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Teacher Narratives on Female Dominance in Sustainable Development: Early Childhood Education

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Abstract

Early childhood education (ECE) teachers are female, even in school management positions. ECE is perceived as dominated by females and has long been regarded as a female occupation. This study explores teacher narratives on female dominance in sustainable development in ECE. Even though females dominate ECE, slight changes occur as some male teachers break the stereotyping and the gender imbalance. This article explores the teacher's narrative through qualitative research, semi-structured interviews, and focus groups, which were employed to understand teachers' narratives on female dominance. Female teachers were purposefully selected to provide an in-depth understanding of the phenomenon. The paper is theoretically grounded on social identity theory, emphasizing that individuals must protect their identities through favorable groups to preserve their self-esteem. A thematic analysis approach was applied to analyse and make the collected data meaningful. The findings show that there are few male teachers in ECE, and as a result, men who wish to become teachers in ECE are scared to be ridiculed and not regarded as man enough. The suggestion is that for ECE to be sustainable, the Department of Basic Education must consider male teachers to be included in ECE and develop strategies for recruiting male teachers and their sustainability.

Keywords: teacher, female, dominance, early childhood education

1. Introduction

Early childhood education (ECE) settings mainly involve female teachers, who predominate since ECE is generally a female occupation (Petersen, 2014; Mashiya, 2015; Msiza, 2020). Women have historically held positions of power in ECE because of the general belief that they are more capable of nurturing than men. This prevents male educators from reimagining themselves as ECE professionals and moving further in their profession (McGrath, 2018; Mathwasa & Sibanda, 2021). The literature shows that the stereotypical ideas of 'nannies' and 'carers' accompanying ECE instruction are more often connected with women's roles than men's (Petersen & Petker, 2011; Petersen, 2014; McGrath, 2018; Msiza, 2020). In ECE, most teachers are female, even in school management positions. Hence, ECE is perceived as dominated by females and has long been regarded as a female occupation space (Petersen, 2014; Mashiya, 2015; Msiza, 2020). Society trusts women to teach young children because women are considered more nurturing than men. As a result, society has deemed that this sector should be dominated by female teachers (Petersen, 2014; Mashiya, 2015; Msiza, 2020).

Even though females dominate ECE, slight changes occur as some male teachers are in ECE settings. Men who deviate from traditional and stereotyped gendered performances tend to be ridiculed by other men and women (Brown, 2016; Moosa & Bhana, 2017; Yang, 2018). However, solid evidence suggests that many parents or guardians are concerned when their young children are assigned a male teacher (Yang, 2018). Therefore, it is evident that for ECE to be sustainable and continue to develop, women are relevant and should occupy the space. Male teachers who have joined the female sector as sustainable proclaimed that they are not soft and feminine compared to females (McGrath, 2018; Msiza, 2020). The argument is that children's gender knowledge is

extended upon observing male teachers demonstrating feminine and masculine traits.

2. Theoretical Framework

The theoretical grounding of this paper is social identity theory (Tajfel & Turner, 1979). The theory is crucial in exploring how females in ECE settings view themselves and the roles deemed appropriate for them against the other gender. Delahaij (2020: 660) states that social identity theory posits that individuals must protect their social identities through favorable groups to preserve their self-esteem. In addition, the female teachers will get the opportunity to answer questions about how they socialize with children, how they operate in a sector that believes working in an ECE setting is a woman's career, and how they protect and preserve their self-esteem. Social identity theory emphasised the existence of social groups and the principle that could explain society's perceptions towards female teachers compared to other groups. As a result, female teachers in ECE get the opportunity to protect their identities.

3. Research Objective

This paper explores teacher narratives on female dominance in sustainable development in early childhood.

4. Literature Review

Education plays an essential role in human life. Early childhood education is the development and education phase, including most cognitive, physical, and social-emotional development (Berk, 2013; Silman, Bozcan, & Koran, 2019). Differences in behavior and personal characteristics between men and women are socially learned and shaped. Children at ECD age are given gender-stereotyped answers and act appropriately following their gender as expected by society (Kanka, Wagner, Schober & Spiel, 2013). During the development phase, the child is introduced to the rules and behavior deemed appropriate to their gender by society and family. An early childhood teacher is essential as it is the first teacher figure apart from parents. The teacher's attitudes and behaviors have permanent effects, allowing them to learn and internalise attitudes and behavior regarding gender roles (Avci & Toran, 2012; Connell, 1998; Driscoll & Nagel, 2008; Meece & Daniels, 2008; Inceoglu & Akcali, 2018). Gender denotes both innate physiological and biological traits for men and women.

Accordingly, female and male gender traits change into gender roles due to the influences of social values and demonstrate differences in behavior (Burr, 1998; Marshall, 1999; Todor, 2010). According to the Organisation for Economic Co-operation and Development (OECD), most ECED and elementary school teachers in most countries are female (OECD, 2015). Cultural and economic conditions have shaped gender roles in teaching throughout history. The religious and moral values of society have influenced gender perceptions and expectations. In this respect, the trust in the protective and supportive nature of women has resulted in the perception that the ECE profession is perceived as services aimed at providing care and protection for the children and in men not giving trust as much as women do in terms of fulfilling these services (Akman, Taskin, Ozden, Okyay, Corfu, 2014; Birey, Beyidoglu, 2013; Yilmaz & Dereli, 2015). Teaching is perceived as a woman's occupation in society, specifically ECD. The influence of stereotypical judgments regarding gender roles during teacher-student communication in the teaching-learning process is apparent. Teachers' behaviors and attitudes supporting sexist, stereotypical judgments of the family and culture influence the games and toys children play, game friend choices, language properties they use, and their problem-solving methods. As reported by Berk (2013), teachers might act in a manner that continues the social gender roles taught at home and support stereotypical judgments. While the manly behaviors of girls are sometimes perceived as being strong and are approved, the feminine behaviors of boys are most often suppressed strongly. Savinskaya (2017) suggests that ECE teachers incorporate effective instructional strategies to promote the sustainability and development of ECD settings. Gender equality applies to women and me, and it is seen as an instrument of the situation of women in particular. Gender stereotyping perceptions in ECDs and schools contribute to limiting the freedom of children to make their own educational choices.

The overwhelming concentration of women teachers in early care and education programs is not new. Despite the prolonged dominance of women in these fields, limited research investigates several possible problems in having almost all women in the workplace (Ceci, Ginther, Kahn & Williams, 2014). Women are believed to be warm, nurturing, and sensitive; they are thought to be more talented at working with young learners than men (Msiza, 2020). Since the customers of early childhood programs are frequently women, the symbols of the power hierarchy of conventional gender positions of women as caretakers are being reinforced, making this repetition of gender production and reproduction of power more apparent (Ransom, 1990). The feminisation debate is linked to the historical context of gender equality. In the late 19th and early 20th centuries, in societies where women were restricted from choosing professions of choice, teaching was their only channel of economic empowerment (Fischman, 2007). Historically, the increase in the number of females in teaching has been in correlation with the expansion of the collective education system (Carrington & Phee, 2008). The feminisation of early childhood teaching is not only prevalent in South Africa but also in Pakistan due to the influence of

societal beliefs and norms on career choices (Danish, 2016).

In South Africa, attitudes towards ECE preservice teachers indicate different sentiments about male teachers teaching in ECE. The National Teacher Education Audit Synthesis Report highlighted the feminization of the teaching profession at the ECE level, where most teachers are females (Hofmeyr & Hall, 1995). Petersen and Petker (2011) argue that in South Africa, teaching in early or lower grades is associated with being nannies and caregivers who are most likely to be female due to their maternal instincts. Bhana and Moosa's (2018) study found that male preservice teachers were more comfortable teaching learners in higher grades, equating to having a higher status profession than teaching in the ECE. Scholars have analysed the problems in the career development of female university teachers from the dimension of power (Shu, 2020). Although female teachers now account for half the teachers in universities, men remain at the top and centre regarding administrative power distribution, participation in school management, and teaching and scientific research achievements brought about by academic power. Women tend to be at lower levels on the fringes, presenting a clear gender-segregated state. The situation is mainly brought about by social gender factors, including traditional gender patterns, policies, institutions, families, and individuals (Tao, 2016). Career development is closely related to self-actualisation (Ren, 2016).

5. Research Methodology

A qualitative research approach was employed to collect rich, in-depth data. Within qualitative research, a phenomenological research design was applied to explore teacher narratives on female dominance in sustainable early childhood education. Moreover, it was used to make sense of the subjective opinions of female dominance on the topic. Semi-structured interviews were conducted with four ECE female teachers and selected through convenience sampling (Mweshi & Sakyi, 2020). The semi-structured interviews solicited teacher narratives on sustainable development in ECE settings. The data collection process enhanced the researchers' focus on the study's objectives.

6. Data Analysis

A thematic analysis approach was applied to analyze and make the collected data meaningful (Peel, 2020). Importantly, it explored the teacher narratives on female dominance in sustainable early childhood settings. In understanding the teachers' narratives on female dominance using the social identity theory (Tajfel & Turner, 1979). The data was imported into Atlas. Ti software. An independent coder was employed to code the transcribed data, which enhanced the accuracy of the coding process and the credibility of the findings (Hosseini et al., 2021). O'Kane, Smith, and Lerman (2021) explain that the reliability of findings can be achieved by reducing biases and being transparent in the coding and analysis processes. At the end of the analyses, themes emerged.

The themes are presented in the section on findings and interpretation and supported by verbatim quotes of teacher's narratives and responses during the semi-structured interviews.

6.1 Female Dominance

The results showed that female teachers are dominant in ECE. For example, external forces from society question the male teachers' career choices in ECE and why they teach young children. They stated that they needed to prove themselves as they felt they were regarded as 'not man enough' because they were taught in a field occupied mainly by females. Most female teachers are regarded as knowledgeable because they have experience working with children, and in addition, the sexuality of the male teachers is questioned:

T: 1 *There is the knowledge that women are good for teaching young children because they are perceived to have love for the children.*

T: 2 *The first is that female teachers dominate ECE and are considered suitable for teaching in this setting.*

T: 3 *With female teachers, physical contact with children is easy for them; you will find them touching children's heads and ears, and I don't think it can be easy with the other gender.*

T: 4 *During our training as preservice teachers, the number of females outnumbered the number of male preservice teachers who studied early childhood education, and the notion of female dominance is evident in universities.*

6.2 Historical and Cultural Lens

The results demonstrated that male teachers were considered potentially abusive in ECE. Male teachers have to prove themselves, to show the children that not all men are mean and try to have good relationships with children by being supportive, gentle, and caring. The environment plays a significant role; if children feel unaccepted, especially in a male teacher's classroom, that is seen as abuse:

T: 1 *I teach grade 2, and there is only one male teacher among women in our school.*

T: 2 *Whenever there is a situation in a class, the male teacher is advised to call for a female teacher as the male teachers are regarded as authoritative.*

T: 3 *In a meeting, women are talking too much as they are talkative; being the minority, we have to listen to them.*

T: 4 *I am very proud of teaching young children, and I understand teaching is a job, regardless of whether it is male or female.*

6.3 Breaking Gender Barriers

Male teachers in ECE are breaking gender barriers and have constructed their identities by joining a setting where female teachers dominate and outnumber male teachers. Male ECE teachers attest that they have a passion and love for the children and can do better in teaching them; it is not only female teachers who can teach in ECE. Other male teachers do not have problems teaching young children and regard themselves as teachers like any other teachers. The Department of Basic Education should know of the skew prevailing in ECE settings:

T: 1 *In ECD, there are very few male teachers in the space of women's domination, and the male teachers are breaking gender barriers.*

T: 2 *Our school has two male teachers in our space, and the males assist us on sports grounds and managing with discipline.*

T: 4 *I asked one male teacher how it is possible to work with young children, and the answer was that I love children and have a passion for teaching ECD, and I can play with them.*

7. Discussions

This study aims to explore teacher narratives on female dominance in sustainable development in early childhood education settings.

This paper found that female teachers dominate ECE settings; however, some male teachers teach in ECE even though there are few. Male teachers were told to call female teachers whenever a class situation occurred, and as a result, they were forced to rely on females. The paper found that male teachers also had positive experiences; they could break the gender barriers in ECE for gender equity. Male teachers in a female-dominated setting were passionate about teaching in ECE (Mashiya et al., 2015; Perez, 2019). Therefore, for the sustainable development of ECE, the Department of Basic Education can conduct public awareness campaigns to actively recruit males or men for professions working with young children through teacher programmes and to expose young children not only to women but men as well as there are men who are taking care of their children at home. As a result, they can teach young children if they wish to become teachers of young children. Other children don't have a father figure at home. If they get the opportunity to be taught by a male teacher, then the ECE can be sustained and developed, and not young children can get used to female teachers only. When transitioning to intermediate, they meet with male teachers, become frustrated, and take a long time to cope with this new situation. According to the teacher narratives, females are passive, fragile, and emotional. At the same time, men are independent and assertive. With this statement, it is evident that for ECD to be sustainable and to continue to develop, the other gender is needed to reduce the imbalance in ECD settings.

8. Conclusion and Recommendation

There are few male teachers in ECE in South Africa due to the gender imbalance noted in the ECE setting. This situation calls for the recruitment of more male teachers. Therefore, public recognition of outstanding male ECE teachers and male lecturers in ECE undergraduate degrees should attract males to ECE through advertising that focuses on male involvement in ECE, promoting the profession to men, and reducing negative stereotyping. Proper attention should also be paid to appropriate orientation strategies for prospective students to assist them in making informed decisions regarding their choice of specialisation. Male student teachers should also be encouraged and educated about strategies to cope with criticism so that they will be resilient when facing challenges with their career choices. Having male teachers together with female the Department of Education will have considered gender equity and sustainable development of ECE settings.

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A Comparison of the Performance of Direct and Transition Students in a Bachelor's Degree Programme in Kenya

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Abstract

This study examined the comparative academic performance of direct entry and transition students in several Bachelor's degree programmes in Kenya, in the context of the Recognition of Prior Learning framework. Through the historical review of Kenyan education policies, the Kenya National Qualifications Framework Act (2022), and General Regulations 2025, the study established that alternative admission routes are essential tools for employability, lifelong learning, and inclusivity. Using a quantitative retrospective design, final mean cumulative GPA data from 2,542 graduates were analyzed through one-way ANOVA and Games-Howell tests. Of these, 1,728 (68%) were direct entry and 814 (32%) were transition students. A one-way ANOVA showed that there was a significant difference in cumulative GPA between students who joined the undergraduate program via Direct Entry and those who transitioned from diploma programs ($F_{(1,2540)} = 4.859$, $p = 0.028$). The Games-Howell Test for post hoc analysis showed that the transition group performed significantly better than the direct entry group in the Bachelor of Arts in Psychology and Counselling ($F_{(1,383)} = 6.653$, $p = 0.01$) with ($\bar{x} \pm sd = 3.11 \pm 0.34$) and ($\bar{x} \pm sd = 2.96 \pm 0.53$) respectively. The reverse was true in computer science ($F_{(1,465)} = 14.583$ and $p < 0.001$), with the direct entry students returning a cumulative GPA of ($\bar{x} \pm sd = 2.66 \pm 0.47$) as compared to the transition group ($\bar{x} \pm sd = 2.42 \pm 0.58$). There was no difference between the groups in the Bachelor of Arts in Communication ($F_{(1,591)} = 0.000$, $p > 0.05$). These results affirm the RPL policy that provides alternative routes of access to undergraduate studies. The study recommends further investigation on the identification of the specific factors that influence better performance from transition students and exploring the issue of admitting students without formal qualifications into degree programmes.

Keywords: recognition of prior learning, direct entry students, transition students, bachelor's degree programme

1. Introduction

Recognition of prior learning (RPL) is a process by which all previous formal, informal, and nonformal learning is given academic recognition.¹ It involves evaluating an adult learner's previous experience, skills, knowledge,

¹ Garnett J & Cavaye, A., (2015). Recognition of Prior Learning: Opportunities and Challenges for Higher Education. *Journal of Work-Applied Management*, 7(1), 28-37.

and informal learning and articulating it towards a formal qualification.¹ The evolution of educational policy in Kenya is profoundly characterized by the influential Sessional Papers of 1965 and 2005. Each of these policy documents was crafted in response to major national aspirations, global pressures, developmental ideals, and socio-economic realities of the education system in Kenya.² Both sought to align education with the broader goals of nation-building, economic growth, and social equity.³ Despite being produced over forty years apart, both documents share the central aim of reforming Kenya's educational system to better serve society, albeit under different socio-political contexts.⁴ Education reforms in Kenya evolved over decades, responding to changing socio-economic, cultural, and political dynamics. An essential component of quality and inclusive education is the recognition of learners' prior learning- that is, knowledge, skills, and competencies acquired through formal, informal, and non-formal means before or outside of the classroom settings.

The 2005 Sessional Paper No.1 2005, explicitly acknowledges the importance of non-formal and informal learning and proposes the importance of Prior Learning as a strategy for reintegrating out-of-school youth and adults to Higher Education. This Sessional Paper emphasized the need to bridge non-formal education and formal higher education systems. The paper encourages the development of flexible admission criteria in Higher Education Institutions and supports the development of modular and credit accumulation systems to accommodate indirect entry to Universities. The Sessional Paper 2005 policy marked a great paradigm shift from rigid academic pathways to a flexible, progressive, and inclusive education systems that appreciate prior and experiential competencies and skills in University admission.⁵

The Kenya National Qualifications Framework Act⁶ provides an approach for the alignment of Kenya's qualifications framework with global standards while tackling long-standing issues such as fragmented qualifications, bottlenecks, lack of transparency, lack of comparability, and poor linkages between education outcomes and labor market needs in academic spheres.

Additionally, the KNQA's 2025 General Regulations 2025 establish the credit accumulation and transfer system (KCATS) as a foundational mechanism for upward, downward, and lateral movement within Kenya's qualifications framework. Regulation 29 of the KNQA General Regulations is the principal provision concerning credit transfers, while Regulation 29 (3) of KCATS says that KCATS is designed to "facilitate credit transfers and exemptions and vertical and horizontal mobility of learners and enable entry, re-entry and attachment of lifelong learning."⁷

A maximum of 49% of the total credits earned from a completed qualification (such as a Diploma) may be transferred to a related or similar qualification when bridging to a higher level, such as a Degree (see Regulation 29(4)(e) but credits for core units such as projects, attachments, and similar experiential components are often excluded.⁸ A person who has gained a diploma-level qualification (KNQF Level 6) through informal or non-formal means, for example, through work experience, self-study, or industry-based learning, may apply to a registered Qualifications Awarding Body for an RPL process to have their skills and knowledge assessed and awarded a formal Level 6 diploma. Once awarded, these can be used in credit transfer under the KCATS provisions.⁹

Direct entry into a university bachelor's degree programme is based on standard academic qualifications such as

¹ AM Singh, (2011). Let the Doors of Learning be Open to all - A Case for Recognition of Prior Learning. *The South African Journal of Higher Education*, 25(4). <https://hdl.handle.net/10520/EJC37705>Cited by:1

² M Ngau, (1990). The Gap Between Promise and Performance: Education-Policy Making and Implementation in Kenya. *Ufahamu: A Journal of African Studies*.

³ Ibid.

⁴ Ibid.

⁵ See Sessional paper No. 1 of 2005 on a Policy Framework for education, training and Research (10 above).

⁶ The Kenya National Qualifications Framework Act CAP 214, Revised in 2022. <http://kenyalaw.org/8181/exist/rest/db/kenyalex/Kenya/Legislation/English/Acts%20and%20Regulations/K/Kenya%20National%20Qualifications%20Framework%20Act%20-%20No.%202022%20of%202014/docs/K>

⁷ Section 29(3) of the Regulations.

⁸ See General Regulations of 2025, see also Kenya National Qualifications Authority capacity development programme, available at https://acqf.africa/capacity-development-programme/webinars/2nd-training-week-5-9-september-2022-skills-qualifications-and-frameworks-for-mutual-trust/session-18_kenya-cats.pdf/@@display-file/file/session-18_kenya-cats

⁹ Regulation 35(4).

the Kenya Certificate of Secondary Education (KCSE) and the Kenya Advanced Certificate of Education (KACE).¹ Non-direct entry into a university bachelor's programme is facilitated by alternative entry pathways like mature age admission, diploma qualification, and credit transfers. In this case, diploma holders with a credit pass are eligible for admission, or those with a pass diploma could be considered if they have two years of post-graduation experience.² This aligns with the recognition of prior learning principle as it allows diploma holders entry into degree programmes.

Universities in Kenya responded to the demand for higher education by introducing a module 2 form of admission. Through module 2, people with diploma qualifications are allowed entry into a degree programme. Others with degrees in other fields are also allowed to use their degrees to gain access to other degree programmes. The introduction of module 2 was an appreciation that there must not only be one pathway to academic progression. This approach has ensured that Nurses who previously possessed a diploma could 'upgrade' to a degree within two years of additional study. A similar approach was adopted in the Schools of Communication, Business Studies, Computer Science, Social Sciences, and many others. In the fullness of time, students admitted through the two pathways attend the same classes and sit for similar exams in their third and fourth years. The concept of RPL is also intended to admit to higher levels, people with no formal learning but with practical experience in a certain field.

In Australia, RPL was introduced as part of the national framework for the recognition of training. The initial focus was on vocational training and training at polytechnics and adult education. However, the programme has now been accepted for accreditation of education and training, including at the university level. In Europe, a wide range of RPL has been developed, providing exemptions in admission of candidates for further studies. For instance, France allows the issuance of degrees based on competence, whether formally or informally. In all, RPL has been recognized as important in addressing issues relating to lifelong learning, employment, and social inclusion. A study established that mature students who adopted alternative academic progression pathways were more motivated by intrinsic goals, meaning that the prior life experience of mature students promoted a deep approach towards studying in higher education.³ Indeed, this was confirmed by Kaldi (2009), who established that mature students had significant skills and experiences which contributed to acquiring a high standard of education and success in course completion.⁴ Hongtao and Xuanning did a longitudinal study on 12,096 students between 2002 and 2014 to establish the time it took for students to graduate, either through direct entry or from an RPL perspective.⁵ It was established that students' decisions and performance in college were major factors in determining graduation. Through longitudinal data and event history analysis, up to 12096 first-time freshmen in a large public university were tracked between the years 2002 and 2014. The findings revealed that academic performance was the most important factor, followed by students' decisions on majors (such as having double majors/minors) in determining graduation and time to degree. However, the study did not establish whether this academic performance was a function of prior learning.

Although enshrined in various international qualification frameworks, there still exist certain barriers that have prevented the application and widespread use of RPL. Such barriers range from personal to institutional, financial, and procedural issues. The case of the MBA programme at the University of KwaZulu-Natal could be a good case study.⁶ The Graduate School of Business of the University of KwaZulu-Natal admitted seven students onto the MBA programme based on RPL. The decision was challenged by senior academics at the faculty level on the basis that it was unfair that someone with no prior qualifications could be admitted to Master's Study programme and would obtain a qualification equal to or just below that of academics who had spent at least seven years to achieve a master's qualification. It was counter-claimed that RPL was a national imperative and one which the University had a moral obligation to meet. Furthermore, it was argued that based on the University policy on RPL, the School and Faculty had an obligation to comply. This study aimed to determine the academic merit of RPL (a student's performance on the programme) and whether RPL students needed additional support or mentorship. Based on the

¹ Daystar University, *Current Statutes of Daystar University* (2013) 13, The University of Nairobi, *Statutes* (2013) 50, The Egerton University, *Statutes* (2023) 75.

² Ibid 76.

³ J Richardson, (1994). Mature Students in Higher Education: I. A Literature Survey on Approaches to Studying. *Studies in Higher Education*, 19, 309-325. <http://dx.doi.org/10.1080/03075079412331381900>

⁴ S Kaldi, (2009). Student Teachers' Perceptions of Self-Competence in and Emotions/ Stress about Teaching in Initial Teacher Education. *Educational Studies*, 35, 349-360. <https://doi.org/10.1080/>

⁵ Y Hongtao & F Xuanning, (2017). Rethinking Graduation and Time to Degree: A Fresh Perspective. *Research in Higher Education*, 58, 184–213, at <<https://doi.org/10.1007/s11162-016-9420-4>>

⁶ AM. Singh, (2011). Let the Doors of Learning be Open to All — A Case for Recognition of Prior Learning. *SAJHE*, 254, pp. 803–818.

students' results, RPL has been found to have academic merit and RPL students did not require additional support in order to succeed on the MBA.

Kenya has practiced the admission of students to degree programmes using an alternative route, largely a diploma. Students with diplomas are admitted and mixed with direct entry ones attending the same classes and sitting for the same examinations. Another but similar approach is admitting students with a degree in one field into another field altogether, such as using a degree in engineering to get into a Law program. These approaches emphasize progression from one level of academic achievement to the next. No serious attempt has been made to implement RPL. Even then, there is no study investigating how these two pathways compare.

One of the main issues of concern has been whether learners who gain direct entry for degree studies comparatively register higher academic achievements than the learners who gain admission through alternative progression pathways. There is therefore a need to determine whether or not there is a difference between the academic achievement of direct and non-direct entry degree candidates.

2. Objectives

This study will seek to:

- 1) Compare the performance of students admitted directly from school and those admitted through progression on the final grade attained at university.
- 2) Propose policy recommendations regarding admissions for bachelor's degree programmes in Kenya.

3. Theoretical Framework

This study is based on the Rhizoactivity theory as proposed by Dae Joong Kang's work. This is a postmodern theory of lifelong learning that proposes understanding learning in a complex, interconnected world, drawing inspiration from the botanical concept of a rhizome. It advocates for embracing uncertainty and rejecting linear, binary ways of thinking about learning, reflecting a more "nomadic" and open-ended approach to knowledge acquisition and development. Rhizoactivity theory, grounded in the premise that learning is non-linear, dynamic and entangled, was leveraged as a framework for examining the learners' journeys for both direct and transition entrants into degree programmes in Kenya. Rhizoactivity theory draws attention to learners' wayfinding within and across the entangled relationship between learning histories, social relations and institutional practices. For both categories of students who entered university for the first time, either directly from secondary school or through a transition programme, the trajectory was far from straightforward. For direct students, Rhizoactivity theory drew attention to their impulse to make new connections in response to unfamiliar and potentially new academic/pedagogic challenges with little or no history of academic or pedagogic experiences beyond secondary schools. As such, their entry and trajectories could be construed as making new connections/entanglement in an otherwise relatively empty/undiscovered rhizosphere of higher education and beyond secondary education.¹

Important nodes within the academic rhizome include those formed by the forms of prior learning of students from diploma or bridging programme undergraduates, which closely align with the concepts in Recognition of Prior Learning (RPL) theory and Rhizoactivity theory. RPL is defined in the Competency-Based Curriculum of the Kenyan context and closely aligns with CBC, which focuses on recognizing both the tacit and explicit competencies nurtured outside formal academic settings and pathways.² Transition undergraduates utilized their prior theoretical and practical academic experiences to recalibrate their learning within the degree programmes, thus demonstrating that prior learning can be recognized and utilized for the purpose of advancing in the academic hierarchy.³ By contrasting the two groups through the dual lenses of Rhizoactivity theory and RPL, this study elucidates the performance differentials as not merely reflections of inherent capabilities but as products of distinct learning paths, each informed by the respective educational histories and institutional validations of competencies of the cohorts.

4. Methodology

This study assumed a quantitative retrospective approach comparing the mean performance on the final examinations of direct entry and transition students. The final cumulative grade point average (GPA) of students who graduated between 2020 and 2024 was compared. A total of 2,542 final year grades were used. Of these, 1,728 (68%) were direct entry and 814 (32%) were transition students. This was for the degrees of BA Communications (n = 586), BA International Relations (n = 564), BA Peace and Conflict Management (n = 385), BA Public Relations (n = 122), Bachelor of Commerce Business Administration (n = 418), and BSc Computer

¹ Kang, DJ, (2022). *Rhizoactivity Theory: A Post-Qualitative Framework for Learning Trajectories*. London: Routledge.

² Republic of Kenya, (2017). Basic Education Curriculum Framework. Nairobi: Kenya Institute of Curriculum Development.

³ UNESCO, (2020). *Recognition, Validation and Accreditation of Non-formal and Informal Learning in Kenya*. Nairobi: UNESCO.

Science (467). The names of the subjects were redacted to protect their privacy. The data used cannot be traced back to the individuals who attained those scores. There were no other serious ethical issues involved.¹ Descriptive statistics such as bar graphs, tables, means, standard deviation, and standard error of the mean were used. A one-way analysis of variance was conducted, followed by the Games-Howell Test for post hoc analysis. This latter test is ideal when group variances are unequal and sample sizes differ, as was the case in this study.

5. Results

This study compared the mean performance of the cumulative GPA of subjects from six different degree programmes for direct and transition admission to the University. We compared data from 2,542 subjects. A summary of the cumulative GPA for the direct and transition group of students is presented in Table 1.

Table 1. A presentation of the mean, standard deviation, standard error, and 95% confidence intervals for direct and transition entry students in all six programmes (n=2,542)

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
D	1728	2.8219	.49518	.01191	2.7986	2.8453	.00	3.83
T	814	2.8667	.43978	.01541	2.8365	2.8970	.00	3.73
Total	2542	2.8363	.47851	.00949	2.8177	2.8549	.00	3.83

(D = Direct admission, T = Transition from diploma students).

Transitioning students had a slightly higher mean GPA (2.867) than those admitted directly. Direct admission students showed greater GPA variability (SD = 0.495) compared to transitioning students (SD = 0.440). The standard errors (SE) are low for both groups, meaning the mean GPA estimates are precise. The 95% confidence intervals for the two groups do not overlap completely (Direct admission: 2.7986 – 2.8453, Transition from diploma: 2.8365 – 2.8970). This hints at a potentially significant difference between the two groups. Both groups have students with zero GPA, which could indicate academic failure, withdrawal, or non-completion. Overall, the transitioned students achieved a higher cumulative GPA than the direct entry ones (Figure 1).

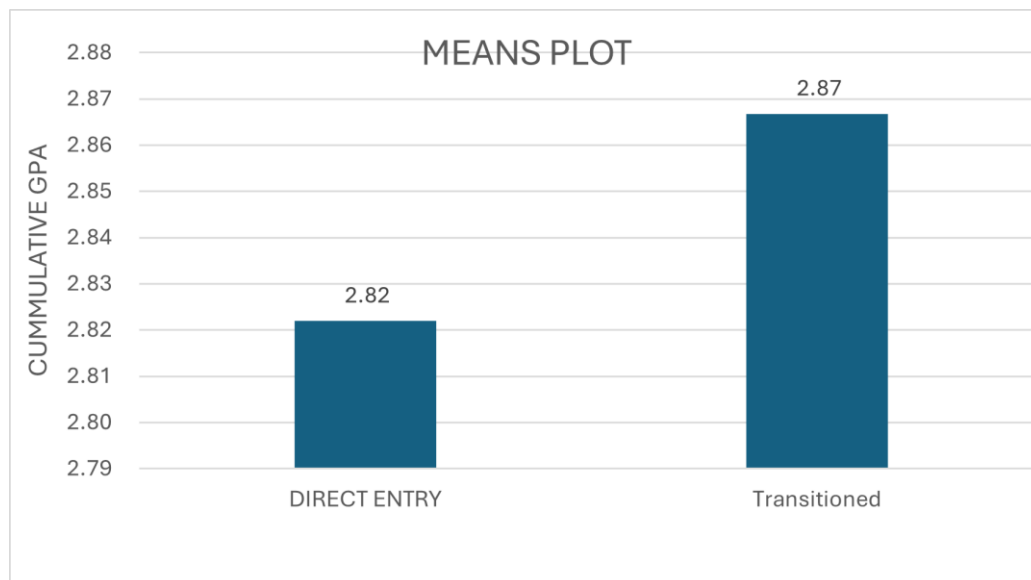


Figure 1. A comparison of the mean cumulative GPA between the direct and transitional entry students

Table 2 presents the mean GPA, standard deviation (SD), and standard error (SE) of GPA scores for 2,542 students across six undergraduate programs. These figures offer insights into academic performance and variation within each program.

¹ M Wekesa, (2025). *Research Methods*, 2nd edn. Nairobi.

Table 2. The Mean, Standard Deviation, and Standard Error of GPA scores for Six Selected Academic Programmes at Daystar University (n = 2,542)

	n	Mean	Std. Deviation	Std. Error
BA.C	586	2.8250	.38274	.01581
BA.IR	564	2.9466	.42393	.01785
BA.PC	385	2.9990	.49046	.02500
BA.PR	122	2.9016	.53563	.04849
BCM.BA	418	2.7695	.52290	.02558
BSC.C	467	2.6256	.49369	.02285
Total	2542	2.8363	.47851	.00949

[BA.C – BA Communications, BA.IR – BA International Relations, BA.PC – BA Peace and Conflict Management, BA.PR – BA Public Relations, BCM.BA – Bachelor of Commerce Business Administration, BSc.C – BSc. Computer Science]

The ANOVA results ($F_{(1,2540)} = 4.859$, $p = 0.028$) indicate a statistically significant difference in cumulative GPA between students who joined the undergraduate program via Direct Entry and those who transitioned from diploma programs (Table 3). While the difference is statistically significant, it is relatively small in magnitude, suggesting that the mode of entry has a limited impact on overall academic performance.

Table 3. Analysis of Variance Testing the Difference in Performance for Two Different Modes of Intake by Use of Cumulative Grade Performance Average (GPA)

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	1.111	1	1.111	4.859	.028
Within Groups	580.698	2540	.229		
Total	581.809	2541			

The highest performing Programs were BA (Peace and Conflict Studies) with an average GPA of 2.9990, and BA (International Relations) with a mean GPA of 2.9466. The lowest Performing Program was BSc (Computer Science) with an average GPA of 2.6256. This variation in GPA across programs justified performing an ANOVA test to determine if the differences are statistically significant.

A one-way ANOVA revealed a statistically significant difference in cumulative GPA across the six undergraduate programs ($F_{(5, 2536)} = 37.694$; $p < 0.001$). (Table 4).

Table 4. Analysis of Variance testing the difference in performance for 6 different programmes by use of cumulative grade performance Average (GPA)

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	40.248	5	8.050	37.694	.000
Within Groups	541.561	2536	.214		
Total	581.809	2541			

The between-groups sum of squares ($SS = 40.248$) reflects the variability in GPA due to differences between the six academic programs. The within-groups sum of squares ($SS = 541.561$) captures the variation in GPA within each academic program. The Games-Howell post hoc test was conducted following a significant one-way ANOVA to compare the mean cumulative GPA between six undergraduate programs. This test revealed statistically significant GPA differences between many program pairs at the $p < 0.05$ level as shown below:

Program Pair	Mean Difference (I-J)	p-value	Direction
BA.C vs BA.IR	-0.1216	.000	BA.IR > BA.C
BA.C vs BA.PC	-0.1740	.000	BA.PC > BA.C
BA.C vs BSc.C	+0.1994	.000	BA.C > BSC.C
BA.IR vs BCM.BA	+0.1771	.000	BA.IR > BCM.BA
BA.IR vs BSc.C	+0.3210	.000	BA.IR > BSC.C
BA.PC vs BCM.BA	+0.2295	.000	BA.PC > BCM.BA
BA.PC vs BSc.C	+0.3734	.000	BA.PC > BSC.C
BA.PR vs BSc.C	+0.2760	.000	BA.PR > BSC.C
BCM.BA vs BSc	+0.1439	.000	BCM.BA > BSc.C

A one-way ANOVA shows there is a statistically significant difference in GPA between Direct Entry and Transition students $F_{(1,2540)} = 4.859$, $p < 0.05$). Transition students (T) showed a slightly higher mean GPA than Direct Entry students (Table 4).

A comparison of the means between direct entry and transition groups for each academic programme is shown in Figure 2. These findings confirmed that the Bachelor of Arts in Peace & Conflict and the Bachelor of Arts in International Relations have significantly higher GPAs compared to the BSc.C (Computer Science) and the Bachelor of Commerce Business Administration.

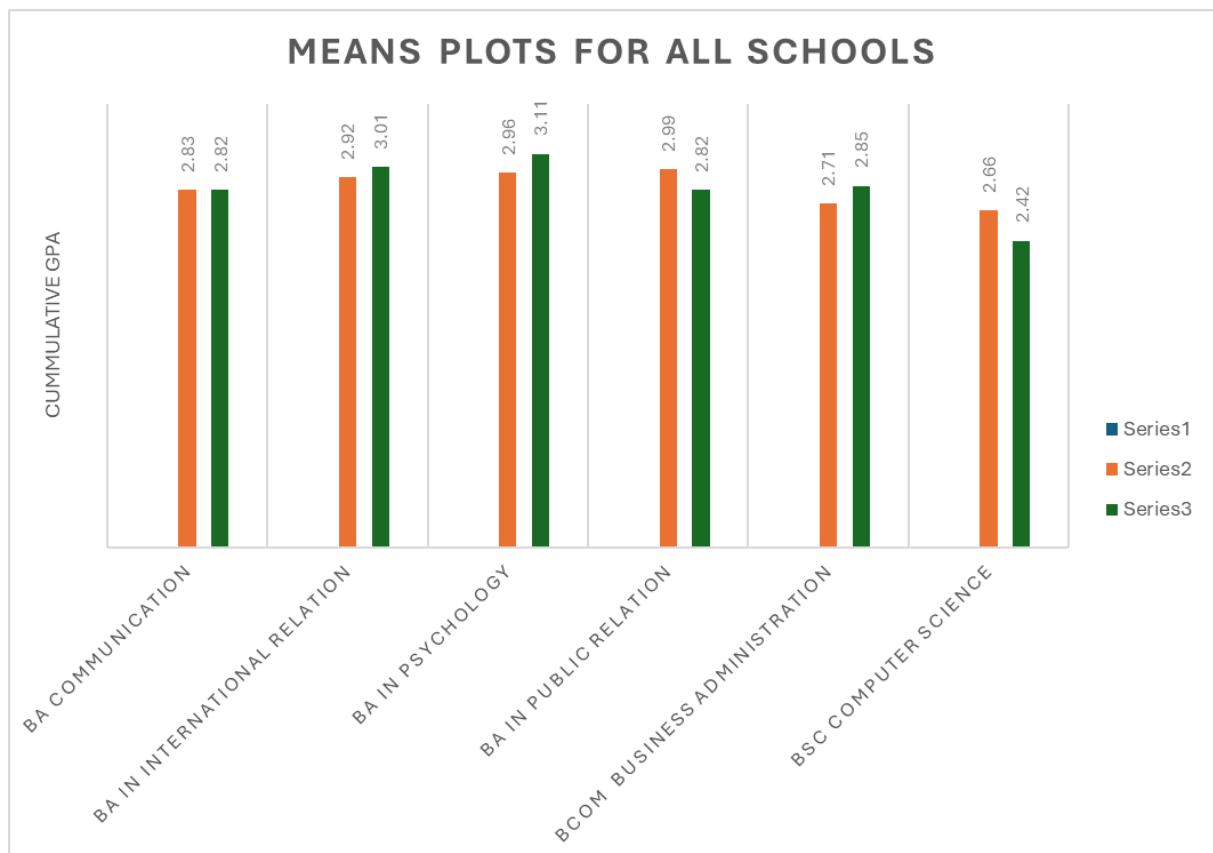


Figure 2. Mean Cumulative GPA for each academic programme

An analysis of variance on Direct entry and Transition for Bachelor of Arts in Communication did not reveal a significant difference ($F_{(1,591)} = 0.000$, $p > 0.05$). This indicates that students admitted through both routes performed at par. The diploma qualification appears to have prepared the students adequately for the Bachelor's programme.

An analysis of variance on Direct entry and Transition for Bachelor of Arts in International Relations & Security Studies returned a slightly significant difference ($F_{(1,562)} = 4.732$, $p < 0.05$). The transition students performed slightly better ($\bar{x} \pm sd = 3.01 \pm 0.40$) about direct entry ($\bar{x} \pm sd = 2.92 \pm 0.43$). The analysis of variance on Direct entry and Transition for Bachelor of Arts in Psychology and Counselling showed a significant result ($F_{(1,383)} = 6.653$, $p = 0.01$) in which the transition group ($\bar{x} \pm sd = 3.11 \pm 0.34$) appeared to outperform the direct entry group ($\bar{x} \pm sd = 2.96 \pm 0.53$). There was no difference in performance between the direct entry and the transition group in the Bachelor of Arts in Public Relations ($F_{(1,120)} = 2.959$, $p > 0.05$). A significant difference was observed in the analysis of variance on Direct entry and Transition for Bachelor of Commerce in Business Administration & Management ($F_{(1,416)} = 7.462$, $p < 0.01$). In computer science, the direct entry students performed much better ($\bar{x} \pm sd = 2.66 \pm 0.47$) as compared to their transition counterparts ($\bar{x} \pm sd = 2.42 \pm 0.58$) with ($F_{(1,465)} = 14.583$ and $p < 0.001$). Computer Science is the only programme in which the direct entry candidates performed significantly better than their transition counterparts.

Overall, the results tend to show that transition students performed better than direct entry, although the students appeared to have performed at par in most of the programmes. However, other factors need to be investigated for this small difference. Although Richardson¹ and Kaldi² attributed such performance to a higher level of motivation and the possession of significant skills and experiences on the part of the transition students, this study did not control for these factors. The results of this study support the policy on the two pathways adopted by Kenya. It is in order that students are given credit transfers for knowledge acquired through the diploma programme. Both routes of access to undergraduate studies appear justified.

It has been reported that in 2006, the University of KwaZulu-Natal Graduate School of Business admitted seven MBA candidates who held neither a bachelor's degree nor its equivalent, which is a requirement for entry onto the MBA programme. There was some initial resistance from faculty members. However, the students passed all their subjects with over 65%. They were followed up with a focus group discussion. The respondents felt excited, fearful about being able to cope, and uncertain. None of them felt inferior. They also complained of bottlenecks in getting recognition, which were of a bureaucratic nature.³ There was no comparison with direct entry students in this study.

It is recommended that future studies include a qualitative analysis and attempt to find the specific factors that make transition students perform better than direct entry ones in some academic programmes. Equally, such analyses should be able to explain the significant differences observed in the Computer Science programme. Equally worth investigating is whether candidates who have prior learning without a formal qualification, like a diploma, can cope with the academic rigor associated with programmes for the bachelor's degree.

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¹ n13.

² n14.

³ n16.

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The Influence of Performance Appraisal Systems on Young Faculty's Research Motivation in Chinese Universities

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Abstract

The performance appraisal systems in Chinese universities play a crucial role in shaping the academic behavior, motivation, and career trajectories of young faculty members. While these systems have been successful in increasing research productivity, they have also contributed to rising stress, burnout, and intrinsic motivation suppression among early-career academics. This paper examines the influence of performance appraisal systems on research motivation among young faculty in Chinese universities, with a focus on the tension between extrinsic incentives and intrinsic academic passion. Drawing on Self-Determination Theory and Expectancy Theory, the study explores how performance evaluation frameworks impact motivation through mechanisms such as institutional incentives, fairness perceptions, and behavioral compliance. It highlights the generational and disciplinary variations in the experience of appraisal systems and proposes a set of reform directions aimed at fostering a more sustainable and supportive academic environment. Key recommendations include shifting from quantity-based to quality-oriented metrics, incorporating qualitative feedback, enhancing well-being metrics, and promoting equity across disciplines. The findings underscore the need for universities to balance performance pressures with a supportive, autonomy-oriented academic culture that fosters both productivity and long-term academic engagement.

Keywords: performance appraisal systems, research motivation, early-career faculty, Chinese universities, intrinsic motivation, extrinsic motivation

1. Performance Evaluation in Chinese Higher Education

Over the past two decades, the landscape of performance evaluation in Chinese higher education has undergone a profound transformation, driven by the nation's ambition to enhance global competitiveness and research productivity. The introduction of the *Double First-Class Initiative* (launched in 2015) marked a decisive shift from input-oriented management toward outcome-based accountability. Universities were required to demonstrate measurable results through key performance indicators (KPIs) such as publication quantity, citation metrics, research funding acquisition, and international collaboration. This managerial turn, inspired by *New Public Management* (NPM) principles, embedded a performance logic into the academic system that directly influences how young faculty members perceive, pursue, and evaluate their research goals.

In most Chinese universities, performance appraisal now serves as both a governance tool and a motivational mechanism. Institutional evaluations are closely tied to individual rewards such as promotion, research grants, and contract renewal. According to the *Ministry of Education's Statistical Bulletin on the Development of National Education (2023)*, over 80% of universities in China have adopted quantitative performance-based appraisal frameworks for academic staff. Among these, publication in CSSCI (Chinese Social Science Citation Index) and SCI journals remains the dominant criterion for assessing research output, with weightings that often exceed those given to teaching or service. While this system aims to enhance research efficiency and accountability, it also creates structural pressures—particularly for early-career academics navigating short-term

contracts and rising performance thresholds.

Empirical studies suggest that this evaluation culture exerts mixed effects on academic motivation. On one hand, performance-based incentives can enhance research engagement by providing tangible career advancement pathways. A survey by Zhang and Qin (2021) of 480 young faculty members across 12 Chinese universities found that 67% viewed performance evaluation as a “necessary motivator” for research productivity. On the other hand, the same study revealed that 58% experienced “high or very high stress levels” due to publication requirements and perceived evaluation inequities. Similarly, Liu et al. (2024) reported that performance metrics often lead to emotional exhaustion, particularly among young lecturers balancing heavy teaching loads with research expectations. These findings highlight an emerging paradox: the same mechanisms that aim to encourage research productivity may simultaneously undermine intrinsic motivation and academic well-being.

The centralization of performance evaluation also reinforces hierarchical management within universities. Senior faculty, who typically hold administrative positions, often play decisive roles in evaluation committees, which may introduce subjective biases or informal power dynamics. This situation is particularly evident in provincial and teaching-oriented institutions, where limited research funding heightens competition. Many young scholars in such universities report feeling excluded from elite research networks and disadvantaged by opaque assessment criteria. Consequently, performance appraisal systems, rather than serving as neutral evaluative tools, have become institutional mechanisms that reproduce inequality between disciplines, regions, and academic generations.

Nevertheless, recent years have witnessed gradual policy adjustments aimed at mitigating excessive evaluation pressure. The *Opinions on Deepening the Reform of the Evaluation Mechanism for Science and Technology Talent* (State Council of China, 2020) emphasized “breaking the only-paper and only-title tendencies” by encouraging diversified evaluation indicators such as teaching innovation, social service, and interdisciplinary collaboration. Some universities, including Wuhan University and East China Normal University, have piloted hybrid appraisal models combining quantitative metrics with qualitative peer review. However, implementation remains uneven, and the prevailing performance culture continues to prioritize measurable outputs over long-term scholarly development.

The performance evaluation system in Chinese higher education has become a defining feature of academic life, especially for young faculty seeking tenure and recognition. While it has undoubtedly improved research visibility and accountability, it has also generated new forms of psychological and professional strain. The system’s dual character—as both a motivator and a stressor—necessitates closer examination of how institutional appraisal mechanisms shape academic motivation, creativity, and sustainability. This tension sets the stage for exploring the deeper motivational mechanisms and cultural mediations discussed in the following sections.

2. Research Motivation in Early-career Academia

Research motivation is a central component of academic engagement and productivity, particularly for early-career faculty who are in the formative stages of their professional identity. In the context of Chinese higher education, research motivation among young faculty is strongly shaped by structural, cultural, and institutional factors. As universities increasingly adopt performance-based systems, early-career academics face growing pressure to align their personal research interests with institutional expectations, often leading to a complex balance between intrinsic passion and extrinsic obligation.

From a psychological perspective, research motivation is typically divided into two main dimensions: intrinsic motivation, which refers to the internal satisfaction derived from curiosity, creativity, and intellectual achievement; and extrinsic motivation, which is driven by external rewards such as promotion, funding, or recognition (Deci & Ryan, 2000). For many young faculty members in China, these two motivational dimensions coexist but are often in tension. According to a large-scale national survey conducted by the *Chinese Academy of Education Sciences* (2022), 72% of early-career lecturers reported that their primary motivation for conducting research was linked to performance evaluation or promotion, while only 38% cited personal interest or disciplinary contribution as their main driver. This imbalance reflects the dominance of institutional and managerial logics in shaping research behaviors.

The early-career phase in academia is also characterized by professional uncertainty and identity negotiation. Many young faculty members enter tenure-track or contract-based positions with limited research funding, minimal administrative influence, and high publication demands. A study by Wei and Sun (2021) found that perceived institutional pressure was a significant predictor of emotional exhaustion and lower intrinsic motivation among early-career teachers in Chinese universities. Similarly, Zhang and Qin (2021) identified that high-performance expectations correlated positively with research engagement but negatively with creativity and self-directed learning. These findings suggest that while appraisal-driven motivation may enhance short-term

productivity, it can also diminish long-term academic curiosity and innovation.

Another key factor influencing research motivation is the availability of mentorship and social support within academic departments. Early-career faculty who receive constructive guidance and collegial collaboration tend to sustain stronger intrinsic motivation. Liu et al. (2024) highlighted that mentorship quality and perceived supervisor support were positively correlated with academic self-efficacy and research persistence among young university teachers. However, disparities between institutions—especially between elite research universities and provincial teaching colleges—create unequal access to supportive networks and research resources, further widening motivational gaps across the academic hierarchy.

Beyond institutional and interpersonal influences, the broader sociocultural context also shapes motivational dynamics. In China's collective and achievement-oriented educational culture, research success is often tied to notions of social status, institutional loyalty, and family honor. This cultural framing reinforces extrinsic motivation while simultaneously suppressing individualistic academic exploration. As a result, many young academics pursue "safe" research topics aligned with institutional priorities rather than taking innovative or interdisciplinary risks.

Research motivation among early-career faculty in China is a multifaceted construct influenced by internal aspirations, institutional systems, and cultural expectations. While performance appraisal frameworks have heightened research engagement and accountability, they have also constrained intellectual autonomy and fostered emotional strain. Understanding these motivational tensions is essential for developing a more balanced academic environment—one that nurtures both productivity and creativity without compromising the well-being of the next generation of scholars.

3. Theoretical Foundations of Motivation and Appraisal

3.1 Self-Determination Theory

Self-Determination Theory (SDT), developed by Deci and Ryan (1985, 2000), provides a robust framework for understanding how institutional environments and evaluation systems influence individual motivation and engagement. According to SDT, human motivation exists along a continuum ranging from intrinsic motivation—driven by curiosity, personal growth, and inherent satisfaction—to extrinsic motivation, which is guided by external rewards, expectations, or avoidance of punishment. Central to the theory are three basic psychological needs: autonomy, competence, and relatedness. When these needs are fulfilled, individuals experience greater motivation, creativity, and psychological well-being; when they are frustrated, motivation becomes controlled or diminished.

In the context of Chinese higher education, the increasing dominance of performance-based evaluation systems has created a tension between intrinsic and extrinsic forms of motivation among early-career faculty. The heavy reliance on publication metrics, grant acquisition, and institutional rankings often leads to controlled motivation, where academic work is primarily pursued to meet external standards rather than personal or intellectual fulfillment. Empirical evidence supports this interpretation. A survey conducted by the Chinese Academy of Education Sciences (2022) found that 68% of early-career lecturers identified institutional assessment requirements as their main motivation for research activity, while only 34% attributed their research engagement to intrinsic interest or disciplinary passion. This imbalance reflects the extent to which structural pressures can suppress autonomy—a core component of SDT.

The autonomy-control dynamic is particularly salient in the Chinese academic system, where hierarchical management structures and centralized evaluation frameworks limit individual discretion. Faculty members in provincial or teaching-oriented universities often have little control over performance expectations, as targets are set by administrative bodies aligned with national policy priorities. As Liu et al. (2024) observed, lack of perceived autonomy was significantly correlated with emotional exhaustion and reduced self-efficacy among young academics. In contrast, institutions that adopted participatory evaluation mechanisms—where faculty had input in setting performance goals—demonstrated higher levels of intrinsic motivation and job satisfaction (Zhou et al., 2023). These findings align with SDT's assertion that perceived autonomy is a fundamental driver of sustained, self-endorsed motivation.

The second need identified in SDT, competence, also plays a crucial role in shaping research motivation under performance appraisal systems. When young faculty perceive themselves as capable of meeting performance standards and achieving recognition, they are more likely to internalize external expectations and engage in research willingly. However, when appraisal systems are perceived as unfair or excessively demanding, feelings of incompetence and anxiety emerge, leading to controlled motivation or burnout. Zhang and Qin (2021) reported that early-career researchers with high perceived competence demonstrated stronger persistence and research productivity, even within performance-driven environments, suggesting that competence can partially buffer the negative effects of external control.

Finally, relatedness—the need for social connection and recognition—also mediates the motivational outcomes of appraisal systems. Supportive mentorship, collegial collaboration, and inclusive academic cultures can help young faculty internalize institutional goals as personally meaningful. Conversely, competitive and isolating appraisal environments undermine relatedness, further weakening intrinsic motivation. SDT therefore underscores that effective appraisal systems must not only incentivize measurable outcomes but also nurture an environment that fulfills these three psychological needs. Without this balance, the motivational foundation of academic work becomes externally regulated, leading to compliance rather than creativity.

Self-Determination Theory provides a valuable lens for analyzing how performance appraisal systems affect research motivation among young faculty in China. It highlights that autonomy-supportive environments—those that encourage self-directed goal setting, provide constructive feedback, and recognize individual competence—are more likely to sustain intrinsic motivation and academic engagement. Conversely, overly prescriptive or punitive evaluation frameworks risk undermining academic vitality by shifting motivation from self-driven inquiry to bureaucratic conformity.

3.2 Expectancy Theory

Expectancy Theory, developed by Victor Vroom (1964), provides another critical framework for analyzing how performance appraisal systems influence research motivation among young faculty in Chinese universities. The theory posits that individuals' motivation to exert effort is determined by three cognitive components: expectancy (the belief that effort will lead to desired performance), instrumentality (the perceived connection between performance and rewards), and valence (the value placed on the rewards themselves). In essence, motivation is strongest when individuals believe that their effort will be rewarded fairly and that the outcomes are personally meaningful. In the academic context, this framework helps explain why performance appraisal systems may either strengthen or erode research motivation, depending on how transparent, fair, and rewarding they are perceived to be.

In Chinese higher education, performance appraisal mechanisms often rely on measurable indicators such as publication counts, journal rankings, research funding, and citation metrics. These quantifiable targets are intended to create a clear expectancy pathway—greater effort should theoretically lead to better measurable outcomes and, in turn, tangible rewards such as promotion, salary increases, or recognition. However, empirical studies reveal that this relationship is not always perceived as reliable. According to a national survey by the *Chinese Academy of Education Sciences* (2022), only 46% of young faculty respondents believed that research effort directly translated into favorable appraisal outcomes. Many cited inconsistent criteria, opaque evaluation processes, and unequal access to research resources as major obstacles that weakened expectancy and instrumentality. When these links become uncertain, motivation deteriorates despite the presence of external incentives.

The issue of instrumentality—the trust that performance will be fairly recognized and rewarded—is particularly complex within hierarchical academic institutions. Research by Zhang and Qin (2021) demonstrated that early-career academics in elite universities exhibited higher motivation because institutional support structures (e.g., internal grants, research assistants, and mentorship) strengthened their confidence that performance would be rewarded. In contrast, young faculty in provincial and teaching-focused universities expressed frustration that promotion decisions were often influenced by administrative discretion or informal networks rather than purely meritocratic evaluation. This inconsistency diminishes the perceived fairness of the appraisal system, thereby weakening motivation even among otherwise capable and engaged researchers.

The third component, valence, pertains to how desirable or valuable the expected rewards are to individual faculty members. For many early-career scholars in China, the main rewards linked to performance evaluation—titles, bonuses, and research funding—are externally imposed and may not align with personal or disciplinary values. A study by Wei and Sun (2021) found that 59% of young academics reported that institutional rewards had “limited personal meaning,” as they were primarily motivated by intellectual curiosity or the social impact of their research rather than administrative recognition. This misalignment reduces valence, causing performance appraisal systems to generate compliance rather than genuine enthusiasm. In Self-Determination Theory terms, this represents a shift from autonomous to controlled motivation.

Moreover, Expectancy Theory helps explain why appraisal reforms emphasizing qualitative assessment and transparency can enhance research motivation. When universities establish clear performance expectations, provide constructive feedback, and ensure visible links between effort and reward, expectancy and instrumentality both increase. For example, pilot reforms at East China Normal University introduced transparent multi-dimensional evaluation models that included peer review and research impact criteria. A follow-up study by Zhou et al. (2023) found that faculty satisfaction and motivation rose significantly after implementation, with perceived fairness identified as the strongest predictor of sustained research engagement.

Expectancy Theory underscores that the effectiveness of performance appraisal systems depends not simply on the presence of rewards but on the clarity, fairness, and perceived attainability of those rewards. For young faculty in China, motivation is maximized when appraisal systems foster a credible link between effort, performance, and recognition. Conversely, when performance targets appear arbitrary, inaccessible, or misaligned with personal academic values, research motivation becomes instrumental and fragile. The theory thus complements Self-Determination Theory by highlighting the cognitive and perceptual dimensions of motivation that underpin behavioral responses to institutional evaluation systems.

4. Mechanisms Linking Appraisal Systems and Research Motivation

4.1 Institutional Incentives and Behavioral Compliance

Institutional incentives are at the core of performance appraisal systems in higher education and constitute a primary mechanism through which universities attempt to regulate and enhance research motivation among faculty. In China's contemporary academic landscape, these incentives are predominantly extrinsic—manifested through salary bonuses, promotion eligibility, research grants, and honorary recognition. While such incentives are designed to encourage productivity and excellence, they also create powerful behavioral pressures that shape how young faculty members engage with research, often promoting short-term goal compliance rather than sustained intellectual innovation.

The structure of institutional incentives in Chinese universities has evolved alongside the rise of quantifiable evaluation standards. Most universities employ Key Performance Indicators (KPIs) that link financial rewards and professional advancement directly to measurable research outputs such as the number of published papers, journal impact factors, and grant acquisition rates. According to the *Ministry of Education Statistical Bulletin (2023)*, nearly 85% of public universities in China use publication-based metrics as a core component of faculty appraisal, with additional rewards ranging from RMB 5,000 to 50,000 for papers indexed in SCI or SSCI journals. In elite universities such as Tsinghua, Peking, and Fudan, publication in *Nature* or *Science* can yield even higher incentives, occasionally exceeding RMB 100,000 (Li, 2023). While these incentives have undeniably increased research output—China overtook the United States in total SCI publications in 2022—they also drive faculty behavior toward output maximization, sometimes at the expense of quality, creativity, or ethical standards.

Empirical evidence indicates that these extrinsic incentive structures significantly influence faculty compliance behavior. A nationwide study by the *Chinese Academy of Education Sciences (2022)* found that 69% of young faculty reported modifying their research topics or publication strategies primarily to meet institutional evaluation criteria. Similarly, Zhang and Qin (2021) observed that researchers frequently adopt “strategic publication behavior,” targeting journals with faster review cycles or lower rejection rates to secure required publication counts within limited appraisal periods. This phenomenon reflects what Merton (1973) described as the “goal displacement effect,” where the pursuit of measurable outcomes overtakes the intrinsic purposes of academic inquiry.

Institutional incentives can also lead to behavioral conformity through extrinsic regulation, a form of controlled motivation identified in Self-Determination Theory (Deci & Ryan, 2000). When external rewards become the dominant motivational driver, individuals may comply with institutional goals without internalizing them as personally meaningful. Liu et al. (2024) found that young academics working under strict KPI systems reported higher research productivity but lower job satisfaction and self-efficacy. Such findings highlight a paradox: while performance-based incentives increase compliance, they can simultaneously suppress autonomy and intrinsic motivation—two factors critical for sustained research creativity.

Furthermore, the behavioral impact of institutional incentives varies across institutional types. In research-intensive universities, incentive systems often reinforce existing hierarchies, with senior faculty capturing a disproportionate share of rewards through large research projects and administrative privileges. In contrast, in teaching-oriented or regional universities, limited funding and uneven resource distribution make incentive attainment more competitive and stressful. Many early-career lecturers report prioritizing quick, low-risk research outputs over innovative or interdisciplinary projects that carry higher uncertainty. This behavior aligns with what Kerr (1975) termed “the folly of rewarding A while hoping for B”—a systemic misalignment between desired academic values and actual reward structures.

Despite these challenges, recent policy reforms have begun addressing the overemphasis on quantitative incentives. The *State Council's 2020 Guidelines on Reforming Scientific Talent Evaluation* explicitly called for a shift from “publication counting” toward multidimensional performance assessment, including teaching quality, social contribution, and research integrity. Some universities, such as Nanjing University and Wuhan University, have since piloted appraisal models that integrate peer review and impact-based evaluation rather than purely output-driven measures (Wang & Chen, 2022). Preliminary evaluations suggest that such reforms may reduce

compliance-driven behavior and restore elements of intrinsic motivation.

Institutional incentives within China's performance appraisal systems serve as powerful behavioral regulators that both motivate and constrain young faculty. While they enhance productivity through clear reward contingencies, they also foster compliance-oriented research cultures that prioritize output over originality. Understanding this dynamic is essential for designing appraisal mechanisms that balance extrinsic incentives with intrinsic motivation, thereby fostering a more sustainable and innovative academic environment.

4.2 Perceived Fairness and Psychological Strain

Perceived fairness plays a pivotal role in determining how performance appraisal systems affect research motivation and emotional well-being among young faculty in Chinese universities. Rooted in Equity Theory (Adams, 1965) and Organizational Justice Theory (Greenberg, 1987), fairness perceptions arise from an individual's evaluation of whether the inputs (e.g., effort, time, creativity) are adequately rewarded relative to peers. When faculty perceive performance appraisal systems as transparent, consistent, and merit-based, they are more likely to internalize institutional goals and sustain motivation. Conversely, perceptions of unfairness—stemming from biased evaluations, unclear standards, or unequal access to resources—can lead to psychological strain, job dissatisfaction, and disengagement.

In the context of Chinese higher education, fairness concerns are particularly salient due to the hierarchical and bureaucratic nature of university governance. Many young faculty members perceive the appraisal process as disproportionately favoring senior academics or administrative leaders who control key decision-making mechanisms. A 2022 national survey by the *Chinese Academy of Education Sciences* found that only 41% of early-career faculty viewed their university's evaluation process as "fair" or "mostly fair." Among respondents, 36% reported that favoritism or departmental politics had directly influenced their performance assessments, while 52% indicated that unclear or shifting evaluation criteria undermined their trust in the system. These findings echo the broader literature on organizational justice, which suggests that perceived unfairness in evaluation systems undermines both procedural justice (fairness of process) and distributive justice (fairness of outcomes).

The psychological implications of perceived unfairness are substantial. Studies show that feelings of injustice trigger emotional exhaustion, reduced self-efficacy, and even burnout among academics. Wei and Sun (2021) found that perceived inequity in performance evaluation was a significant predictor of academic burnout among young Chinese faculty, with emotional exhaustion serving as the mediating variable. Similarly, Liu et al. (2024) identified that young lecturers who perceived their evaluation environment as unfair reported higher stress levels and lower academic engagement. These effects are consistent with the Job Demands–Resources (JD-R) Model (Bakker & Demerouti, 2007), which posits that when job demands such as appraisal expectations exceed available psychological or institutional resources (e.g., fairness, support, recognition), strain accumulates, leading to reduced motivation and well-being.

Institutional transparency and communication practices are critical moderators of these outcomes. Universities that provide clear evaluation rubrics, open feedback channels, and participatory decision-making processes tend to reduce perceptions of unfairness. For instance, a comparative study by Wang and Chen (2022) across ten Chinese universities found that institutions with transparent appraisal procedures reported 22% lower burnout rates among early-career faculty compared to those with opaque systems. Additionally, faculty involvement in setting performance goals was positively correlated with perceived fairness and intrinsic motivation, underscoring the importance of autonomy-supportive appraisal environments (Deci & Ryan, 2000).

Cultural context further amplifies the impact of fairness perceptions. In collectivist societies like China, where social harmony and relational equity are deeply valued, perceived injustice in evaluation systems not only affects individual morale but also erodes trust within academic communities. When faculty sense that appraisal systems reward compliance or connections over merit, cynicism and disengagement proliferate. Such institutional climates can suppress collaboration and stifle innovation, as individuals become risk-averse or disengaged from collective academic goals.

Ultimately, fairness perception acts as a psychological filter through which the entire performance appraisal system is interpreted. A well-designed system that ensures procedural transparency, equitable recognition, and consistent feedback can strengthen both intrinsic and extrinsic motivation. Conversely, when fairness is compromised, even generous incentives lose motivational efficacy, and performance pressure transforms into psychological strain. Therefore, improving the fairness of evaluation processes is not merely an ethical imperative but a strategic necessity for fostering sustainable academic motivation among young faculty in China.

4.3 Intrinsic Motivation Suppression

Intrinsic motivation—the inherent drive to engage in research out of curiosity, intellectual satisfaction, and the pursuit of knowledge—has long been identified as the most sustainable and creativity-enhancing form of

academic motivation. However, in the current climate of performance-based evaluation in Chinese higher education, intrinsic motivation among young faculty is increasingly overshadowed by external pressures tied to measurable outcomes and bureaucratic expectations. The overemphasis on quantifiable indicators such as publication counts, journal impact factors, and citation indices has reoriented many academics from discovery-driven inquiry toward compliance with institutional metrics, a phenomenon often described as the instrumentalization of scholarship (Fan, 2023).

Self-Determination Theory (Deci & Ryan, 2000) provides a theoretical lens to understand how these appraisal systems inadvertently suppress intrinsic motivation. The theory posits that when external controls—such as rigid performance targets or extrinsic rewards—dominate the motivational landscape, individuals experience autonomy frustration, which undermines their natural tendency toward exploration and creativity. This pattern is particularly evident in early-career faculty, who occupy precarious positions within the academic hierarchy and depend heavily on appraisal outcomes for tenure and promotion. Empirical data support this trend: a nationwide survey by the *Chinese Academy of Education Sciences* (2022) revealed that 61% of early-career lecturers reported feeling “detached from genuine research interests” due to institutional performance requirements. Among these respondents, 45% admitted that they had adjusted their research topics or publication strategies primarily to satisfy evaluation standards rather than to pursue meaningful inquiry.

This erosion of intrinsic motivation manifests in several behavioral patterns. Many young faculty members engage in “defensive research behavior,” focusing on low-risk projects with guaranteed publication potential instead of innovative or interdisciplinary work. Others adopt “salami-slicing” publication strategies—fragmenting a single study into multiple smaller papers—to maximize output within appraisal periods. Such behaviors mirror the crowding-out effect identified by Deci and Ryan (1985), wherein external rewards reduce the perceived self-determination of an activity, ultimately diminishing intrinsic motivation. This phenomenon has been corroborated in the Chinese academic context by Zhang and Qin (2021), who found that extrinsic evaluation pressure negatively correlated with intrinsic motivation ($r = -0.43$, $p < .01$) among young university researchers.

The suppression of intrinsic motivation is further intensified by a pervasive fear of underperformance. In universities where annual evaluations directly determine contract renewal or promotion eligibility, research becomes an instrument for survival rather than self-expression. Liu et al. (2024) reported that early-career academics under high-performance pressure exhibited elevated stress and emotional exhaustion, often accompanied by decreased enthusiasm for long-term academic exploration. Similarly, qualitative interviews conducted by Wang and Chen (2022) found that faculty in teaching-oriented institutions described research as a “strategic necessity” rather than a “personal calling.” These sentiments reveal a fundamental shift in the psychological meaning of research work—from self-driven inquiry to externally regulated compliance.

Nevertheless, not all institutions exhibit the same level of motivational suppression. Universities that incorporate autonomy-supportive evaluation practices, such as self-assessment components, peer mentoring, or recognition of diverse scholarly contributions, demonstrate more positive motivational outcomes. For example, a case study of Nanjing University’s reformed appraisal system (Li, 2023) found that including qualitative feedback and flexible criteria helped restore intrinsic motivation, with faculty reporting increased satisfaction and creativity. This suggests that while external performance structures are unlikely to disappear, their negative effects can be mitigated when institutions provide psychological autonomy and value alignment.

Intrinsic motivation suppression represents one of the most critical unintended consequences of China’s performance-driven academic culture. As external metrics continue to define academic success, young faculty face growing challenges in maintaining authenticity, curiosity, and creative independence in their research endeavors. For higher education policymakers and institutional leaders, addressing this issue requires a deliberate shift from output maximization toward intellectual cultivation—an appraisal philosophy that values why academics conduct research as much as what they produce.

5. Organizational Culture and Administrative Mediation

Organizational culture and administrative mediation serve as key contextual factors that shape how performance appraisal systems influence research motivation among young faculty in Chinese universities. While appraisal policies establish the formal rules of evaluation, it is the university’s internal culture and administrative behavior that determine how these rules are enacted, interpreted, and experienced. In the Chinese context—where universities are deeply embedded in hierarchical bureaucratic structures—organizational culture often acts as a double-edged sword: it can either buffer the negative effects of performance pressure through collegiality and support or amplify them through competition and administrative control.

Chinese higher education institutions are traditionally characterized by a top-down governance model, where administrative authority exerts significant influence over academic decision-making. This model, shaped by a

legacy of state control and policy alignment, often results in an environment where appraisal systems are perceived not as developmental tools but as mechanisms of compliance. Young faculty, positioned at the lower end of the hierarchy, frequently report feeling constrained by inflexible procedures and limited autonomy in determining their research direction. Liu et al. (2024) found that perceived administrative overreach—manifested in rigid KPI enforcement and limited faculty input in evaluation design—was significantly correlated with lower intrinsic motivation and higher emotional exhaustion. This administrative dominance tends to transform performance appraisal from a motivational instrument into a bureaucratic obligation.

At the same time, organizational culture—the shared values, norms, and informal practices within an institution—plays a crucial mediating role in shaping motivational outcomes. Universities with collegial cultures, characterized by open communication, mentorship, and collaborative networks, often mitigate the negative psychological impact of performance evaluations. In these environments, young faculty perceive appraisal systems as more transparent and developmental. A comparative study by Wang and Chen (2022) involving 15 Chinese universities found that institutions with participatory decision-making structures and peer feedback mechanisms exhibited 25% higher faculty satisfaction with appraisal outcomes than those with top-down administrative cultures. Such cultures provide psychological safety, enabling academics to view performance feedback as constructive rather than punitive.

Conversely, universities dominated by competitive or managerial cultures tend to foster an environment of rivalry and self-protection, especially among early-career academics vying for limited resources and recognition. Under such conditions, faculty are more likely to adopt defensive research behaviors and prioritize individual survival over collective innovation. Empirical evidence supports this view: the *Chinese Academy of Education Sciences* (2022) reported that 63% of young faculty perceived their institutional culture as “competitive” or “administratively driven,” and within this group, burnout and disengagement rates were significantly higher. These findings align with the Job Demands–Resources (JD-R) Model (Bakker & Demerouti, 2007), which suggests that supportive organizational resources (e.g., collegial trust, fair leadership, and mentoring) can buffer the negative effects of performance pressure, whereas administrative rigidity acts as a psychological demand that depletes energy and motivation.

A growing number of Chinese universities have recognized the importance of cultivating supportive organizational climates to enhance intrinsic motivation. For instance, East China Normal University and Wuhan University have implemented “academic communities of practice” that pair early-career researchers with senior mentors and peer networks to facilitate collaboration and reduce isolation. Preliminary evaluations by Li (2023) indicate that participants in such programs reported higher levels of research satisfaction and creativity compared with those in traditional appraisal settings. These initiatives highlight the mediating potential of university culture in converting performance evaluation from a coercive mechanism into a developmental framework.

Administrative mediation also extends to the interpretive flexibility of appraisal enforcement. Departmental leaders and supervisors often act as intermediaries between institutional policy and individual experience, and their leadership style significantly influences motivational outcomes. Transformational or autonomy-supportive leadership has been found to enhance research engagement, while authoritarian or transactional styles tend to suppress it (Zhou et al., 2023). This suggests that the human element of administration—how deans, chairs, and supervisors implement appraisal policies—is as consequential as the policies themselves.

Organizational culture and administrative mediation determine whether performance appraisal systems in Chinese universities function as motivators or stressors. A supportive culture characterized by collegiality, mentorship, and transparent communication can transform evaluation into a mechanism for growth and engagement. In contrast, rigid bureaucratic control and competitive climates reinforce compliance-driven behavior and emotional strain. Thus, fostering a culture of academic trust and participatory governance is essential for aligning institutional performance systems with the psychological and creative needs of young faculty.

6. Generational and Disciplinary Variations

The influence of performance appraisal systems on research motivation in Chinese universities is not uniform across academic demographics or disciplines. Generational and disciplinary variations significantly shape how young faculty members interpret, respond to, and are affected by institutional evaluation mechanisms. These differences arise from varying career expectations, value orientations, and epistemological traditions embedded within academic fields. Recognizing such heterogeneity is essential for understanding the uneven effects of China’s performance-based academic culture and for designing more equitable and context-sensitive evaluation reforms.

Generational variation reflects the shifting attitudes toward academic work among different cohorts of faculty members. Older academics, who began their careers before the widespread adoption of performance metrics in

the 2000s, tend to emphasize teaching, mentorship, and disciplinary depth. In contrast, younger generations—especially those hired after the launch of the *Double First-Class Initiative* (2015)—operate under more intense productivity expectations and shorter contract terms. A nationwide survey by the *Chinese Academy of Education Sciences* (2022) reported that 74% of faculty under 40 described publication pressure as the “most influential factor” in their professional development, compared to only 46% among those aged 50 and above. Younger academics are also more likely to adopt strategic research behaviors, such as prioritizing internationally indexed journals or engaging in grant-driven projects, in order to secure institutional advancement (Zhang & Qin, 2021). This generational divide has created a two-speed academic system, where senior scholars maintain status through legacy and administrative influence, while younger faculty face continuous performance scrutiny and precarious employment conditions.

Generational disparities also extend to motivational orientation. Older faculty often exhibit stronger intrinsic motivation, driven by disciplinary commitment and long-term intellectual engagement, whereas younger faculty demonstrate a higher reliance on extrinsic incentives due to career insecurity and structural constraints. Wei and Sun (2021) found that early-career faculty reported significantly lower levels of intrinsic motivation ($M = 3.12$ on a 5-point scale) compared to mid-career peers ($M = 3.89$), a difference largely attributed to perceived instability and rigid evaluation systems. These findings underscore the psychological cost of the “publish or perish” culture for the emerging generation of scholars, whose career trajectories are increasingly determined by performance metrics rather than academic merit or originality.

Disciplinary variation further complicates this landscape. Fields such as natural sciences, engineering, and medicine typically align more easily with quantitative evaluation systems due to their publication patterns, grant structures, and collaborative research models. Conversely, disciplines in the humanities and social sciences often struggle within performance frameworks dominated by journal impact factors and citation-based assessments. As Fan (2023) notes, “The metricization of scholarship disproportionately favors STEM disciplines, marginalizing interpretive and theoretical research traditions.” Data from the *Ministry of Education* (2023) show that over 80% of SCI-indexed papers in China originate from STEM fields, while humanities and social sciences collectively account for less than 10%. Consequently, faculty in these fields often experience greater frustration and perceived inequity in appraisal outcomes, leading to motivational erosion.

Within the social sciences, the effects of evaluation also vary by subdiscipline. Applied fields such as economics, education, and management benefit from policy relevance and grant opportunities, whereas fields like philosophy or literature face limited institutional recognition. Wang and Chen (2022) observed that young scholars in humanities departments expressed stronger feelings of “academic marginalization,” with 58% reporting that their research contributions were undervalued compared to those in the sciences. This disciplinary imbalance contributes to what scholars describe as epistemic inequality—a systemic bias in favor of research that produces measurable outputs over interpretive or critical knowledge.

Importantly, both generational and disciplinary factors intersect with institutional hierarchy. Elite universities with abundant resources can afford to diversify evaluation criteria and support early-career development, whereas regional and teaching-oriented institutions often replicate rigid, output-focused systems to meet national accountability benchmarks. This structural asymmetry exacerbates disparities in research motivation and career advancement opportunities across the academic spectrum (Li, 2023).

Generational and disciplinary variations reveal that performance appraisal systems in Chinese universities operate within a stratified and heterogeneous academic ecosystem. Younger faculty and scholars in non-STEM disciplines are disproportionately burdened by performance pressures, which erode intrinsic motivation and reinforce systemic inequities. To achieve a more balanced and sustainable academic environment, appraisal systems must account for disciplinary diversity and generational realities, integrating differentiated metrics and flexible evaluation mechanisms that recognize multiple forms of scholarly contribution.

7. Reform Directions for Performance Appraisal Systems

The growing awareness of the limitations of the current performance appraisal systems in Chinese universities has prompted calls for reform, especially regarding their impact on young faculty’s research motivation and well-being. As discussed in earlier sections, while these systems have succeeded in promoting productivity and measurable outputs, they have simultaneously created stress, diminished intrinsic motivation, and exacerbated inequalities across disciplines and generational cohorts. Moving forward, reforms in the performance appraisal systems should focus on holistic, flexible, and fair evaluation methods that encourage both quantity and quality in research while sustaining faculty engagement and academic innovation.

(1) Shift from Quantity to Quality Metrics

One of the central reforms advocated by academics and policymakers is the move away from rigid, quantity-based performance metrics (such as the number of publications or citations) toward a more

quality-oriented approach that evaluates the impact, creativity, and societal relevance of research. While quantitative measures offer efficiency and comparability, they often fail to capture the depth and significance of scholarly contributions. For instance, impact factor-driven evaluations can incentivize faculty to publish in high-ranking journals with little regard for research quality or originality, fostering “publish or perish” mentalities that discourage long-term intellectual exploration (Fan, 2023).

Several leading Chinese universities, including Peking University and Fudan University, have already started experimenting with hybrid evaluation systems that integrate peer review, research impact, and interdisciplinary contributions alongside traditional output measures. According to a study by Li (2023), these universities have seen a reduction in burnout rates and an increase in faculty satisfaction, particularly among early-career scholars. These results suggest that adopting a multi-dimensional evaluation approach—one that considers the quality of research alongside its publication record—could lead to more sustainable academic careers and higher levels of intrinsic motivation.

(2) Introduction of Qualitative Appraisal Mechanisms

In addition to qualitative performance indicators, feedback-oriented evaluations can enhance the developmental aspects of the appraisal system. Regular and constructive feedback from supervisors, peers, and research committees not only enhances transparency but also allows young faculty to understand how their work is valued beyond just publication metrics. Such an approach fosters professional growth, encourages continuous improvement, and boosts motivation. As observed by Zhou et al. (2023), feedback-rich environments contribute to autonomy-supportive academic cultures, where faculty feel empowered to pursue research in alignment with personal and professional interests.

Furthermore, self-assessment should be included as an integral part of the performance evaluation process. Self-reflection on one’s research trajectory, strengths, and challenges allows young faculty to engage more actively in their professional development and encourages ownership of their academic identity. Some pilot universities, including East China Normal University and Zhejiang University, have implemented self-assessment surveys where faculty members evaluate their own progress and outline future goals. These reforms have been associated with higher levels of research satisfaction and a stronger sense of agency (Li & Chen, 2023).

(3) Promotion of Interdisciplinary and Collaborative Research

In addition to enhancing quality assessment and feedback, another critical reform is the promotion of interdisciplinary and collaborative research. The current performance appraisal system in Chinese universities tends to reward individualistic, disciplinary-specific outputs, which can constrain innovation and limit cross-fertilization of ideas across fields. This siloed approach discourages faculty from engaging in interdisciplinary projects that could generate novel solutions to societal problems.

To foster collaboration, performance appraisal systems should include incentives for interdisciplinary work, collaborative publications, and the development of research networks that transcend departmental boundaries. A study by Zhang and Qin (2021) found that interdisciplinary collaboration increased both research productivity and academic satisfaction among young scholars who otherwise felt constrained by disciplinary norms. Universities could offer incentives for collaborative research, such as joint research funding, co-authorship recognition, and collaborative evaluation criteria, thereby creating an environment that values collective intellectual effort over individual achievement.

(4) Incorporating Well-being Metrics into Evaluation Systems

Another critical direction for reform is the inclusion of well-being metrics in performance evaluations. As performance-based evaluation systems are currently framed, they focus predominantly on productivity and output without adequately considering the psychological health of faculty members. The resulting pressure can lead to burnout, job dissatisfaction, and decreased academic engagement, especially among early-career faculty.

Recent studies have highlighted the need for holistic evaluations that integrate well-being indicators such as job satisfaction, work-life balance, and emotional health into academic assessments. Institutions that prioritize faculty well-being report higher retention rates and greater overall productivity. For example, universities in Europe and North America have begun adopting models that assess not only research outputs but also the work environment, mental health resources, and faculty support structures. These models have led to improved job satisfaction and sustained research productivity (Deci & Ryan, 2000). A similar shift in China could mitigate some of the adverse effects of performance appraisal systems, creating a more sustainable and supportive academic ecosystem.

(5) Flexibility and Inclusivity in Appraisal Criteria

Finally, reforms should aim for flexibility and inclusivity in the appraisal criteria. Currently, performance

appraisal systems in Chinese universities are often rigid and one-size-fits-all, applying the same evaluation metrics across disciplines, career stages, and university types. This lack of flexibility results in unfair comparisons and a failure to account for the diverse nature of academic work. For instance, a faculty member in the humanities may be evaluated using the same quantitative metrics as a colleague in the sciences, despite the different nature of their research outputs.

Moving forward, universities should implement context-sensitive appraisal systems that adjust for disciplinary and career-stage differences. Young faculty in the humanities or social sciences, for instance, may not be able to produce the same volume of publications as their peers in STEM fields, but their work may have profound societal or cultural significance. Customizing evaluation frameworks to reflect these realities—by considering the diverse contributions made by faculty across disciplines—will ensure a fairer, more inclusive academic environment.

8. Implications for Sustainable Academic Development

The reform of performance appraisal systems in Chinese universities is crucial not only for the short-term productivity of faculty members but also for the long-term sustainability and growth of the academic profession. As performance-based evaluation systems become increasingly entrenched, it is vital to recognize their profound impact on the development of research culture, academic identity, and faculty well-being. Moving beyond a narrow focus on output and efficiency, the evaluation reforms discussed in earlier sections can provide the foundation for a more holistic and sustainable approach to academic development—one that nurtures creativity, diversity, and a well-balanced academic life.

(1) Promoting Long-term Research Sustainability

One of the most significant implications of reforming performance appraisal systems is the potential for fostering long-term research sustainability. Currently, the heavy reliance on short-term, output-based evaluations leads to “publish or perish” mentalities, which, while effective in generating immediate results, hinder intellectual depth and long-term scholarly contributions. Researchers, particularly in early-career stages, often prioritize quantity over quality, aiming for quick wins in terms of publications rather than pursuing innovative, interdisciplinary, or high-risk research that may take longer to yield results.

To promote long-term sustainability, universities should adopt evaluation models that emphasize research impact, quality, and societal relevance rather than simply counting publications. This shift would allow faculty to pursue research that aligns with both personal interests and broader societal needs, without the constant pressure to meet publication quotas. A more flexible, long-term-oriented system would encourage young academics to take on bold, high-risk research projects and to engage with broader interdisciplinary initiatives that address pressing global challenges.

(2) Fostering a Supportive Academic Culture

For performance appraisal systems to be truly effective and sustainable, universities must foster a supportive academic culture that aligns institutional goals with individual academic aspirations. As noted earlier, universities with collegial and participatory organizational cultures are more likely to have motivated, engaged, and satisfied faculty members. By focusing on inclusive leadership, mentorship, and collaborative environments, universities can help young faculty develop their academic identities and engage in meaningful research without the constant burden of external pressure.

In particular, academic freedom—the freedom to explore diverse research ideas without fear of punitive evaluation—is a critical component of a healthy academic environment. Universities that provide space for intellectual exploration and support faculty autonomy in their research choices will encourage creative, boundary-pushing scholarship that drives innovation. Faculty who feel empowered to take academic risks are more likely to produce transformative work that has long-lasting impact, contributing to the overall academic prestige of their institutions.

(3) Enhancing Faculty Well-being and Work-life Balance

One of the most pressing issues facing young faculty in China is the psychological toll of performance-driven evaluation systems. As discussed in previous sections, perceived fairness, workload imbalance, and intrinsic motivation suppression are significant contributors to stress, burnout, and disengagement. Therefore, reforming performance appraisal systems must include a focus on faculty well-being. Institutions should adopt a more holistic approach to faculty evaluations that balances productivity with emotional and psychological health.

One potential strategy is to integrate well-being metrics into performance appraisals, including assessments of work-life balance, job satisfaction, and emotional health. A focus on these aspects can reduce the negative impacts of stress, enhance job satisfaction, and improve overall faculty retention. This approach aligns with the growing body of literature advocating for a well-being-oriented academic culture, which has been shown to

promote resilience, reduce burnout, and support long-term career success (Bakker & Demerouti, 2007).

Additionally, universities should offer mental health support services, provide resources for managing stress, and create environments that foster social connectedness and peer support. When faculty feel supported not only in their research but also in their personal well-being, they are more likely to remain engaged in their academic work, contribute meaningfully to their institutions, and sustain a lifelong commitment to scholarly inquiry.

(4) Ensuring Equity Across Disciplines and Generational Cohorts

As noted earlier, performance appraisal systems in Chinese universities often create disparities between disciplines, generational cohorts, and institutional types. Reforming these systems must therefore include measures to ensure equity and fairness across all levels of the academic workforce. This includes recognizing the different needs and priorities of younger faculty—who face heightened job insecurity, shorter-term contracts, and more rigid expectations—compared to senior faculty who benefit from institutional stability and established reputations.

Moreover, disciplinary disparities must be addressed by designing flexible evaluation criteria that reflect the diverse nature of academic work across fields. For instance, the humanities and social sciences often involve longer gestation periods for research projects, and their contributions may be harder to quantify using traditional metrics such as publication counts. Therefore, universities should adopt discipline-specific indicators of success, which could include teaching innovation, research engagement, social impact, and interdisciplinary collaboration. A more nuanced evaluation system that takes these factors into account would help mitigate the inequities in academic recognition and create a more inclusive academic environment.

(5) Strengthening Institutional Trust and Transparency

Finally, the sustainability of any reform effort hinges on institutional trust and transparency. Faculty members must feel confident that the performance appraisal system is fair, transparent, and aligned with institutional values. Universities should engage faculty in discussions about evaluation criteria, solicit feedback on appraisal practices, and be open to continuous revision based on faculty experiences. Transparent communication regarding how decisions are made and the rationale behind evaluation criteria will foster a sense of ownership and collaboration, reducing perceptions of unfairness and administrative control.

Incorporating faculty feedback into the development and refinement of appraisal systems also enhances the legitimacy of the process, making it more likely that faculty will buy into the system and feel motivated to contribute their best work. As such, universities should adopt participatory governance models in which faculty members are involved in the decision-making processes related to academic evaluations, performance goals, and reward structures.

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Teachers' Perspectives on the Issues and Challenges in the Implementation of Inclusive Education

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Abstract

This qualitative study explored some issues and challenges encountered by MAPEH teachers in implementing inclusive education at Bagabag National High School, Nueva Vizcaya, Philippines. Using purposive sampling, nine teachers participated in semi-structured interviews. Thematic analysis generated three major themes: (1) selecting appropriate strategies and reinforcement, (2) recognizing diverse and individualized learning needs, and (3) viewing the teaching of learners with disabilities as a rewarding profession. Findings revealed that most teachers feel unprepared to teach learners with disabilities due to the absence of formal training, limited instructional materials, inadequate facilities, and insufficient stakeholder support. Despite these barriers, teachers demonstrated resilience by adapting strategies and fostering supportive learning environments. The study highlights the need for sustained professional development, improved resources, and policy-driven support to strengthen inclusive education practices. Recommendations include capacity-building programs, adequate funding, and strengthened collaboration among teachers, school leaders, and the Department of Education.

Keywords: inclusive education, instructional challenges, teachers' perspective, learning disabilities, MAPEH teaching

1. Introduction

Inclusive education is recognized globally as a fundamental principle for ensuring equitable access to quality education for all learners, including those with disabilities. It emphasizes the right of every student to participate in regular classrooms, receive individualized support, and benefit from learning experiences that accommodate their unique abilities and needs (UNESCO, 2020; Florian & Black-Hawkins, 2019). In the Philippines, this principle is reinforced through **Republic Act No. 11650**, which mandates the establishment of Inclusive Learning Resource Centers across all school districts, municipalities, and cities. The law provides the necessary funding, sets standards, and institutionalizes services to ensure learners with disabilities are not excluded from mainstream education. This legal framework reflects the state's commitment to transitioning from segregated and integrated education systems toward fully inclusive environments where learners with special needs are educated alongside their peers.

Despite the progressive nature of such policies, the implementation of inclusive education in Philippine public schools remains complex and uneven. Schools often encounter challenges related to limited instructional materials, inadequate facilities, insufficient funding, and a lack of human resources specialized in special education (Flores & De Vera, 2022; Macapagal, 2022). Teachers frequently face difficulties in differentiating instruction, providing appropriate reinforcement, and motivating learners with diverse abilities due to insufficient pre-service training and limited opportunities for professional development in inclusive pedagogy (Cagayat & Dagasdas, 2021; De Guzman & Llana, 2023). These challenges are compounded by the need to balance the learning requirements of students with disabilities with those of their peers, often resulting in instructional strain and frustration for teachers.

The role of teachers in inclusive education cannot be overstated. Their attitudes, preparedness, and pedagogical competence significantly influence the effectiveness of inclusion, as they are responsible for implementing individualized strategies, assessing student progress, and fostering an equitable classroom environment (Cho & Choi, 2020; Evans, 2020). Moreover, research highlights the importance of teachers' intrinsic motivation and professional fulfillment, which can sustain commitment to inclusive practices even in the face of systemic challenges (Santos & Villanueva, 2021). However, gaps remain in understanding how teachers perceive and navigate these challenges within the context of general education classrooms, especially in schools with limited resources and support systems.

At Bagabag National High School, MAPEH teachers are increasingly expected to accommodate learners with disabilities in regular classrooms, often without specialized training or sufficient instructional resources. Understanding the challenges they face, the strategies they employ, and the professional supports they need is essential to improving inclusive education practices. Therefore, this study aims to explore (a) the issues and difficulties experienced by MAPEH teachers in implementing inclusive education and (b) how they navigate these challenges to support learners with disabilities. The insights generated will contribute to the development of targeted professional development initiatives, resource allocation strategies, and policies designed to enhance the quality and effectiveness of inclusive education in Philippine public schools.

2. Review of Related Literature

2.1 Inclusive Education: Concept and Legal Framework

Inclusive education refers to the practice of educating all learners—regardless of their abilities, disabilities, socioeconomic background, or cultural identity—within mainstream classrooms, ensuring equal access to quality education and opportunities for participation (UNESCO, 2020). The fundamental principle behind inclusive education is equity, emphasizing that learners with disabilities have the right to be educated alongside their non-disabled peers while receiving tailored support that addresses their unique learning needs (Florian & Black-Hawkins, 2019). Inclusion extends beyond mere physical presence in the classroom; it encompasses participation, engagement, and learning outcomes, making it a holistic approach that addresses social, emotional, and cognitive development (Armstrong, 2021).

In the Philippine context, the implementation of inclusive education is reinforced by Republic Act No. 11650, which mandates the establishment of Inclusive Learning Resource Centers in all school districts, municipalities, and cities. The law provides funding, establishes standards, and institutionalizes services for learners with disabilities (Republic Act No. 11650, 2022). Despite these legal frameworks, schools often face challenges in translating policies into practice due to resource limitations, insufficient teacher training, and inadequate institutional support (Flores & De Vera, 2022). These gaps underscore the importance of understanding teachers' experiences and perspectives as they serve as the primary implementers of inclusive education programs.

2.2 Teacher Preparedness and Professional Competence

Teachers play a pivotal role in the success of inclusive education. Effective inclusion requires teachers to possess not only content knowledge but also pedagogical competence in differentiated instruction, classroom management, and assessment strategies tailored to learners with diverse needs (Cho & Choi, 2020). Several studies indicate that teachers often feel unprepared to handle learners with disabilities due to limited pre-service training and insufficient opportunities for continuous professional development (Cagayat & Dagasdas, 2021; Serafica et al., 2023).

A study by Macapagal (2022) highlighted that general education teachers often struggle to modify lesson plans or adapt teaching strategies to accommodate students with learning disabilities. Similarly, Aquino et al. (2019) emphasized that teachers require holistic strategies that consider cognitive, emotional, and motivational aspects of learners with disabilities to foster meaningful engagement. Teacher preparedness is further complicated by the diverse profiles of learners with disabilities, including differences in cognitive functioning, communication skills, and socio-emotional development. This necessitates ongoing professional development programs that combine theoretical knowledge with practical classroom strategies.

In the Philippine context, research shows that although many teachers have a general foundation in education, relatively few have formal special education training. This gap affects their ability to identify individual learner needs, implement individualized education plans (IEPs), and employ adaptive teaching methods (Pimentel, 2021; Ognase & Maslang, 2024). Teachers' limited competencies often result in reliance on standard instructional strategies that may not be effective for students with disabilities, which can impede academic progress and social inclusion.

2.3 Challenges in Instructional Strategies and Classroom Management

One of the primary challenges teachers face in inclusive classrooms is the selection of appropriate instructional

strategies and reinforcement methods. Heterogeneous classes require differentiated instruction that accommodates varying learning styles, abilities, and paces. Teachers often report difficulty in designing lessons that address the spectrum of needs in a single classroom (De Guzman & Llana, 2023). Motivation and engagement emerge as critical factors for learners with disabilities, yet teachers often lack the skills to implement effective motivational strategies (Agran et al., 2020).

The literature indicates that inclusive classrooms demand flexible teaching approaches, including scaffolded instruction, cooperative learning, and multi-sensory teaching methods (Florian & Black-Hawkins, 2019). Teachers must also employ reinforcement strategies that align with individual learning goals. However, research in the Philippine setting has found that many teachers rely on generalized methods, primarily due to limited access to updated teaching materials, assistive technologies, and specialized training (Flores & De Vera, 2022; Macapagal, 2022). This aligns with the study's findings where MAPEH teachers expressed challenges in identifying and applying suitable teaching strategies.

Effective classroom management is another critical component. Managing diverse learners in a single setting can create instructional strain, especially when teachers are required to balance the learning needs of students with disabilities and the academic expectations of the broader class (Cho & Choi, 2020). Studies emphasize that inclusive classrooms necessitate individualized support, frequent formative assessments, and adaptive behavioral management techniques to maintain an optimal learning environment (Evans, 2020).

2.4 Recognizing and Responding to Individual Learner Needs

Understanding the unique needs of learners with disabilities is essential for designing meaningful educational experiences. Individualized assessment and continuous observation allow teachers to tailor instruction, monitor progress, and provide timely interventions (Jones et al., 2017; Evans, 2020). Teachers often find it challenging to identify students' specific needs due to the absence of formal assessment tools and training in interpreting learning profiles.

Parental involvement emerges as a key factor in supporting inclusive education. Research indicates that collaboration between teachers and parents enhances understanding of learners' needs, facilitates home support, and promotes holistic development (Bartolome et al., 2020).

Teachers who effectively engage parents report improved student motivation, participation, and learning outcomes. However, inconsistent parental engagement remains a challenge, particularly in rural or resource-constrained settings, which further complicates teachers' efforts to implement individualized strategies (Flores & De Vera, 2022).

Moreover, recognizing learners' diverse needs is not limited to cognitive or academic considerations; teachers must also account for socio-emotional, behavioral, and physical requirements. Santos and Villanueva (2021) emphasize that inclusive education requires educators to develop empathy, flexibility, and creativity, enabling them to provide responsive instruction that nurtures both academic and personal growth.

2.5 Teachers' Motivation and Professional Fulfillment

Despite the challenges associated with inclusive education, many teachers report a sense of personal and professional fulfillment when working with learners with disabilities. Studies highlight that inclusive teaching can enhance teachers' instructional skills, problem-solving abilities, and professional resilience (Santos & Villanueva, 2021). Teachers often derive intrinsic satisfaction from witnessing students' progress and achievements, fostering a positive cycle of motivation and commitment to inclusive practices.

In the Philippine context, teachers' dedication is often supported by their desire to provide equitable learning opportunities, even in the absence of adequate resources or systemic support (Flores & De Vera, 2022). This intrinsic motivation underscores the importance of teacher well-being and professional recognition in sustaining inclusive education initiatives.

2.6 Gaps in Resources and Stakeholder Support

Resource limitations—including outdated curriculum guides, insufficient instructional materials, lack of assistive devices, and inadequate facilities—pose significant barriers to effective inclusive education (De Guzman & Llana, 2023; Maslang et al., 2021). Additionally, the lack of trained personnel, including specialized educators, exacerbates these challenges. Stakeholder support, particularly from school administrators, local government units, and parents, remains inconsistent, affecting program implementation and student outcomes (Bartolome et al., 2020).

Research suggests that multi-level collaboration between teachers, administrators, parents, and policy-makers is essential for sustainable inclusive education (Cho & Choi, 2020; UNESCO, 2020). Schools with strong stakeholder engagement report higher success in implementing inclusive practices, including better classroom accommodations, improved teacher preparedness, and increased learner participation.

2.7 Synthesis

The literature demonstrates that while inclusive education is widely endorsed and legally mandated, its implementation in the Philippines faces persistent challenges. Teachers' limited training, insufficient instructional materials, inadequate resources, and inconsistent stakeholder support hinder the effective inclusion of learners with disabilities. At the same time, teachers' dedication, resilience, and intrinsic motivation remain critical enablers of inclusive practices. Addressing these gaps requires targeted professional development, resource allocation, stakeholder collaboration, and systemic support to equip teachers with the skills and tools necessary to provide equitable, responsive, and high-quality education for all learners.

3. Methodology

3.1 Research Design

A qualitative descriptive research design was employed to explore MAPEH teachers' experiences and perspectives regarding inclusive education. This approach allowed for an in-depth understanding of the lived realities of teachers, grounded in their narratives.

3.2 Locale of the Study

The study was conducted at Bagabag National High School, Bagabag, Nueva Vizcaya, during the 2024–2025 academic year. The school operates regular classes without dedicated SPED sections, making it an ideal context for examining inclusive education challenges.

3.3 Participants and Sampling

Nine MAPEH teachers—both junior and senior high school—were selected through purposive sampling. The inclusion criterion was: teachers must have experience teaching learners with disabilities in regular classes.

3.4 Data Collection

Semi-structured interviews were conducted, each lasting 20–40 minutes. An interview guide, developed based on recent literature on inclusive education, was used to ensure systematic data gathering. Interviews were conducted in Filipino to facilitate clearer communication.

3.5 Data Analysis

Thematic analysis was used following Braun and Clarke's (2021) six-phase framework: familiarization, coding, theme development, review, defining themes, and final report writing.

3.6 Ethical Considerations

This study adhered to strict ethical standards to ensure the protection, privacy, and dignity of all participants. Prior to data collection, permission was obtained from the principal of Bagabag National High School, and informed consent was secured from all nine MAPEH teachers who participated in the interviews. Participants were fully briefed on the purpose, objectives, and procedures of the study, and were assured that their involvement was voluntary, with the option to withdraw at any time without penalty. To maintain confidentiality, respondents' identities were anonymized using pseudonyms, and all interview data were securely stored and accessible only to the researcher. Furthermore, the study respected the professional and personal boundaries of participants, ensuring that sensitive information regarding teaching practices or challenges was handled with discretion. Ethical guidelines outlined by the Philippine Department of Education and principles of research integrity, including transparency, honesty, and non-maleficence, were strictly followed throughout the study to safeguard the welfare of all participants and uphold the credibility of the research.

4. Results and Discussion

Through thematic analysis of the interview data, three major themes emerged that describe the issues, challenges, and experiences of MAPEH teachers in implementing inclusive education at Bagabag National High School.

4.1 Theme 1: Selecting Appropriate Strategies and Reinforcement

Teachers consistently expressed the difficulty of selecting and applying effective instructional strategies in heterogeneous classrooms, particularly when learners with disabilities are integrated into general education settings. Their responses revealed that while they recognize the importance of differentiated instruction, they struggle to identify suitable approaches tailored to the specific needs of students with disabilities. Ms. M highlighted this challenge:

"You have a limited teaching approach when teaching heterogeneous classes that include students with disabilities." — Ms. M

This sentiment was echoed by several participants who noted a lack of formal training in special education. Most

teachers rely on trial-and-error methods, intuition, or general classroom practices, which may not always accommodate learners requiring specialized support. The absence of explicit guidelines or updated teacher manuals intensifies uncertainty in selecting the most appropriate instructional strategies.

Teachers also emphasized that motivation is a critical element for student engagement and academic success. However, they found it challenging to motivate learners with disabilities without adequate tools, background knowledge, or exposure to evidence-based strategies. Some expressed concern that traditional reinforcement methods may not be effective for learners with developmental or cognitive challenges:

“Motivating them is difficult because we don’t really know what specific strategy works for each disability.”

These findings align with literature stating that teachers often experience difficulty modifying instruction due to insufficient training in inclusive pedagogy (De Guzman & Llaneza, 2023; Macapagal, 2022). Inclusive settings demand adaptive and responsive instruction, which requires teachers to be knowledgeable about disability types, learning profiles, assistive technologies, and behavioral interventions (Agran et al., 2020).

The lack of training contributes to teachers’ feelings of instructional inadequacy. Without a strong foundation in inclusive methods, many default to generalized strategies that may not fully address the needs of students with disabilities. This supports Aquino et al. (2019), who emphasized holistic, learner-centered approaches for diverse student populations, and Nachiappan et al. (2018), who underscored the importance of teacher resourcefulness in designing engaging and responsive activities.

Furthermore, several teachers expressed frustration over the absence of updated curriculum guides and teaching resources, limiting their instructional options. The reliance on outdated or incomplete materials restricts creativity and makes it challenging to construct meaningful learning experiences.

Overall, this theme reflects the gap between policy expectations and classroom realities, where teachers are expected to deliver inclusive instruction without sufficient preparation, training, or material support.

4.2 Theme 2: Recognizing Special Needs of Learners

Another major theme that emerged is the challenge of recognizing and responding to the unique learning needs of students with disabilities. Teachers repeatedly emphasized the emotional, instructional, and professional demands of working with diverse learners in one classroom. Mr. P expressed this difficulty:

“It is very difficult to determine their needs... they have particular needs that must be addressed individually.” — Mr. P

Teachers acknowledged that each learner with a disability has a different learning profile, requiring individualized attention, pacing adjustments, and tailored instructional activities. However, due to the absence of formal assessments, limited training, and lack of specialist support, identifying specific needs becomes a significant challenge. Mr. M also shared:

“Depending on the demands of our pupils, we must create various activities.” — Mr. M

This indicates that teachers are aware of the importance of differentiated instruction but feel overwhelmed by its implementation. Designing varied activities for students with disabilities, while simultaneously meeting the curricular expectations for regular learners, puts teachers under considerable cognitive and emotional strain.

These findings align with Evans (2020), who argues that effective inclusive education requires continuous assessment, contextualized planning, and flexibility—skills that teachers need to develop through ongoing professional training.

A recurring sub-theme under this category is the importance of parental involvement. Teachers noted that parental support significantly influences student progress:

“You must work more. Parents also play a role in helping their children reach their full potential.” — Ms. Y

This supports Bartolome et al. (2020), who assert that meaningful parent–teacher collaboration enhances learning outcomes for students with disabilities. However, teachers reported inconsistent parental cooperation, which further complicates their ability to plan appropriate interventions.

Hence, this theme reveals that teachers recognize the nuances of learner diversity but feel constrained by limited training, lack of assessment tools, insufficient specialist support, and inconsistent stakeholder engagement.

4.3 Theme 3: Teaching Special Learners as a Rewarding Job

Despite the challenges, teachers highlighted a strong sense of fulfillment and intrinsic motivation in working with learners with disabilities. Many expressed joy upon witnessing even small improvements in learners’ skills, behavior, or participation. Ms. G articulated this sentiment:

“We must assist them in developing and improving their abilities... We help them manage their learning disabilities.” — Ms. G

This response reflects a deep sense of purpose and the belief that teaching goes beyond academic instruction—it involves guiding learners toward independence, confidence, and social participation.

Teachers also emphasized that working with students who have disabilities helps them grow professionally by expanding their patience, creativity, and adaptability. This resonates with Santos and Villanueva (2021), who found that teachers often view inclusive education as an opportunity for personal and professional development, despite its complexities. Another teacher, Ms. Z, described moments of pride when her students successfully participated in school activities:

“I can make impossible things happen, allowing them to join activities despite their disability.” — Ms. Z

Her statement reflects the teachers’ dedication to ensuring that learners with disabilities experience meaningful inclusion—not just in academics, but also in extracurricular and social activities. This aligns with current educational frameworks that define inclusion as the full participation of all learners in varied learning experiences (UNESCO, 2020).

The emotional satisfaction derived from these experiences appears to compensate, to some extent, for the practical challenges teachers encounter. This theme illustrates that while teachers need more support and training, they retain strong professional commitment and empathy—critical attributes for inclusive education practitioners.

5. Conclusion

The findings of this study indicate that MAPEH teachers at Bagabag National High School face multiple challenges in implementing inclusive education for learners with disabilities. Teachers reported feeling inadequately prepared due to limited training and exposure to special education strategies, which affects their confidence and instructional effectiveness. Additionally, the study revealed that instructional materials, school facilities, and funding are insufficient to support inclusive learning, creating further barriers for both teachers and learners. General education classrooms often lack the necessary structures and support mechanisms to accommodate students with disabilities, and low stakeholder engagement—including limited parental involvement and community support—hinders the successful implementation of inclusive programs. Despite these challenges, teachers consistently demonstrated commitment, resilience, and a sense of fulfillment in assisting learners with disabilities, highlighting their dedication to fostering equitable and supportive learning environments. Overall, the study underscores the need for systemic improvements, professional capacity building, and strengthened institutional and community support to enhance the quality and effectiveness of inclusive education.

6. Recommendations

To address the identified challenges, the study recommends a multi-faceted approach to strengthen inclusive education. First, professional development programs should be enhanced, offering regular training in inclusive pedagogy, differentiated instruction, classroom accommodations, and behavioral management strategies to equip teachers with the skills and confidence to meet diverse learner needs. Second, schools should be provided with sufficient material and human resources, including updated curriculum guides, assistive devices, and adequate funding, to facilitate effective inclusive teaching. Third, hiring and training qualified personnel with special education expertise should be prioritized, and current teachers should receive in-service training to expand their competencies. Fourth, stakeholder collaboration should be strengthened through active engagement of parents, local government units, and community groups to provide a supportive network for learners and teachers. Finally, the Division of Nueva Vizcaya should establish monitoring and review mechanisms, conducting periodic evaluations to ensure compliance with RA 11650 and assess school-specific needs. Collectively, these measures aim to create an inclusive, responsive, and sustainable educational environment that maximizes opportunities for learners with disabilities.

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