their children can take world/foreign language classes in middle or high school. These are all great options for HL maintenance *if* a family can afford the option or the family's HL happens to be Spanish, French, German, or Mandarin Chinese. For bilingual families of less-commonly taught languages and language varieties, alternative options are necessary for HL maintenance.

One option where HL children can learn about their heritage language and culture is through community-based HL (CBHL) programs or schools. For Chinese Americans, a growing population in the U.S. (Fry et al., 2015), this is often the only option, particularly if their HL variety is not Mandarin Chinese. It can also be argued that less commonly taught varieties of Chinese are not as instrumentally valuable as Mandarin, but nonetheless, HL parents still make decisions for their families to participate in these programs. Family language policy has been a growing field of scholarship that investigates the planning of language use within a home among family members, drawing from the two fields of language policy and child language acquisition (King et al., 2008).

Under the theoretical framework of *family language policy*, this ethnographic case study investigates Cantonese American families' *investment* (Norton Peirce, 1995) in sustaining their family's HL through a Cantonese CBHL school in the Mid-Atlantic region of the United States.

More specifically, this study aims to answer the following research question: *Why do families choose to participate in a Cantonese CBHL school as a form of language management?*

Background

Heritage language education

Heritage language education is a broad area of scholarship that encompasses numerous methods of language education for the purpose of heritage language maintenance, including dual-language bilingual education, world language education (i.e., Spanish for Native Speakers), and others. Before introducing the study, this section reviews several key background concepts related to heritage language education and this current study: heritage language maintenance, community-based heritage language schools, and sociohistorical context of Chinese as a HL in the United States.

Heritage language maintenance

Language maintenance (LM) has long been studied in sociolinguistics, particularly in response to language shift and contact. Fishman (1964) defined language shift and maintenance scholarship as being “concerned with the relationship between change or stability in habitual language use on one hand, and ongoing psychological, social or cultural processes, on the other hand, when populations differing in language are in contact with each other” (p. 32). In short, language maintenance refers to the policies and practices that are implemented to reverse language shift. HL maintenance generally refers to perceptions and behaviors related to the maintenance of a specific heritage language used by the immigrants who have cultural connections to this language other than the dominant language (Kelleher, 2010).

Fishman, a renown sociolinguist, contributed decades of his work into scholarship and advocacy for HL maintenance, among other important fields, and greatly impacted our modern

understanding of language contact, shift, and maintenance through a sociolinguistic lens. In HL research, language shift and language loss take place as early as the second generation or, if by chance, in the third or fourth generation. Many studies have indicated that this most often occurs by the third generation in the U.S. (Alba et al., 2002; Rumbaut, 2004; Rumbaut et al., 2006). Primarily due to the assimilationist language policies of the U.S. education system, HLs are “lost” once a generation becomes monolingual in the hegemonic language—English. This can happen differently between individual families, local communities, and larger diasporas. For example, some families may experience HL loss by the second generation, but other members of the local community may have maintained their HL; and further, one local community may have had no access to world/heritage language programs in their public schools or local community-based programs, but members from a diasporic community in a larger city may have had a lot more access to those resources. There are numerous factors that contribute to language shift and loss: immigration patterns, linguistic and societal status, perception of instrumental value, resource availability, national and state-wide language policies, among others.

Community-based heritage language schools

Community-based heritage language (CBHL) schools are typically “non-profit organizations founded and operated by parents from the respective immigrant or heritage language community for the purpose of maintaining and teaching the language and culture of their heritage” (Coalition of Community-Based Heritage Language Schools, 2018, para. 1). These HL programs have also been referred to as Saturday/Sunday schools, weekend schools, ethnic schools, mother tongue schools, community schools, and complementary schools. Lee and Chen-Wu (2021) indicate that there are several types of CBHL programs that currently exist in the U.S.: weekend programs, religious-affiliated programs, after-school programs, language

camps, expatriate schools, and online programs/tools. In this study, this particular CBHL program is one of many throughout the country that function after mainstream K-12 schooling or on weekends—and that usually operate through rented space on public or private school premises or in churches.

The goals of these programs are to prevent HL loss and promote intergenerational HL maintenance, and while there are many challenges with existing CBHL schools and within specific language communities (see previous sections), they are vitally important to the sustainability of HLs in the United States. because mainstream world language education rarely offers opportunities for bilingualism with less commonly taught languages (LCTLs), or “languages other than English and the commonly taught European languages of German, French and Spanish” (The National Less Commonly Taught Languages Resource Center, n.d.). Even dual language and immersion (DLI) programs, for which there are more than 3,600 program across 44 states (as of 2021), primarily operate with teaching Spanish ($N=2936$), Mandarin Chinese ($N=312$), and French ($N=182$), along with English (American Councils Research Center, 2021). In other words, nearly 97% of DLI programs, which only account for under 3% of all public K-12 schools (based on National Center for Educational Statistics data), teach only these three languages—and typically the standardized, hegemonic variety of those languages. Therefore, these CBHL schools “have long existed to fill this void and help maintain immigrant languages and cultures” (Beaudrie, 2016, p. 81). Unlike world language programs that are a part of the mainstream educational system, CBHL programs typically do not have a standardized curriculum and are not subject to the regulations of public K-12 education. The curriculum, materials, and assessments used in these programs are decided by the individual programs

themselves, with many using materials created outside of the local context (e.g., Cantonese schools taking textbooks from Taiwan for traditional characters).

Chinese CBHL schools (or ‘Chinese schools,’ as they are commonly referred to) have existed in the U.S. since 1886, when the first Chinese language school was established in San Francisco, CA (Liu, 2010). Until the early post-WWII decades, the Chinese American diasporas were predominantly Cantonese speaking, so most Chinese CBHL programs in the U.S., and in other countries with large Chinese diasporas, primarily taught Cantonese (Pan, 1997). According to Wong and Lopez (2000), the original purpose of these CBHL schools in the late 19th century and early 20th century was to promote patriotism toward China and to educate immigrant children about Chinese language and culture in preparation for their eventual return to the homeland. Predictably, these goals conflict with who the CHL students attending these schools usually are—that is, second+ generation Chinese *Americans*. Chinese CBHL programs can also be problematic in that they have historically have a reputation of practicing monolingual language ideologies in an attempt to “replicat[e] the language repertoires of the first generation” (Song, 2018, p. 3). They often engage implicitly in “one language only (OLON), usually the minority ethnic language of course, or one language at a time (OLAT)... treat[ing] the pupils as if they were the same as those from their ancestral countries” (Li Wei, 2014, p. 164-165). In sum, the ideologies present in these CBHL programs have traditionally encountered numerous conflicts between those who operate or teach the program and the students who attend them.

Chinese as a heritage language: Sociohistorical context

Only in recent times has there been an interest and investment in Chinese language education. With the *rise of China* (Duff et al., 2015) and consequent interest in U.S.-China relations, ‘Chinese’ has become a popular and trendy language to study, and subsequently, more

research has been conducted in Chinese language learning and teaching in the last few decades. However, this also comes with numerous complicated implications for CHL education. The ‘Chinese language’ is a complicated notion because, due to sociopolitical matters, it has become synonymous with the specific hegemonic variety—Mandarin Chinese, or *Putonghua* (the standard variety based on the Beijing dialect). The language label itself is problematic because, in reality, it encompasses seven or eight major dialects and many more minority varieties (Zhou, 2019), which are not mutually intelligible with *Putonghua*. Additionally, with the latest wave of migration from Mainland China, the de facto Chinese language taught in U.S. schools has become Mandarin Chinese. For CHL programs, this is especially problematic because young Chinese American children are coming into these after school or weekend CBHL programs having little or no exposure to Mandarin Chinese at all.

The conflation of all Chinese varieties being consolidated into one Chinese language creates several complications as it pertains to CHL education. These unique complications have led to many CHL scholars’ investigation of how these issues impact CHL programs, teachers, and learners. Depending on the time, the different varieties of Chinese can hold more prestige or power in a given context. By the end of the 20th century, Mandarin gradually replaced Cantonese in these CHL programs, a sign of the “changing hierarchies amongst varieties of the Chinese language as a result of the rising politico-economic power of mainland China” (Li Wei, 2014, p. 166). By the mid-1990s, approximately “eight out of ten pupils in Chinese schools were taught in Mandarin; Cantonese remained the language of instruction for only one of every eight students (Lai, 2004)” (Liu, 2010, p. 2). Given the current trend of continued increasing migration from Mainland China and the *rise of China* (Duff et al., 2015; Zhou, 2019), many CBHL programs teach Mandarin exclusively, or on rare occasion, offer Cantonese as an option (Duff et al., 2017),

which differs from the dominant variety of Chinese CBHL schools just a few decades ago. This has resulted in many Chinese families “enroll[ing] their students in Chinese heritage schools even though Mandarin is not their home or community language. In such cases, Mandarin may function as a “surrogate” heritage language, which can connect ethnic Chinese children with Chinese culture” (Wiley, 2014, p. 20).

Conceptual Framework

Investment

Investment is a construct initially developed in the mid-1990s by Bonny Norton (then Norton Peirce, 1995), and later expanded throughout years of her work related to identity and investment (e.g., Darvin & Norton, 2015, 2017, 2023; Norton, 2000, 2013). It was intended to be the sociological complement to the psychological construct of *motivation* in SLA studies (see Dörnyei, 1994; Dörnyei & Ushioda, 2009). Norton (2013) claims these theories assumed that “motivation was a character trait of the individual language learner and that learners who failed to learn the target language were not sufficiently committed to the learning process” (p. 6). These traditional characterizations of ‘motivation’ place the onus on individual language learners rather than taking a wider look at the social, historical, and political context for which language learning exists. While instrumental in much of the work in SLA studies, the L2 motivation research tends to neglect the sociocultural experience of language learners, and thus, Norton developed the construct of investment to “complement constructs of motivation in the field of language learning and teaching” (2013, p. 6). To make the distinction between ‘motivation’ and ‘investment’ even clearer, Norton and Toohey (2001) illustrate an example of a learner who was highly motivated in their language learning (in a traditional, psychological sense) but, at the same time, were excluded from the language practices in the classroom and was then positioned

as an ‘unmotivated’ language learner. This is the case of many HLLs—whether they explicitly use *investment* as their framework—where HL students are positioned as ‘lazy’ and ‘problematic,’ or as speakers of “kitchen sink” varieties (Valdés et al., 2006) in a HL classroom, and are therefore stigmatized and punished for it (e.g., Abdi, 2009, 2011; Wiley, 2008).

Norton’s work was inspired by that of Bourdieu (1977, 1984, 1991), which relates investment to the social and historical relationship that learners have with the target language. In theory, if learners “invest” in their language learning, and vice versa, they will gain *symbolic resources* (e.g., language, education, relationships) and *material resources* (e.g., jobs, money), which will in turn increase their cultural and linguistic capital. These investments are strongly tied to the identities of learners. However, Darwin and Norton (2023) have recently cautioned those using these constructs as being misinterpreted and reduced to transactions (i.e., neoliberal perspective). Instead, they argue that the construct of *investment* “accentuates how in the social world learners with diverse identities and unequal access to resources are positioned in different ways,” and extending that “investment is a tool that enables us to probe these inequalities and to challenge the dominant ideologies that perpetuate these inequalities. Herein lies perhaps the main distinction between investment and motivation” (Darvin & Norton, 2023, p. 37). They further argue that the onus of language learning is not exclusively on the learners themselves, but rather, that teachers—and others who are in privileged positions of power—have the responsibility to reflect on their own perspectives and how they encourage (or discourage) investment in the educational experiences of their students (Darvin, 2020), particularly of those who are often marginalized in the classroom. Darwin and Norton (2015) developed a model of investment to show how various aspects of our sociocultural existence impact the investment of language learners (see Figure 1).



Figure 4. Darwin and Norton's (2015) Model of Investment

Many scholars have utilized investment as their conceptual framework to investigate Chinese language education. For example, Wu and her colleagues (2014) examined investment among Asian American middle schoolers who studied Mandarin Chinese as a HL in a charter school in the northeastern U.S.; Chen and Wang (2023) used identity theory from a poststructuralist perspective in conjunction with Norton's construct of investment to examine how six dialect-speaking university students construct their identity while learning Mandarin; and Liang's (2020) dissertation cross-case study, which investigated the investment and identities of four adult Chinese HLLs in the United States. These three studies all had different approaches for how they defined investment in their studies, connecting it with various other constructs (e.g., agency, identity, language ideologies), but they all examined participants that mostly shared one common trait—they were all “heritage” language learners of Mandarin from non-Mandarin backgrounds. And while the motivations for learning Mandarin varied across participants and across studies, it is undeniable that these specific types of learners are uniquely positioned in their HL education. This paper utilizes an *investment* framework alongside Family Language Policy (FLP) to examine the interaction of language ideologies and language management between HL parents and children.

Family language policy

Through the conceptual framework of family language policy (FLP) (Curd-Christiansen, 2014, 2018; King et al. 2008; Spolsky, 2009, 2012), this study investigates the interaction between two factors that may motivate HL parents and children to join and participate in a CBHL program—language ideology and language management. I plan to look for instances of *investment* (Norton Peirce, 1995; Norton, 2000) in the data to explicate the rationale behind parents' and children's motivations to attend the Cantonese school as a form of *language management*. Previous FLP studies have investigated many factors of language maintenance related to the three prongs language policy—language ideology, language management, and language practice (Spolsky, 2009, 2012). Curdt-Christiansen (2014, 2018) further develops Spolsky's FLP model into an interdisciplinary framework that includes micro and macro factors (see Figure 5). Much of the work in previous FLP studies investigated within the homes of families in relation to the three factors, but not many explicitly discuss the role of CBHL programs that some HL parents and children choose to participate in. Even fewer FLP studies consider the sociopolitical context, or language hierarchies, of the heritage languages (Curd-Christiansen, 2009, 2016; Hua & Li Wei, 2016; Wang, 2017). Thus, there is a gap in the FLP scholarship that this proposed study hopes to fill by providing detailed insight into a community of parents who not only choose to send their HL children to this CBHL program but also actively participate in the operations of that program. Additionally, the voice and agency of children are often a missing component of FLP studies (Smith-Christmas, 2016, 2020, 2022) as many of these works focus on the parents' perspectives and decision-making. This proposed study also aims to fill the gap by integrating HL children's perspectives at Rockland Cantonese School.

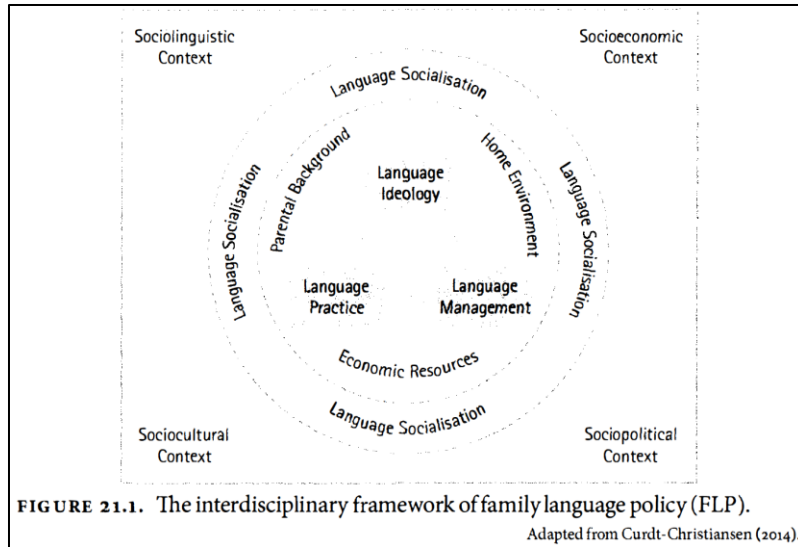


Figure 5. The interdisciplinary framework of FLP (Curdt-Christiansen, 2018)

Methodology

This study is part of a larger, longitudinal ethnographic case study that was conducted over the span of three years (2022-2025) between the various stakeholders of the target Cantonese CBHL school (the practitioners) and me (the researcher). In ethnography studies, a researcher will typically spend an extensive amount of time with their participants and research site in order to better understand the patterns of behaviors, beliefs, and language within a culture-sharing group. Additionally, ethnographies can also be conducted to investigate a cultural group to better understand a larger issue, and they should be evaluated with flexible standards that are “embedded within the participants’ lives, historical and cultural influence, and the interactive forces of race, gender, and class” (Creswell & Guetterman, 2018, p. 475).

This particular study is an ethnographic case study, in which the researchers are less likely to identify cultural themes of a culture-sharing group, and instead, their goal is aimed at detailed investigation of the *case* (Yin, 2014). The salient feature of a case study is that it is holistically investigating a confined, *bounded* entity—a person (or small groups of persons), a

school, an organization, or something larger—and that the nature of the inquiry is explanatory or exploratory. The term *bounded* in case study means that the case is “separated out for research in terms of time, place, or some physical boundaries” (Creswell & Guetterman, 2018, p. 478), and that the researcher identifies this “case” within their larger context (e.g., geographical, political, social, economic), which is pertinent to the focus of the study (e.g., Yin & Davis, 2007). Case study “methodology” is merely denoting a focus on a bounded entity (or entities) and requires multiple points of evidence, all while using said entity to speak back to theory. It does not necessarily have a unique method for the act of collecting or analyzing data, which is why researchers usually attach case study to larger methodological frameworks, such as ethnography or phenomenology. Ethnographic case studies require multiple sources of evidence for data collection (Creswell & Poth, 2018) in order to develop an in-depth, detailed understanding of the case, and it is recommended to have multiple approaches to data analysis. The bounded entity for this case study is the target research site: a local Cantonese CBHL school, which consists of various stakeholders. Before going into the data collection procedures, some context needs to be given on the research site and my positionality in relation to that site.

Research site: Rockland Cantonese School

The target research site for this study is a Cantonese CBHL program, henceforth referred to as Rockland Cantonese School, which operates on Sunday afternoons during the academic school calendar. Rockland Cantonese School, located in the Mid-Atlantic region of the United States, was founded by two parents in 2012 who were essentially pushed out of a previous Chinese school in the area. These two parents, now board members of Rockland, repeatedly told me that they created this program because the principal of the previous Chinese school no longer wanted to have a Cantonese strand, and so all the parents who wanted their children to learn their

HL—that is, Cantonese—were pushed out of the school. Through attending regular board meetings and interviews with these two founders, I gained a perspective that, while these two parents knew nothing about running a cultural and educational non-profit organization, they created this space for a LCTL community that continues to be neglected in mainstream Chinese language education.

As of Fall 2024, the school holds two-hour Cantonese classes every Sunday for approximately 65-70 Cantonese HL students, ages 4-12, across five classes—Cantonese Beginner (CB) 1-3, Cantonese (C) 1-2. Many of the students who come into the program are from third generation Cantonese- and/or mixed- American families (their Cantonese grandparent/s migrated to the U.S., Cantonese parent/s were born here), although some are second generation Cantonese-/mixed- American (Cantonese parent/s migrated to the U.S.). And because these are HL families with highly varying range of exposure to the Cantonese language at home, the students often come into the classroom with low to minimal language proficiency. In fact, some parents shared that they do not speak or understand Cantonese themselves.

The majority of Rockland parents and administrators are second-generation Cantonese Americans with parents and/or grandparents who are from Hong Kong, from the Guangdong province of Mainland China, and many also have parents who are “越南華僑” (jyut6naam4 waa4kiu4, overseas Chinese-ethnic people from Vietnam). Some parents, including the principal of Rockland, have parents who are 臺山人 (toi4saan1 jan4, Toisan people) and speak 臺山話 (Toisanese language) at home, a non-mutually intelligible variety of Cantonese (Yue). As far as I know, there are no Toisanese CBHL schools in the area, even in larger cities, which is why many of the Toisanese-speaking community come to Cantonese schools to learn their *surrogate heritage language* (Wiley, 2014), one that is most closely related to their own HL. There are also

some parents who are first-generation Hong Kongers or Chinese-ethnic Vietnamese immigrants and moved here in their teenage years, like the two founders of the school. The Cantonese teachers mostly identify as “香港人” (hoeng1 gong2 jan4, Hong Kongers) and take a lot of pride in their Hong Kong identity, strengthened by what was happening in Hong Kong (see 2014 Hong Kong Umbrella Movement, 2019-20 Hong Kong protests against extradition bill), with only one teacher who identifies as coming from the Guangdong province.

Researcher Reflexivity and Positionality

As a researcher conducting an ethnographic inquiry, it is best practice to clearly state my positionality in relation to the work, as well as having reflexivity, or “awareness of the influence the researcher has on what is being studied and, simultaneously, of how the research process affects the researcher. It is both a state of mind and a set of actions” (Probst & Berenson, 2014, p. 814). As the researcher partner, I have been extra careful and sensitive about my position with the CBHL school. As a doctoral student and researcher, I am constantly aware that despite being a second-generation Cantonese heritage speaker whose parents are 越南華僑 (Chinese-ethnic Vietnamese immigrants) who myself attended a rigorous weekday Cantonese school for four years in my youth, various stakeholders may still perceive me as an outsider coming into the school. However, I have also been able to build relationships with Rockland’s community and stakeholders by volunteering with the school for a few years, by showing up to important meetings and social events, and more recently, by being a part of the school’s advisory board. Broadly, my relationship with the stakeholders is that of an “insider-outsider,” one that is multilayered and fluid and one that can shift throughout the duration of the study (Thompson & Gunter, 2011). For example, while I see many of the stakeholders as my own culture-sharing community, I am also aware that I am a researcher conducting an ethnographic case study on this

community, and therefore, I have had to straddle the line between my multiple roles and identities—as a doctoral student, researcher, Cantonese heritage speaker, board member, and community member—at different times for different purposes.

More specifically, my positionality would best be described as an *insider in collaboration with other insiders* (Herr & Anderson, 2015). There are consistent power relations at play throughout my time being a part of this community, and that the participants of the study mostly see me as a non-parent insider who is working with them to help their school (this has been voiced to me by numerous participants). While I am a Cantonese community member, my position as a doctoral student from a renowned university, as an expert in heritage language education, as a board member with a close relationship with the administration team, among other hierarchical positions of power, I am fully aware that my various statuses may cause participants some hesitancy to share with me at times. However, I have done my best to assure them that I am here for the benefit of the school and that my various experiences and resources are at their disposal. As an ethnographer and a community member, I am aware that I am also regularly engaging in this work as a *participant observer*—being both part of the research myself and being the researcher conducting the study, as well as developing close relationships with *key informants* (Herr & Anderson, 2015).

As readers read through the findings, they should be cognizant of my positionality and my biases toward Rockland. I want to be completely transparent that I am not an outsider detached from the research by any means, and my goal is not to appear completely unbiased in this work. This is my community, and I am very upfront that I want them to succeed, and so the data collection, data analysis, and reporting of this work is meant to be *for, with, and by* the community. Therefore, readers should know that my multiple identities that make me an insider

of Rockland Cantonese School have granted me access to this community, and that my findings should be interpreted with that in mind. As previously mentioned, ethnographic case studies are typically conducted with the understanding that our interpretations—as ethnographic researchers—are only one possibility that is based on our own history, culture, and experiences, and that our conclusions are often tentative (Creswell & Guetterman, 2018).

Data collection

While the larger ethnographic case study took place between fall 2022 and spring 2025, the data collection for this study primarily took place in spring 2025. Primary data collection included: semi-structured interviews, focus groups, observations of various meetings with parents, admin, teachers, and/or board members, classroom observations, and classroom observations debrief meetings. Data collection instruments and methods varied by stakeholder group, which included: board members, administrators, teachers, parents, and current and past students. Rockland Cantonese School operates as a CO-OP (or cooperative) school, so parents and administrators work very closely together to collaboratively develop and operate the school. In fact, every board member, administrator, and most of the teachers have children currently or previously enrolled at Rockland Cantonese School. Parents sign an agreement to indicate that, beyond having their children attend class, they themselves will be part of various committees (e.g., social, marketing, fundraising, health and safety) and/or take on administrative roles (e.g., principal, vice principal, academics). This is to say that while I have these participants labeled as categorical stakeholder roles, the majority of parents wear multiple hats and are typically involved much more than just dropping their kids off at Rockland every Sunday. Table 5 details the qualitative data collected to help respond to the schools' needs. Survey and interview protocols can be found in Appendices I-IV.

Table 5. Data Collection

Participants	Types of Data	Mode of Data Collection
All participants	Observations	Recordings, Observation notes
Parents	Semi-structured interviews, Focus groups, Meetings	Recordings, Meeting notes, Memos
Students (current & past)	Semi-structured interviews, Focus groups, Classroom observations	Recordings, Observation notes
Teachers	Semi-structured interviews, Classroom observations, Meetings	Recordings, Observation protocol/notes, Meeting notes
Administrators & Board members	Semi-structured interviews, Observations, Meetings	Recordings, Observation notes, Meeting notes

While this larger ethnographic case study is collectively gathering these various data sources from each participant group, this study, which investigates two aspects of FLP—language management and language ideologies—will primarily examine the data collected from parents and their children (i.e., current/past students).

Data analysis

For data analysis, I followed *thematic analysis* (Braun & Clarke, 2006) guidelines for qualitative data analysis (Saldaña & Omasta, 2018). First, all the recorded data was transcribed (through Zoom closed-captioned transcriptions and/or OtterAI) and cleaned into individual Word documents. After cleaning, the files were uploaded into Dedoose Qualitative Research Software. Using this software tool, I first conducted deductive coding to identify instances of *investment* (i.e., identity, ideology, and capital) and instances of the *FLP features* relevant to the study (i.e., language ideology, language management), as well as flagging for macro FLP features. Subsequently, I examined each individual coding to identify patterns (or sub-codes) with each instance identified during the deductive coding phase. This second process of coding was a recursive approach, which involved looking at the emerging sub-codes of the already deductively-coded instances, helping refine the existing larger categories of investment and FLP

features into more comprehensive, meaningful thematic findings that made sense to respond to the larger question: *Why do families choose to participate in a Cantonese CBHL school as a form of language management?* The following section will detail the three major thematic findings along with sub-themes.

Findings

The findings in this section are organized into three larger thematic categories: community-based heritage language schooling as a site of resistance, tensions in Cantonese language and literacy, and personal regret and realization.

Community-based heritage language schooling as a site of resistance

This first thematic finding addresses the foundation of Rockland's existence and its operations today. In the first sub-theme, interview and observation data reveals how various stakeholders envision the school as a site of resistance against the expansion of Mandarin and Mainland Chinese hegemony. In the second sub-theme, Cantonese-heritage children share how they perceive themselves when compared to mainstream U.S. society and discuss their complex identities through language, race, ethnicity, and nationality.

Sociopolitical factors and the founding of Rockland Cantonese School

From the inception of this school, Rockland has been a site of resistance. As previously mentioned, Rockland Cantonese School was founded after the Cantonese branch of a local Chinese CBHL school was abolished, leaving the Cantonese parents of that school to fend for themselves. In 2012, two of those parents, who had limited to no educational or non-profit organizational background, decided to start up Rockland Cantonese School to continue Cantonese heritage education to the local community. In an interview with one founder (pseudonym: Gabby), she shared:

Until China opened up and there's more Mainland people coming in... I can feel that there is a big wave of knocking everything over and yeah not just a language-wide culture... if you go out to eat right now, you can see more of the Mainland China cultural food and language and writing more often... (Interview, Gabby, Founder/Board Member)

When I pushed her further to express how she felt about the hegemonic Mandarin Chinese language and Mainland Chinese culture spreading in the Chinese diasporic communities in the U.S., she responded:

Well, I do feel... I don't like it. I don't like it at all because [...] it made me motivated to actually continue [with] the Cantonese school. When we first started with it, just that summer, we would try to start the school, I tried to find help, like you know, go and try to see what kind of reference or any help from other places or other language schools. And I went to a lot of them and [they would] be like, "No one would learn Cantonese anymore, like you know, it's stupid, like you know, why [do] you keep doing it? Like, no one even bother[s] with Cantonese anymore." So, I felt- I actually felt... I didn't feel sad, but I felt more embarrassed. (Interview, Gabby, Founder/Board Member)

Gabby's evident resistance toward the spreading cultural, linguistic, and ideological influence of the P.R.C. was shared among many others at the school, and it was a major impetus for the founding and continued enrollment of families at Rockland Cantonese School. It is important, for context, to note that Gabby's—and others'—resistance against the dominant language and culture of Mainland China does not come from a place of inherent contempt, but rather, it comes from a place of being forcefully marginalized and erased by that dominant culture and language, which has been voiced to me numerous times by many participants in this larger ethnographic case study. While many CBHL schools are either eliminating Cantonese programs, transitioning Cantonese programs into Mandarin programs, or newly launching Mandarin programs, there are still programs like Rockland that act as sites of resistance against Mandarin hegemony that is spreading from the P.R.C.'s linguistic assimilationist policies toward *Putonghua* (Spolsky, 2014).

When asking the then Vice Principal (and second-generation Cantonese HL parent; pseudonym: Sam) how they felt about emergence of Mandarin schools in the area that was once predominantly Cantonese, he responded:

You know, it's strange. I feel, kind of... possessive isn't the right word. But like, I do feel possessive of Cantonese in the sense of like, I'm sad about it. That Mandarin seems to be everywhere, and it feels like there's a loss of [my] culture there. Maybe that's what I mean by possessive, I feel loss there. Yeah, part of it is like I don't understand Mandarin at all, whereas at least I have some connection to Cantonese and some understanding of it, and so it's interesting. I wouldn't say I feel like on a front or insulted or anything like that, but it always tweaks me a little bit when people ask me about Chinese and they kind of make the assumption of Mandarin, because... I don't know, it feels like, well, that's not my Chinese. And so, it's just kind of a separation there that's unfortunate. I don't know that I have anything against [Mandarin] itself, but it just it makes me feel separate, I suppose, from Chinese that most people think about now. (Interview, Sam, Vice Principal/Parent)

Not only do native Hongkongers feel strongly about the impact of China's strict assimilationist language policies, but even second-generation CHL parents who have Hongkonger parents feel this strong sociopolitical tension that has a direct influence on their own language identity and ideology. There are also many other sociopolitical factors that motivated the founders to create the school, teachers to teach at the school, and parents to send their children to the school. In late summer or early fall of 2023, Rockland had a teacher shortage at the last moment, and they had put out hiring advertisements on Facebook, Instagram, and elsewhere in search of Cantonese-speakers who could serve as teachers. One of Rockland's highly motivated teachers (pseudonym: Minnie), who at that time had no Cantonese teaching experience at all, shared her story of how she discovered the school and why she chose to get involved:

And then this summer, my kids were traveling and one night I was just watching TV, checking things out on the internet, on my Facebook, and then I saw that they [Rockland] were looking for a teacher. [...] So, I was like *huh?* I think it's also I'm at an age and I've been away from Hong Kong for so many years. I mean, I haven't forgotten about my root. And I have kind of loosely been following the, you know, how people back in Hong Kong are fighting about- you know, we are losing our language. They're trying to change the Chinese in school and all that. [...] They're using Mandarin as, you know, how they teach the classes [in Hong Kong]. So, I have been following loosely. And so, I think all the thoughts came together at that moment, and I'm like, "Okay, let me just message these people and say, 'Hey, I'm interested.'" (Interview, Minnie, Teacher)

Many Hongkongers do not identify as Chinese, particularly after the return of Hong Kong to the P.R.C. post-British colonization. Most people of Hong Kong strongly identify with a democratic

territory and are prideful in their language and independence, and, as demonstrated in recent political protests, most Hongkongers have strongly resisted being forcefully assimilated into P.R.C.'s governmental and ideological re-colonization—one that is dictatorial and authoritarian. As Rockland's academic administrator (pseudonym: Nia) put it, "Because we are Hongkongers, and Hongkongers speak Cantonese. And I view myself as a Hongkonger, not a Mainland Chinese, because there's a difference" (Interview, Nia, Academic Administrator/Parent). As indicated in Maggie, Minnie, and Nia's interviews, their involvement with and investment in Rockland is highly motivated by sociopolitical factors.

"Because! Everybody thinks I'm White!": Identity and race, ethnicity, nationality, language

In many instances, various stakeholders have voiced to me that one of the main reasons they participate or attend Rockland is because they want to be around people "like them." This can have many connotations, but for many parents, they want their children to have positive ethnic identity development, an important factor particularly for racialized immigrant families (Phinney & Ong, 2007). In response to me asking about how long they plan to have their child/ren attend the school, one parent (pseudonym: Lily), who at the time of the interview had a 4.5 year old daughter (pseudonym: Rinna) and a newborn son, shared with me:

I'll keep [bringing] her in as long as it's sustainable in terms of our routines. I prioritize this activity over her other activities. Just because I really feel it's important for her to have a strong ethnic-racial identity to being Chinese American. And so, as long as you know, she doesn't protest too much. I don't want to be too forceful if she doesn't want to go to Chinese school, but at the same time I'm going to encourage her. I'm going to try to make it fun. Get her excited about going to it, and as long as we are in the area, and she's willing. Then we're going to continue for as many years as we're able. (Interview, Lily, Parent)

As a researcher in social sciences, Lily feels strongly that ethnic and racial socialization is vitally important to Rinna's social and emotional wellbeing. Lily's family is from the Guangdong province of China, a Cantonese-speaking region, and although she was born there and migrated

to the U.S. at a very young age, she no longer speaks Cantonese and so she has not been able to reinforce Rinna's Cantonese language capabilities at home. When I pushed her and asked why she sent Rinna to a Cantonese school and not a Mandarin school, especially when she has to drive an hour from her house to Rockland and then an hour back every Sunday, she responded:

It's kind of funny, because my husband and I had a debate over whether it's more important to send her to Mandarin school which is closer to us in [state] or Cantonese school, and I won the battle on that. Because my husband is like Cantonese- it's not a dying language, but you know, even in Hong Kong they're shifting to Mandarin, and it's less commonly used. And so, my husband said, there's no practical benefit to knowing Cantonese. And my take is that it's more the cultural. It's more the cultural piece, and being able to connect with the generations of family before us who've come from Southern China and Hong Kong... (Interview, Lily, Parent)

This response once again highlights the hegemonic marginalization that Mandarin—which is reinforced by P.R.C. national language law and policy—has on Chinese communities and families of minoritized languages overseas. While China's language policy further attempts to homogenize Chinese as one unified language, parents like Lily actively, and with much effort, resist this marginalization.

I have interviewed Lily a few times throughout the 2024-25 school year, and I even interviewed Rinna once toward the end of the 2025 school year. Rinna is at the age where she cannot yet see or verbalize the ethnolinguistic benefits of this type of schooling, and she mainly sees the school as a place to play with her Cantonese teacher and the other students who both look like her and share the same cultural and linguistic identity. However, Lily has repeatedly shared with me that she wants her child to know that she is beautiful too, despite what (social) media defines as “beautiful” in the U.S., and that a part of why she wants her children to be around other similar-looking children is “to boost her self-esteem and recognize that, you know, black hair and brown eyes are beautiful too, and that she doesn't have to be whitewashed into standards of beauty.”

Just as parents of Rockland do not want their children to be racialized and compared to White mainstream society, the HL children at the school are also cognizant of their own identities, at least in the older age group. When conducting a focus group with four HL children, three students and one teaching assistant (TA), all age 11-12 placed in the highest available grade at Rockland, they had quite an interesting, complex conversation about race, ethnicity, and nationality, as it related to their own identities. During this conversation, the students were completing a language portrait task I had asked them to do as we were having this conversation (see Appendix for Language Portrait Template). Figure 2 is the Student 2's drawing for the language portrait task, which is what was being discussed at the start of the excerpt.

Excerpt from C2 Class Focus Group:

- Student 1: Why'd you color yellow, dude? [referring to drawing in Figure 2]
 Student 2: Because! Everybody thinks I'm White! But first of all, I'm Asian! I'm Asian! I'm not- I'm not White! I'm- I'm Asian American.
 John: Yeah?
 Student 2: My parents came from Vietnam.
 John: Yeah?
 Student 1: Technically, my dad's from Hong Kong. So, am I British? (laughs)
 Student 3: Cuz my dad was born in Hong Kong before 1990.
 John: Before?
 Student 1: That means, so does that mean, I'm technically British?
 John: I don't know. What do you think?
 Student 2: You're not British-
 Student 1: Because sometimes-
 Student 2: You're Asian American! Doesn't that make you-
 TA: British American.
 Student 1: Wait, I'm British Chinese American.
 TA: Exactly.
 Student 2: Yeah, you're British Asian American. (laughs)
 Student 3: I'm ABC. American British Chinese! (laughs)
 Student 2: Wha::t?

Referring to the language portrait sample of Student 2 (Figure 2), the conversation around why Student 2 intentionally chose to color himself yellow can be viewed as an explicit act of resistance against being labeled as White. As the focus group facilitator and having heard this

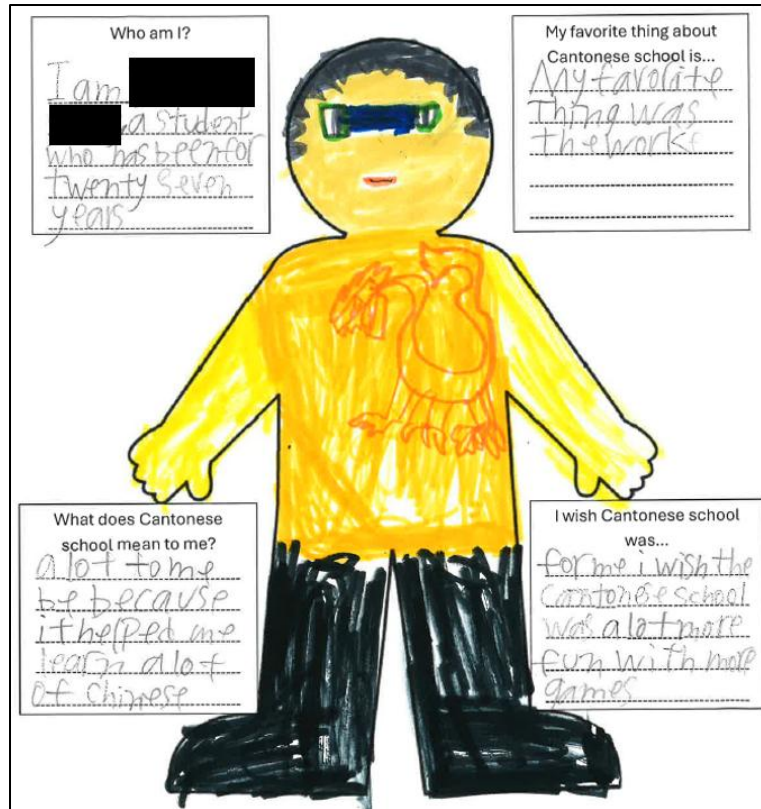


Figure 6. Language Portrait Sample - Student 2 (C2 Class)

recording numerous times, Student 2 was animated and heated when he responded with “Because! Everybody thinks I’m White! But first of all, I’m Asian! I’m Asian! I’m not- I’m not White! I’m- I’m Asian American.” He repeatedly expressed that he identifies himself as Asian and Asian American and *not* White. This conversation is seemingly indicative of the mainstream perception of Asian Americans but also in education and educational research—that we are often invisibilized (Chan, 2021; Lee, 2022) and even erased from any meaningful discussion around race and racism. Historically, Asians and Asian Americans have been left out of the binary Black/Brown vs. White discussions on race, often labeled as *honorary whites* or “embraced as second-tier members of the community of color, or erased altogether from consideration...” (Shaw, 2023, p. 143). This, of course, is further exacerbated by damaging, racist trope that is the model minority myth (Lee, 2009; Museus & Kiang, 2009), which intentionally sets Asian Americans and other communities of Color in opposition by putting Asian Americans in closer

proximity to Whiteness, only further serving the goals of systemic white supremacy. Student 2 resists this narrative by again exclaiming, “I’m not White! I’m- I’m Asian American!” all while coloring himself with the bright yellow marker—not a *white* (or pink) marker.

Later in the same excerpt, the other two students (Students 1 and 3), who both have fathers who are from Hong Kong, further complicated the conversation by introducing their complicated nationalities—one that is tied to pre- and post-British colonization. Although they were trying to be humorous in this excerpt, it is a fascinating observation to see how these 11-12 year olds are able to identify but also make meaning of sociohistorical and sociopolitical aspects of their own identities. This entertaining discussion about pre- and post-colonial Hong Kong demonstrates another layer of complexity in students’ self-identification—that they are not just seeing themselves as racialized (White vs. Asian) but also as historically colonized in reference to their own nationality (Hong Kong vs. British vs. Chinese vs. American). Nia, who identifies as a Hongkonger experienced life before and prior handover of Hong Kong, shared with me that she has both Hong Kong permanent residency and a British National Overseas (BNO) passport, though she also added at the time, “We (Hongkongers) don’t have Chinese citizenship” (Interview, Nia, Academic Administrator/Parent).

In this thematic finding, it is exemplified through various stakeholder voices that Rockland Cantonese School, a CBHL school intended for children with Cantonese (and mixed) backgrounds, is a site of resistance based on numerous sociopolitical factors. From one founder’s vision of the school as resisting the oppressor from the supposed within-group (i.e., “Chinese”), to a teacher’s entrance into the community based on their feelings of erasure in the homeland (Hong Kong), to students who can explicitly delineate themselves as Asian (and not White), we

can clearly see numerous sociopolitical factors coming into play that highlights not only why but the importance of this Cantonese CBHL school to this particular community.

我識聽識講，唔識讀唔識寫: Tensions in Cantonese language and literacy

This second thematic finding is complex because it not only addresses the tensions on parents' personal language histories and proficiencies, but also how these personal experiences impact and shift the goals of the CBHL program. Additionally, Cantonese CBHL programs face another challenge in that the spoken Cantonese language does not correspond to written Chinese language, which is based on standard Mandarin, or *Putonghua*. This creates another tension that is manifested in the classrooms between teachers and CHL students.

Cantonese language histories of second-generation parents

As a volunteer TA for an entire year between 2022-23 at Rockland with their youngest class (CB1, ages 4-6), I was able to witness, on a weekly basis, all the parents gathering in the main room (the cafeteria) and get their children ready for two hours of Cantonese lessons. As it got closer to two o'clock each Sunday, the principal (pseudonym: Julie), a second-generation Toisanese HL speaker, would speak Cantonese into the microphone and ask all of the students to start lining up in front of their classroom teachers: “小朋友, 預備排隊!” (siu2 pang4jau5, jyu6bei6 paai4deoi2; Little friends, prepare to line up!) or some variation of that. And as they all lined up, Principal Julie would send them off into their classrooms one class at a time: “OK (class level) 可以上堂!” (ho2ji5 soeng5tong4, You can go to class!” and the young children would all follow their teachers and their TAs into their classrooms, one class at a time.

Most weeks, once the children were away in their classrooms, the parents would go do their grocery shopping or just stick around to get some committee work done with other parents. However, for a few weeks each semester, Julie would run parent meetings while the students

were in class. The first parent meeting would be more of a meet and greet, where parents would sit around in a circle and introduce themselves and their background, followed by some Q&A and committee workshop time. For some background, while Julie comes from a Toisanese HL background, she learned Cantonese growing up in the then predominantly Cantonese-speaking suburb, in a neighboring town next to where Rockland is located. In one particular parent meeting at the start of the semester (Fall 2024), when she modeled how to introduce herself, she shared: “My husband is actually Cantonese, and I’m actually Toisan, so I can speak two. But I’m an ABC (American-born Chinese). I do not read and write, just for your understanding...” (Observation: Parent Meeting, Julie). This is something Julie has shared time and time again, sometimes in Cantonese, and it is a common phrase that many Cantonese Americans know how to express: “我識聽識講，唔識讀唔識寫” (ngo5 sik1teng1 sik1gong2, m4sikduk6 m4sik4se2; I can listen and speak, but I can’t read or write), or some variation of that phrase. Sharing that vulnerability allowed other parents to also express themselves, which they did. In that same parent meeting, numerous other parents shared similar language histories and experiences:

I can speak and I could listen, but reading and writing is not my strong suit. (CHL Dad A)
 ... I only speak Toisan-wa, but I can understand Cantonese but cannot read it and cannot write it. (CHL Mum A)

My father is Hong Kong and my mom speaks Toisan, so I grew up with a lot of Chinese around me, but I don't speak that well, enough to get by, but not great, so not enough to teach [my children] adequately. (CHL Mum B)

We know, kind of like “slang” Cantonese. It's not like, yeah, it's not for polite society. And my husband can order dim sum, but that's about it. (CHL Mum C)

So we have three languages going on at home. My husband thinks he knows how to speak Cantonese, I say I know how to speak Bulgarian, so we call it even by butchering each other's language. My kid is fluent in Bulgarian, but it's been very difficult to get him to speak Cantonese because I don't speak it that well, I speak better in Toisan than I do in Cantonese, but teaching him in Toisan, he’s always telling me to go back to the ‘regular Chinese,’ so he knows the difference. (CHL Mum D)

While not every parent has the same language profile—some more fluent and literate than others in the HL—these language experiences are common among many second-generation HL speakers. In these moments, there is a co-construction of investment (i.e., ideology, see Darwin & Norton, 2015) happening between the school administrators, the parents, and the intentions or purposes of the program itself. These experiences make up parents' beliefs and attitudes about the HL (or language ideology), and it does not only impact their decisions to send their children to Rockland (or language management) but also reciprocally and recursively interacts. In first interview I had with Lily, I asked her what kind of impact she thought Rockland Cantonese School would have on her family and her children, and she shared with me:

So, I think more for the cultural piece than the language fluency piece. Growing up in suburban [NE state], I didn't really have peers that looked like me. And so that took a negative toll on my self-esteem, and being a researcher and having done some studies on ethnic, racial socialization, I knew how important it is for children to be exposed to people who look like them and share the same cultural foods, cultural traditions. And so for me, it's more of my daughter being able to recognize that there are people in the community who look like us. And I've been very happy with this school because it seems like there are many mixed-race families, families who are second-generation parents like us, who probably want the same thing and are not expecting their kids to become fluent speakers. I was very worried when I signed up that, 'Oh, my gosh, I'm gonna be in an environment where everyone speaks fluent Cantonese, and as a parent I can't even say that I do that.' (Interview, Lily, Parent)

In exposing her own vulnerabilities with me, she shared her lack of confidence in speaking the target HL, she shared her fears of being a “lesser HL parent” than others, and her own historical challenges with self-esteem brought on by her upbringing in a predominantly White environment. Another CHL parent (pseudonym: Nathaniel), who is the only Cantonese HL parent (second-generation) in their household, has two mixed-ethnicity children who I personally had been the TA for during my first year volunteering at Rockland. To the same question, Nathaniel responded:

My expectation of it isn't- it's not very high in the terms that they're going to become Cantonese scholars or anything like that, right? But it is more just awareness for them to know that there are other Cantonese-speaking kids, that they can be aware of that [...] Learning some of the language as well is also helpful because I definitely have tried some of the basic stuff like the numbers, some of the colors with them, right? And then the school helped reinforce that as well as they were going through [levels of classes].
(Interview, Nathaniel, Parent)

For many parents, their identity (as Cantonese or Chinese Americans) and ideology (e.g., past experiences, language proficiencies) coalesce to impact how they position themselves in the school and how they choose to invest in the school (see investment model, Darvin & Norton, 2015). Moreover, their perceived benefits may not necessarily be tangible or instrumentally beneficial for their family or their children but more that the capital they hope to gain from attending a Cantonese CBHL school is one that benefits their children's identities and social-emotional wellbeing. For parents, like Lily and Nathaniel, their decision to send their third-generation Cantonese children to Rockland Cantonese School was not focused on gaining high levels of language proficiency but rather to socialize them into a community of co-ethnic, Cantonese heritage children and parents for positive ethnic identity development.

(Language) Shifting the goal

In fact, Principal Julie herself has reiterated at almost every parent meeting that I had attended between 2022 and 2025 that their children will not be fluent in Cantonese by the time they graduate. In fact, when I first heard her say those words aloud in Fall 2022, I was shocked and looked around the room, looking for other stunned faces, but what I noticed was not that. What I discovered during my three-year ethnographic experience here at Rockland was that many—though not all—parents felt relieved that their burden of passing down Cantonese, a language that even they lacked confidence in using, was also not the expectation of many other second-generation Cantonese HL parents in the room. Rather, it is strong co-ethnic bonds and

positive ethnic identity development that these parents were wanting for their children. One parent (pseudonym: Janet) expressed to me in an interview:

I can appreciate how important it is for some people to know [heritage language]. But to me, I'm more interested in the culture and just an appreciation for it because I strongly believe that you can, with your own interests in mind, pursue it later on. But the important thing is just to expose them and let them know it's there. (Interview, Janet, Parent)

For many parents, while high language proficiency would be great, it is not necessarily the main goal for participating in this Cantonese CBHL program. For many, they understood coming to Rockland for two-hours of Cantonese class one time a week, where that may be their only exposure to Cantonese for that whole week, that advanced language proficiency is just not a feasible expectation, but rather that “planting seeds of language” and culture, as one Chinese teacher in another study put it, is worth the trip: “It is like in winter, those hibernating plants do not die; they are still living. When the spring comes, they will begin to sprout. If you don't keep the seeds there, there will be no chances for them to grow” (You & Liu, 2011, p. 365).

During a fall parent meeting of the year prior, one parent expressed: “I try to speak Cantonese to my daughter, but it doesn't always work [...] one of the main reasons why I wanted to put [child] here because I wanted preserve the culture and to know what her *real* identity is” (Parent Meeting, Anonymous Parent). While I was unable to follow up with this parent as to what they meant by “real” identity, I can infer that, like many Rockland parents during this post-COVID-19 era, they are constantly battling an assimilationist culture outside of these walls that attempts to whitewash their rich Cantonese background. Another parent wrote in a survey response: “Having a community that fosters our culture and traditions is important to me and [Rockland] has helped immensely in helping me share and teach those traditions with/to my family, which is ethnically blended” (Parent Survey, Anonymous Parent). It is seemingly evident

that, especially during these times, many of the stakeholders feel a need for a strong connection to their Cantonese, and Toisanese, culture to fortify their bicultural identities.

Many parents at Rockland Cantonese School, particularly those who are second+ generation Cantonese HL speakers, often mentioned lacking confidence in their own language capabilities. This has led to parents sharing with me that their primary goal for their family is not actually to be fluent “Cantonese scholars,” as Nathaniel put it. Instead, they simply wanted their children to have a strong sense of ethnic identity, to know their heritage, and to be socialized around other co-ethnic families in the area. While Rockland Cantonese School is in fact a language school where children learn to converse in Cantonese and read and write traditional Chinese characters, as their website indicates, it is also in their description that “[Rockland] is not just a school, it is also a community. Families come together to help with school events including fundraising, hosting cultural events, and promoting the school. In doing so, families form strong bonds, even lifelong friendships” (Rockland Cantonese School website).

Written Chinese or Spoken Cantonese?

While many second+ generation parents may not feel that advanced language proficiency is a feasible goal, or simply may not desire that goal, Rockland Cantonese School is still an “immersion-based program, designed for students ages 4 to 12, focuses on developing speaking, reading, and writing skills. Our goal is to graduate students who can converse comfortably in Cantonese, and have the ability to read and write traditional Chinese” (Rockland Cantonese School website). The Cantonese HL teachers, who often are/were parents or relatives of Cantonese HL children attending Rockland, did in fact have a job to teach children Cantonese language (i.e., listening, speaking, reading, writing) for two hours every Sunday during the academic year.

For context on Chinese characters, there are two forms of written characters: traditional and simplified. Traditional characters are mainly used to Hong Kong and Taiwan, whereas simplified characters are used throughout Mainland China. Many of the teachers at Rockland are from Hong Kong, along with the academic staff who helped develop the curriculum, and therefore, the school focuses on teaching traditional characters. A further complication in the “Chinese” writing system is that while characters may be either traditional or simplified versions of the same character or word, there is only one officially recognized writing form for all varieties of “Chinese”—that is, the one that is most closely aligned with *Putonghua*, or standard Mandarin. This creates many complications for language varieties, like Cantonese, who are trying to teach young children to speak Cantonese one way but then write Cantonese in a different way—in standard Mandarin but with traditional characters.

This creates numerous complications for schools like Rockland where they use textbooks produced in Taiwan for the traditional characters, but the structure and word choice of written Chinese is aligned with standard Mandarin. This does not necessarily impact individual character learning, which often happens in the lowest class level, where they learn to speak and write segmented words and phrases (e.g., numbers, dates, colors, body parts). However, in the upper grade levels, things start to get complicated when they start reading from texts and begin confusing written standard Chinese with spoken Cantonese.

During the classroom observation of an upper-level class, Minnie, the highly motivated teacher that was introduced earlier in the findings, was teaching a lesson on ordering food items during dim sum. According to my observation notes and her classroom observation report, her teaching was excellent—used authentic cultural content, had a thorough lesson plan, had great classroom management, used translanguaging, and took a generally humanizing approach with

her students. In fact, she planned ahead to have a parent bring in real dim sum (realia) at the end of class to bridge all their learning together. For the most part, everything went as planned during the class. However, I noticed that she was confusing written Chinese and spoken Cantonese when engaging the students in an activity. One of my recommendations from my observation notes and in her classroom observation report stated:

Written Chinese/Cantonese vs. Spoken Cantonese: The majority of this lesson was focused on written Chinese/Cantonese phrases rather than spoken Cantonese. I thought this was strange considering they would never say “這是 ____” or “我喜歡吃 ____” at a restaurant. Authentic language use could be helpful here, but you could bring awareness that “in written Chinese, which is a formal system to standardize Chinese, we say it this way...”

Spoken Cantonese does not use the phrase “這是 ____” (ze2 si6, this is ____), which is a direct Cantonese translation of standard Mandarin (zhè shì). Instead, in spoken Cantonese, we would say, “呢個係 ____” (ni1 go3 hai6, this is ____), which means the same thing but with completely different words. In this activity, they were not reading out of a text, they were pointing at specific dim sum items in cut out photos. In other words, it was not a literacy task that Minnie was asking the students to participate in, but rather, an authentic speaking task with inauthentic spoken language use. The other example in the same lesson was that Minnie was teaching the students to say, “我喜歡吃 ____” (ngo5 hei2fun1 hek3, I like to eat ____). Again, a direct translation of standard Mandarin but with Cantonese pronunciation. No Cantonese user would ever say the phrase “ngo5 hei2fun1 hek3 ____” in a spoken interaction. Instead, they would use spoken Cantonese phrase, “我鍾意食 ____” (ngo5 zung1ji3 sik6 ____), to express the same meaning.

In a recorded debrief meeting with Minnie after the lesson, we went over the entire observation report with all her strengths and recommendations. This excerpt exhibits our discussion regarding one specific recommendation:

- John: The main thing throughout [the class] was that the majority of the lesson was focused on written Chinese, rather than spoken Cantonese.
- Minnie: Oh... even though I didn't write anything, but the language I chose was the written Chinese, correct.
- John: So, I was wondering about that, which you don't have to respond to, this is just something I thought about throughout the class, was that, instead of *ze2 si6* (這是) whatever, or *ngo5 hei2fun1* (我喜歡)-
- Minnie: *nil go3* (呢個), uh huh, *ngo5 zung1ji3* (我鍾意), mhm...
- John: Yeah, *nil go3*. So instead of saying that, you can say like “*ngo5 zung1ji3* this” or “*ngo5 zung1ji3* that.” For me, I was just thinking, like, if you’re thinking about authenticity, and you go into a dim sum restaurant, no one is going to say “*ze2 si6*,” right?
- Minnie: That’s true, that’s true.
- John: Or *ngo5 hei2fun1*... no one says that, right?
- Minnie: And especially for the lesson that we were teaching, that would have been more relevant, right.
- John: Yeah, I do think that there is a place to teach them about a formalized system of standardized [written] Chinese, but you can say, you know, “in writing, because of the way that the Chinese language is structured in standardized form, we write it this way. BUT, when we speak and when we talk in a restaurant, we’ll do this, so let’s practice this in authentic language.”

Having known and worked alongside Minnie for a couple of years now, it is evident to me, and in this excerpt, that she embodies a profound and refreshing growth mindset in her teaching.

Minnie is not a traditionally trained teacher; she was just a first-generation Hongkonger

American who happened to see Rockland’s hiring advertisements on Facebook one late summer day and decided to join this community. In response to my recommendation above, Minnie

further added:

Yeah. I love- I love this recommendation because [...] that’s the very thing that I think- and not just me, on average, every [Rockland] teacher struggles with, but more with me because I think some of these teachers are less wishy-washy than I am, in the sense that they kind of already made up their mind, right? If they think that their focus is with written, they just teach the written. And some, you know, if you go to adult class, [adult class teacher], focus on the conversational. But for me it's a journey. I'm still struggling because... I feel like in the back of my mind, there’s a textbook hanging. In the back of my mind, there’s a textbook hanging. So when I add a unit that is not in the textbook, but then I’ve been talking about food in the textbook, and I try to introduce this additional activity that is fun for us, that is more relevant for us... Oftentimes, I wonder if I’m confusing them, or if I’m just sticking with my script so that I’m not off-script. But then

other times, it feels like there are always two competing goals here, which one? Because I only have two hours. Anyways, I'm not [excusing] myself, I'm saying that's something I have a hard time thinking through in my own head. That's an area I need more help with. (Classroom Observation Debrief Meeting, Minnie, Teacher)

These issues brought on by the fact that *Chinese* languages, even those that are not mutually intelligible with Mandarin, use a standardized written form that is derived from Mandarin. This sociolinguistic and sociopolitical dilemma creates a lot of confusion for Cantonese teachers like Minnie, who is not trained in education or language. Despite this, Minnie's self-reflection on her own teaching and desire to improve her own language pedagogy is remarkable and emblematic of a teacher who has great investment in this community and future Cantonese speakers.

From personal regret to future heritage language maintenance

While many parents expressed that it is their familial ties that motivates them to participate in a Cantonese HL program at Rockland, it is also more than that. As I attended parent meetings, interviewed more and more parents, and observed interactions between families, I began to notice that it is more than just their cultural or ancestral histories that bring them together, it is also their language learning histories. However, as second+ generation Cantonese HL parents, and even first-generation Cantonese parents, this often is a sentiment of regret. Minnie, the passionate teacher, was also a parent of a Cantonese HL children and attempted sending her, now adult, children to a Chinese school when they were younger:

Unfortunately, I guess my kids can be considered second generation, who has Cantonese-speaking parents, but I have not chosen to teach them Cantonese at home. I have my own reason, but what you mentioned 'traumatizing'... the first time I heard my then maybe five year old daughter said "I hate you" was when I took her to a Chinese school I think in [city]. Just because someone was going to drive us to the school, and we want to try out the class. And she never wanted to go back again, so I think I understand some of that [trauma]. (Interview, Minnie, Teacher)

As we co-constructed our many interviews together, we mutually shared our language histories.

When I shared my trauma of being forced to attend a dehumanizing Cantonese CBHL school for

four years (two-hours daily Monday through Friday), Minnie also shared her personal experiences with sending her children to this type of school, and the trauma that it caused her—that stained memory of her daughter telling her “I hate you.” Now, Minnie’s regrets and traumas (i.e., language ideology) as a parent has brought her into this Cantonese-speaking community as an inspirational and motivated Cantonese teacher.

In another parent interview, one parent shared with me that their appreciation for their Cantonese heritage did not emerge until their twenties, a common experience for many HLLs:

The culture and that heritage and the value of it didn't really hit me until probably, you know, when I was [in my] mid-twenties, maybe early twenties. And so that's where, you know, it's something that I guess I have a little bit of regret growing up, and that's where you're trying to appreciate some of that culture. I'm hoping that you know my kids in particular will have some of that knowledge, have some of that visibility, and learn to appreciate some of it as they grow up, as well. (Interview, Anonymous Parent)

This reoccurring theme of regret sometimes hits HLLs too late, and for second+ generation parents, this language ideology (experiences) impacts their decisions for language management (CBHL schooling). Sam, the Vice Principal, shared a similar sentiment at a parent meeting:

I was born in [NE state], but I grew up in [MW state] and there was no such thing as Cantonese school in [MW state] in the 1990s. And so, I'm just very pleased that [Rockland] even exists [...] It was actually going pretty okay, speaking to my girls in Cantonese. But one day, my four year old asked, “How come only grown-ups speak Cantonese? How come kids don't want to speak Cantonese?” We knew it was time to come here. (Parent Meeting, Sam, Parent/Vice Principal)

In an interview with Sam, I had asked him about his background with Cantonese culture and language, as well as his language learning experiences, to which he stated, “But certainly as a kid, I remember, there was no one in my school that was Chinese or Asian at all, and certainly I think the only the only other Cantonese people that we ran into and my parents befriended were the Chinese restaurant in [city] where we were.” As he shared about growing up in a predominantly white area, going to predominantly white schools, and being two and a half hours away from a major Chinatown, he also began to reflect on how different that is for his daughter now: “And certainly now here in [Rockland], my

daughter- I think like 30% of our school is Asian. And so, it's a much different experience for her than it was for me." Sam's experiences are resonant with many other Cantonese HL parents' experiences at Rockland. It is not just their own personal regrets or shame for not learning Cantonese, or not learning it to the degree that they had hoped, but rather, it is also the lack of representation, resources, and access.

When analyzing this experience to Darwin and Norton's (2015) model of investment, Sam's, and others', regretful experiences do not come from a lack of personal motivation—in fact, he felt very strongly about his Asian and Chinese identity growing up. Rather, it was more that there was no perceived benefit or affordances to learn Cantonese growing up in that predominantly white environment, and therefore little to no imagined capital for learning Cantonese in that setting. Similar to the previous parent, it was not until early adulthood that they began appreciating the value of their Cantonese heritage, shifting their beliefs and attitudes toward a positive perspective of their HL, though not without attached regret.

This is also echoed in Lily's previous comments about why she began sending her daughter, Rinna, to Rockland, though more related to her desires for Rinna to have positive ethnic identity development and self-esteem. From her own experience being isolated from a co-ethnolinguistic community, which "took a negative toll on [her] self-esteem," she knew that she had to send her daughter to this Cantonese school to expose her to a co-ethnic community:

For me, it's more of my daughter being able to recognize that there are people in the community who look like us. And I've been very happy with this school because it seems like there are many mixed-race families, families who are second-generation parents like us, who probably want the same thing and are not expecting their kids to become fluent speakers. (Interview, Lily, Parent)

Unlike first-generation parents that has been reported in many CBHL studies, second+ generation parents typically do not have advanced language proficiency or literacy skills in their HL. The second-generation Cantonese HL parents and their children come to Rockland with a diverse range of language ideologies (i.e., language proficiency, language histories, expectations, experiences with Chinese schools). Many of them themselves were traumatized by attending Chinese CBHL school growing up, and while they feel this school is important for co-ethnic,

cultural socialization, they really appreciate that Rockland takes a humanizing approach to teaching Cantonese. From my time as a TA and in my classroom observations, I noticed that many of the teachers put intentional effort to create a third space (Bhabha, 1994) classroom that encourages translanguaging, participation, and acknowledgement of their hybrid identities.

Discussion

The original research question of this study asks: *Why do families choose to participate in a Cantonese CBHL school as a form of language management?* Reflecting back on Darvin and Norton's (2015) model of investment, we can see numerous connections as to why Cantonese and mixed-ethnicity parents and children are invested in their Cantonese HL learning. It is clear that their identities (as Cantonese HL families) and their ideologies (from their experiences, attitudes, and beliefs) have a great impact on how they position themselves in this school and in this Cantonese community. Rockland Cantonese School is the only Cantonese school in the entire region, and for families like Lily and Rinna who drive one hour to get them to this school and one hour back each week, they have a perceived benefit that is worth the imagined capital that they are getting. This study found that, for many parents, the imagined capital that helps guide their investment is not language, but rather, is the cultural, co-ethnic socialization. This finding resonates with much of the scholarship conducted on Chinese CBHL schools (Fang, 2015; Lu, 2001; Sun & Kwon, 2025; You & Liu, 2011; Zhang, 2012).

However, the reasons for attending a *Cantonese* CBHL program are more complex and also take into consideration many macro factors. Beyond Spolsky's (2009, 2012) three-prong language policy framework, it is sociopolitical and sociolinguistic (macro) factors that also influence these Cantonese heritage parents into participating in the school—whether it's the founders who developed the program, the teachers who educate the children, or parents who help

run the school, many of them perceive this school as a site of resistance, or a cultural *counterspace* (Solórzano et al., 2000). Traditionally, *counterspace* has been conceptualized as a site where “deficit notions of people of color can be challenged and where positive collegiate racial climate can be established and maintained (p. 70). The clear opposition that this school is resisting against is white, mainstream culture, where spaces are dominated by English-only environments, and where people of color are left in the margins. In U.S. mainstream society, which promotes “linguistic exclusion (Irvine & Gal, 2000) and neglect (Phyak, 2021), and constitutes a version of erasure (Wiley, 2022)” (Moore & Chi, 2024, p. 443), Asian Americans have “rarely [hold] meaningful agency in how they participate” in mainstream society, being labeled as “honorary whites” and viewed as “second-tier members of the community of color, or erased altogether” (Shaw, 2023, p. 143). This is also evident in much of the data presenting in the findings—e.g., the student who vehemently distances himself from whiteness in the classroom, Lily who wants her child to be around other children who look like her in hopes that she does not just compare herself to “whitewashed standards of beauty.” Especially in a post-COVID-19 world, the rampant xenophobia and racialization of Asian Americans in the United States almost forces many of these parents to need this *counterspace*.

However, because this particular research site teaches *Cantonese*—a Chinese language variety that has become marginalized in the larger, supposed within-group *Chinese* diasporic community—it is not only white, mainstream culture that this target community is actively resisting but also hegemonic Mandarin-speaking Chinese culture. It is not just the *between-group* (Chinese/Asian Americans vs. non-Chinese/Asian Americans) resistance that is occurring in these findings, it is also a *within-group* (a minoritized Cantonese vs. a hegemonic Mandarin) issue that exists. This complex sociopolitical dynamic further pushes many families to actively

resist against this “within-group” hegemony at Rockland. These findings are echoed in numerous other studies conducted on *Chinese* CBHL schools in the U.S. that shed light on the hierarchical power dynamics of Mandarin vs. other marginalized varieties (Fang, 2015; Song, 2018; Zhang & Slaughter-Defoe, 2009) and the complicated notion of the *Chinese* language (Wong & Xiao, 2010; Zhou, 2019). Despite the language hierarchy and instrumental value of Mandarin (Curdt-Christensen, 2016; Hua & Li Wei, 2016; Wang, 2017), these stakeholders explicitly reject Mandarin hegemony by intentionally sending their kids to Rockland Cantonese School.

Lastly, parents—including the founders, administrators, and teachers who are/were also parents of Cantonese HL children—and children’s personal language histories, attitudes, and beliefs (i.e., language ideology) also influence their decisions for participating in this school. This can be positive experiences and exposures to the Cantonese culture for many parents, but it can also be negative experiences with their own Cantonese learning that motivates them. Many of these parents who attended Cantonese CBHL schools in their youth experienced traumatic events that stem from pedagogical and cultural tensions at these schools, similar to Chinese schools that practice pedagogies inspired by Confucian values (e.g., teacher-centeredness, rote memorization and repetition, passive thinking), as documented in the scholarship (Jia, 2009; Liang, 2018; Liang & Shin, 2021; Liao et al., 2017; see *banking model*, Freire, 1970). These negative learning experiences can sometimes lead to personal regret, and realizations later in life, to create an even stronger will to instill Cantonese culture and language with their children (King & Fogle, 2006).

Tying this altogether to incorporate the theoretical framing of this study—*investment* (Darvin & Norton, 2015, 2017, 2023; Norton, 2000, 2013; Norton Peirce, 1995) and *family language policy* (Curdt-Christiansen, 2014, 2018; King et al. 2008; Spolsky, 2009, 2012)—the findings illustrate a clear link between family investment in their Cantonese heritage language/

culture and their rationale for their decisions to participate in Rockland Cantonese School. While originally interested in how language ideology impacts choices to attend, and their investment in, this CBHL program as a form of language management (see FLP framework), what actually resulted was the target site of language management (i.e., Rockland) was being recursively influenced and impacted by the families' language ideologies. This cyclical influence between families' language experiences, attitudes, beliefs and the Cantonese CBHL program was changing the goals and purposes of both the families and the school itself. Additionally, in Curdt-Christiansen's (2014, 2018) updated interdisciplinary FLP framework, this study discovered that macro factors (i.e., sociopolitical, sociolinguistic) were also interacting with family's language ideologies as well as Rockland's mission and purpose. This study illustrates the interactive and recursive nature, as well as the complexity, of the various components of family language policy that come into play when it comes to family's decisions for attending this CBHL school.

Conclusion

This study demonstrates that parents' motivations for sending their children to a weekend CBHL program are quite complex. There is no singular rationale for these families' decisions in this study, but for many, they perceived this school as a site of resistance, or counterspace, to both white, mainstream culture in the U.S. as well as Mandarin hegemony brought on by strict P.R.C. language orders (Zhou, 2019). For many parents at this Cantonese CBHL program, their own language ideologies, based on language attitudes, beliefs, and experiences, guided their decision-making to attend Rockland Cantonese School. As King and Fogle (2006) point out, oftentimes it is parents' "own personal encounters with language learning successful or unsuccessful seem to serve as the primary motivator in opting for an additive or enrichment family language policy" (King & Fogle, 2006, p. 706).

However, what this study discovered was that while their personal identities and ideologies may have influenced their decision to go to Rockland, their identities and ideologies have also influenced how Rockland, or the site of language management, operates as a school—including its goals and missions. Moreover, many of these second-generation parents, with third-generation children attending the school, hold regret and perhaps shame for not having high language capabilities in Cantonese, and this influences their expectations of the school. Thus, influenced by their perceptions of their own language proficiency, parents' expectations shifted toward a focus of promoting their children's *biculturalism* rather than their bilingualism, or perhaps *some* bilingualism as a byproduct of attending the Cantonese school.

Finally, while there are a lot of tensions involved in both attending and operating a CBHL school of a less-commonly taught language, it is nonetheless imperative that these programs exist as a form of language management for HL families and for the sustainability of multilingualism in the United States and around the world. The diversity of languages and language varieties are continually threatened by hegemonic entities—namely, mainstream English and dominant Mandarin in this study—and these schools necessitate support and solidarity from institutions that hold power and capital. While dual language and bilingual education programs are a great form of language education for many commonly taught languages (i.e., Spanish, French, German, Mandarin), there are hundreds of other languages in the U.S. that need resources. As many studies on CBHL programs have suggested, these schools cannot merely rely on parent volunteerism to operate—it is an unsustainable approach. We need a larger network of advocates and allies to work alongside them on this journey toward sustainable multilingualism. If we—especially those of us who work in language education—say that we care about multilingualism, then future scholarship and advocacy in language education must pay attention to CBHL schools.

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Appendix: Language Portrait Template

The template consists of a central human outline with four text boxes for reflection:

- Top Left:** Who am I?

- Top Right:** My favorite thing about Cantonese school is...

- Bottom Left:** What does Cantonese school mean to me?

- Bottom Right:** I wish Cantonese school was...

Chapter 4 [Paper 3]: Sustaining heritage languages through community-based schools:
Engaging in a research-practice partnership

Sustaining heritage languages through community-based schools:

Engaging in a research-practice partnership

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Abstract

Community-based heritage language (CBHL) programs and schools are vitally important for the ethnolinguistic vitality and sustainability of heritage languages (HL) and HL communities in the United States. However, these CBHL schools are not without their challenges, specifically with those that teach Chinese as a HL. Some of the well-known issues that Chinese CBHL programs face are: how language varieties are perceived, resisted, or stigmatized with HL students; the cultural and pedagogical conflicts between first-generation Chinese teachers and second-generation Chinese HL learners; and the programmatic sustainability of Chinese CBHL programs, particularly with funding, administration, and teacher retention.

Research to explore and inform solutions to the various challenges is sparse but necessary. Scholars have long called for research and evaluation studies that seek to understand key stakeholders of programs, how programs work, and what impacts programs may have on the HL communities (e.g., Beaudrie, 2016; Elder, 2009; Son, 2017). This conceptual article proposes the utilization of research-practice partnerships between CBHL schools (partner practice organization) and university affiliates (researchers) by exemplifying how a university researcher and a CBHL school collaboratively worked toward sustainability of the school.

Keywords (up to 6): community-based heritage language schools, heritage language education, research practice partnership, language sustainability, less commonly taught languages, multilingualism

1. Introduction

Community-based heritage language (CBHL) programs and schools are vitally important for the ethnolinguistic vitality and sustainability of heritage languages and HL communities in the United States. Where dual language and immersion programs aim to promote bilingualism for a singular—typically standardized and commonly taught—target language and English (see American Councils Research Center, 2021), CBHL programs can fill a void for less commonly taught languages in the U.S. (Beaudrie, 2016). However, these CBHL programs are not without their challenges, specifically with those that teach Chinese as a HL. Some of the well-known issues that Chinese CBHL programs face are: how language varieties are perceived, resisted, or stigmatized with HL students (e.g., Leung & Wu, 2011; Li Wei, 2014; Li Wei & Martin, 2009; Luo et al., 2019; Wiley, 2008; Wong & Xiao, 2010); the cultural and pedagogical conflicts between first-generation Chinese teachers and second-generation Chinese HL learners (e.g., Jia, 2009; Li & Pu, 2010; Liao et al., 2017; Xiang, 2016); and the programmatic sustainability of Chinese CBHL programs, particularly with funding, administration, and teacher retention (Chao, 1996; Lee, 2014; Li, 2005; Liu et al., 2011; Wang, 1996).

One example is with Li's (2005) study, where their investigation of three separate Chinese CBHL schools in the metropolitan Phoenix area illustrated that parents were the primary resource that kept the schools operating (e.g., funding, teaching, administration, social events), noting that "Chinese schools have depended largely on the parents in terms of the financial standing, human resources, and form of written and oral Chinese taught in the schools" (p. 202). They also found that this overreliance on the parents' involvement simultaneously created challenges, such as teacher shortages, high turnover rates, and un- or under-qualified teachers.

They conclude their study by recommending that the Chinese CBHL schools should leverage resources at universities.

While this is just one example of many challenges that Chinese CBHL programs encounter in their operations, research to explore and inform solutions to the various challenges is sparse but necessary. Scholars have long called for research and evaluation studies that seek to understand key stakeholders of programs, how programs work, and what impacts programs may have on the HL communities (e.g., Beaudrie, 2016; Elder, 2009; Son, 2017). This conceptual article proposes the utilization of research-practice partnerships between CBHL schools (partner practice organization) and university affiliates (researchers), exemplify how to university researcher and a CBHL school collaboratively worked toward sustainability of the school.

2. Background

2.1 Heritage language maintenance and sustainability

Language maintenance (LM) has long been studied in sociolinguistics, particularly in response to language shift and contact. Fishman (1964) defined language shift and maintenance scholarship as being “concerned with the relationship between change or stability in habitual language use on one hand, and ongoing psychological, social or cultural processes, on the other hand, when populations differing in language are in contact with each other” (p. 32). In short, language maintenance refers to the policies and practices that are implemented to reverse language shift. Heritage language maintenance (HLM) generally refers to perceptions and behaviors related to the maintenance of a specific heritage language used by the immigrants who have cultural connections to this language other than the dominant language (Kelleher, 2010).

Joshua Fishman’s work greatly impacted our modern understanding of language contact, shift, and maintenance through a sociolinguistic lens. In HL research, language shift and

language loss take place as early as the second generation or, if by chance, in the third or fourth generation. Many studies have indicated that this most often occurs by the third generation in the U.S. (Alba et al., 2002; Rumbaut, 2004; Rumbaut et al., 2006). Mainly due to the assimilationist language policies of the U.S. education system, HLs are “lost” once a generation becomes monolingual in the hegemonic language—English. This can happen differently between individual families, local communities, and larger diasporas. For example, some families may experience HL loss by the second generation, but other members of the local community may have maintained their HL; and further, one local community may have had no access to world/heritage language programs in their public schools or local CBHL programs, but members from a diasporic community in a larger city may have had a lot more access to those resources. There are numerous factors that contribute to language shift and loss: immigration patterns, linguistic and societal status, perception of instrumental value, resource availability, national and state-wide language policies, among others.

While HLM can vary between families and the communities involved, it is generally understood that subsequent generations become less proficient in the HL. This understanding of HLM places native, monolingual proficiency of a target language as the benchmark. In our modern understanding of multilingualism, native proficiency is not the goal nor is it an accurate depiction of what HLLs can attain. By acknowledging that HLLs are, in fact, multilingual learners, have multilingual proficiencies and, by definition, use language differently than monolingual speakers, the research that studies how languages are “maintained” should be seen through this lens. Moreover, we now have advanced technological innovations and various modes of language use (i.e., multiliteracies) that simply cannot be compared from one generation to the next. In other words, how we use language and how we learn language is not indicative of

“more” or “less” proficiency in the HL, but rather, that the next generation is going to use language *differently* than the last. Therefore, what is being maintained in HL maintenance should not be measured by our simple understandings of language proficiency that is based on a scale comparing 2nd+ generation HLLs to monolingual, native speakers. *Sustainability*, a construct that is primarily discussed in environmental research, is perhaps a better term for the dynamism that exists in intergenerational heritage language learning. Hult (2023) sees sustainable multilingualism as “linguistic practices that meet the needs of the present, without compromising the linguistic diversity future generations will require to meet their needs” and adding that “truly accessible and inclusive social, economic and cultural development requires the cultivation of robust multilingual repertoires” (p. 71).

2.2 Heritage language education and Community-based heritage language schools

Heritage language education is a broad area of scholarship that encompasses numerous methods of language education for the purpose of heritage language maintenance, such as dual-language bilingual education or world language education (e.g., Spanish for Native/Heritage Speakers). Mainstream language education in the U.S. may serve some HL students of hegemonic languages and varieties, or commonly taught languages, but it rarely offers opportunities for bilingual and bicultural development of all other languages. Another option for HL learners of less-commonly taught languages (LCTLs), or “languages other than English and the commonly taught European languages of German, French and Spanish” (National Council of Less Commonly Taught Languages, n.d.) are community-based heritage language (CBHL) programs, which “have long existed to fill this void and help maintain immigrant languages and cultures” (Beaudrie, 2016, p. 81). CBHL programs are typically “non-profit organizations founded and operated by parents from the respective immigrant or heritage language community

for the purpose of maintaining and teaching the language and culture of their heritage” (Coalition of Community-Based Heritage Language Schools, 2018, para. 1). These programs have also been referred to as Saturday/Sunday schools, weekend schools, ethnic schools, mother tongue schools, community schools, and complementary schools. For the purposes of this conceptual article, we will walk through an ethnographic case study of a research-practice partnership that was developed with a Cantonese CBHL school in the Mid-Atlantic region of the United States.

2.3 Research-practice partnership

Research-practice partnerships (RPPs) are “long-term collaborations between practitioners and researchers that are organized to investigate problems of practice and solutions for improving educational systems” (Penuel & Gallagher, 2017, p. xi). RPPs were designed to be a joint effort between:

... agencies that primarily administer education (such as state education agencies, local education agencies, or schools) and those that primarily research education (such as public and private universities, research institutions, or community groups that conduct research) to impact decision making in education through the use of research evidence. (National Network of Education Research-Practice Partnerships, n.d.)

These frameworks have traditionally been applied to partnerships between mainstream (K-12) educational institutions and universities (similar to school-university collaboration or partnership; see Ravid & Handler, 2001). In this conceptual article, I argue and demonstrate that the tenets of RPPs are relevant and can be applied between university researchers and practitioners/stakeholders of non-mainstream, community-based schools. CBHL schools have historically been left to their own devices—founded, developed, operated, and taught by parents who have little to no programmatic or pedagogical experience, often leading to issues of funding, administration, and teacher shortages/retention (Chao, 1996; Lee, 2014; Li, 2005; Liu et al., 2011; Wang, 1996). Scholars have long called for research and evaluation studies to be

conducted to better understand key stakeholders, how programs operate, and/or what impacts programs may have on the HL communities (e.g., Beaudrie, 2016; Elder, 2009; Son, 2017).

As a small-scale *design research partnership* (Coburn, 2013), the researcher and practitioner in this study “collaborate to design, study, improve, and scale innovations” (Hendrick et al., 2017, p. 2), where the focus remains on the needs of all parties involved to create commitments to “collaborate and jointly learn through research for the purpose of making improvements that will impact equity” (Yamashiro et al., 2023, p. 14). This collaborative and stakeholder-centered step should not be undervalued and is imperative to building an equitable partnership (Farrell et al., 2022a; Vetter et al., 2022). Farrell et al. (2022b) highlights the boundary infrastructures that specify the spaces where learning takes place in an RPP: boundary spanning, boundary practices, and boundary objects. Since the start of this ethnographic case study, I have collaborated with the stakeholders (or practitioners) of the CBHL program in numerous varied activities that engage in each of these boundary spaces through presentations, semi-structured interviews, student focus groups, board/admin/teacher/parent meetings, classroom observations and debriefs, and more. Hendricks et al.’s (2017) framework details five dimensions of an effective RPP:

- 1) Building trust and cultivating partnership relationships
- 2) Conducting rigorous research to inform action
- 3) Supporting partner practice organization in achieving its goals
- 4) Producing knowledge that can inform educational improvement efforts more broadly
- 5) Building capacity of participating researcher, practitioners, practice organizations, and research organizations to engage in partnership work

These five dimensions have been confirmed to be goals from partnerships of all types (Farrell et al., 2017). The next section will demonstrate and exemplify how I employed each step of Hendrick et al.’s framework in the research site, pseudonym: Rockland Cantonese School.

3. Conducting a research-practice partnership in CBHL schools

Before describing the process and benefits of implementing an RPP with a community-based school, some context needs to be given on the research site: Rockland Cantonese School (pseudonym), a CBHL school located in the Mid-Atlantic region of the United States. Rockland Cantonese School operates on Sunday afternoons during the academic school calendar. The school was founded by two parents in 2012 who were pushed out of a previous Chinese school in the area. These two parents, now board members of Rockland, informed me that they created this program because the previous Chinese school's principal no longer wanted to have a Cantonese strand, and so all the parents who wanted their children to learn their HL—that is, Cantonese—were pushed out of the school. While these two founders had minimal experience or knowledge about running a cultural and educational non-profit organization, they created this space for a LCTL community that continues to be neglected in mainstream Chinese language education.

The school holds two-hour Cantonese classes every Sunday for approximately 70+ Cantonese HL students, ages 4-12, across five classes—Cantonese Beginner (CB) 1-3, Cantonese (C) 1-2. Many of the students who come into the program are from third generation Cantonese- and/or mixed- American, although some are second generation Cantonese-/mixed-American. Because these are HL families entering the school with highly varying range of exposure to the Cantonese language at home, the students often come into the classroom with low to minimal language proficiency. In fact, some parents expressed that they do not speak or understand Cantonese themselves. Additionally, the majority of Rockland parents and administrators are second-generation Cantonese Americans with parents and/or grandparents who are from Hong Kong, from the Guangdong province of Mainland China, and many also have parents who are “越南華僑” (jyut6naam4 waa4kiu4, overseas Chinese-ethnic people from

Vietnam). There are also some parents who are first-generation Hong Kongers or Chinese-ethnic Vietnamese immigrants and moved here in their teenage years, like the two founders of the school. Most of the Cantonese teachers identify as Hongkongers and take a lot of pride in their Hong Kong identity, with one teacher who identifies as being from Guangdong province.

This conceptual paper demonstrates the process of how a university researcher and a small, non-profit organization (Rockland Cantonese School) worked together to design an evaluative study based on a needs analysis from various stakeholders of the school. Readers should have a clear understanding that this is intended to be a small-scale case study that is inspired by the tenets, or dimensions, of a *design research partnership* RPP to improve the sustainability of CBHL programs like Rockland. In each of the following five dimensions (Hendricks et al., 2017), I will walk through a brief description, including indicators of progress, how I implemented these (or not) in practice, as well as where I encountered challenges in each.

3.1 Building trust and cultivating partnership relationships

The first dimension addresses building trust and cultivating partnership relationships, which are essential in conducting effective education RPPs. Developing and maintaining these relationships can be challenging in some cases, requiring significant time before a trusting partnership is established. Similarly, in evaluation studies, having a strong understanding and connection with primary-intended users (PIUs), or the people in specific positions of an organization who will use the findings and have the ability to implement change (Patton, 2008) and stakeholders is necessary for a successful and useful evaluation. Coburn et al. (2013) found certain challenges that can negatively impact trust-building partnerships may include limited interaction between RPP members, power imbalance between RPP members, differences in

priorities, conflicting views on different aspects of the project, and time constraints. Hendrick et al. (2017) mentions five indicators of progress for this dimension (pp. 5-7):

1. Researchers and practitioners routinely work together.
2. The RPP establishes routines that promote collaborative decision-making and guard against power imbalances.
3. RPP members establishes norms of interaction that support collaborative decision-making and equitable participation in all phases of the work.
4. RPP members recognize and respect one another's perspectives and diverse forms of expertise.
5. Partnership goals take into account team members' work demand and roles in their respective organizations.

3.1.1 Implementation of Dimension 1

Building trust and cultivating partnerships at Rockland Cantonese School was something I knew was going to be important from the start of this venture. As a doctoral student that started in fall of 2020 at the height of the COVID-19 pandemic, it was difficult to attempt to build any relationship with an outside organization. Rockland Cantonese School was closed throughout the entire 2020-21 academic year (AY), and while they attempted to re-open in 2021-2022, they had to shut down again due to a new, more dangerous variant that was spread in the early fall of 2021. Before I knew I was going to conduct any kind of evaluation or research study, I wanted to learn more about this local Cantonese school and introduce myself, which I did in the following email to the Principal (pseudonym: Julie) of Rockland on August 9, 2021:

Hello 你好!

My name is John Chi. I am a student at the University of Maryland, and I am also a heritage speaker of Cantonese. I went to 中華文化院 in Oakland, CA as a child for many years. I was looking for opportunities to volunteer and help out with programs that promote Cantonese culture and language, and I would love to get to know your program and, if possible, volunteer with the program.

A little about me. I was born and raised in Oakland, California, where I went to Chinese school learning Cantonese for four years in my youth. I studied Mandarin Chinese in university and lived in the Beijing region for two years, working with local English teachers there. For my

studies, I work in education and am very interested in heritage language education, especially with minority dialects, like Cantonese, at the community level. As you can see, it is a very personal subject to me, and I want to provide and help my community out, especially for the young ones to develop positive ethnic identity as Chinese Americans. For now, I would just love the opportunity to volunteer and help out if you need any assistance of any kind.

If you want to talk further, please let me know!

*Thank you,
John*

Shortly after that email, Julie had emailed me back and wanted to have a quick phone call about my background and what I could possibly provide for the school in my volunteering. About a month later, I noticed on the school's social media that they were suspending operations for yet another year due to the rising spread of the new COVID-19 variant, and so I sent the following email on September 11, 2021:

Hi Julie,

I just saw on the website announcement and on Facebook about the 2021-22 year being suspended. I'm really sad and sorry to read this, but I understand keeping it moving without appropriate resources, etc. is not easy. Thank you for the opportunity to volunteer with the program, and if you need any help or assistance in the future, please keep me in mind and do let me know.

*Thank you,
John*

I share these emails because not to suggest that any future researchers any sort of template to build trust and cultivate relationships with practitioners but more so that things do not always work out the way you want them to, even at the early stages of nurturing a rapport to begin a partnership. While I was unable to enter the school and meet all the stakeholders (e.g., administrators, teachers, parents, students, community members) until fall of 2022, it was important that I remained in contact and in good standing with the Principal of the Rockland. For

any future inquiries, she would at least have this email exchange to refer back to when vetting me for a new school year. On April 18, 2022, I offered my help again after seeing on social media that they were planning to re-open in fall of 2022:

Hi Julie,

How have you been? I hope you are doing well this year.

I saw on Facebook that [Rockland] is planning to resume again next fall! That's great news. I know it's a bit early, but if you need a helping hand in the fall to prepare for the start of the program, I would be happy to help!

*Kind regards,
John*

Building trust and cultivating relationships takes patience and repeated effort. In fall of 2022, I was able to come into the school and meet all the stakeholders, and I ended up being a volunteer teaching assistant for their lowest grade level, a class of 20+ four- to six-year-old kids. In fact, on the first day of school when they had a parent meeting after the kids went into the classes, Julie was excited to introduce me to all the parents as a “researcher from [university name] who is interested in us! Isn’t that great?!” For the remainder of the year, I came in on Sundays to volunteer with Ms. Li (pseudonym), where the children would spend two hours each week learning Cantonese numbers, body parts, colors, seasons, weather, and more. I spent this year learning about the school and building relationships with each of the stakeholders at Rockland.

Dimension 1 of Hendrick et al.’s (2017) RPP framework lists particular indicators of ‘building trust and cultivating partnership relationships.’ By meeting weekly with teachers, I was able to gain their trust and learn more about who each member of the school was, and vice versa. Letting them know who I was is also essential. I remember for the first year, Julie and others continued to ask me about what my goal was for being at Rockland. While I was not ready to

answer this question yet, I understood this community's suspicion of a "researcher" outsider who has no children or tangible investment in the program, especially in a sensitive sociopolitical environment (see 2019-20 Hong Kong protests against extradition bill). It was not until August of 2023, prior to the start of the 2023-24 AY, that I had asked Julie if I could conduct an evaluation study on, for, and with the school. Fortunately, Julie, being a strong, involved administrative lead for the school, was completely supportive of my project idea that would eventually become my dissertation study. I was able to establish regular routines with running my process and progress by Julie, creating norms of interactions to support collaboration between us. Julie and others on the administration team had a good understanding of my role as a volunteer and as a busy doctoral student, and I had an understanding that these are all volunteer parents running a Cantonese CBHL school on their own time and effort. Collectively and mutually, we respected each other's roles, responsibilities, and time. Although it took over two years of trust-building and partnership-cultivating, this RPP was becoming solidified.

3.1.2 Considerations for implementation

The two years of cultivating trust was not without bump in the road. For starters, I was unable to meet or build any relationships for the entire first AY (2021-22) when I had initially reached out to the Principal of Rockland Cantonese School. For the entire second year, I did not really have an understanding of my own position or goals for being at the school, and despite inviting me into their school, the various stakeholders at Rockland had every right to be suspicious of what I was doing there. After all, this is a close-knit, culture-specific ethnolinguistic community that has been multiply marginalized by mainstream society (i.e., White, English-speaking) and by hegemonic Chinese culture and language (i.e., Putonghua/Mandarin-speaking from Mainland China). This brings me to my second point of

consideration for entering a community like this: having an awareness of your positionality in relation to the stakeholders of the RPP.

When conducting work within an ethno-racial community, it is pertinent that the researcher, who starts off as an outsider, has reflexivity, or “awareness of the influence the researcher has on what is being studied and, simultaneously, of how the research process affects the researcher. It is both a state of mind and a set of actions” (Probst & Berenson, 2014, p. 814). As the researcher partner, I have been extra careful and sensitive about my position with the CBHL school. As a doctoral student and researcher, I am constantly aware that despite being a second-generation Cantonese heritage speaker whose parents are 越南華僑 (Chinese-ethnic Vietnamese immigrants) who myself attended a rigorous weekday Cantonese school for four years in my youth, various stakeholders may still perceive me as an outsider coming into the school. Broadly, my relationship with the stakeholders is that of an “insider-outsider,” one that is multilayered and fluid and one that can shift throughout the duration of the study (Thompson & Gunter, 2011). For example, while I see many of the stakeholders as my own culture-sharing community, I am also aware that I am a researcher conducting an RPP with this community, and therefore, I have had to straggle the line between my multiple roles and identities—as a doctoral student, researcher, Cantonese heritage speaker, board member, and community member—at different times for different purposes. For those hoping to conduct similar work with a community-based school, particularly one that is racialized in mainstream society, you need to be extremely cautious and cognizant of your positionality, your reflexivity, and how you approach the community.

3.2 Conducting rigorous research to inform action

In this second dimension, conducting rigorous research to inform action, Hendrick et al. (2017) found that the criteria for high-quality research meant that the research is “*methodologically rigorous* and that it is *relevant, timely, and useful for practitioners and policymakers*” (p. 8). This dimension concerns the quality of the research conducted in an RPP: the *what*, *why*, and *how* of research in all processes of the research (e.g., formulating research questions, collecting data, analyzing data). Indicators for this dimension are (pp. 8-10):

1. RPP conducts research that addresses problems of practice facing the practice organization.
2. The RPP has developed systematic processes for collecting, organizing, analyzing, and synthesizing data.
3. Decisions about research methods and designs balance rigor and feasibility.
4. The RPP conducts research to clarify and further specify problems of practice prior to identifying and assessing strategies for addressing those problems.
5. Findings are shared in ways that take account of the needs of the practice organization.

3.2.1 Implementation of Dimension 2

In offering to implement an evaluation for Rockland in fall of 2023, I was able to get approvals from all the board members and the administrative team to do so. At this point, I had already built trust and cultivated a partnership with these stakeholders. Because an RPP should focus on the needs of all parties involved to create commitments to “collaborate and jointly learn through research for the purpose of making improvements that will impact equity” (Yamashiro et al., 2023, p. 14), I conducted a needs analysis to frame our collective inquiry with and for the program. I did this through two modes of inquiry during spring 2024 that involved most stakeholders: 1) surveys for various stakeholders about what kind of evaluation they wanted (i.e., what kind of information they want to know more about), and 2) semi-structured interviews with board members, administrators, teachers, and parents. Through my experience working with utilization-focused evaluation (UFE, Patton, 2008), I have been trained to conduct needs analyses as a beginning step toward a useful evaluation for the school. Through this needs

analysis, I was able to identify problems of practice, or themes of information, that the various stakeholders of the school wanted to know more about:

1. Parent and student enrollment, retention, and motivations
2. Parent expectations and needs
3. Parent and family engagement
4. Teacher recruitment and retention
5. Teacher professional development opportunities

This information was shared in a PowerPoint with board member, administrator, teacher, and parent stakeholder groups, as well as next steps. During this process, all stakeholder groups were able to give their input and feedback on the program's needs. Evaluation questions were negotiated between the administration team and myself, and I subsequently developed rigorous data collection methods to gather information from all stakeholder groups, including students.

Data collection took place between fall 2024 and spring 2025 and included nine observations of board member, administration, teachers, and parent meetings, four classroom observations with subsequent debrief meetings with teachers, four sets of focus groups with students, semi-structured interviews with four board or administration members (including the founder, principal, vice principal, and academic liaison), seven teachers, twenty-two parents, and fifteen student interviews (including current students, past students, and student service learning/SSL volunteers). This immense amount of data is still being analyzed for the evaluation report at the moment, but once completed, it will be shared with all stakeholder groups, along with a plan for action that will be co-developed with the board members and administrative team.

3.2.2 Considerations for implementation

I was fortunate enough to have taken an entire semester-long course on Language Program Evaluation during my previous degree, and I have conducted numerous evaluations on district, state, and nation-wide language programs (e.g., world language, study abroad, state/district testing) during my previous position at the Center for Applied Linguistics. Emergent

educational researchers who are incipient in their research area may not always be trained to conduct effective evaluation studies on programs like this, so doctoral programs for education should provide courses or training for hands-on evaluation and research methodology. Hendrick et al. (2017) asserts that the criterion for this dimension is that research in RPPs should be “*methodologically rigorous and that it is relevant, timely, and useful for practitioners and policymakers*” (p. 8). I believe I was methodologically rigorous with my approach to this program evaluation, but I did have challenges, namely the timeliness of the process. As a doctoral student and graduate assistant teaching teacher education courses, I was not always able to report findings and collect data in a timely manner due to the limitations of where I was in the program. These processes are not always as linear and well-defined as a researcher would hope prior to starting the evaluation study, but I also had to get approvals and stages passed in my doctoral program before I should have done any formal data collection. Thus, every step in the process of the RPP took longer than it should have due to my time constraints. Fortunately, I had built a trusting relationship with the practice partners, and they were deeply understanding of my circumstances. Future researchers who are hoping to partner with CBHL schools for research should try to plan farther ahead of time and take your doctoral milestones into consideration. However, you should also be flexible in the processes and that things may not always go in the order that you expect them, being mindful, of course, of your practice partners’ timelines as well.

3.3 Supporting partner practice organization in achieving its goals

The third dimension, ‘supporting the partner practice organization in achieving its goals,’ aims to address the practice organization’s achievement of its goals. The research goals and the practice organization’s goals may be seen differently, and in RPP, the practice organization’s goals are the primary mission. It has been noted in scholarship that assessing the impact on the

practice organization's improvement efforts can be challenging. Regardless, Hendrick et al. states that "it is essential for RPPs to determine feasible ways to assess the impact of their work on local improvement efforts" (p. 12). The three indicators for this dimension are (pp. 12-13):

1. The RPP provides research and evidence to support improvements in the partner organization.
2. The RPP helps the practice organization identify productive strategies for addressing problems of practice.
3. The RPP informs the practice organization's implementation and ongoing adjustments of improvement strategies.

3.3.1 Implementation of Dimension 3

Throughout the process of conducting the various processes of this evaluation, I was also an active member of the school community. In fact, in spring of 2024, I was formally invited to become a board member of the school, which meant that I was obligated to support the improvements of the practice partner organization in all aspects, including those themes of interest from the needs analysis. While collecting data for the evaluation, I was very much "doing" the actionable items to address the school's problems of practice in the process. For example, two of the themes from the needs analysis involved teachers, and one of them was 'teacher professional development opportunities.'

As a practitioner and researcher of applied linguistics and language teacher education, I am privy to being aware of conferences, training programs, and other professional development opportunities. In October of 2024, I invited two of the board members—one founder and Principal Julie—and two of Rockland's teachers to an annual conference on Community-Based Heritage Language Schools that is always hosted at university just 30 minutes away from where Rockland. As a researcher on CBHL schools, I have been attending this conference nearly every year since 2015, and I was very fortunate to be able to work with the organizers of the conference and invite these four members of the Rockland community to not just learn about HL

teaching but also to make connections to the broader CBHL community. The entire experience was one that was cherished and appreciated by the Rockland Cantonese School, and the teachers, reportedly, were able to take what they learned from the conference back to their classrooms almost immediately.

Another example of how I supported Rockland was conducting teacher observations for professional growth—this was something all of the teachers had asked for because these teachers are all volunteers and only one of the five teachers at Rockland work in an educational setting outside of the school. During spring of 2025, I conducted four classroom observations of four teachers and provided detailed feedback in an observation report, which we reviewed in an hour-long teacher debrief meeting (for each teacher). For more details about the value of these classroom observations, you can see Chi (dissertation, in progress) about process. These are just two examples of how I was actively engaged in supporting the partner practice organization in achieving its goals and addressing its problems of practice during the time I served as a board member there. I also attended regular board meetings, parent meetings, teacher meetings, and so on, as well as engaging with parents and students throughout the AY.

3.3.2 Considerations for implementation

As both a research partner and community member of the CBHL school, something that I discovered to be quite difficult to manage was to address this dimension of the RPP in a systematic, organized manner. As a member of the Rockland Cantonese School community, and eventually as a board member of the school, I struggled to separate my evaluation study for the RPP and my role as an active participant of the school itself. These two positions were inextricably tied to each other, and so it was complicated to organize how and for which purpose I was engaging in each of these activities. In other words, I could not put what I was doing in

clean categories that respond to the evaluation because I was addressing problems of practice in the moments that they emerged. Again, the process of the RPP that we were engaged in (and that we are still engaged in) is not one that could be scheduled in a linear, step-by-step timeline. If we had a problem in the moment, we had to address it in the moment; we couldn't wait until I was done with my evaluation to find the problem in order to address it, so it was therefore a recursive and iterative process of identifying problems of practice and solving problems of practice. In hindsight, this is not actually a problem at all and is likely just a part of the process, but future research partners in an RPP should be mindful that this will likely happen if you are closely connected with the practice partner organization.

3.4 Producing knowledge that can inform educational improvement efforts more broadly

This fourth dimension pertains to the goal of RPP to influence practice and partnership more broadly and the impact beyond the partnership. While this may look different depending on the type of RPP, it is important to attend to this dimension of effectiveness if that is the goal of both partnership members. The three indicators for this dimension are (p. 15):

1. The RPP develops and shares knowledge and theory that contributes to the research base.
2. The RPP develops and shares new tools and/or routines that can be adapted to support improvement work in other settings.
3. The RPP develops two dissemination plans, one that supports partnership goals and a second for broader dissemination.

3.4.1 Implementation of Dimension 4

One of the major benefits of conducting a RPP successfully is that this dimension should eventually go hand in hand with producing knowledge that contributes to the broader research base. It is my hope and my goal that the work conducted on this Cantonese CBHL program can be extended to research and practice of other CBHL programs of LCTLs. The sustainability of heritage languages in the United States cannot be addressed by mainstream world language or

dual language/bilingual education alone, and we therefore need community-centric and community-based solutions to sustaining heritage languages, which are *America's languages* (American Academy of the Arts & Sciences, 2017).

When I first met with stakeholders in leadership positions, they were excited that someone outside of their small, local Cantonese school was interested in their work. When interviewing the founder (pseudonym: Gabby), she expressed to me:

I'm just open to anyone who wants to do a little more or research anything about the school in general. Like I said, I don't have any educational background, so I'm running the school just because I'm watching my kids, and we just grow together as a school. So sometimes I do feel myself getting to a point where I don't know where to go anymore too. Just having some fresh ideas, like you coming in doing some actual research, and seeing how we can do it differently or [provide] any directions, and I think it's great. I'm open to anybody who's actually motivated to run the school or help in any part. [...] It's nice to hear from everybody, and that's how we can grow. Because we can get information or ideas from [stakeholders] because we always have to learn what the new generation needs. So, this is the only way to do it. (Interview, Gabby, Founder/Board Member)

She emphasizes that it can sometimes feel isolating to only be in the close-knit community, and therefore when someone like me, a university researcher, approached them, they felt re-energized to make change. Another member of the leadership team who heads the academic side of the school (pseudonym: Nia), also expressed enthusiasm and gratitude for an outsider willing to come into the community, sharing:

This is very invaluable because you act as an advocate for our community. If there's no one to do research or "write something" about it, we may just end up fading out, you know. So, if we have some people like you to do research or do some projects on this, at least our voice can be heard and be brought to the table for discussion. Yeah, so I find it really useful and helpful because we don't have... Firstly, we are not education professionals. Second, we don't graduate from a language or even linguistics background. So, we don't know the type of research methods you guys are doing and how you guys "promote" or "create" knowledge out of something. So, I really appreciate that you take up this research and help the Cantonese community not just [Rockland], but for the whole nation, you know, I really appreciate it. (Interview, Nia, Academic Administrator)

These two administrators at Rockland were eager to both have someone from the outside come in but also for word about the work that they do in the CBHL school to go out and be shared. They have an understanding that just functioning as an insular program that only caters to local community will not sustain future generations of Cantonese HL speakers, and therefore dissemination of the RPP work is indispensably important to this marginalized community.

The RPP with Rockland Cantonese School has two dissemination goals in mind. First, an executive report of the evaluation conducted between 2024-2025, which will be presented to the stakeholders of the school. Once completed, the full report and PowerPoint slides will also be available for all stakeholders to view. The reporting will support the practice partner organization's goals and provide action items to address problems of practice that were identified by the stakeholders during the needs analysis. The second dissemination goal, this article being one of them, will be for the research conducted with and about Rockland to be published in research journals on language and education. At the moment of this article being drafted, other manuscripts are simultaneously being prepared for dissemination.

3.4.2 Considerations for implementation

Unfortunately, it is difficult to evaluate the impact that the two dissemination goals will have on both the target CBHL school and on the broader audience who may be able to use these findings. That is not something that can be predicted until time has passed, but I will do my absolute best to ensure that the dissemination does happen to both the practice partner organization and to the larger scholarly community who is invested in CBHL programs and schools and multilingual sustainability in the U.S. broadly. Future researchers of RPPs should make dissemination plans ahead of time and work on them while simultaneously engaging in the RPPs. In fact, the researcher partner should have a good foundational understanding of CBHL

programs prior to engaging in this work so that they can be fully informed while they participate in the RPP.

3.5 Building capacity of participating researcher, practitioners, practice organizations, and research organizations to engage in partnership work

Hendrick et al. (2017) mentions that despite and increasing demand from doctoral students and junior scholars, the opportunities for these researchers to learn how to conduct an RPP are limited. On the other end, few practitioners have opportunities to engage with others outside of their organization. To increase partnership opportunities between researchers and practitioners, these two parties need to move beyond their traditional roles and perspectives of the other party. Researchers need to see educational organizations more than just potential for publications and focus on the problems of practice to be invested *with* partner organizations, and simultaneously, practitioner organizations must not think of researchers as an outside, unbiased evaluator who is going to conduct all the work for them. RPP experts indicate that “collaborating to negotiate the focus point of joint work and to develop and implement improvement initiatives could be opportunities for both researchers’ and practitioners’ learning” (p. 17). This fifth dimension is how an RPP can support partners’ capacities to productively engage in joint practice. By doing this, “RPPs can support both researchers and practitioners in developing new capacities and ways of working, while also helping partner educational organizations establish routines around the use of evidence in order to inform improvement work” (p. 17). The seven indicators of this dimension are (pp. 17-19):

1. Team members develop professional identities that value engaging in sustained collaborative inquiry with one another to address persistent problems of practice.
2. Team members assume new roles and develop the capacity to conduct partnership activities.
3. Participating research and educational organizations provide capacity-building opportunities to team members.

4. The work of the RPP contributes to a change in the practice organization's norms, culture, and routines around the use of research and other evidence.
5. There are shifts in professional expectations for education researchers and for practitioners that reward members from each organization for sustained participation in significant partnership work.
6. The RPP establishes conditions in the practice organization that lead to sustained impact beyond the life of the partnership.
7. Research and educational organizations allocate resources to support partnership work.

3.5.1 Implementation of Dimension 5

At Rockland, nearly every stakeholder has been building capacity of participating and engaging in partnership work. The unique aspect of this CBHL school is it is under co-operative (CO-OP) organizational model, meaning that every parent in the school has a role and responsibilities to help with the school. In helping the administrative team draw out the “organizational structure” of the various roles, we highlighted the importance of collaboration between and within stakeholder groups. As previously mentioned, I was eventually invited to become a board member as of spring 2024, and in this new role, I was able to assist in the development of various structures in the school, including professional development and observational feedback for teachers, creating a routine of collecting data from parents, among others. In this new role as a board member, I was able to develop a new professional identity—one that is invested in addressing persistent problems of practice.

One major struggle that CBHL programs encounter, which has been reported in previous scholarship and persists in Rockland, is the overreliance on parents for every aspect of the school (Li, 2005; Wu et al., 2011)—in particular, funding. To mitigate the sole reliance on parent tuition and fundraising to fund school operations, I was able to exploit my role as a university researcher to apply for graduate student and academic research grants to support the school's goals and address problems of practice (e.g., pay teachers for professional development, purchase supplies to enhance classroom learning). I also helped the school leadership revise a state-funded grant

proposal application that the local district was offering to community-based programs, using my background and expertise in CBHL schooling in conjunction with some parents who happened to have experience in writing grant proposals. During the time of this project, the research partner and stakeholders from the practice partner organization allocated collective resources and expertise to engage in partnership work for Rockland Cantonese School.

3.5.2 Considerations for implementation

It is very important to take into consideration the fact that most of the stakeholders of Rockland are from a middle-upper middle class socioeconomic status, and we therefore have resources, both economic and human, to work together with the university researcher to support this work. While it is unfortunate that these programs have historically relied solely on the stakeholders for funding, this CBHL school in particular has the financial means to stay above water. Therefore, we were able to really use our collective resources to sustain significant partnership work that is necessary for a successful RPP. Lastly, not every educational partner will have the capacity to invite the research partner to join in an administrative or board role, so it just happened to be that the practice partner organization was seeking help from an “expert” who knew about research in the specific field of heritage language education. Future researchers interested in an RPP should consider that there could be more challenges, related to resources, to build the capacity of all parties to engage in this work.

4. Conclusion

Now more than ever, we need to support community-based heritage language schools. Multilingualism has become a pop term for many schools and programs that are aiming to promote a neoliberal perspective on cultural and linguistic diversity, but this often leads to commodification of people’s languages and cultures as symbolic capital in a globalized world.

Additionally, the only world languages that are “supported” (i.e., funded or provided resources) in these scenarios are those that already hold capital—in the U.S., that would be English, Spanish, French, German, and increasingly, Mandarin Chinese. All other languages (LCTLs) are generally not funded in mainstream school systems, including dual language or bilingual education programs, which is why we—researchers and practitioners of HLs or CBHL schools—need to engage in partnership work to promote languages that are denied support and access into the mainstream. With an administration that is both forcing English down the throats of multilingual communities (Executive Order No. 14224, 2025) while simultaneously taking away the supports for multilingual learners to learn English (Meckler & McDaniel, 2025), it is more important than ever to advocate and engage in activism for HLs in the United States. I encourage emerging and seasoned scholars, who have resources in valued institutions (i.e., universities), to set up research-practice partnerships to engage in community-centric work with CBHL schools. And I encourage practitioners or stakeholders of CBHL programs to leverage the public resources in these institutions to better support your organizations by collaborating in a mutually beneficial partnership to better sustain both your school and your heritage languages.

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Chapter 5: Discussion

This paper-based dissertation contains three separate manuscripts that collectively discuss the significance of heritage language education through the lens of language rights. While these papers have separate foundations and frameworks that distinguish them from each other, they all have the same intention; that is, to investigate how the various stakeholders—including me, the researcher—demonstrate investment in HL education for the purpose of sustaining the target HL. The first manuscript, the research synthesis, identified the goals and purposes of Chinese CBHL schools as well as the challenges and complications that they face in the literature. The second manuscript uses investment and family language policy to dive into the various stakeholders' ideologies and identities through ethnographic case study methodology to examine why these families are sending their children, and participating themselves, to a Cantonese CBHL program. Lastly, the final manuscript is a conceptual paper that recommends using a research-practice partnership framework to promote the sustainability of CBHL programs and, subsequently, the HLs themselves. This discussion will review the three papers and the importance of each, as well as how they connect to each other and previous scholarship.

Paper 1: Research synthesis

In the first manuscript, a comprehensive research synthesis aimed look at the literature to answer two research questions: 1) What purpose do these programs serve? and 2) What challenges do these programs face? From the 19 articles identified and reviewed, several themes emerged in response to each research question. In searching for the purpose of Chinese schools, most schools claim to promote intergenerational transmission and preservation of Chinese culture (i.e., history, values, practices) and language (i.e., oral, aural, literacy) (He, 2004; You & Liu, 2011; Zhou 2014) in order to prevent language shift and promote language maintenance

(You & Liu, 2011). Historically, Chinese schools in the U.S. were developed for the purpose of promoting patriotism toward China and to educate immigrant children about Chinese language and culture in preparation for their eventual return to the homeland (Wong & Lopez, 2000), and to some extent, some schools still use literature, assessment, and other materials that come from the host country of the target language (P.R.C. or Taiwan), which intentionally or unintentionally promotes certain political stances via implicit, and sometimes explicit, propaganda (Fang, 2015).

But what the research synthesis found, in response to the first RQ, was that there were two larger thematic goals of these schools: 1) to develop bilingual and bicultural (ethnic) identity for children through socialization with co-ethnic peers; and 2) to develop Chinese literacy skills. The interesting part of studies that found the goal to be aligned with bilingual-bicultural identity is that these schools are often spaces that promote the heritage language through heteroglossic language use (i.e., codeswitching, translanguaging). Most of the studies seemed to indicate that these were natural parts of what was happening in the classrooms. This is a departure from what some of the literature had suggested, where at least historically, these schools aimed to “replicat[e] the language repertoires of the first generation” (Song, 2018, p. 3), often engaging in “one language only (OLON), usually the minority ethnic language of course, or one language at a time (OLAT)... treat[ing] the pupils as if they were the same as those from their ancestral countries” (Li Wei, 2014, p. 164-165). These experiences described by Song (2018) and Li Wei (2014) were my exact dehumanizing experiences of attending a Cantonese CBHL school for four years in my youth, so it actually came as a pleasant surprise to see so much (although not all) of the more recent literature mention that these programs are taking a more holistic approach to education Chinese American youth, at least in integrating their full linguistic repertoires.

In response to the second RQ, three thematic categories were revealed: 1) challenges that CBHL programs face with diversity in regard to sociopolitical issues, language diversity, socioeconomic diversity, and growing racial/ethnic diversity; 2) pedagogical and social tensions that still exist in some programs; and 3) operational issues that these programs typically encounter. Many of the diversity issues that CBHL programs face stem from the notion of *Chinese* as a language category (Wong & Xiao, 2010). The “Chinese language” is an extremely complex, conflated notion that has become synonymous with a singular, hegemonic variety (i.e., *Putonghua*, standard Mandarin) due to nation-state ideologies of a *rising China* (Zhou, 2019). The sociopolitical nature of this tension is also heightened because of the aggressive re-colonization of territories that desire independence from the P.R.C.—namely, Taiwan and Hong Kong. Thus, by extension, Chinese diasporas that are highly diverse are also feeling these tensions in Chinese CBHL schools in the U.S. and elsewhere. Fang (2015) illustrates a great example of schools in the Mid-Atlantic region of the U.S. that encountered conflicts between schools that catered more to Taiwanese people and those that catered more toward Mainland Chinese, noting that it can sometimes come in the form of implicit socialization: “the infusion of political belief into heritage language education often happened without any explicit intention of politically indoctrinating the students” (p. 64). In the second paper, we also saw this playing out with the target community, the local Cantonese community, heavily resisting Mandarin hegemony. I want to be clear about this: while languages themselves are not inherently social or political, there is no “two-sides” to what is happening with non-Mandarin language varieties. There is clear language policy and language order from Mainland China that is intentionally attempting to eradicate minoritized languages and cultures with the goal of unification (Spolsky, 2019; Zhou, 2019), and this is evident in the rapid dismantling of Cantonese programs, among

other language varieties, in “Chinese” CBHL schools across the country (see Save Cantonese campaign, <https://www.savecantonese.org/>).

In the next thematic finding for RQ2, while there has been great progress in acknowledging and humanizing Chinese American youth by recognizing their full linguistic repertoires in these CBHL programs, there were also many studies that acknowledge cultural and pedagogical tensions that still exist in Chinese schools (Li, 2005; Li & Pu, 2010; Liao et al., 2017; Jia, 2009; Song, 2018). The pedagogical tensions mainly exist from first-generation teachers who practice Confucian-inspired teaching methods, emphasizing rote memorization, repetition and drills, passive thinking, and teacher-centeredness (Clarke & Gieve, 2006; Jin & Cortazzi, 2006). Because many teachers experienced learning Chinese in their youth in Chinese-speaking countries, this can often transfer into how they approach learning and teaching if they themselves never experienced a method that does not resemble a *banking model* of education (Freire, 1970). However, ideologies (e.g., attitudes, beliefs, experiences) do not always mirror practices, which we saw in Li and Pu’s (2010) study where the teacher held traditional, authoritative beliefs about teaching and learning, and how children should behave, using phrases such as “maintain control,” “disobedient” children, and others to describe teaching Chinese American youth at the Chinese CBHL school. However, her actual practices in the classroom did not resemble that traditional type of classroom, according to the authors, and she actually often negotiated the roles between students and teacher during their observations.

Finally, the last challenge that scholarship on Chinese CBHL programs reported facing was operational issues related to 1) overreliance on parents to run schools; and 2) under-resourced and -qualified teachers in the programs. These CBHL programs have historically faced logistical problems related to teacher shortages, teacher retention, and funding (Chao, 1996; Lee,

2014; Li, 2005; Wang, 1996). Many seem to indicate that because these schools do not often collaborate or partner with outside organizations/communities, they rely solely on parents to operate the schools, including “hiring” parents as teachers (often they are volunteers or getting paid essentially nothing). Li (2005) suggests that these Chinese schools need to work with external institutions, organizations, communities to build collaboration and partnerships to economic, social, and human resources that are not just parents. To summarize, this research synthesis found that CBHL programs encounter various challenges both at the micro-level (e.g., operations, pedagogy) and at the macro-level (e.g., sociopolitical, sociocultural tensions).

Paper 2: Family’s investment in a Cantonese CBHL school

Because there are so many sociopolitical issues with the Chinese language, as previously mentioned, many communities who speak non-Mandarin languages do not have a place to go to learn their HL and may instead choose to participate in a CBHL school to learn a *surrogate HL*—Mandarin (Wiley, 2014). Because of this, it was interesting to investigate why this small community of mostly first- and second-generation Cantonese-speaking parents made the explicit decision to attend Rockland Cantonese School rather than the other Mandarin schools in the area. For this study, the RQ asked: Why do families choose to participate in a Cantonese CBHL school as a form of language management? Using Darvin and Norton’s (2015) model of *investment*, we can see many reasons for why Cantonese and mixed-ethnicity parents and children are invested in their Cantonese HL learning. Their identities (as Cantonese or mixed HL families) and their ideologies (their experiences, attitudes, and beliefs) have a great impact on how they position themselves in this school and in this Cantonese community. Rockland Cantonese School is the only Cantonese school in the entire region, and for these families, they have a perceived benefit that is worth the imagined capital that they are getting. For many parents, that capital that helps

guide their investment is not the language learning itself, but rather, it is the cultural, co-ethnic socialization. These findings resonate with much of the previous scholarship, as illustrated in the research synthesis (Fang, 2015; Lu, 2001; Sun & Kwon, 2025; You & Liu, 2011; Zhang, 2012).

However, the study also found that the parents' reasons for attending a *Cantonese* CBHL program are more complex and take into consideration many macro factors. Beyond the traditional three-prong language policy framework (Spolsky, 2009, 2012), it is also macro factors (i.e., sociopolitical, sociocultural) that impact parents into participating in the school. Many stakeholders perceive this school as a cultural *counterspace* (Solórzano et al., 2000). The participants are resisting against white, mainstream, English-dominant culture, which promotes “linguistic exclusion (Irvine & Gal, 2000) and neglect (Phyak, 2021), and constitutes a version of erasure (Wiley, 2022)” (Moore & Chi, 2024, p. 443). Especially in a post-COVID-19 world, the rampant xenophobia and racialization of Asian Americans in the United States almost forces many of these parents to need this *counterspace* for cultural refuge. In addition to resisting whiteness, because this particular research site teaches *Cantonese*—a Chinese language variety that has become marginalized in the larger, supposed within-group *Chinese* diasporic community—they are also actively, and maybe even more vehemently, resisting hegemonic Mandarin-speaking Chinese culture. It is not just the *between-group* (of different racial identities) resistance that is occurring in these findings, it is also a *within-group* (of the same racial identity, but minoritized Cantonese vs. hegemonic Mandarin) issue that exists. This complex sociopolitical dynamic further pushes many families to actively resist against this “within-group” hegemony at Rockland. These findings are echoed in numerous other studies conducted on Chinese CBHL schools in the U.S. that shed light on the hierarchical power dynamics of Mandarin vs. other marginalized varieties (Fang, 2015; Song, 2018; Zhang &

Slaughter-Defoe, 2009) and the complicated notion of the *Chinese* language (Wong & Xiao, 2010; Zhou, 2019). Despite the language hierarchy and instrumental value of Mandarin (Curd-Christensen, 2016; Hua & Li Wei, 2016; Wang, 2017), the stakeholders explicitly reject Mandarin hegemony by intentionally sending their kids to Rockland Cantonese School.

Lastly, this study found that Rockland parents' and children's personal language histories, attitudes, and beliefs also impacted their decisions to attend this school. This can be positive experiences and exposures to the Cantonese culture for many parents, but it can also be negative experiences with their own Cantonese learning that motivates them. Many of these parents who attended Cantonese CBHL schools in their youth experienced traumatic events that stem from pedagogical and cultural tensions at these schools, similar to Chinese schools that practice pedagogies inspired by Confucian values, as documented in the scholarship (Jia, 2009; Liang, 2018; Liang & Shin, 2021; Liao et al., 2017). These negative learning experiences can sometimes lead to personal regret, and realizations later in life, to create an even stronger will to instill Cantonese culture and language with their children (King & Fogle, 2006).

Incorporating the theoretical framing of this study—*investment* (Darvin & Norton, 2015, 2017, 2023; Norton, 2000, 2013; Norton Peirce, 1995) and *family language policy* (Curd-Christiansen, 2014, 2018; King et al. 2008; Spolsky, 2009, 2012)—the findings illustrate a clear link between family investment in their Cantonese heritage language/culture and their rationale for their decisions to participate in Rockland Cantonese School. While originally interested in how language ideology impacts choices to attend, and their investment in, this CBHL program as a form of language management (see FLP framework), what resulted was that the target site of language management (i.e., Rockland) was being influenced and impacted by the families' language ideologies. This recursive influence between families' language ideologies and the

Cantonese school was changing the goals and purposes of both the families and the school itself. Additionally, in Curdt-Christiansen's (2014, 2018) updated interdisciplinary FLP framework, this study discovered that macro factors (i.e., sociopolitical, sociolinguistic) were also interacting with family's language ideologies as well as the school's mission and purpose. This study illustrates the interactive and recursive nature, as well as the complexity, of the various components of family language policy that come into play when it comes to family decisions for attending a CBHL school of a marginalized variety of Chinese.

Paper 3: Engaging in research-practice partnership with CBHL schools

The final paper of the dissertation is a conceptual article that serves two main purposes: 1) to encourage institutionally supported researchers to partner with community-based programs and schools to promote sustainability of both the CBHL programs and of the HLs; and 2) to self-examine and evaluate my own practices and experiences as a research partner to Rockland. I wrote this as a conceptual piece rather than an empirical study for a very practical reason—because this paper is funded by the ACTFL Research Priorities Grant and will therefore be submitted to *Foreign Language Annals*. I spoke extensively with one of the Co-Editors of the journal, expressing my concerns and challenges of writing an empirical article on an RPP, and they recommended that I write it as a conceptual piece, using my experience as an exemplar for how I implemented each dimension of the RPP framework (Hendrick et al., 2017), while also being reflective about the challenges that I encountered during my time as the researcher partner of the RPP. Thus, that is exactly what the third paper turned out to be. While this third paper does not necessarily speak to the literature, as it is not necessarily an empirical study, I do hope that it does speak to both researchers in universities (e.g., doctoral students, research assistants, faculty) and practitioners in CBHL schools (e.g., administrators, teachers, parents). Throughout this

process, I discovered that the RPP framework is extremely comprehensive and helpful, and that while these partnerships are typically between research institutions and mainstream school systems, I thought it was an extremely helpful framework to guide my work—my partnership—with Rockland. That being said, I hope that this conceptual paper serves as a case study or guide for how I approached the CBHL program so that perhaps a doctoral student out there might attempt to do the same for a different community, learning the lessons mentioned in the article.

Regarding sustainability, I do think that now more than ever, we need to support CBHL programs across the board. These programs are neglected in research and mainstream school systems and cannot sustain themselves through insular volunteerism alone. For less-commonly taught languages, like Cantonese, these programs are essential for the cultural and linguistic sustainability of their respective communities. Aside from Spanish, French, German, and Mandarin Chinese, these LCTLs are not funded in mainstream school systems, including dual language or bilingual education programs, which is why we—researchers and practitioners of CBHL schools—need to engage in partnership work to promote languages that are denied support and access into the mainstream. When we educators talk about culturally sustaining pedagogies (Paris & Alim, 2017) or promoting community cultural wealth (Yosso, 2005), these sites—these counterspaces—are where cultures and languages are sustained, and they need economic, social, and human resources in order to thrive. I encourage emerging and seasoned scholars, who have resources in high capital institutions (i.e., universities), to set up RPPs to engage in community-centered work with CBHL schools. And on the other end, I encourage practitioners or stakeholders of CBHL programs to leverage the public resources in these institutions to better support your organizations through mutually beneficial collaborations and partnerships to better sustain both your school and your heritage languages.

Chapter 6: Conclusion and Significance

Heritage languages, and multilingualism broadly, in the United States has been threatened at an unprecedented level under the current administration in the White House. With Executive Order No. 14224 (2025) mandating English as the official language of the U.S., while simultaneously taking away supports for multilingual learners to learn the newly designated official language (Meckler & McDaniel, 2025), it is more important than ever for all of us to advocate and engage in activism for heritage languages and multilingual communities in the United States. Moreover, heritage languages of less commonly taught languages and varieties have almost always been neglected by world language, dual language/bilingual education, and other forms of mainstream language education in K-16 contexts. While the three papers in this dissertation are focused on one singular community in a CBHL school that has been doubly marginalized by mainstream society and even in the “Chinese” diaspora, it more than just Cantonese that is disappearing at an alarming rate.

CBHL schools serve as an alternative path and resource for HL communities to participate in an educational setting with co-ethnic families, which has been proven to be beneficial for positive ethnic identity development for racialized immigrant families (Phinney & Ong, 2007). These spaces are not perfect, as indicated in the research synthesis (Paper 1), but they are essential for HL sustainability, and the HL families who choose to attend these CBHL schools have immense investment in these programs for many reasons (Paper 2). But their sole investment is not enough to sustain multilingualism in the United States. To truly serve our multilingual learners and their families, we—scholars, educators, and language advocates and activists—cannot stand idly by as languages are stolen from racialized immigrant communities

only to be resources for non-HL students later. We must support and campaign for heritage language rights and heritage language sustainability for and with heritage language communities.

Future directions

I hope that the papers presented in this dissertation bring awareness to the fact that these CBHL schools already exist in the communities that they serve. Educators who want to work with multilingual families need not create these spaces for HL families but should instead find out where their multilingual students are spending their weekends and work in partnership with these communities. Applied linguists and language education scholars who want to conduct research and/or engage in language advocacy should seek to build relationships with CBHL programs, keeping in mind our positionalities and regularly practicing reflexivity and humility as we approach them. Having strong research-practice partnerships with local CBHL schools is a mutually beneficial process for both our research community and for our HL families. Families and other stakeholders of CBHL programs should know that they do not have to do this community sustaining work alone, especially LCTL programs that lack educational resources in mainstream language education. There are public resources that exist—educational, economic, and human resources—that can be accessed through public institutions, and sometimes, reaching out to a language and/or linguistics department at a local college can be the first step in creating a long-term, sustainable research-practice partnership.

Appendix I: Parent Needs Analysis Survey (Qualtrics)

CSGW Language Program Evaluation (Current Parents)

Start of Block: Introduction

Dear parents of CSGW,

My name is John Chi, I am a PhD student in Applied Linguistics and Language Education at the University of Maryland. As some of you already know, I am conducting a **sustainability-focused and participatory-based language program evaluation (LPE)** for the Cantonese School of Greater Washington (CSGW). To be upfront, this LPE is a part of my dissertation study, so it also really helps me to have as many participants as possible.

This survey. As a vital stakeholder group for the school, your input is important to help conduct this evaluation effectively. This survey is meant to serve as a **needs analysis** to help shape and guide the direction of the evaluation. The survey will be organized into three main sections:

- 1) your background information;
- 2) your experiences and perceptions of the school; and
- 3) your ideas about the language program evaluation

If you could spend 15+/- minutes filling out this short survey, I would greatly appreciate it. Your participation is completely voluntary, but the school (and I) would immensely benefit from your input. If you are a two-parent household, you may choose to fill this survey out individually or collectively. I am not going to assume that each spouse will share the same experiences or perceptions, so I will leave that decision up to each of you.

Confidentiality. I will do my absolute best to keep all information confidential, and no one but me (John Chi) will see the direct survey results. The entire survey is kept anonymous, but there is an option at the end of the survey to add your contact information if you want to be contacted for future participation in the evaluation. If I choose to share information in the future (via reports, journal articles, etc.), I can assure you that your identity will be anonymized and no one will be able to connect *what you mention in your responses* to you. By continuing, you are agreeing to participate with this survey.

If you have any questions about the survey, please let me know via email: johnchi@umd.edu

Thank you,

John Chi 朱家業

End of Block: Introduction

Start of Block: A. Background Info

A1 Are you a parent at CSGW?

☐ Yes (1)

☐ No (2)

A2 How long have you been a part of CSGW?

☐ This year (2023-24) is my first academic year (1 year) (1)

☐ Last year (2022-23) was my first academic year (2 years) (2)

☐ Since before COVID-19/temporary school shutdown (3+ years) (3)

A3 How many of your children attend or have attended CSGW (in total)?

☐ 1 (1)

☐ 2 (2)

☐ 3 (3)

☐ 4+ (4)

A4 What other roles do you have at CSGW?

☐ Administration/Leadership (1)

☐ Committee Leader (2)

☐ Committee Member (3)

☐ None (4)

☐ Other (5) _____

A5 Do you have Cantonese heritage?

- ☐ Yes (% does not matter) (1)
- ☐ No (my partner/child does) (2)
- ☐ Other (3) _____
-

Display this question:

If Do you have Cantonese heritage? = Yes (% does not matter)

A6 What generation Cantonese- or Chinese-American do you consider yourself?

- ☐ 1st generation (I immigrated to the U.S. as an adult) (1)
- ☐ 1.5 generation (I immigrated to the U.S. as a youth or teenager) (2)
- ☐ 2nd generation (I was born in the U.S. to immigrant parents, or moved here as a baby/toddler) (3)
- ☐ 3rd+ generation (My grandparents+ immigrated to the U.S.) (4)
- ☐ Other (5) _____
-

Display this question:

If Do you have Cantonese heritage? = Yes (% does not matter)

A7 Did you attend a Cantonese or Chinese school (after school or weekend program) as a child?

- ☐ Yes, for many years (3 or more years) (1)
- ☐ Yes, but only for a bit (1-2 years) (4)
- ☐ Kind of/Not really (5)
- ☐ Not, I did not attend at all (2)
- ☐ Other (3) _____
-

Display this question:

If Did you attend a Cantonese or Chinese school (after school or weekend program) as a child? = Yes, for many years (3 or more years)

A8 How was your experience with the Cantonese or Chinese school that you attended? (Please elaborate your response and share as much as you'd like.)

End of Block: A. Background Info

Start of Block: B. Your experience with CSGW

B1 Can you tell me about your history or background with the school? (Respond however you prefer.)

B2 As a parent, what has your overall experience at the school been like?

B3 Why do you, or what motivates you, to send your child(ren) to CSGW?

B4 As a parent, what do you see as the purpose or goal of the school?

B5 How do you see the school developing in the future? (E.g., What direction do you see the school going?)

B6 Were any of the previous questions in this section confusing to you?

☐ Yes (1)

☐ No (2)

☐ If yes, please elaborate: (3)

End of Block: B. Your experience with CSGW

Start of Block: C. Language program evaluation (LPE)

C1 As you know, I am conducting a language program evaluation, which is meant to promote the sustainability of the school. I am doing this through participatory means, which is meant to get the perspectives from all stakeholders at the school. Your responses in this section will help shape and guide the direction of the LPE.

C2 What are your initial thoughts about me conducting this type of evaluation?

C3 How do you think this evaluation can help the school grow or sustain? (Please elaborate.)

C4 Who do you want to know more information about, as it relates to the school? (Please elaborate.)

C5 What specific things do you want to see from this evaluation? For example, if I were to gather information, what kinds of information do you want to know? Or, what kinds of questions do you want answered? (Please elaborate.)

C6 How do you want to use the information that I gathered from this evaluation?

C7 Were any of the previous questions in this section confusing to you?

☐ Yes (1)

☐ No (2)

☐ If yes, please elaborate: (3)

End of Block: C. Language program evaluation (LPE)

Start of Block: D. Comments or questions?

D1 Do you have anything else that you want to share with me (John)?

D2 Do you have any questions for me?

End of Block: D. Comments or questions?

Start of Block: E. Future participation

E1 Would you like to participate in this evaluation in the future (via interviews, focus groups, etc.)?

☐ Yes (1)

☐ Maybe (2)

☐ No (3)

E2 If you said yes to the previous question, please provide the following information so I can keep in touch:

E3 Name: _____

E4 Best way to contact you (email, phone number, etc.):

☐ Email (1) _____

☐ Phone (2) _____

☐ Other (3) _____

End of Block: E. Future participation

Appendix II: Admin/Board Member Needs Analysis Protocol

Note: On Zoom, turn on closed captioning and then record (with permission).

Welcome/Greetings. (5 minutes)

Background. (10-15 minutes)

1. Can you first tell me a little bit about your background with Chinese, or Cantonese? (E.g., Where did you grow up? How much Cantonese did you hear growing up?)
2. How do you feel about the language shift toward Mandarin in the U.S.?
3. Do you consider yourself first generation, second generation, ...? (Ask to explain.)
4. Did you attend a Chinese school growing up? (*Elaborate:* How many years? How was your experience?)
5. *If yes to previous question:* What did you like about the Chinese school? What do you wish your Chinese school did better?

The school: CSGW. (15 minutes)

1. Can you tell me a little bit about your history or background with the school? (E.g., When did you start being a part of the school? When did your children start attending?)
2. What has your overall experience been like at the school?
3. Why do you, or what motivates you, to send your child(ren) to the school?
4. What do you see as the purpose or goal of the school?
5. How do you see the school developing in the future? (E.g., What direction do you see the school going?)

Language program evaluation. (15-20 minutes)

As you know, I am conducting a language program evaluation, which is meant to help promote the sustainability of the school. I am doing this through participatory means, which is meant to get perspectives from all stakeholders in the school. In this LPE, I am going to have to answer some evaluation questions, but those questions will come from the stakeholders, people like you. So, as I ask these following questions, please keep in mind that you are a primary stakeholder, and that this evaluation is about your needs and what questions you want answered. I am just here to gather data and help in answering those questions in a systematic way.

1. What are your initial thoughts about me running this type of evaluation?
2. How do you think this evaluation can help the school grow or sustain? (*Elaborate:* Do you think it's important?)
3. What kinds of specific things do you want to see from this evaluation? (*Elaborate:* If I were to gather information, what kinds of information do you want to know? Or rather, what kinds of questions do you want answered? Who do you want to know more information about?)
4. How do you want to use the information that I gather from this evaluation?
5. *If time:* What are some things that you like about the school? What are some things that you think could be improved?

Do you have any questions for me?

Appendix III: Teacher Needs Analysis Protocol

Note: On Zoom, turn on closed captioning and then record (with permission).

Welcome/Greetings. (5 minutes)

Background & School. (15 minutes)

1. Can you first tell me about your background? (E.g., Where did you grow up? How much Cantonese did you hear growing up?)
2. Can you tell me about your history or background with the school? (E.g., Did you have children that attended the school? How long have you been teaching there?)
3. Why did you choose to teach at the school? And what motivates you to teach at the school?
4. What do you see as the purpose or goal of the school?
5. How do you see the school developing in the future? (E.g., What direction do you see the school going?)

Language program evaluation. (15-20 minutes)

As you know, I am conducting a language program evaluation, which is meant to help promote the sustainability of the school. I am doing this through participatory means, which is meant to get perspectives from all stakeholders in the school. In this LPE, I am going to have to answer some evaluation questions, but those questions will come from the stakeholders, people like you. So, as I ask these following questions, please keep in mind that you are a primary stakeholder, and that this evaluation is about your needs and what questions you want answered. I am just here to gather data and help in answering those questions in a systematic way. Do you have any questions about the evaluation before I start asking these questions?

1. What are your initial thoughts about me running this type of evaluation?
2. What kinds of specific things do you want to see from this evaluation? (*Elaborate: If I were to gather information, what kinds of information do you want to know? Or rather, what kinds of questions do you want answered?*)
3. How do you want to use the information that I gather from this evaluation?
4. What are some things that you like about the school? What are some things that you think could be improved?

Do you have any questions for me?

Appendix IV: Parent Interview Protocol

Note: On Zoom, turn on closed captioning and then record (with permission).

Interviewer: John Chi

Interview: CSGW Parents (current)

Duration: 30 minutes

(Personal) Experience

1. Tell me a little bit about yourself and your background? And your children?
2. Do you do any kinds of Cantonese-related activities at home? (What kinds of exposure do your children have to Cantonese outside of the school?)
3. [If HL parent] Did you go to a Cantonese school growing up? If so, how was your experience?
4. Why did you decide to send your children to CSGW? (motivation)
 - a. How long have your children been at CSGW? Do you plan on continuing their enrollment?
5. What are your expectations from CSGW? What do you hope you or your children get out of CSGW? What kind of role do you see the school having on your family and children? (impact, imagined future)

School and Outreach

1. Do you think it's important for CSGW to expand and grow?
2. How do you see CSGW developing in the future?
3. What suggestions or recommendations do you have for the CSGW outreach?

Questions?

- Do you have any questions for me?

Appendix V: IRB Approval

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TEL 301.405.4212

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irb@umd.edu
www.umresearch.umd.edu/IRB

DATE: March 20, 2025

TO: John Chi

FROM: University of Maryland College Park (UMCP) IRB

PROJECT TITLE: [2148068-1] Sustainability and investment in the community: A collaborative and participatory evaluation of a Cantonese community-based heritage language school

SUBMISSION TYPE: New Project

ACTION: APPROVED

APPROVAL DATE: March 20, 2025

REVIEW TYPE: Expedited Review

REVIEW CATEGORY: Expedited review category #7. 45CFR46.404 applies. Waiver of assent.

Thank you for your submission of New Project materials for this project. The University of Maryland College Park (UMCP) IRB has APPROVED your submission. This approval is based on an appropriate risk/benefit ratio and a project design wherein the risks have been minimized. All research must be conducted in accordance with this approved submission.

Prior to final approval of this project scientific review was completed by the IRB Member reviewer. This submission has received Expedited Review based on the applicable federal regulations.

This project has been determined to be a MINIMAL RISK project.

Please remember that informed consent is a process beginning with a description of the project and insurance of participant understanding followed by a signed consent form. Informed consent must continue throughout the project via a dialogue between the researcher and research participant. Unless a consent waiver or alteration has been approved, Federal regulations require that each participant receives a copy of the consent document.

Please note that any revision to previously approved materials must be approved by this committee prior to initiation. Please use the appropriate Amendment forms for this procedure.

All UNANTICIPATED PROBLEMS involving risks to subjects or others (UPIRSOs) and SERIOUS and UNEXPECTED adverse events must be reported promptly to this office. Please use the appropriate reporting forms for this procedure. All FDA and sponsor reporting requirements should also be followed. All NON-COMPLIANCE issues or COMPLAINTS regarding this project must be reported promptly to this office.

Please note that all research records must be retained for a minimum of seven years after the completion of the project.

If you have any questions, please contact the IRB Office at 301-405-4212 or irb@umd.edu. Please include your project title and reference number in all correspondence with this committee.

This letter has been electronically signed in accordance with all applicable regulations, and a copy is retained within University of Maryland College Park (UMCP) IRB's records.

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