

THE UNIVERSITY OF NOTTINGHAM

**The Perception of Lifelong Learning by Adult Learners under the Context of
Education Transformation in Hong Kong:
A Study of Adult Learners' Values and Experiences in the Continuing
Education Fund (CEF) Programme**

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**Thesis submitted to the University of Nottingham
for the Degree of Doctor of Education**

Jun 2022

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ABSTRACT

The Continuing Education Fund (CEF) was established by the Hong Kong Government in 2002 to assist the people of Hong Kong in acquiring new knowledge and skills, to enhance their competitiveness in the global labour market and ultimately to become adaptable lifelong learners. This study aims to determine in what ways the CEF affects adult learners studying the *Principles of Marketing* (POM) course at a tertiary institute in Hong Kong. It focuses on the programme's impact on student motivation and course outcomes. The research also seeks to understand whether the programme increases the likelihood that participants will take part in lifelong learning when the funding ends.

Drawing on a literature review on andragogy and related theories of motivation, two surveys were distributed to a tertiary education class composed of both CEF participants and non-CEF participants. The research compared demographic data and learning outcomes between the two groups; a subset of students was interviewed to obtain more in-depth feedback and comments about the impact of the CEF programme, and suggestions for its development. The study discovered that students who had applied for the CEF outperformed their peers in terms of academic performance and participation rates and are more likely to pursue further education after completion of the programme. It also shows the root cause to be the economic incentive scheme within the fund, as motivational factors of learning between the CEF participants and the non-CEF participants were broadly similar.

The study concludes that the CEF programme has a net positive effect on the tertiary landscape in Hong Kong, particularly for those currently applying to the fund. An increase in the CEF endowment can be expected to generate corresponding positive effects on the adult workforce in Hong Kong. Further research is recommended to determine the most effective scheme by which to advance the CEF programme in the long run.

ACKNOWLEDGEMENTS

I would like to express my deepest gratitude to my supervisor Professor John Holford for his infinite patience and tremendous support in guiding my doctorate research. His feedback was insightful and favourable in all the right places. My research work could not have been so successful without his invaluable assistance.

I am truly thankful to Professor Sarah Speight for her continuous guidance and inspirational advice of my research, especially with some of my unrefined ideas. She helped me think critically about my own work and kept me on the right path.

A big thank you to my former college Principal Dr. Richard Wong and all the colleagues at the institute where the research took place. His academic support and encouragement pushed me to succeed in my own journey into further education.

Special thanks to Mr. Kenny Cheung for allowing his course to be such a rich source of data for this study. The whole study would have fallen apart if he was not such an outstanding teacher. His quality teaching is beloved by students and faculty.

I would like to offer my sincere appreciation for the amazing lifelong learning journey enlightened by Mr. Sunny Lam. The completion of my dissertation could not have been accomplished without his endless support and encouragement. Without him, I would be lacking the knowledge I have today.

Last but not least, I must express my profound gratitude to my family and friends who along the way believed in me. I am eternally thankful to all of them.

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LIST OF ABBREVIATIONS

ACCA – The Association of Chartered Certified Accountants

AACSB – The Association to Advance Collegiate Schools of Business

C&SD – Census and Statistics Department

CEF – Continuing Education Fund

CEOs – Chief Executive Officers

CHC – Chu Hai College of Higher Education

CIHE – Caritas Institute of Higher Education

CIA – Central Intelligence Agency

CityU – The City University of Hong Kong

CityU SCOPE – The School of Continuing and Professional Education of City University of Hong Kong

COVID-19 – Coronavirus Disease

COS – Career-Oriented Studies

CTIHE – HKCT Institute of Higher Education

CUHK – The Chinese University of Hong Kong

EC – The European Commission

EDB – Education Bureau

ERG (Theory) – Existence, Relatedness, Growth

EU – The European Union

FYFD – First-year-first-degree

GCC – Gratia Christian College

GDP – Gross Domestic Product

H1N1 – Hemagglutinin Type 1 and Neuraminidase Type 1 (Swine Flu)

HDI – Human Development Index

HK – Hong Kong

HKALE – Hong Kong Advanced Level Examination

HKBU – The Hong Kong Baptist University

HKCAA – Hong Kong Council of Academic Accreditation

HKCAAVQ – Hong Kong Council for Accreditation of Academic and Vocational Qualifications

HKCEE – Hong Kong Certificate of Education Examination

HKDSE – Hong Kong Diploma of Secondary Education

HKG – The Hong Kong Government

HKIED – The Education University of Hong Kong

HKMU – Hong Kong Metropolitan University

HKNYC – Hong Kong Nang Yan College of Higher Education

HKSYU – Hong Kong Shue Yan University

HKU – The University of Hong Kong

HKUSPACE – School of Professional and Continuing Education of the University of Hong Kong

HKUST – Hong Kong University of Science and Technology

HKSAR – The Hong Kong Special Administrative Region of the People's Republic of China

HSUHK – Hang Seng University of Hong Kong

ICSA – The Chartered Governance Institute

IMD - International Institute for Management Development

LLL – Lifelong Learning

LLP – Lifelong Learning Programme

LU – Lingnan University

LWB – Labour and Welfare Bureau

NLS – Non-Means Tested Loan Scheme

NSS – New Senior Secondary

NSSE – National Survey of Student Engagement

OCEF – Office of the Continuing Education Fund

OECD – The Organisation for Economic Co-Operation and Development

OUHK – The Open University of Hong Kong

PLM (Theory) – Power Load Margin

PolyU – The Hong Kong Polytechnic University

PolyU SPEED – The School of Professional Education and Executive Development of the Hong
Kong Polytechnic University

POM – Principles of Marketing

POCQ – Post-course Questionnaire

PRCQ – Pre-course Questionnaire

QF – Qualifications Framework

RQ – Research Question

SARS – Severe Acute Respiratory Syndrome

SG – Singapore

SRQ – Research Sub-Question

THE – Times Higher Education

THEi – Technological and Higher Education Institute of Hong Kong

TWC – Tung Wah College

UGC – University Grants Committee

UK – The United Kingdom

UNDP – United Nations Development Program

US – The United States

WFSFAA – Working Family and Student Financial Assistance Agency

YCCECE – Yew Chung College of Early Childhood Education

CHAPTER ONE: INTRODUCTION

1.1 Background Information

The Continuing Education Fund (CEF) was launched in May 2002. It is an incentive programme designed to facilitate higher learning among permanent adult residents in the territory of Hong Kong. It is an initiative supported by the Hong Kong Government (HKG) as part of a broader effort to implement educational reform, in response to the challenges of globalisation, to better prepare Hong Kong's workforce for the knowledge-based economy (OCEF, 2021). The fund is aimed to encourage and assist people to pursue continuing education courses to strengthen themselves with knowledge and skills. It reimburses adult learners for the successful completion of an upskilling or cross-skilling course deemed to facilitate the development of Hong Kong. This paper serves to analyse the effectiveness of the CEF programme by examining the factors necessitating its existence and analysing the participants' response to reveal how well the CEF addresses those need factors. Along the way, this paper provides practical suggestions for enhancing the programme which details additional policy ideas that address the needs of Hong Kong and provides an analysis on how adults learn in order to properly measure if the CEF incentivises the precise factors. Most importantly, it is necessary to investigate what it implies to be educated as an adult in the modern world.

Education is an invaluable commodity; it is intrinsically essential, a necessity of society and one of the most reliable predictors of economic prosperity. It is a lifelong goal of human beings to become educated. From the cradle, every experience is mentally enriching and offers intrinsic value. Most societies thereby mandate education as something not just utilitarian and useful, but as a basic human right tantamount to the progression of nation states. Beyond compulsory education, adults invest countless resources into education and many of them accumulate great debts or forego earning opportunities for years to add values to their skills and future outputs. Even looking beyond formalised education, the sum of most human interaction and recreation bends towards the common

goal of education. It is no exaggeration to say that education is an intrinsic life goal and how people experience it.

To put it simply, education is a broad term that refers to gaining experience and transforming the experience into behavioural change and enriching the individual. Acquiring education is essential in human development. It teaches members of a society about the values and traditions of the system wherein they reside. Education is responsible for language acquisition and skill enhancement. Formalised education is an attempt to help individuals acquire certain skill-based milestones at a fast pace and involves tested methods entwined with rigorous study. Education development puts this process in a system of learning specifically aimed towards individuals' general growth and career development. At an adult level, education is usually geared towards making high-skilled workers able to perform a specific job and perform it well.

In the present context, education is undoubtedly a vital aspect of socio-economic development. Nation states are built from their educated populace and, economic development hinges on the most educated workers within a society. Future prosperity is built by educational investments. In the present context, this development is linked directly to human capital generated by education. An improvement in a workforce's education increases work efficiency and the productivity of an economy, as well as enhancing national competitiveness in the global world, in granting the workforce additional flexibility to respond to changing markets. While it may appear that seeking to train an entire workforce only yields long-term goals when the next generation come into careers, short-term boosts are evident by continual gains in productivity, innovation and economic growth via training those already in the workforce (Stevens & Weale, 2003). More skilled people can boost productivity, innovation, and economic growth of the nation in the global market. Everywhere in the world, improving human capital has become an important agenda in educational policy with the aim of increasing global competitiveness (Bates, 2002).

1.1.1 Impacts of Globalisation on Education

There has always been a fixation on education among the socially mobile, but demand for higher education has skyrocketed in recent years. As the world becomes interconnected, a given worker, firm, or public entity is forced to compete with others on a global scale. This is globalisation, the process of organisations (public and private) developing international influence or opening operations on an international scale. According to Medel-Añonuevo et al. (2001), “Globalisation has produced outcomes and processes which make the learning of new skills and competencies of paramount importance”. This aspect of globalisation, the need for a continual upgrading of skills and capabilities, has proven to be one of the most debated and evaluated concepts of the 21st century; its implications send shockwaves out to businesses, societies, politics, going so far as to shake up the demographics of given regions as international students flock to universities better suited to their budget and needs. In his paper, *Globalization 101: The Three Tensions of Globalization*, Rothenberg provided a definition to this effect when he wrote in the introduction, “*Globalization is the acceleration and intensification of interaction and integration among the people, companies and governments of different nations*” (2003, p.1). Any and every interaction between bodies of people, in the context of globalisation, represents an escalation from how the same interactions were done before. Increased competition and communication do in fact bring the world closer, but at a faster pace, including increased challenges and with higher stakes that only a sufficiently educated workforce can respond to on a national level. Furthermore, Rothenberg’s vision of globalisation is one where there is more blending between different spheres such as politics, economy, education, etc. that were historically separate. Education is now tied to the market economy, the employment market, governance, etc. in a deeper way than before. Responding to this fundamental paradigm shift represents one of the most important policy decisions that governments are required to respond to for the sake of their economic development.

Across the array of sectors influenced by globalisation, a proper education system acts as a

sort of pressure valve that allows other spheres of society to adjust. Reforms in education geared towards preparing a workforce for global competition can determine how well an economy fares against increased competition in light of increased opportunity. Education allows work force to acquire skills in a shifting economy; and a specifically globalised education, that is, a system that focuses on workforce capabilities and global competence, can yield an exceptional workforce in a macro labour market (Bray, 2003). Beyond pure labour and skills, educational reform has been shown to have considerable impact on a social and cultural structure (Poon & Wong, 2008). An educated workforce acts as a filter, disseminating new technology, techniques, cultures and skills to the rest of society. This is, as will be demonstrated, one of the ways in which Hong Kong distinguished itself as a rising economic power in the 21st century and the reason why it continues to seek further means of educating its populace.

1.1.2 The Education System and Policy in Hong Kong

Hong Kong as a geopolitical entity itself is a complicated topic. Officially, Hong Kong (HK) is referred to as ‘the Hong Kong Special Administrative Region of the People's Republic of China (HKSAR)’ and is classified as a special administrative region of China. This grants Hong Kong a sort of autonomy, under the ‘One Country, Two Systems’ policy that demarks Hong Kong as its own entity within different indexes. Since the 1997 handover, Hong Kong's economic future became far more exposed to the challenges of economic globalisation and the direct competition from cities in mainland China (Richardson & Chang-Hee, 2005). HK is the world's 35th largest economy and one of the most important commercial cities in the world. In 2020, the Gross Domestic Product (GDP) of Hong Kong was worth \$346 billion US dollars and the GDP value of Hong Kong in 2021 represented 0.31% of the world economy (World Bank, 2021).

The education system of Hong Kong has traditionally been swift to respond to challenges, readapting to fit the structure and needs of society. In brief, HK was a small but strategically placed fishing village throughout the Qing dynasty and used to be a colony of the United Kingdom (UK)

for 155 years (1842 to 1997). In 1978, an educational shift occurred in Hong Kong under British administration, when the HKG implemented an education policy named '9 years of free and compulsory education' which mandated all children aged 6 to 15 to participate in formal education. It adopted the British '6-5-2-3' academic structure, meaning six years of primary education, five years of secondary school, two years of pre-university entry courses and three years of university programmes. However, access to higher education was limited during the 1970s. An estimated half of all primary graduates could enter government secondary schools and stiff competition led to soaring prices and scarcity among private institutions. Admission in either sector was predicated by two high impact examinations, the 'Hong Kong Certificate of Education Examination' (HKCEE) and the 'Hong Kong Advanced Level Examination' (HKALE), taken at completion of secondary five and seven respectively. These tests created an effective bottleneck in keeping a low percentage of the population out of degree programmes. While these problems were partially budgetary, a mere 2% of students were admitted onto university degree programmes in 1975 (University Grants Committee, 1998).

To adapt to the changing world and reduce the pressure of examinations, two public exams, the HKCEE and the HKALE, which was used to test after completion of Secondary 5 and 7 respectively, were abandoned in 2009.

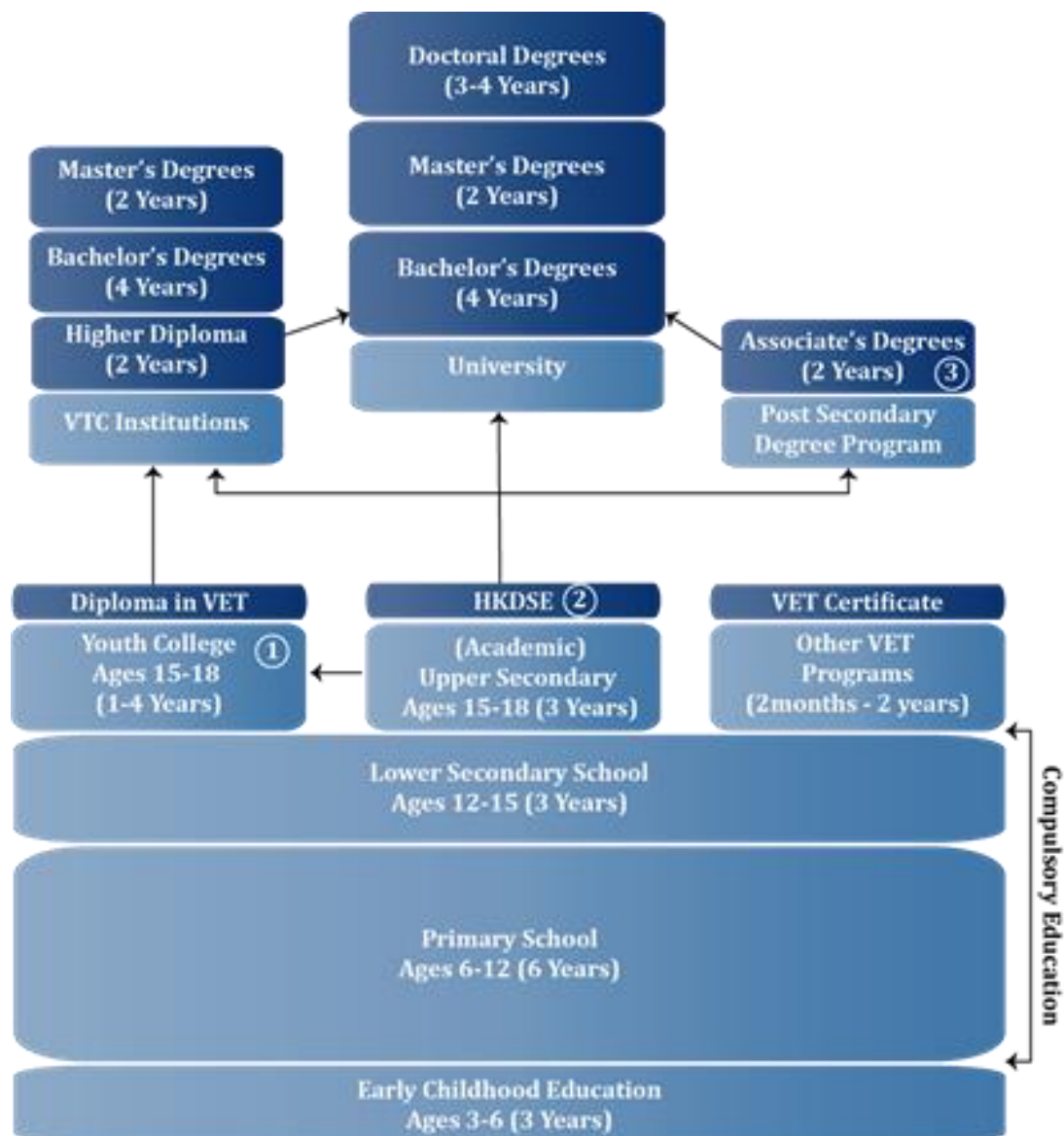


Figure 1.1 The Structure of HK's Education System

The new '3-3-4' academic structure for senior secondary education and higher education was implemented at Secondary 4 in 2009. **Figure 1.1** depicts the system as it stands now. Three years of early childhood education is voluntary. After studying 6 years at free primary school, students can enjoy 3 years of junior secondary and 3 years of senior secondary education. 4-year university programmes are optional and most of them are funded while many students continue onto upper secondary school, a youth college, or a vocational tract.

Education is standardised to the extent that students in Hong Kong are required to take four

core subjects, namely: Chinese Language, English Language, Mathematics and Liberal Studies, a customisable course which helps students develop multi-perspectives and critical-thinking skills. The core subjects are supplemented by voluntary electives, chosen from 20 New Senior Secondary (NSS) subjects and/or a broad range of courses from Career-Oriented Studies (COS) in the programme. At the end of the course, they will receive a 'Senior Secondary Student Learning Profile' which shows the results of the public examination 'Hong Kong Diploma of Secondary Education (HKDSE)' and other achievements. Throughout their secondary education, students can experience different varieties of practical courses and gain work-related experiences like job attachments which are practical approaches to create a workforce that the new global society requires and an opportunity for students to explore a career orientation before entering the job market.

It took until 2012 for university education to reach its current state, four years as opposed to three for most undergraduate programmes. Overall, reception to this change has been positive, as it gives university programmes more time to adapt curriculums in line with the Chinese mainland and the US's system of higher education. The new curriculum is precisely oriented towards the development of the new types of workers who need to be more adaptable, flexible and skilful as demanded by the global economy.

However, enrolment figures are still short of expectations. At present, only 15,000 first-year-first-degree (FYFD) places are offered by eight University Grants Committees (UGC) to funded higher education institutions. This amounts to an 18.5% admission rate in the 17-20 age group, a figure far lower than the number of secondary school graduates meeting general university admission requirements (EDB, 2021). Although starting from the 2018/19 academic year, the UGC-funded universities provide around 5,000 senior year undergraduate intake places for graduates of sub-degree programmes and students with other relevant qualifications, many students seeking a higher degree are not able to receive admission. It should be noted that these figures are exclusive of the eight universities funded by the UGC, namely:

- The University of Hong Kong (HKU),
- The Chinese University of Hong Kong (CUHK),
- The Hong Kong University of Science and Technology (HKUST),
- The Hong Kong Polytechnic University (PolyU),
- The Hong Kong Baptist University (HKBU),
- The City University of Hong Kong (CityU),
- Lingnan University (LU), and
- The Education University of Hong Kong (HKIEd).

The remainder of students not admitted into a degree-awarding programme must select from a few other options, such as: acquiring certificates, diplomas, or degree-level awards at either vocational training colleges or non-government-funded higher institutions which provide top-up programmes in coordination with courses offered by their partner institutions on a self-financing basis. Higher education institutions are not funded through the UGC, but present viable avenues for citizens to achieve higher education. They include:

- Caritas Institute of Higher Education (CIHE),
- Centennial College,
- Chu Hai College of Higher Education (CHC),
- Gratia Christian College (GCC),
- Hang Seng University of Hong Kong (HSUHK),
- HKCT Institute of Higher Education (CTIHE),
- Hong Kong Nang Yan College of Higher Education (HKNYC),
- Hong Kong Shue Yan University (HKSJU),
- Hong Kong Metropolitan University (HKMU),
- Technological and Higher Education Institute of Hong Kong (THEi),
- Tung Wah College (TWC), and

- Yew Chung College of Early Childhood Education (YCCECE).

In the same way, many UGC-funded universities in Hong Kong have also established separate administrative bodies geared towards providing degrees on a self-financing basis. For example, The School of Professional and Continuing Education (SPACE), The School of Professional Education and Executive Development (SPEED) and The School of Continuing and Professional Education (SCOPE), all operate as extensions of The University of Hong Kong (HKU), The Hong Kong Polytechnic University (PolyU) and The City University of Hong Kong (CityU) respectively. They offer comprehensive programmes from sub-degree to master's levels in partnership either with faculty members, with the universities, or with overseas universities – a field of programmes which has been increasing dramatically over the last two decades. These programmes consist of offshore campuses, established in Hong Kong with the partnership of a university but operated by institutions based in different countries, such as the UK, the US, Australia and so on. *Table 1.1* below provides the distribution of such collaborative establishment.

<u>Hong Kong Tertiary Institutions</u>	<u>Country of origin of overseas institutions</u>						<u>Total number of Linkages</u>
	UK	Mainland China	Australia	Canada	US	Others	
The University of Hong Kong	6	0	3	1	0	0	10
HK Management Association	2	3	2	0	0	1	8
CUHK	0	0	3	2	0	0	5
Caritas Institute	0	2	1	1	0	0	4
Hong Kong Baptist College	2	0	1	0	1	0	4
HK Productivity Council	3	0	0	0	1	0	4
City Polytechnic	2	0	0	0	0	0	2
HKUST	1	0	0	0	1	0	2
Hong Kong Polytechnic	1	0	1	0	0	0	2
Shue Yan College	0	2	0	0	0	0	2
Others	4	9	2	3	3	3	24
Total (by Country)	21	16	13	7	6	4	67

Table 1.1 Collaboration of HK's Tertiary Institutions and Overseas Institutions

The trend of increasing collaborative establishments between educational institutions coincides with the trend of running educational entities as for-profit organisations. ‘Corporatisation’

is the word describing this, or when a state-owned enterprise or other typically public organisation becomes incorporated or takes up the management structure of a corporation. Running higher educational institutions as businesses is a popular practice in Hong Kong and a trend that only is increasing. In their seminal book about the corporatisation of education, *Academic Capitalism: Politics, Policies and the Entrepreneurial University*, Slaughter and Leslie comment that:

“To maintain or expand resources, faculty had to compete increasingly for external dollars that were tied to market-related research, which was referred to variously as applied, commercial, strategic and targeted research, whether these moneys were in the form of research grants and contracts, service contracts, partners with industry and government, technology transfer, or the recruitment of more and higher fee-paying students.” (1997, p.8)

Development in the field of global collaborative education in Hong Kong has offered citizens continuing education opportunities and access to higher education. However, with the intention of generating extra income to facilitate institutional development, university authorities have been incentivised to establish links and collaborate with other institutions to recruit more fee-paying students. Consequently, education in Hong Kong is being increasingly utilised as a commodity, with university presidents as the Chief Executive Officers (CEOs) and students as consumers. The adoption of market-oriented approach in running higher education has become common and the global trends of ‘decentralisation’ and ‘marketisation’ continue to shape the educational development in Hong Kong (Carnoy, 2000; Mok, 2003).

The effects of this shift – another tell-tale indication of globalisation – are ambiguous. On one hand, it makes education more globally focused and accessible. On the other hand, it homogenises curriculums and drives the price of education up to prohibitive levels. Some of these effects are beyond the scope of this study, others remain important motivational factors in the Continuing Education Fund. Additionally, it is worth mentioning that as Hong Kong’s connection

with the People's Democratic Republic of China tightens, student groups associated with a number of Hong Kong's tertiary institutes often take centre stage during protest movements. These student-led movements tend to have hold sway on the broader political discourse within Hong Kong, and reflect the broader, if not more distilled, cultural zeitgeist among youths of the time (Tse, 2007). Any history of education in Hong Kong must mention this connection, particularly considering a portion of data collection for this study occurred during the highly controversial Anti-Extradition Law Amendment Bill Movement in 2019. The latter in particular causing not just societal tension but interrupting educational institutions and causing friction in student teacher relationships (Purbrick, 2019).

As far back as 1967, student activists took an active role in protests movements. The 1967 riots saw leftist student organisations leading protests and going so far as to use school resources to make homemade explosives (Loh, 2010). Another recent example can be illustrated as well. The pro-democracy Umbrella Movement in 2014, which witnessed a flair in relations between Mainland and Hong Kongers involved high degrees of student involvement. In these cases, the universities were bastions for a range of dissent, ranging from civil to violent (Fung & Su, 2016). This is not a rare phenomenon globally, but it does frame one undeniable facet of modern university life in Hong Kong: the functions of higher education can be disrupted by political activism.

In 2019, protests erupted when the Hong Kong Government were eager to implement an Anti-Extradition Law Amendment Bill, with the Chinese University of Hong Kong and the Hong Kong Polytechnic University serving as particularly severe battlefields. This caused excessive strain on the psyche of the citizenry of Hong Kong, particularly among its students and teachers (Hou & Hall, 2019). Not only was productivity in the classroom stymied, but teachers often found themselves in the compromising position of having to assist their students navigate political realities while coming themselves under criticism for 'instigating' students by not preventing their protesting (Sun, Chiu & Tsang, 2020). While the society of Hong Kong is still grappling with the full effects

of the extradition protests and is indeed still in the throes of the pandemic, preliminary research has shown amid struggling student population, teachers have found a renewed sense of purpose. A collection of oral interviews conducted by Wong and Moorhouse (2020) found that: “Teachers had to reconsider their roles in the classroom as they personally navigated and simultaneously helped students navigate the unprecedented circumstances” (p.652). As a researcher, I can attest personally to the fact that while the timetable for classes and for this study were delayed during the unrest, there was a tangible sense of solidarity between faculty and students during this time.

1.1.3 Continuing Education in Hong Kong

Hong Kong’s modern economy is informed by its own meteoric rise on the global stage, but even more so by sharp periods of economic decline. Evidence of these declines, including a spike in unemployment and a steep drop in the Gross Domestic Product (GDP), can be observed in 1998, 2001, 2003 and 2008 respectively (Trading Economics, 2021). While downturns in the economy are rarely welcoming phenomena, HK has used these periods to restructure portions of its economy in broader sweeps.

The HKG faced the challenges of economic restructuring and made strides to prepare for the advent of a knowledge-based economy – one in which the bulk of the workforce can be considered highly skilled. On the other hand, the government adopted incentive programmes with the aim of enhancing competitiveness in the globalised world and preserve economic vitality. Fortunately, Hong Kong boasts a highly flexible educational system, borne by its directionality towards the global East and the West (Tan, 2018). Western education, geared towards creativity, independent thought, and communication, finds new application in the East Asian Educational Model, best exemplified by the education systems in Hong Kong, Singapore, and Shanghai, as a post-Confucian method for synthesizing disparate parts to create an integrated whole. This has led to an educational environment marked by a few factors: constant education reform, with policy initiatives often led by international organisations, to the end of developing a highly performative

culture (Zhu, 2020). Thus, Hong Kong (and Singapore to a lesser extent) is often at the forefront of implementing innovative education policy.

The HKG has been proactive in its attempts to formulate several continuing education policies over the past few decades. A modern and notable example can be seen in 1989 when the Open University of Hong Kong (OUHK), formerly the Open Learning Institute of Hong Kong was established to offer open and distance education. It represented a considerable uptick in the amount the government had prioritised investing in continuing education (Lee, 1997). After 30 years of rapid development, the OUHK will be entitled the Hong Kong Metropolitan University (HKMU) to facilitate the university in winning public and global recognition in 2021. The HKMU is committed to advancing learning and knowledge as well as offering practical and professional programmes to meet the changing needs of Hong Kong (HKMU, 2021).

In 1994, the Federation for Continuing Education in Tertiary Institutions was also established to promote lifelong learning and coordinate the development of continuing education in Hong Kong. However, although continuing education was rising in necessity, not many people in Hong Kong could afford the costs of education. In order to keep pace with demand, the HKG started to branch out into existing institutions for support. During the period from 1998 to 2005, a number of continuing education policies were formulated in coordination with other private and public organisations to make the benefits of continuing education more accessible. These policies include the launch of the ‘Workplace English Campaign’, an incentive programme to upskill workers already employed and the establishment of a ‘Qualification Framework’ that better outlined who was eligible for training and education funds. On top of that, the government instituted funding programmes with the purpose of encouraging eligible adult learners for further education, namely, Non-Means Tested Loan Scheme (NLS) and the CEF (Cheung, 2006).

While not perfect by any means, it is generally agreed that these programmes have had a strong impact on the overall levels of education in Hong Kong. According to the *Surveys on the*

Demand for Continuing Education in Hong Kong, conducted by the School of Professional and Continuing Education of the University of Hong Kong (HKU SPACE), the increasing number of participants in continuing education programmes may be largely due to the HKG's funding policies (Young, 2008).

1.1.4 Continuing Education Fund (CEF)

The CEF is the focal point of this research as it is one of the most impactful funding programmes in Hong Kong. The HKG launched the CEF in May 2002 with the aim of encouraging Hong Kong citizens to enrich their knowledge through continuing education and further equip themselves, including strengthening their family and social integration skills and cultural literacy as well as enhancing their work capabilities and potentials in serving the community. These enable them to seize the opportunities brought by the current and future social and economic development of Hong Kong (Labour and Welfare Bureau, 2018).

It offers monetary subsidies directly to people seeking further education, incentivising a subset of people who are capable and willing to gain additional skills, but unable to finance further education to pursue further higher education programmes. In principle, only continuing education courses which contribute to the economic development of Hong Kong are covered in the scope of subsidy. Specifically, these courses are separated into a few broad categories determined to match Hong Kong's labour needs:

- (a) logistics,
- (b) financial services,
- (c) business services,
- (d) tourism,
- (e) languages,
- (f) product and digital design,
- (g) inter-personal and intra-personal skills for the workplace,

- (h) life skills, such as working with others as well as values and attitudes, and
- (i) creative industries.

During the initial phase, degree-holders were excluded from the subsidy and there were several strict eligibility criteria. For instance, the applicant is required to be a resident in Hong Kong possessing the right of abode, right to land and right to reside in Hong Kong without any kind of legal restrictions. Applicants had to be between 18 and 65 years of age, both at the time of applying and at the time of reimbursement. At first, the reimbursement only covered HK\$10,000 worth of expenses. In 2018, HK\$6.2 billion was allocated to benefit only 610,000 people. To encourage the public to better equip themselves, the HKG injected an additional amount of \$10 billion into the CEF and implemented enhancement measures. The upper age limit for applicants moved from 65 to 70 and the subsidy ceiling moved from HK\$10,000 to HK\$20,000 per applicant effective from April 2019. The following is a full breakdown of eligibility requirements from Working Family and Student Financial Assistance Agency (WFSFAA, 2021).

Applicants should be:

- Hong Kong residents who have the right of abode or the right to land or to remain in Hong Kong without restriction, i.e. ‘A’ (right of abode), ‘R’ (right to land) or ‘U’ (right to remain in Hong Kong without restriction) should appear below the date of birth on the Hong Kong Smart Identity card, or holders of one-way permits from the mainland China.
- Aged between 18 and 70 (i.e., before reaching the age of 71) both at the time when the CEF reimbursable course under application commences and at the time when an application for fee reimbursement is submitted (which should be within one year upon the successful completion of the CEF reimbursable course).

Reimbursement eligibility:

- Applicants who apply for CEF for the first time, or applicants who have opened CEF accounts before 1 April 2019 (regardless of whether their accounts were closed in the past), they may submit claims for reimbursement of fees for CEF reimbursable courses commenced on or after 1 April 2019.
- The maximum entitlement for new applicants is HK\$20,000. Applicants who have opened CEF accounts before 1 April 2019 are eligible for claiming the additional HK\$10,000 subsidy and the unused balance (if any) of the original subsidy of HK\$10,000. The co-payment ratios by learners (i.e., the percentage of fees to be borne by learners) for the first HK\$10,000 subsidy is 20% of the course fee and, that for the second HK\$10,000 subsidy is 40% of the course fee.

Most of these requirements are self-evident, but the clause on reimbursement requires clarification. For instance, applicants are required to pay the entire amount of the course fee prior to the commencement of the programme and will be reimbursed at the end of the curriculum only to the successful candidates, which implies that the students must face a certain amount of financial constraints while opting for the courses. Additionally, the fund is hereby not guaranteed to the participants with unsatisfactory results and insufficient attendance. Overall, it is not difficult for any resident in Hong Kong to apply and receive the funding. Ease of access has also created an environment where the people of Hong Kong can access continuing education on a higher scale than before, creating a skilled and self-motivated workforce to carry the city into the future. It can be noted that a comprehensive and thorough investigation to safeguard public money is required to ensure that there is an adequate educational return on the Government's investment.

1.1.5 Quality Assurance

The final factor to consider, while laying out the background information behind the CEF, is how effective the CEF-eligible courses are. Quality Assurance is a powerful academic concept that has been in vogue for over two decades. Generally, Quality Assurance refers to the efforts enacted

by an institution to ensure a certain unit-wide standard of performance. Educational Researcher Harman, regards quality assurance as:

“...systematic management and assessment procedures adopted to ensure achievement of specified quality or improved quality and to enable key stakeholders to have confidence in the management of quality and the outcomes achieved. Stakeholders are individuals and groups who have a major interest in the higher education institution or system and its achievements.”

(1998, p.346)

Hong Kong is the first among East Asian countries to use quality measures to monitor higher education in order to ensure a high standard of teaching. The Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ) has replaced the Hong Kong Council of Academic Accreditation (HKCAA) which was established in 1990. The HKCAAVQ is the current monitoring body of quality assurance. It is a statutory body, appointed by the Secretary for Education, as the accreditation authority responsible for regulating all academic and vocational accreditation offered by overseas universities and education or training through non-local courses and programmes for the CEF. In addition, the HKCAAVQ provides quality assurance and assessment services to educational and training institutions, course providers and the general public.

In 2008, the Qualifications Framework (QF) was established and officially launched by the HKG. QF-related quality assurance is undertaken by the HKCAAVQ and it is a seven-level hierarchy as shown in *Figure 1.2* which designed to put in order qualifications in the academic, vocational and professional as well as continuing education sectors to promote and support lifelong learning with a view to facilitating life-long learning and continuously enhancing the quality, professionalism and competitiveness of our workforce in an increasingly globalised and knowledge-based economy (HKQF, 2021).



Figure 1.2 Seven-level Hierarchy of QF

Beyond working with local institutes, the HKCAAVQ also provides advisory and consultancy services in education qualifications and standards to different government bureaus and other organisations in Hong Kong and the Asia-Pacific region. Additionally, many programmes offered by universities in Hong Kong have received official accreditation from various international review bodies; for example, The Association to Advance Collegiate Schools of Business (AACSB), The Chartered Governance Institute (ICSA) and The Association of Chartered Certified Accountants (ACCA) and so on. Observably, many programmes provided by Hong Kong universities have consistently ranked near the top of many international lists. According to the Times Higher Education (THE) World University Rankings in 2022, The University of Hong Kong (HKU), The Chinese University of Hong Kong (CUHK) and The Hong Kong University of Science

and Technology (HKUST) ranked at positions 30th, 49th and 66th respectively in the list of World's Top 100 Universities. It is recommended that the HKG can consider the facilitation of the collaboration of CEF-accredited colleges and vocational schools with the elite Hong Kong higher education institutions which enhances the quality of CEF programmes to shift Hong Kong to become a better knowledge-based society.

1.2 Need and Significance

Many governments are considering the question 'to what extent the lifelong learning impacts outcomes' and hopefully some examples from Hong Kong can illuminate the issue. In Hong Kong, an increase in education levels has been linked to higher wealth particularly, an increase in pro-societal business practices and better overall life outcomes. While Hong Kong has, statistically, become quite prosperous in recent decades in part due to education policies. However, its continuing education programmes are not above scrutiny. Indeed, Hong Kong as a special administrative zone, a cultural and economic island within its own country, offers a microcosm in which the effects of educational policy can be examined under a microscope should other governing educational bodies seek measures of improvement.

Consequently, it amplifies the main question of the CEF programme and the significance of this research. For example: How effective the CEF is at addressing the issues discussed above? Does the CEF lead to higher educational attainment in participants? How can the HKG, or any legislative body faced the challenges of globalisation? Are there any backup plans to create a programme similar to the CEF or more effective than the CEF in the future? The CEF is a data rich example of what one special administrative zone has done to further education. This paper evaluates the CEF programme comprehensively which allows educators and policy makers in Hong Kong as well as in the wider world to understand what can be solved and improved under the challenges of the local and global context. Not only this study provides data points demonstrating what outcomes are predicated on the programme, it also attempts to measure the impact it has on learner motivation, apart from any other

pre-existing conditions, to make the findings more customisable to policy makers inside and outside Hong Kong.

1.2.1 Overview of Lifelong Learning

The nature of labour is changing around the world. Globalisation continues to shift economies and incentivise high-specific functions for labours while automation invalidates low-skill workers. Global economies are now service-based and knowledge-oriented and governments are beginning to realise the importance of lifelong learning and the impact it may have on labour productivity. The implementation of lifelong learning is vital in supporting both social and economic development of a nation by creating more high-skilled workers in an economy (Medel-Añonuevo et al., 2001). From an international perspective, it is observed that lifelong learning serves with greater competency and efficiency to develop the educational stature of an economy (Holford et al., 1998). Lifelong learning is a critical policy for the development of citizenship, social cohesion as well as employment. Undoubtedly, nations with lifelong learning-oriented programmes are more competent to adjust to macro shifts in the marketplace as displaced workers are more able to find employment. Tangible examples of lifelong learning programs and their effectiveness at enhancing professional skills and developing knowledge in a workforce are already evident around the world. For example, the European Union (EU), established their flagship continuing education ‘*Lifelong Learning Programme*’ (LLP) in 2006. The LLP was funded by the European Commission (EC) and provided several opportunities to qualifying learners and organisations across Europe. There were several programs under the LLP aimed towards various specific target groups such as that of schools, higher education, vocational training and education, non-vocational adult education and learning professionals (European Commission, 2010).

Investing in lifelong education has been proven to be beneficial to a society, with return manifesting in boosted economic prosperity and better business practices (Medel-Añonuevo et al., 2001). **Figure 1.3** below depicts a model of lifelong learning with regards to a published paper of the

EC and depicts the competing individual, social and economic interests. According to the European Commission, the two triangles, namely public funding and private funding, need to be brought closer in order to bridge the learning gap which allow the individuals to follow the path of lifelong learning. However, this is possible only through the bridging of the learning gap or bringing the two triangles closure. It can be noted that investment is generated not only from the individuals but also from the employers and governments. The needs and demands of the individuals must be made in line with those of the economy and the employers.

A Model of Lifelong Learning

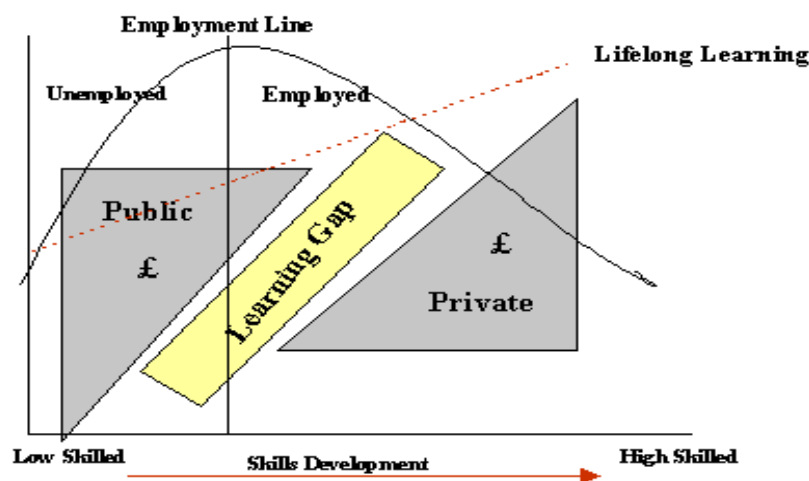


Figure 1.3 Model of Lifelong Learning (Scottish Parliament, 2002)

On top of that, the model tracks a measurable trend that as a worker furthers their education, their employment prospects increase. When public funding and private funding are considerably distant from one another, it creates a learning gap, essentially a deadweight loss zone. This learning gap represents workers who are willing and able to receive further education except when they are financially restricted. This triangle can be closed by one of two events: Either market forces can act on the private market for education, causing prices to drop (unlikely, given swelling demand), or the public sector can step in with programmes to subsidise, incentivise, or otherwise invest fiscally in continuing education. Essentially, the model measures an inefficiency in the supply of education.

By closing the education gap, the demand for education can be reached at a proper equilibrium. Investigating how market forces react is particularly difficult to harness. Therefore, the most efficient means would be to use public funding programmes such as the CEF.

Undoubtedly, before examining supply-side solutions to a learning gap, it is essential to take a step back to ask why the demand for education is so strong. The growing need for lifelong learning does not stem from governments or business initiatives, but from the immense interest on an individual level. Universities, education programmes, training, etc. only exist in part to address an intrinsic need that only increases as wealth and recreational time also grow. Conventionally, continuing education refers to learning opportunities for those who have left formal education and would like to acquire new knowledge or skills for personal interests, academic or career prospects (OECD, 1996). However, it is significant to investigate what else could spur the demand. Continuing education can be considered as a lifelong process for people of all ages to acquire knowledge and skills. With mounting competition and technology changing on a daily basis, workers who voluntarily achieve elevated levels of education or continue to develop personal skills are highly sought after for the perceived increase in flexibility, creativity and productivity. Continuing education is a competitive edge at a time when competition is fierce.

Currently, the demand for adult education has risen, but andragogy experts have shifted the focus on education to a continuous and never-ending process – every individual has the opportunity to learn from past experiences and use that information to impact how they interact with the external world (Cohen, 1975; Künzel, 1991). Therefore, lifelong learning does not only consider the implication of learning tools such as academic books and other printed sources in a limited way as in the case of regular learning courses. Instead, the learning process provides significant considerations to the usage of different environments and past experiences both formal and informal techniques (Aspin & Chapman, 2001). In other words, lifelong learning not only depends on the willingness of the learners, but also on the environment that in turn facilitates informal learning,

namely: a global classroom (Fischer, 2000).

Therefore, it is readily established that:

1. there is a demand for lifelong learning,
2. demand is spurred by global market forces, and
3. institutions offer one pathway to meeting this demand.

It is significantly important to focus narrowly on the context of Hong Kong again. After all, success in the global market is dependent on the effective implementation of lifelong learning plans (Aspin & Chapman, 2001). In Hong Kong, the concept of lifelong learning is implemented in two broad categories, namely, ‘conventional education’ and ‘continuing education’ (Young, 2008) as shown in *Figure 1.4*. Continuing education is broken up into two sectors, formal education via a bachelor’s degree, master’s degree, or doctorate degree and employment training opportunities. The former one is primarily used to acquire a base of expertise needed in a high-skilled position, or in order to reskill to match one’s abilities to shifting economic factors (like downturns or major market shifts) The latter one is mainly used for upskilling, that is, additional training or courses that allow an individual to fine-tune their abilities to perform a more specific, higher skilled task or enable them to take on responsibilities already tangential to their skillsets.

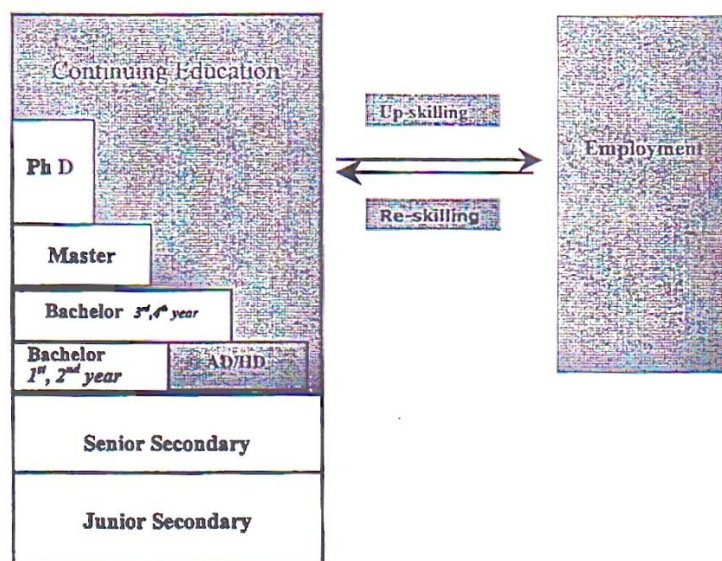


Figure 1.4 Lifelong Learning System in Hong Kong (Young, 2008)

Both upskilling and retraining are the goals of the CEF, and the flexibility of the payment scheme is intended to accommodate learners seeking each goal no matter what their educational backgrounds are. The primary purpose of this paper is to discover how well the programme achieves its goal. It seeks to critically evaluate the impacts of the CEF on adult learners at a tertiary level and discover their motivations to learn. The research also investigates the differences between the CEF and the non-CEF learners concerning their academic performance and participation rates as well as identifying their learning experiences and perceptions of the programme. On top of that, the study identifies some strengths and weaknesses in the CEF which allows local practitioners and government officials to consider appropriate approaches for enhancing learners' motivation and their satisfaction during the learning process, as the concept of the CEF is highly beneficial for boosting local competitiveness and attaining global competency, although it is subject to well-planned and effective implementation.

1.3 Research Objective and Questions

1.3.1 Main Research Question (RQ): In what ways does the CEF affect adult learners studying at a tertiary institute in Hong Kong?

The primary purpose of this study is to examine the impacts of the CEF on adult learners and educational development in Hong Kong. This study is not approaching the CEF as something inherently positive or negative so that the analysis is as unbiased as possible. It takes the data and attempt to conclude positive aspects of the programme and potential shortcomings as well as the reasons why certain parts function properly while other parts do not. It also investigates the factors which affect a participant's decision to join the CEF as well as the impacts of the fund during the term of study and its lasting outcomes. On top of that, this study further distinguishes between correlation and causation in the results in order to understand the core reason behind the finding. Therefore, it is essential to break the main research question (RQ) into sub-questions (SRQs) for clarity. The sub-questions scrutinise the programme's effectiveness in accomplishing the policy

goal as well as possible positive and negative externalities. They also identify the strengths and weaknesses of the CEF in relation to similar programmes worldwide. Additionally, the impacts of the programme on learners' motivation are analysed to recognise the lasting effects on lifelong learning.

This study answers the main RQ in a way that can demonstrate the effects of the CEF apart from other factors to the ends that policy makers better know how to expand, retract, or change the programme for maximum impact. Therefore, the emphasis on motivation – which is essential to understanding to what degree this programme specifically leads towards better outcomes in individual learners. Most importantly, an evaluation of motivational factors and recommendations is significant for a progressive and effective research.

1.3.2 Research Sub-Questions (SRQs)

1. To what extent does the CEF enhance students' motivation to learn before enrolling in the programme?

Motivation takes centre stage when determining the effectiveness of the CEF versus other incentive programmes, or a standard demand baseline, to continue their education. It is important to note that why students choose to continue their education by the CEF. After all, a number of incentive approaches exist. Sponsorships by the employers and scholarships can be found elsewhere and not all students exclusively require funding. Moreover, it is essential to examine what extent the funding matters. For example, if the CEF were extended to grant a HK\$200,000 endowment to every participant, almost the entire eligible population of Hong Kong would enrol. It is more crucial to determine at what point in funding a considerable shift in the number of participants occurs. Ideally, an answer to this question would provide enough solid evidence to show that given an increase in X funding dollars, Y number of additional students would decide to enrol and complete the programme. Additionally, it is worthwhile to investigate the current impact of the CEF on student motivation and this data would better allow the HKG to scale up or even scale back funding

for the CEF programmes for better policy goals and outcomes.

2. What are the main sources of motivation to learn for those adult learners who are applying for the CEF compared with those who are not applying?

Motivation is the basis to understand and manipulate the principles of behavioural change of individuals. Many education programmes are rooted as incentive programmes, trying to incentivise a segment of the population to enact a new behaviour for the benefit of society. This study adopts certain tools from behavioural economics in its analysis of the results. The field of behavioural economics hinges on the question of incentive and the uncovering of data that explains why people make the choices they make. This in turn allows for a policy that stimulates behaviours inextricably linked towards benefiting society. Behavioural economics, however, is not so much a matter of legalising pro-social behaviours while outlawing negative behaviours. Rather, programmes are crafted to make a segment of the population more likely to choose the positive behaviour. On its surface, the CEF targets financial motivators by removing cost barriers, but only to successful students. Participants are thus still, in a sense, earning their money by performing well in the programme. However, it is favourable to scrutinise if the current CEF is effective and in line with the actual motivation of participants.

A satisfactory answer to this research question would quantitatively determine how effective the CEF is at creating positive externalities by discovering what motivates students to pursue the programme and to investigate whether the programme itself, or other factors that lead to programme enrolment. Discovering the impetus for motivation allows policy makers to not only scale up or down the CEF to meet policy needs, but to adjust the programme itself to the efficiency of meeting its ultimate goals.

3. Is there any evidence to suggest that the CEF students perform better and achieve a better outcome compared with those non-CEF students in the same course?

Providing incentives can be highly flexible but it can also be challenging to implement. It

can lead to illogical consequences when the approach utilised inappropriately. There is a certain risk that educational incentive programmes may not be implemented as planned or unintended externalities created. There are certain things they need to be taken into consideration when balancing an incentive and the effect it may create. For example, those who cannot raise the funds on their own initiative for continuing education may not perform well academically or probably the additional pressure of gaining incentive pushes adult learners to become mentally depressed when they fail.

An answer to this research question demonstrates the impacts of the CEF on student performance either positive or negative. Incentives are powerful stimuli. Measuring both CEF and non-CEF students' performance should yield information on whether the incentives devised by the programme function appropriately or not. If the CEF participants performed worse than their non-CEF participant classmates, the existence of a negative externality was generated.

4. What major benefits and limitations can be recognised in the CEF programme?

To put it broadly, it is essential to investigate the aggregate benefits and the apparent shortcomings of the programme. Raw data and a general verdict about the programme's effectiveness may help answer some questions, but any real change, adjustments, or up/down scaling of the programme must come from a macro analysis, examining its strengths and shortcomings. It is sensible to state, for example, that the CEF allows six out of ten prospective learners to receive higher education if they would not have been able to receive it. However, it is also required to discover the reasons of the remaining four students who are not able to receive the benefits and whether there are any unforeseen conditions barring their participation or not. For example, a similar programme in Singapore (SG) only nets an additional five out of ten prospective students. It is important to discover in what conditions the CEF programme can function more effectively in HK than in SG.

A proper answer to this research question does not simply look at the CEF in a vacuum, but

compare it to comparable programmes around the world, hopefully to discern the strengths and weaknesses of the programme as they relate to its execution in Hong Kong. It should also essentially answer the ‘Why’, or ‘How’ behind the first three research questions and examine the reasons of motivating – or failing to motivate – prospective adult learners critically.

5. Will the CEF students have any intention to pursue further education or training in the future after completion of the programme?

The entire term ‘CEF’ is predicated on the word ‘Continuing’. This study’s section on ‘Need and Significance’ concluded that the only way forward in the global economy was a highly flexible, well-trained workforce that continually sought education to adapt to changes. The CEF was created to meet this demand and provide training and education to citizens for the benefit of Hong Kong’s economy and society. Even if the CEF produces positive academic results, it creates an important question – whether it motivates learners to continue their education in the future. By the standards detailed above, a successful version of the CEF programme is demanded which enables or inspires lifelong learning or at least the CEF applicants will permanently recognise the value and accessibility of future education.

A proper answer to this question indicates the relationship between learners who participated in the CEF programme and further education in the future. The study does not simply investigate which group of participants continued their education but also examine how much impact the CEF has had on their decision to start and continue. There must be a clear picture aside, from a CEF participant’s point of view, how much ‘inspiration’ or ‘momentum’ he or she gained exclusively from the CEF programme. Inspiration and momentum, in this case, refers to the non-tangible benefits of the programme that might instil a desire for lifelong learning.

1.3.3 Summary of Research Questions

Table 1.2 demonstrates the five SRQs as discussed above which includes the means of the research and detailed research approach is listed and elaborated in **Chapter 3**.

1. To what extent does the CEF enhance students' motivation to learn before enrolling in the programme?	Pre-course questionnaire
2. What are the main sources of motivations to learn for those adult learners who are applying for the CEF compared with those who are not applying?	Pre-course questionnaire and interview
3. Is there any evidence to suggest that the CEF students perform better and achieve a better outcome compared with those non-CEF students in the same course?	Assessment results and attendance rates
4. What major benefits and limitations can be recognised in the CEF programme?	Post-course questionnaire and interview
5. Will the CEF students have any intention to pursue further education or training in the future after completion of the programme?	Post-course questionnaire and interview

Table 1.2 Summary of Research Questions

CHAPTER TWO: LITERATURE REVIEW

The purpose of this literature review is to provide a synthesis of published work relevant to the research questions of the study. The review explores the literature on andragogy and motivation, considering how this literature can illuminate the motivation of students accessing the CEF. Specifically, it examines the past and present state of andragogic literature to expound upon and demonstrate the following four areas:

1. The applications and limitations of andragogy, with emphasis on the work of Malcolm Knowles.
2. Other theories of motivation in adult learning offered by different social scientists.
3. How theory and motivation are linked or can be linked to education policy and CEF programmes in Hong Kong.
4. A similar programme in Asia, comparing its strengths and weaknesses.

Each of these areas serves as ‘guideposts’ in constructing the questionnaire and methodology as well as measuring the effectiveness of the CEF in the bounds of this study.

2.1 Introduction to Andragogy

The term *andragogy* refers to ‘man led’ education rather than *pedagogy* which has the root ‘*ped*’ (from the Greek, meaning ‘child’) (Smith, M., 1996, 1999). Andragogy was a term first coined by Alexander Kapp in 1833 and developed into a theory of education by Eugen Rosenstock-Huessy who was a leading force in the first theoretical, academic reflections on adult pedagogical issues in the 1920s. Rosenstock-Huessy (1925) sought to provide a systemic guide for the instruction of adult learners. Much of the literature on the subject directly compares and contrasts it to pedagogy in an attempt to formalise new teaching practices for adults. The following sections present a clear picture of andragogy, setting the foundation for a deeper look into the motivation of adult learners.

The research questions presented previously focus on whether the Continuing Education Fund (CEF) is effective. For example, by what metric can the programme be considered successful academically, and how is the achievement of learning outcomes reflected in student responses

through questionnaire or interview? The answers assist in understanding the essence of effective adult education, both in a policy and classroom sense.

The most influential figure in andragogy is probably Malcolm Knowles, an American educator who spent his career from the 1960's to the 1980's honing a number of theories on adult education and popularising the term '*andragogy*' in adult education in the USA (Kearsley, 2010). According to Malcolm Knowles, andragogy is the art and science of adult learning; thus, andragogy refers to any form to any form of adult learning (Knowles, 1984). He opened the doors of inquiry and the study of adult education and wrote a number of volumes on how to effectively transition from the teaching of children to the teaching of adults.

The following section provides an introduction to the notion of andragogy and its application on the CEF programme.

2.1.1 The Contributions of Malcolm Knowles: Self Directed Learning

In his book, *The Modern Practice of Adult Education: From Pedagogy to Andragogy*, Knowles (1980) differentiates how adults and children operate effectively in a classroom, applying the term andragogy in relation to the former. According to Knowles, adults are differing from young learners in five broad categories: *self-concept, adult learning experience, readiness to learn, orientation to learning and motivation to learn* as shown in **Figure 2.1**. Adherence to these factors determines the broad effectiveness of any given learning programme, curriculum, or teaching style.

KNOWLES' 5 ASSUMPTIONS OF ADULT LEARNERS

In 1980, Knowles made 4 assumptions about the characteristics of adult learners (andragogy) that are different from the assumptions about the characteristics of child learners (pedagogy). In 1984, Knowles added the 5th assumption.

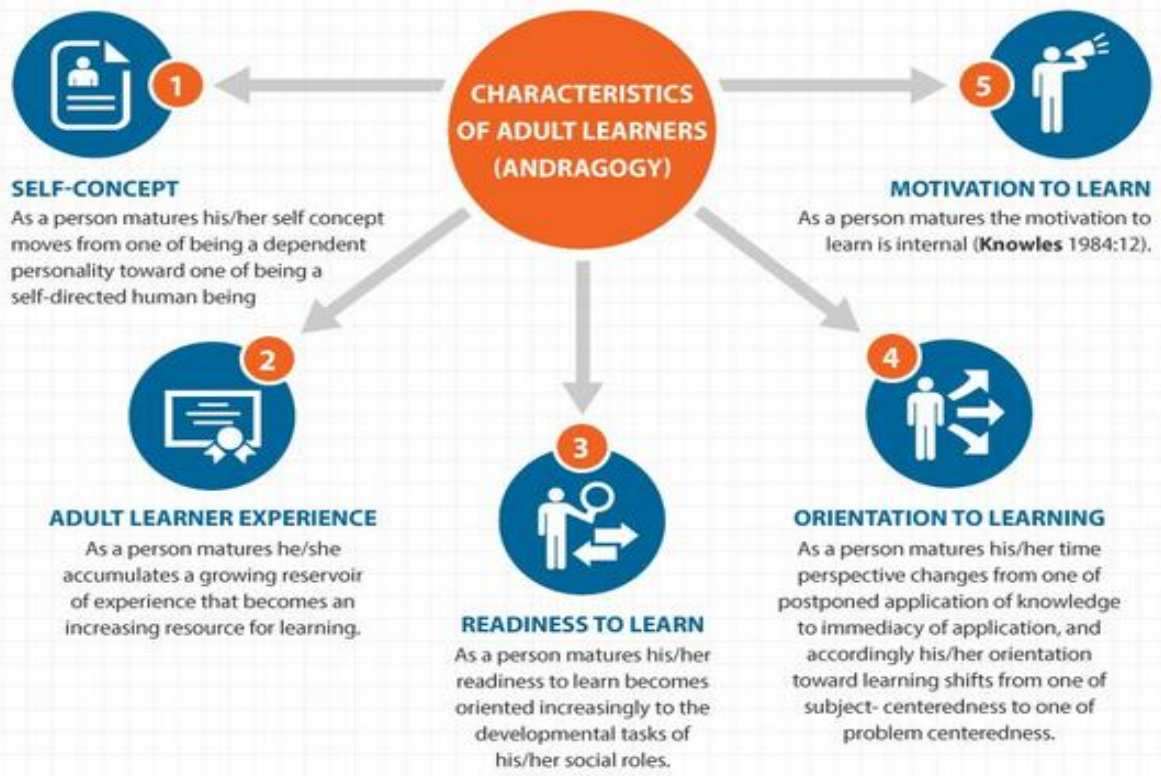


Figure 2.1 Five Assumptions of Adult Learners (Knowles, 1984)

1. Self-concept:

In an andragogical approach, according to Knowles, the learner is an older individual who has already been through years of formal education. They are not starting from base, and they have likely chosen to keep on educating themselves. Therefore, the adult learner is self-directed and responsible for his or her own learning even when there is usually an instructor. This marks the importance of self-evaluation. The function of an evaluation is to reveal what the learner has learned and what the learner could improve, but the intrinsic value of whatever additional education the adult learner sought, does not hinge on a test score. In context of future points Knowles will discuss, self-evaluation of benchmarks is more significant than formal testing found

in pedagogical settings. The difference between the two is more rooted in informing where one stands in skill acquisition as opposed to measuring understanding. In this way, Knowles regards adult learners as differing from young learners in that they tend to strive more towards skill acquisition as opposed to high academic scores.

2. *Adult Learner Experience*

According to Knowles, there is a clear curve from generality to specificity as one progresses through the education system in a pedagogical context. The experience of an instructor is important as it determines the content, execution, and evaluation of a child's classroom. In contrast, the learner's experience, and the influence it has on the course may outweigh what the instructor delivers in an andragogical classroom. Quality instruction is significant, but the fact is that a motivated adult learner is willing to search for their own materials particularly, study in their own effective way and learn what they are eager to learn. Furthermore, the experiences each student brings into the classroom has an enriching effect on the class. Students can learn from others' backgrounds and the different experiences each student brings to the classroom ensures a degree of diversity. Adult learners thrive in workshops or discussion-based courses which allow them to learn and to teach and each one of them can become an increasing resource for learning.

3. *Readiness to Learn*

Generally, an adult has agency to decide when learn and what subjects they choose. Economic reasons, lifestyle changes, or pure coincidences may trigger a readiness to learn. If an adult decides what and when they learn, they also possess the mental facilities to determine gaps in their knowledge. An outstanding child who learns advanced materials may have a challenging time contextualizing his or her knowledge whereas an adult learner may hold the experiences necessary to immediately apply those materials. One of the most significant distinctions between young students and adult learners is motivation. This study determines the connection between motivation and the CEF. Thus, the questionnaire measures motivation by allowing the CEF

participants to rank a range of factors influencing their decision to take part in the programme.

4. *Orientation to Learning*

Learning is oriented to building a foundation. The orientation of learning is completely shifted from subject-centeredness to problem-centeredness in adult education. In Knowles's view, adult education must have a purpose and it must be oriented around a task, or a problem, or a goal that comes from outside of the classroom. The application of knowledge must be related to some real-life tasks rather than being organized around a hierarchy of difficulty related to age or system of examination. In an andragogical classroom, topics should be oriented around life or work situations and context must be specific as well as practical.

5. *Motivation to Learn*

Motivation for learning acts as a summary of all the points discussed above. Children are motivated mostly by external factors, such as the fear and consequences of failure, the competition of grades, the rewards that come from success. Probably the most obvious motivator is the factor mentioned above since compulsory education is compulsory and they do not have a choice. By contrast, adult learners do have an option. Most of an adult learner's motivation is internal. They may be seeking self-esteem, higher quality of life, recognition, self-confidence, or self-actualisation. Learning is a choice and a strategy towards improving life outcomes. These five factors should paint a clear picture of the benefits of focusing on andragogy as a teaching method for classroom application. It is useful to understand whether the motivations of adult learners vary according to how far the courses they take are integrating the principles of andragogy. Therefore, motivational factors must be measured.

In *The Adult Learner: A Neglected Species* (1973), Knowles developed what he called a '*spiral of self-directed learning*': a model where students gradually advance in self-directed learning, focusing their learning on a topic of interest, mastering it, and allowing curiosity or professional goals to influence their next topic. In this model, there is no 'graduation'. Instead, learners continually work

toward higher levels of education based on a need or problem, or a question they have about the future. A well-executed adult learning programme should therefore trigger a drive for lifelong learning among adult participants. In other words, students motivated to pursue the programme should be more likely to continue their education independent of the programme.

2.1.2 Applying Modern Principles of Adult Education

Serving as a capstone of andragogical study, *Andragogy in Action* (1984), provides a summary of all Knowles' proposals for practice. The book builds on past research and shows how his views evolved. Knowles used the book in part to back step on some of his previous positions: for example, instead of viewing andragogy and pedagogy as apart and sometimes at odds with each other, he offered a more synthesised view than in *The Adult Learner: A Neglected Species* (1973). Finally, he provided information most pertinent to the study at hand: clear guidelines for a classroom operated under the principles of andragogy.

Despite living and working mostly in the US, Knowles considered his principles of education applicable to any educational context. According to his research, adults of any educational or cultural background can learn more effectively under a system of andragogy (Knowles, 1984). There is something innate in the developmental cycle of learning that transcends culture. That is not to say culture does not bring its own unique educational factors, but that adults tended to learn in similar conditions as opposed to child learners. Knowles learned by applying his classroom principles to a number of disciplines that every single field of study can make effective use of andragogy to enhance learner's experience. Sciences, arts and everything in between are witnessed enormous benefit. Certain factors within each subject were more impacted than others. For example, self-directed learning, experiential learning, process design, peer review, self-diagnosis and self-evaluation saw marked improvement over other skills (Knowles, 1984).

This principle was developed during his tenure at North Carolina State University starting in 1974, where Knowles developed and ran courses using the principles of *andragogy* in order to teach

adult learners how to internalise the learning process as their responsibility. His students approached it in three steps, initially by using self-inventories to discover their goals in learning, and then reflective exercises attempted to show them how the learning process was changing them step by step. Much of this was delivered in an andragogical context, group run introspective reflections. Next, they were taught how to take control of their own learning and tested in how effectible they could transfer skills. Finally, they were given control of their own learning and asked to apply their findings in the real world, evaluating the results. This programme essentially made use of the model of continuing education and showed how it could work in a real setting. The ultimate goal was ‘*self-directed learning*’ derived from andragogy, but the structured itinerary to achieve self-direction was influenced in part by pedagogy.

Knowles utilised this opportunity to reconstruct his initial clash between childhood and adult education as the ‘*Two Models of the Learning Process*’, each warranting its own time and place as shown in **Table 2.1**.

PEDAGOGICAL	ANDRAGOGICAL
<ol style="list-style-type: none"> 1. Learner is dependent on teacher, who decides what should be learned, how and when; and whether it has been learned. 2. The experience of the teacher, textbook writer is what counts (the student's experience does not matter, his identity comes not from experience but from external sources: he/she is the child of X; lives at Y, goes to school at Z). Therefore, the backbone of pedagogy is 	<ol style="list-style-type: none"> 1. Learner is self-directing but conditioned by schooling to depend on teachers for learning, so he/she must be re-oriented. 2. Adults are the richest sources of experience for one another: there is a wide variety of experience among 30+ years old. However, they can be locked into routinised ways of thinking, so may need help in becoming more open minded. 3. Readiness to learn is dependent on need

<p>transmission techniques.</p> <ol style="list-style-type: none"> 3. Student readiness to learn is mostly a matter of age as he/she moves through the curriculum. 4. Orientation to learning is subject centred: acquisition of content, organised in terms of curriculum. 5. Motivation to learn is through external pressures: parents, teachers, competition for grades. 	<p>to know or do something to meet some critical developmental life tasks more effectively.</p> <ol style="list-style-type: none"> 4. Orientation to learning is problem-centred so learning experiences must be found through critical life experiences. 5. The most powerful motivators are internal: better outcomes in life, self-esteem, self-confidence, self-actualisation.
<p>BASIC FORMAT: A CONTENT PLAN</p>	<p>BASIC FORMAT: PROCESS DESIGN</p>
<ol style="list-style-type: none"> 1. Students are isolated learners in competition for grades, an atomised mass before the authority of the instructor. 2. It is the instructor's responsibility to cover all the content the student needs to cover in the curriculum. 3. Organise content into 50-minute chunks, three per week, 13 weeks a term, etc. 4. The learning sequence is determined by the logic of the subject matter, not the readiness of the learners. 5. The most effective means of 	<ol style="list-style-type: none"> 1. The instructor is a facilitator. However, there are many other resourceful people to call upon: the learner's peers: specialists in the community, media or computerised resources, field experiences, etc. 2. Climate setting is crucial. The physical setting is important (and the typical classroom, with chairs in rows and a lecture podium up front, is singularly unsuited for learning). Learners should face one another or sit in groups round tables. Far more important, however, is the psychological setting, especially regarding the following: <ul style="list-style-type: none"> ■ Mutual respect between the facilitator and

transmission are lectures, presentations and assigned readings.

learners.

- Collaboration (rather than competitive rivalry) among learners. Trust of all involved. Supportiveness: Learners are treated with unqualified personal regard and organised into support groups.
- Openness and authenticity are modelled by the facilitator to enable learners to risk trying out new behaviours.
- Learning is designed to be an adventure, laced with the excitement of discovery.
- Kindness and a caring social atmosphere are vitally important.

3. Learner involvement is crucial; learners are committed to the plan to the extent that they have participated in the planning.

- Learners must help diagnose their own learning needs. Some models of socially and organisationally needed competencies is required for them to be able to spot gaps they need to fill.
- Learners should participate in formulating their own learning objectives; this is best done by helping them produce learning contracts.

	<ul style="list-style-type: none"> ■ Learners must participate in the design of lesson plans, if their learning objectives, learning styles and problem-solving styles are to be accommodated. ■ Learners must be helped to carry out their learning plans as per their contracts. ■ Self-direction requires participation in evaluation of one's work.
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Table 2.1 The Two Models of the Learning Process (Knowles, 1984)

Knowles found that full self-directed learning must be taught in a conventional way and learning is an evolution from one model to the other. According to the model above, we are able to assess how andragogic the course material or context was based on subjective perceptions of the course via the semi-structured interview. Knowles demonstrated how one teaches adults is incredibly important and can impact education outcomes. Although this study does not focus on andragogical teaching, it ensures the quality of teaching is at an appropriate level.

Distinguishing between the effects of the CEF programme and the teaching methodology is essential in addressing the weak points of this study, an obstacle can be removed via a comparative analysis of the CEF participants and the non-CEF participants. Further research can be settled, particularly more recent sources dealing with adult education, including in how it intersects with the policy which assists in linking andragogy directly to policy suggestions. The question of what factors in adult education are affected by the CEF will determine the most important foci of study.

2.1.3 The Limitations of Andragogy - Finding a Criterion of Measurement

Knowles with his work on andragogy (1970, 1973, 1980, 1984) presented models and systems of effective adult teaching largely in how it differs from pedagogy. Since 1984, other theorists and practitioners have expanded on Knowles initial research and subjected it to critical review. Large

segments of the further research are devoted to synthesising the principles of andragogy with different societal cross-sections, such as culture, modern technologies, and public policies, as well as addressing some of the weaknesses in Knowles's initial theories.

One of the challenges in creating a comprehensive study of andragogy is the subjective nature of learning processes. People learn in separate ways and distinctive styles, and to categorize every learning style (and to evaluate if the class at the focus of this study used teaching techniques to match that style), is beyond the scope of this study. Furthermore, while Knowles's models for adult learning are theoretically useful for an educator; however, they are difficult to consistently define and measure in practice (Clardy, 2005). As stated by researcher J.R. Rachal (2002): "The empirical literature examining the efficacy of andragogy remains, after over three decades, both inconclusive and beset by considerable variability in definition, resulting in differing approaches to andragogy's implementation" (p. 2).

Rachal (2002) further investigates into several studies and extends the five factors criteria that Knowles made the focus of the field into seven areas which can be further considered including '*voluntary participation, adult status, collaboratively determined objectives, performance-based assessment of achievement, measuring satisfaction, appropriate adult learning environment and technical issues*'. This research demonstrates that although the five factors of andragogy do appear to positively impact learning outcomes, researchers have had vastly different experiences when measuring how the factors are manifested in andragogic practices.

The establishment of measurement appears as a large issue in any discussion of Knowles' study. His work was largely concerned with classifying the traits of andragogy and demonstrating how they differ from pedagogy, rather than setting up a template educational practitioners could use to measure them. To put it simply, there has yet to be an empirical test of the theory of andragogy, particularly when the learner profiles set by Knowles intersect with culture, policy, and motivation to learn (Holton et al, 2009). Undoubtedly, cultural differences can account for a sizable

differentiation between teachers and learners in adult education, and policy derived from one set of andragogical-inspired standards may perform differently in two different contexts (Peltz & Clemons, 2018). In other words, teaching practices and policies that support effective learning may vary, while student motivation remains the constant. In this regard, it is argued that Knowles did not present a series of techniques for teachers, but a list of attributes that make for an effective learner (Hartee, 1984). More generally, andragogy has focussed little on teaching practices, but emphasised student motivation as the impetus of action (Pratt, 1993). Illeris (2008) regards motivation in education as the focus in his research. He seeks to capture the scope of all motivational factors and to combine them into a single output (learning). In the first chapter of his book *Contemporary Theories of Learning* (2008), he offers a diagram to illustrate his theory as **Figure 2.2** shown below.

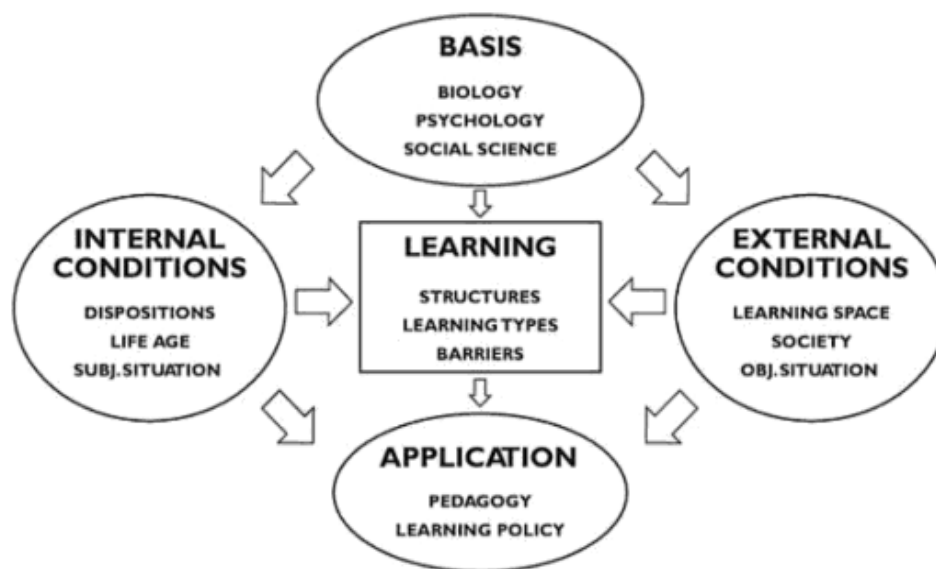


Figure 2.2 The Main Areas of The Understanding of Learning (Illeris, 2008)

Illeris stresses the interaction of these factors by emphasising how a person’s objective circumstances, psychological composition, combined with motivational factors, teacher effectiveness, and so on to facilitate or block the process of learning. Each factor can contribute positively or become detrimental if it is insufficient. Investigating how these factors intersect with the CEF reveals which aspects of the programme seems the most relevant to specific forms of adult education; the

common intersection concepts can be extracted and investigated for further analysis.

The most obvious impact of the programme may be found in its influence on the external conditions the learner faces. External conditions refer to any environmental or facilitation-based concern, including scholarship programmes. The CEF is designed to encourage continuing education and assist in removing financial barriers for the students. However, the additional clause within the CEF requiring students to achieve passing grades may affect the internal conditions at work, providing additional sources of motivation. This is an example of how Illeris' model flows from one factor into another and can be employed to examine both economic and motivational effects of the CEF programme. Moreover, the model can be used as a basis for evaluating the effect of demographics on programme participation – to examine whether certain ages or income brackets particularly favour the programme. All the factors mentioned above must be considered in a comprehensive look at the impact of the CEF programme.

Illeris discusses the overall interaction of societal environment and the process of continuing education in his book, *Learning, Development and Education* (2016). In the chapter '*Transfer of Learning in the Learning Society*', he presents evidence collected by learning researchers to demonstrate that similar educational systems operate differently depending on the social contexts in which they are found. A learner faced with a similar educational programme in one setting may fail to achieve the same results of learning in another. Different social and educational contexts can lead to different learning results for students. Illeris seeks a template to organise learner motivation and succeeds in indicating environmental factors based on a given society or culture. The efficacy of any learning programme, including Hong Kong's CEF courses, is dependent on the learning environment. Whereas a model centred more on Knowles' andragogy might focus on the individual teachers in Hong Kong as drivers of effective education, a model focused on Illeris' work would include an emphasis on the Hong Kong education system as a whole: what motivational factors has the society produced? Therefore, a survey of motivational factors among CEF participants should reveal the

applicability of certain adult learning theories towards future policy initiatives in Hong Kong or similar education systems to a certain extent.

Undoubtedly, motivation is predominant when it comes to making Illeris' theories applicable to a specific category of funding programmes. Of particular importance is the intersection between motivation, culture, and local policy which may lead to different outcomes in learning. Thus, the questionnaire will specifically focus on the motivation factors that CEF and non-CEF participants may have in their decision when enrolling in the programme. These questions must address multiple theories of motivation, cultural signifiers such as demographics, social influence, etc., and questions related to the local policy aspect will be also asked in the semi-structured interview. Additionally, the integration of quantitative and qualitative data will serve to replicate the intersectionality of factors which Illeris concerned with observing.

2.1.4 Adult Education, Society, and Policy

Diverse cultures tend to yield different educational practices and priorities. Swiss educational psychologist Jean Piaget (1964) describes two main methods of learning that a society can skew towards: *assimilative* and *accommodative*. In short, *Assimilation* occurs when we modify or change latest information to fit into our schemas (what we already know). It keeps the added information or experience and adds to what already exists in our minds. *Accommodation* is when we restructure or modify what we already know so that new information can fit in better. This results from problems posed by the environment and when our perceptions do not fit in with what we know or think. A society may modify *status quo* ideas internally during the process of learning (perhaps this might be called, in other words, '*critical thinking*'), or fit new ideas into existing criteria (part of this may be called '*memorisation*', though application factors heavily as well).

A society's values can influence which of these is emphasised, and these factors, along with individual teaching, institutional practices, and any other factor influencing the orientation of a

classroom, determine the environment of education. Because each approach has its own weaknesses and strengths, systemized teaching practices tend to fall on a spectrum. In the view of these educational psychologists, a synthesis, that is, a complete melding, of accommodative and assimilative approaches is optimal and should be the goal of public policy (Lefa, 2014). Interestingly, Hong Kong has, among global systems, a semi-blended approach, owing to its dual Chinese and British educational legacy (Ren, 2020). It is more accommodative in general, but some features of assimilative models work towards its advantage.

It is worthwhile to scrutinise what educational factors might influence the broader social context in turn informing education in Hong Kong. A social scientist E.Y.M. Chan in Hong Kong specifically points out the Confucian learning heritage and frames this historic reality within a context of adult education (most particularly the teaching approaches of teachers) and blended learning (or the use electronic media teaching tools in coordination with face-to-face instruction) in the society. She asserts that a more traditional, or assimilative model dominates education in Hong Kong. That is, the norm has tended towards teacher-centred classrooms where the teacher, the resident expert in the room, dictates while students memorize. By this model, education firmly favours adjusting digestible facts into an inflexible current situation (Chan, 2019) and shows the culture is shifting and diverges greatly from other East Asian cultures. The book *'Public Policymaking in Hong Kong: Civic Engagement and State-Society Relations in a Semi-Democracy'* asserts that society led actors have largely democratised civil society, gently pulling along the state-led policy apparatus into liberalizing social policy (Lee et al, 2012). While the research was conducted well before the social unrest movements in 2019, the work paints a picture of Hong Kong as an assimilative society during a prolonged process of liberalisation – both in public society and in public policy.

A successful education policy would be best rooted in educational models favouring the blending of assimilative and accommodative approaches, with an eye to the hierarchical challenges

that might exist in the society. Furthermore, after looking at what sort of policy ought to be effective in Hong Kong given the work of Illeris and Piaget, it is critical to investigate what policy leads toward effective results in adult education (Huitt, 2001).

Finally, bringing the discussion from Illeris back to Knowles (and to some of the criticism of instructional andragogy) both their theories and concepts demonstrate the importance of motivation on andragogy and policy. Effective policy should thus seek to change in learning motivation. However, both their theories fail to indicate not only the effects of cultural differences and public policies on motivation and society, but also how motivation shapes an educational system and environment. Fortunately, this study can bridge the two, at least in a limited context, by utilising their theories to ask the right questions of programme participants.

In her comprehensive review of Knowles, Valerie McGrath suggested that to measure the impact of andragogic practices, subjective data such as student questionnaires would be more effective than measuring results (McGrath, 2009). The design of both sets of pre-course questionnaire and post-course questionnaire can be applied to answer how a course with good andragogy may change outcomes. The following areas of issues will be specifically focused on:

1. Establishing a link between the CEF and ‘good’ andragogic theory.
2. Discussing theories of motivation and how they might relate to the CEF.
3. Linking abstract motivational theories to the real effects of the CEF.

It is necessary to construct a questionnaire from the factors. Starting with the motivational factors isolated by Illeris, the following section tackles the first matter with a discussion of how adult education influences the public policy and vice versa, and of what questions this study should focus on, and which it should avoid.

2.1.5 Andragogy and the CEF

The CEF is a major educational policy milestone in Hong Kong, and it represents another

significant global trend in education policy. The intersection of adult education and policy, driven by a global knowledge economy, has influenced educational policy and government planners alike to ask how to best commodify and facilitate lifelong learning (Jarvis, 2009).

This can be taken cynically, as a symptom of an out-of-control market commodifying education to the point where it may have lost some of its effectiveness (Slaughter and Leslie, 1997). Education is pursued for its own sake without transferring any skills, and government programmes act as subsidies that only further drive this ‘bubble’. It has been shown that attempts to commodify education have fallen short of expectations, particularly in how human capital is expended (Kuzminov, 2019). These are valid concerns, and the consumer value side of this question will be elaborated in a future discussion about ‘*corporatisation*’.

However, it is noticed that the programme is a goal of government function, a more optimistic interpretation is more in line with the stated objectives of the CEF. According to Mark Tennant in *Psychology and Adult Learning*, “The aim of (continued) education is to cultivate autonomous, independent, rational, and coherent selves who have a sense of social responsibility. But there is also a radical tradition... associated with political justice for social justice and social change” (Tennant, 2019).

In this view, continued education apart from politics and the spectre of globalisation resembles more purely Knowles’ model of self-directed learning which can be considered as self-improvement and allows individuals to respond to changing labour factors in line with their demands.

Hence, the questions are: To what extent does the CEF subsidise superfluous post-graduation credits and coursework with no grounding in professional skills and advancement? To what extent does the CEF ‘upskill’ Hong Kong’s labour force? To what extent does the CEF stimulate continued interest in lifelong learning?

Although the set of small-scale data generated through this research is an issue in making overarching statements about the efficacy of the whole programme, this question concentrates on a

dichotomy of usefulness vs superfluity. The scope of this study is limited to determine whether governmental funding programmes are an appropriate response to the challenges of globalisation; however, it is certainly feasible to measure the outcomes and perceptions of CEF participants versus non-CEF participants in Hong Kong. This study should be able to determine if CEF participants (a) found the programme and course materials useful, and (b) were more likely than non-CEF participants to signal interest in continuing education.

In addition, in her contribution to the educational studies volume *Power and Possibility*, Milana (2019) provides an overview of patterns in comparative research on international adult education policy and their interactions with national and local policy developments. Milana categorizes four different patterns of studying adult education initiative. Based on the categorisation, the study of the CEF would fall under as a ‘*Type 3*’, as it tends to yield useful information confirming or denying learning theories, methods of allocation and education and by analysing new models (Milana, 2019). Undoubtedly, it will be challenging to make statements about the whole effects of the CEF based on this research, but it will be possible to demonstrate a general direction of certain factors by adopting the theory.

Among the factors that shown in the reasonable foundation of study, the changing affectation of student motivation continually regarded as an influencer in outcomes and demonstrably linked to changes in policy (Clover, 2019). While useful data has been collected on grades, demographics, etc, the most fruitful avenue will be used to direct the questionnaire towards the matters of motivation: what inspires students to learn before and after the programme, and how the CEF impacts those motivational factors. The section below is a discussion on motivation and how the CEF impacts learners’ motivational factors.

2.2 The Impetus of Motivation

The word ‘motivation’ comes from the Latin term ‘*motivus*’ which more directly translates to ‘a moving cause’, or ‘the cause of movement’. It is also the foundation of the research questions

related to the CEF in this study. For example, the motives of students to participate in higher education, the impact of the funding on a learner's decision to enrol in the course with a particular approach. These questions can be answered by applying the principles of andragogy to motivation – what 'the causes of movement' are for an adult learner. Many researchers on motivation are concerned with the overall question 'what initiates human action' including Lyman W. Porter, Gregory A. Bigley, Richard M. Steers in their book, *Motivation and Work Behavior* (2003). Some of their definitions of motivation are listed below:

1. Motivation is what energises human behaviours, directs, or channels behaviours and sustains/maintains the behaviours. As stated above, motivation is the cause that begets an action. Past an initial cause, motivation is what continues a behaviour as well. However, it is essential to examine what separates motivation from instinct. One serves the other, not the other way around.
2. Motivation is the psychological process through which unsatisfied wants or needs lead to drives that aimed at goals or incentives. This can be as simple as hunger driving a search for food but taken to a higher level. Motivation is what causes a human to consume but in a more advanced sense motivation allows someone to turn the desire to seek employment, fulfill their job well and earn sufficient income to purchase necessities. Motivation is not instinct, but instinct can be a motivating factor.
3. Motivation guides an individual's intensity, direction and persistence of effort towards attaining a goal. Another reason that humankind is separate from animals – human beings exist with dual lives – one in the physical world of objects and sensations while another in a conceptual headspace. Human beings have the ability to allow stimuli from one world to affect the other. For example, dogs can only learn to eventually associate the sound of a bell with being fed but only human beings can form a prayer in times of hardship or envision the steps to passing a difficult Maths exam after failing a quiz. Internal motivations can change how humans interact

with the world and while these internal motivations may be spurred on by physical events that happened in the real world. They can be processed and synthesised with other events, experiences, memories, and desires. A dog may have an extraordinarily strong motivation to search for food while a human can combine life experiences and awaken a motivation to learn how to cook a perfect meal.

4. Motivation manifests as an inner need for fulfillment. There is something undeniably intangible about certain motivations inherent in humans across the world. A need for connection, love, family, success, purpose and happiness, whether innate or learned culturally exerts an incredible amount of force on any individual's motivation to act. It is asserted that all motivation has its roots at bringing happiness or comfort. This claim is beyond the scope of this study. However, it is worth noting to consider if the root of motivation an innate desire to become secure, happy and prosperous.

Numerous theories of motivation have been developed over the years that claim to understand why people act and how they act. Some of these theories, especially those are most relevant to the CEF, will be analysed further in this literature review. The HKG has a great interest in examining what stimuli can be used to help adults learn and perform better (e.g., academic grades, attendance rates etc.) as well as investigating the sources of learning motivations and the effectiveness of the CEF to increase students' motivation to learn in long term perspective. Answering these questions assists the usage of public funding allocated efficiently and effectively in future education.

2.3 Theories of Motivation

Linking the theories of andragogy to motivational factors assists us to identify the possible factors which motivates the CEF participants in this study and examine if the CEF impacts those factors. There are a number of perspectives from which to view the motivation for adult education. A different theory might, for example, illuminate the financial aspects of the decision, while another may emphasise the personal development aspect of education. In the end, there is a distinct difference

between pursuing education for the chance to generate more income and to enhance one's own feeling of self-worth. Understanding a wide variety of theories allows the researcher to ask more accurate and pointed questions to better analyse motivation. Applying Balakrishnan's 2021 primer '*The Adult Learner in Higher Education: A Critical Review of Theories and Applications*' to the study, this section will examine common theories of motivation and analyse them in the CEF context to generate better research.

This study collected data on adult learners who participated in the CEF programme. Some of the data is numeric consisting of concrete numbers that can be manipulated into straightforward analysis while another sizable scale of solid data are the participants' stories, accounts and reasons which comprise the reasons of their decision to continue their education. These stories cannot be analysed numerically but yield incredibly useful information about the CEF. A different approach is required - one that accounts for the myriad of reasons why one might seek further education and further seeks to categorise it. Hence, it is necessary to recognise different motivational theories and concepts. The full breakdown on motivation analysis will be discussed in **Chapter 3**.

2.3.1 Need-Based Theories

The best starting point for motivation theories is the *Hierarchy of Needs* proposed by Maslow (1943). Arguably the first taxonomy of motivation in modern psychology, this model suggests that every person has five basic 'tiers' of needs that required to be filled in order as illustrated in **Figure 2.3**. The lower-tier needs must be met before the upper-tier needs even become a consideration. Also, the barriers to the needs are primarily external in the lower orders and internal in the higher orders. Nature must first be overcome before the focus of self-improvement shifts inward (McLeod, 2007).

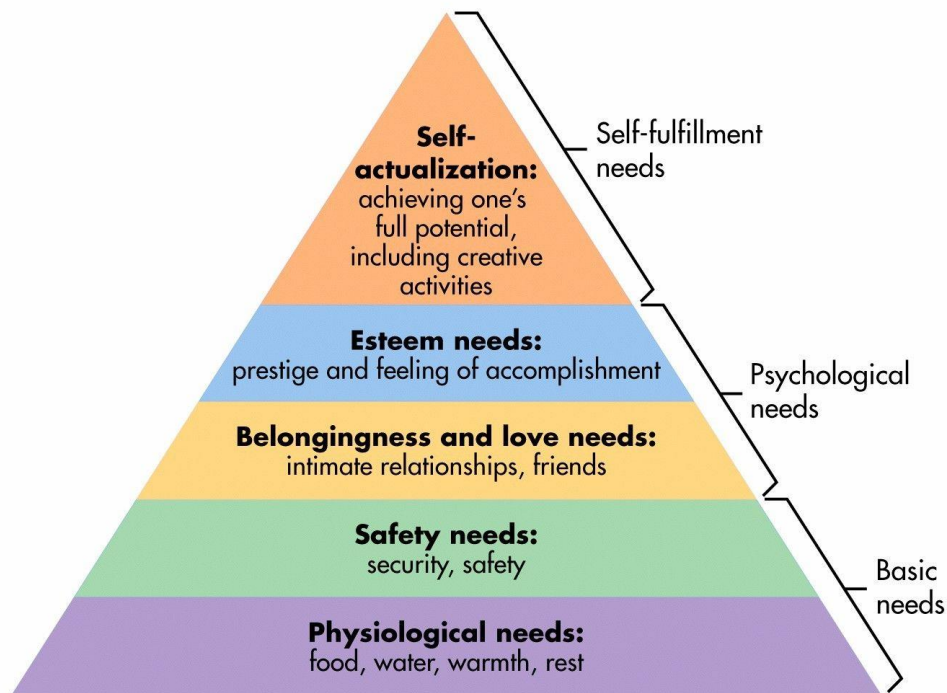


Figure 2.3 Maslow's Hierarchy of Needs (1943)

The lowest needs are the '*physiological needs*' – food, clothing, shelter and other basic needs that pertain directly to survival. A logical person does not care about taxes, interpersonal relationships and sports outcomes when he or she is in need of water. When these needs are attained, the needs that pertain to short-term survival, human needs shift into long-term '*safety needs*' which are the desires for security and stability which are all external motivators.

External needs are illustrated for a student's decision to attend college. With regard to stability and security, it is not hard to imagine someone enrolling or going into debt to enrol in a programme because of a higher chance of a prosperous job in the future. This external motivator links readily to the economic theories of motivation based on opportunity cost or investment.

Moving on to the top of the hierarchy, the focus shifts from external motivators to internal desires. Human beings as social animals feel satisfied when certain internal criteria are attained. The third tier '*sense of belonging*' activates when all safety needs are achieved and relates to the importance of identity, especially when framed within a group.

'*Esteem needs*' are the needs for power, status and recognition which can be accomplished

by enrolling in a university programme or attending a prestigious school. A degree is something of a status symbol and at the very least it is a steppingstone to wealth and professional success.

The highest level of needs is '*self-actualisation*' which implies the desire to reach one's full potential. Maslow suggests that this group of people are rare. However, it can be well explained that a well-reviewed and tenured lecturer stays in a particular university environment because it allows him to reach his full potential to achieve sense of fulfillment.

The Theory of Hierarchy of Needs illustrates that lower-level needs must be satisfied before higher-level needs become motivators. Once satisfied, the need is no longer a motivator, which implies a critique of the behaviourists' stimuli-response model. Unmotivated students will not become more motivated by things that already satisfy their needs and requirements and this hierarchy is universal to people around the globe. It is critical to note that students come from a few various stages of the hierarchy (except one and five) while most of them come from the fourth stage— a class of people who have achieved most of their needs. This neatly fits with some of the previously discussed models of globalisation. Growing wealth, success and access to what might be called 'lesser needs' leads directly to an increase in the demand for higher education. The majority of people in Hong Kong are affluent compared to different countries in the world as their basic needs are attained. Therefore, their needs are automatically moved to the higher needs such as the fulfillment of learning and achievement. Maslow's hierarchy of needs can be used as the basis for a deeper investigation. For example, according to the theory, a student operating in self-actualisation may perform better than a student operating in the belonging stage. More applicable related theories are demonstrated as follows:

Expanding on Maslow's hierarchy of needs and guiding the study's questionnaire is Alderfer's *ERG Theory (1972)* which reclassifies the five-step pyramid with three categories as shown in *Figure 2.4*.



Figure 2.4 Alderfer's ERG Theory (1972)

- I. *Existence* – Including all of the basic necessities required in simply surviving, e.g., food, water, shelter, etc.
- II. *Relatedness* – A desire for relationships with other people, including belongingness in broader social groups.
- III. *Growth* – A desire for personal development. Alderfer seems to differ on the topic of self-actualisation, preferring instead to classify the top of his hierarchy with a never-ending quest for self-improvement.

According to Alderfer (1972), understanding where a person is in his or her life stage provides an understanding of one's motivation for learning. A person in the existence category can be benefitted by the increased economic benefits of adult learning rather than someone in the relatedness category, who is probably interested in the social aspect of adult learning. Meanwhile, a growth-stage student would focus on gaining more self-esteem and connection with their higher focus in life. The needs of a person in this model can be dynamic in different life stages and more than one need can be operative at the same time.

The ERG Theory offers a greater flexibility than Maslow's Hierarchy of Needs as it

acknowledges that some needs are more basic than others. It recognises that a person who is starving can still seek physical connection, or someone who is lonely can still desire personal development. The theory allows different ‘tracts’ of needs which are positioned differently and simultaneously. One can have all their needs fulfilled in a sphere of family. They are recognised as a valuable member if they are improving in whatever role they take in the family while the same individual can be struggling to make simple connections in their working life.

The ‘soft’ data (interviews) are able to reveal not just which stage of development students tend to enrol in, but also which stage of development yields the best results in a student. Initially, it is assumed that the student operating in the growth stage performs optimally. However, it is essential to recognise whether a student seeking self-improvement through education performs best, as well as investigating whether a student seeks education for employment reasons or not.

Noting the differences between various stages of development and their possible impacts on motivation and performance they demark, motivational factors are measured in *Question 11* on the pre-course questionnaire in order to discover the differences between outcomes based on metrics of development under the ERG Theory. As to the factors directly measured in this question, the Theory of Needs provides specific categories which are beneficial as complementary.

Alderfer (1972) created ERG Theory which is the adjusted version of ‘hierarchy of needs’ model while McClelland (1961) went in a completely new direction and proposed the *Theory of Needs*. Instead of creating a hierarchy for distinct levels of needs, he suggested there were three main motivating needs for human beings:

1. *Need for Affiliation*, or the desire for friendly and close interpersonal relationships. This is similar to the Relatedness of the ERG Theory or the sense of belonging in the hierarchy of needs. The major difference is that this need exists independently of any other need one may have and affiliation is a more inclusive term than either of the definitions. This need can be attained, for example, with a sufficiently strong social connection to a company, family, or

military unit.

2. *Need for Achievement*, or the drive to excel, to meet and surpass a set of standards, to strive for success. This need matches the idea of ERG Growth and a combination of self-esteem and self-actualisation in the Maslow's hierarchy. Placing achievement on equal footing with all other needs implies an innate drive all people must reach or something other psychologists consider as belonging to a higher order.
3. *Need for Power*, or the need to make others behave in a way that they would not have behaved otherwise. This point is the greatest deviation from the other theories of motivation. The implication that humans need (on a base level) to control one another is surprising at first and contains a number of implications. It is crucial to step back and examine what it implies to make people change their behaviour. Power interactions can be found everywhere, and its presence does not imply a negative relationship. Positive relationships, all relationships even, include power. The accumulation of power in relationships can be regarded as an innate human need. Other psychologists claimed that this need is just an extension or a higher order of the need for affiliation.

The theories mentioned above can be applied for the research as it investigates other motivational factors other than the financial incentive offered by the HKG. Recall that economic incentives exist in the field of external motivators. Also, the theory of Hierarchy of Needs is not so interested in the motivation behind existing as it refers to survival, shelter, food, warmth, to instinct in some cases and higher order needs in others.

In this paradigm, a student who is drawn to the CEF programme is looking for the personal growth and development which tertiary education offers or probably they are eager to attain the status and power associated with a degree. Undeniably, focusing on applying Knowles' theories of andragogy to the CEF programme is significantly important. As discussed above, andragogy empowers adults to take control of their own education in a mediated environment. Acquiring a

degree in an andragogical classroom is similar to enrolling in a personal growth course which fulfills the motivating need effectively.

Synthesising these diverse needs with the principles of an andragogical classroom allows us to take the divisions of power, achievement and affiliation and split them into factors suited towards measuring the CEF. As follows, the power factors consist of pay rise, qualification enhancement and promotion prospect. Achievement-based factors include simply improving one's ability to perform a current job, learning something new or interesting, or increasing self-confidence, while affiliation is addressed by meeting new people, receiving a new job, or improving one's ability to do his current job. The overlap in these factors can be noted. These distinctions ensure the study measures properly all three factors of needs with consistency, looking towards the ERG Theory as well. These factors are the basis of *Question 11* on the pre-course questionnaire and *Question 12* on the post-course questionnaire.

2.3.2 Economic Theories

Going back to the origin of economics, Adam Smith's *The Wealth of Nations* in 1776 surmises that humans act rationally and are in pursuit of their own self-interest. Individuals make decisions based on what benefits them most in a given moment. A rational person always chooses systematically and purposefully to achieve their objectives and increase their own well-being. Self-interest does not come without a cost. What an individual gives up to obtain an item or take an action is called '*opportunity cost*'. When making any decision, decision makers should be aware of the opportunity costs that accompany each possible action. Therefore, the relevant costs for decision making requires comparing the costs and benefits of alternative choices (Smith, 1776). For example, when an adult learner considers whether to attend a full-time course at a tertiary college for an additional year, he or she compares the fees & foregone wages to the extra income he could earn with the extra year of education.

As a result, motivating adult learners is relatively simple. Incentives such as rewards or

subsidies can induce a person to act by manipulating the principle of cost and benefit. In order to encourage a behaviour that may have been marginal, economists must propose an incentive that pushes the behaviour from ‘opportunity cost’ into a behaviour that actually manifests. Economists have used the theory of human’s as rational decision-makers to build theoretic models of human behaviour.

According to the *Human Capital Theory*, the promotion of education–investment in human capital facilitates the production of the whole economy (Becker,2010). Therefore, to facilitate life-long learning and improve human capital in the society, one of the most effective reward systems is to subsidise learners who obtain good grades and achieve high punctuality for the benefit of society. The implementation of the CEF programme is based on the rationale that learners can be stimulated to learn by using economic incentives (Cheung, 2006). This principle explains why learners who desire education but lack the funds to pursue education enrol in the programme.

The opportunity cost of education (expensive, taking out loans, etc.) is mitigated by removing financial barriers but economic theory offers another reason why an individual may turn to education. Higher education is a powerful investment and as an indicator of future success and better outcomes, it is ranked incredibly high compared to other financial investments (Nica, 2012). The investment in education is different from other forms of investment such as stocks, bonds, gold, real estate or even bitcoin. When an education matures it pays back in expertise to perform high skills and techniques. Before putting the CEF into practice, Hong Kong’s workforce was considered to be vastly underqualified for the labour side of the global commodity market (Cheung, 2006). According to International Institute for Management Development (IMD) and United Nations Development Program (UNDP) in 2021, Hong Kong has become one of the top performers in a number of global outlook rankings in terms of World Competitiveness and Human Development Index (HDI) after decades of education investment by the HKG.

There is strong economic incentive at work in the CEF and in factors that led to its inception.

It is significant to indicate the factors place higher education on the demand curve of prospective learners. Economic theory explains why an adult learner might choose to invest in their continued education or why a society would be better off subsidising higher education. However, it does not explain the root motivation behind some adult's decision to continue their education. Many choose to enrol based independently of their future potential earnings. While this review will return to economics, it is time to branch out into softer fields of psychology to examine alternative and less monetarily driven theories of motivation.

2.3.3 Two-Factor Theory

Moving away from need-based and economic theories, Frederick Herzberg is a psychologist who focused on business management. He proposed the *two-factor theory* which applied some of Maslow's concepts specifically into a business setting as shown in **Figure 2.5**. He labelled the lower order needs as '*hygiene factors*' which include interpersonal relations, technical supervision, decent working conditions, company policies and administration as well as the work effects on personal life (Herzberg, 1966).



Figure 2.5 Herzberg's Two-Factor Theory (1966)

Hygiene factors are necessary to induce a person to work, but they do not motivate excellent work performance. Decent work performance comes from '*motivator factors*', i.e., recognition,

advancement, responsibility, growth opportunities and attachment to the work itself. An employee needs to be connected to their work and feels an attachment in order to work productively and efficiently.

The two-factor theory indicates human beings need to grow and develop in any settings. When basic work condition factors are adequate, people will not be dissatisfied. They will not be motivated until there is a deeper level of attachment. Therefore, superiors are required to design jobs tasks with a high degree of responsibility and discretion which focus on giving ownership to the workers. Herzberg's two-factor theory laid the ground for contemporary theories about inner and outer motivation and intrinsic and extrinsic rewards and how these rewards can be balanced to achieve optimal motivation. Imagine how the theory contributes to the enhancement of the CEF programme, a class can be operated like a company, with students as employees with a task to complete and a teacher as a superior. Based on this theory, if adult learners are only influenced by hygiene factors without motivators, they may only be willing to attend the minimum number of lessons (achieve 80% attendance) and achieve the minimum required score which are required by the government. However, if higher order needs of adult learners are attained, they are motivated to apply themselves, master the material and continue their education for the ultimate goal of becoming lifelong learners.

This section justifies the previous discussion in **Chapter 2.1** on adult education and the importance of evaluation in the semi-structured interview indicates how the research participants felt about their level of satisfaction with the programme.

2.3.4 Theory of Margins

Knowles was not the first to field a theory of adult education. McClusky (1963) who is a professor of educational psychology proposed the *Theory of Margins*, also known as the *Power-Load-Margin* (PLM) formula is shown as **Figure 2.6**.

McClusky's Theory of Margin

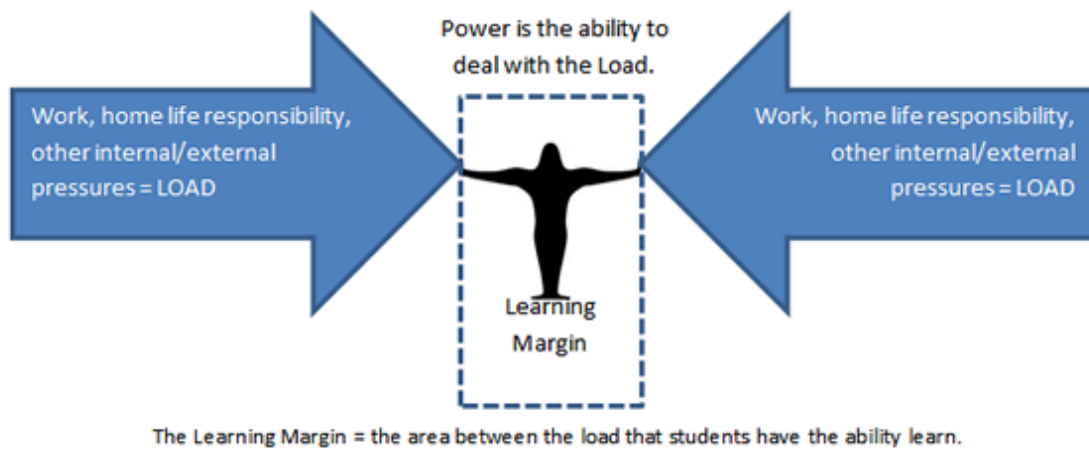


Figure 2.6 McClusky's Theory of Margins (1963)

Adulthood is a time of growth, change and challenges in which there is a constant struggle to balance the 'load' of living (all the stressors of living in an unpredictable world) and 'power' (every tool an individual has to control their lives). Both load and power are composed of internal and external factors. External load consists of tasks involved in normal life requirements (such as work and community responsibilities) while internal load comprises life experiences developed by people (such as desires and future aspirations). Power consists of a combination of external resources (social abilities and economic abilities), and it also includes internally acquired or accumulated skills and experiences contributing to effective performance.

McClusky (1963) states that Margin can be enhanced either reducing load or boosting power. When load continually matches or exceeds power and if both are fixed the situation becomes highly in danger. The major reason of naming it as the '*theory of margins*' is simply because margin is the balance between load and power. If load is higher than power, it leaves a negative margin, and the individual cannot function properly. If the load is lesser than the power, the margin is positive and the individual has enough control over their life to thrive and start new projects, such as lifelong learning.

The goal of any individual should be minimising load while maximising power, but much of the time, load must be taken on in order to receive power. Bringing the Theory of Margins back to education, a bachelor's degree can be one of the examples to confer a lot of power. It opens the door for graduates to higher paying jobs. It bestows prestige and offers knowledge and experience. On top of that, a degree is challenging to attain. Classes are demanding and the school fees can confer an enormous load onto a prospective student. An optimal student is one who has sufficient margin to accept additional load in the short run so that they will not just survive but thrive during the degree programme. The CEF, as intended, reduces the load associated with gaining the power of higher education. By removing the financial burden, students who can scrape by sufficient fund to learn, the lack of load and subsequent increase in learner margin are achieved to reach the programme goal of creating lifelong learners.

Using the theory of margins to inform questionnaire points is straightforward. Some questions in the questionnaires can measure the impact the programme had on 'load' felt by the students. For example, *Question 6* in both sets of questionnaires measures the income of the participant. *Question 7* addresses how much the participant paid for the course on their own and *Question 8* inquires whether the programme was mandated by a separate entity or taken by pure initiative. It provides a baseline which demonstrates the relationship between financial load between the CEF participants and the non-CEF participants.

2.3.5 Learning Theory

This study has put emphasis on the keywords 'innate', 'driven' and 'need'. However, there are entire branches of motivational psychology not predicated on any innate instincts, drives or desires. Behaviourists, for example, believe that all human behaviour is learned. Behaviourism is seen as outdated in modern circles, but understanding it is essential to seeing the evolution of more popular cognitive theories today.

The most famous scholar associated with early behaviorism was Ivan Pavlov, a Russian

physiologist who conducted Nobel Prize winning research on digestion. Pavlov (1902) discovered through observation, at first by accident and then by study, that his dog test subjects could be taught to associate food with the sound of a bell. Whenever they heard a bell signaling food was coming, they would salivate in anticipation. After some training to reinforce this association, only the bell was needed for the dogs to start salivating as shown in *Figure 2.7*.

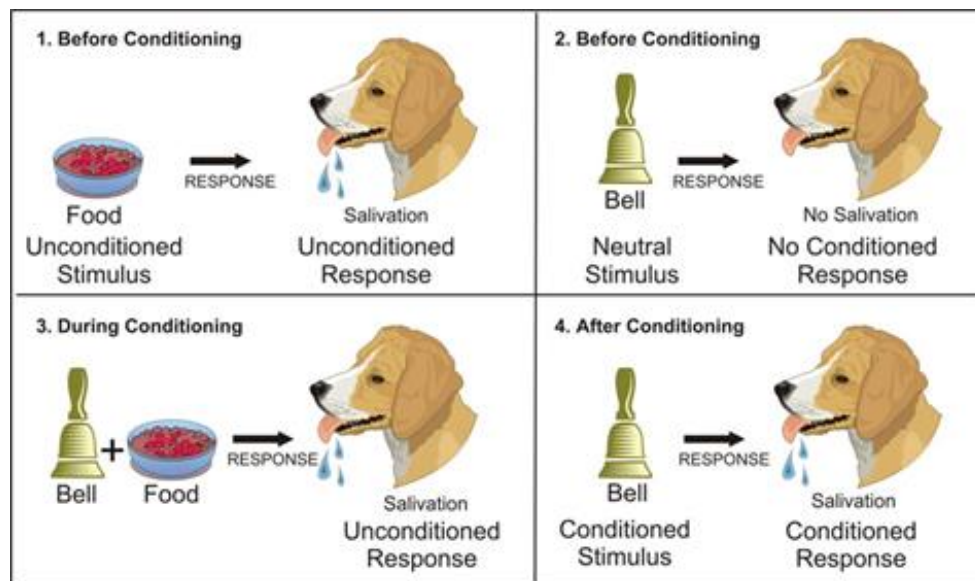


Figure 2.7 Pavlov's Classical Conditioning (1902)

Based on Pavlov's experiments, a stimuli-response model was constructed and called 'classical conditioning'. All 'instinctual' behaviour non-dependent on previous behaviour is called an unconditioned stimulus, for example a dog drooling for meat. A neutral stimulus is something that does not naturally elicit a psychological response, such as a ringing bell. A conditioned stimulus is when a neutral stimulus starts to elicit a response through learned behaviour (Windholz,1997).

According to the theory of classical conditioning, people are willing to learn something new if they are exposed to positive stimuli in pursuit of that behaviour or if the desired behaviour is rewarded systematically. If motivation is what causes behaviour, then motivation is, in this case, a stimulus or a reward. This can be applied a number of ways to the CEF programme. First of all, the fund itself to an adult learner is a grant of HK\$20,000 which positively reinforces lifelong learning

behaviours. An adult learner consistently reinforced with positive stimuli when they work towards an educational milestone will be much more likely to pursue lifelong learning in the future. The following set of theories are built on the Pavlov's literature in order to inform a subset of post-course questionnaire questions dealing with the CEF's long-term motivational effects.

2.3.6 Cognitive Theories

The modern landscape of motivation theories is dominated by *cognitive psychology*. Early cognitive motivation theories were pioneered by Kurt Lewin (1935) and Victor Vroom (1964). The former Lewin was one of the first voices trying to bridge behaviourists with other needs-based theories. In his time, the psychological landscape was in the throes of a battle between 'nature' and 'nurture'. For example, if human beings primarily motivated by a pre-set of instincts and genes that dictated their reactions, or if they taught to be the way they were by life experience. This debate may seem simplistic to a modern commentator, due to Lewin's interventions. He ascribed a principle of dual causality. The circumstances of one's birth, their innate instincts (and what parts of personality would later be ascribed to genes) provides a base, a template for interacting with the world. External factors acting independently, or in response to the individual in question interact with this base and imbue it with experience. This experience is internalised based on prior experiences or the base in question. In other words, personality may be attributed to both nature and nurture, both cause and effect and chance. Lewin created a formula for behaviour, succinctly written: $B = f(P, E)$. An individual's Behaviour is a function of that Person's personality, capabilities, training, experience, etc. and his/her existing Environment. This is a simplified account but his work in cognitive psychology, particularly the inclusion of a study and theory of personality, created the groundwork for many psychologists and scholars to propose their own theories.

2.3.7 Expectancy Theory of Motivation

In response to Maslow and Herzberg, Vroom (1964) published the '*expectancy theory*' that sought to separate three aspects of motivation: *effort*, *performance* and *rewards* as illustrated in

Figure 2.8. Vroom wrote in a business context considering of ways to cognitively encourage higher productivity.

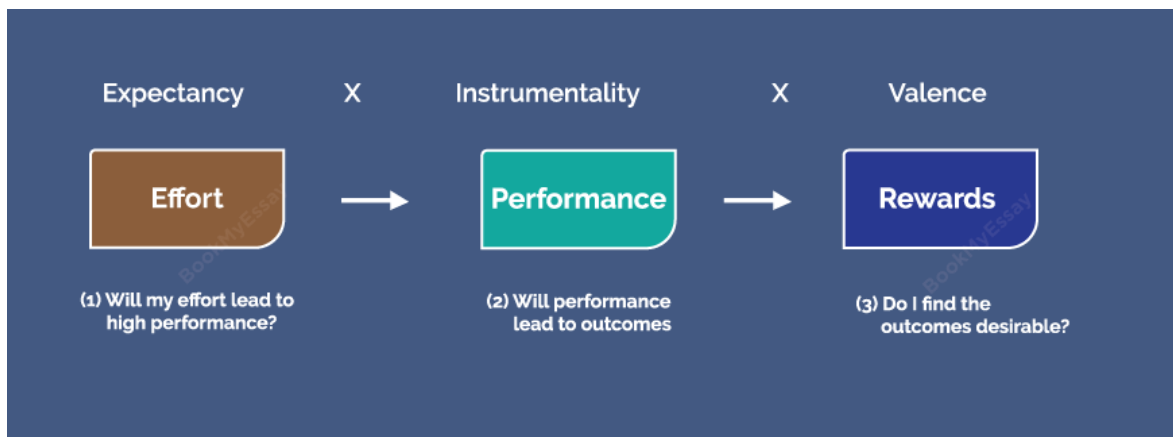


Figure 2.8 Vroom's Expectancy Theory (1964)

Vroom's expectancy theory is based on the belief that individuals seek to minimise pain and maximise pleasure. Therefore, measuring productivity and motivation can be fraught with subjectivity. After all, one individual's definition of success, fulfilling, or boring can be highly variable to their experience, personality, skills, knowledge and abilities. All of these traits are combined as an aggregate unit called motivation and they directly impact performance via three other traits known as *expectancy*, *instrumentality* and *valence*.

Expectancy is the principle or the knowledge that harder work will lead to higher performance. A worker with high expectancy knows the more effort they put into a project, the more they will be rewarded. A worker with low expectancy is often demoralised and they struggle to see the impact of their work on a project. Possessing the correct skills, resources and support to do a job are the factors which increase expectancy.

Instrumentality is the knowledge that a worker will be properly compensated for their efforts at accomplishing work. Motivation needs some amount of reward after all. Instrumentality can enhance if a worker knows exactly how the reward system works, if they trust the system that will reward them and if there is transparency in how the reward is distributed. If expectancy is about feeling competent, instrumentality is about feeling trust.

The element *Reward* of this theory appears to be similar to the sample of Pavlov's dogs. Input = output, work = reward and the traditional set up of company incentives is valid. However, the theory is not about self-interest but about why certain people are motivated and how to reward or tap into motivation with proper incentive. By understanding how a worker prefers to be compensated, how they prefer to feel useful and how they like to feel motivation, this theory can add what is basically economic incentive to higher order needs. Recall in the economic analysis how economic theories account for only lower order needs. This theory is one of the linkage points tying parts of economic incentive theory back into the higher order needs.

The implications are incredibly useful when examining the learners' satisfaction level of the CEF in the post-course questionnaire and semi-structured interview. Expectancy theory allows us to realise the necessity of measuring perceived rewards. We are also able to measure which aspects of satisfaction linked positively or negatively to the CEF participation or the non-CEF participation. On top of that, there is another theory with a taxonomy that will help create the criteria by which these factors can be measured.

2.3.8 Expectancy-Value Theory

Since 1964, a number of different psychologists and motivation experts have taken Expectancy Motivation Theory and tweaked it in ways, emphasising some points over others or putting it into new contexts. *Expectancy-Value Theory* is one of the more notable permutations (Eccles & Wigfield, 2000). Developed by Jacquelynne Eccles and her colleagues, the theory illustrates the strength of a tendency to act in a certain way depends on the strength of an expectation that the act will be followed by a given outcome and on the attractiveness of that outcome to the individual. In other words, motivation is influenced by a person's belief that effort will lead to performance, performance will lead to specific outcomes and that outcomes are valued by the individual.

The motivation to select one choice over another in a work or classroom setting is dependent

on two major factors: *expectations for success* and *subjective task value* in particular domains. Expectations for success is a variable based on achievement. Meanwhile, subjective task value focuses on the payoff for performing that task. The two factors are similar to Vroom's expectancy and instrumentality, but the model does further differentiate task value into four distinct categories:

1. *Attainment value*, is there a significant difference between achieving the task and failing the task?
2. *Intrinsic value*, how much does the participant enjoy the activity?
3. *Utility value*, is the task valuable and will it help the participant in the future?
4. *Cost*, or what other goals must be left to the wayside to accomplish the task?

It provides another linkage to the economic theory of *opportunity cost*. Now, all of these different rewards can differ considerably between individuals. Experience, ability, culture, educational achievement, beliefs and more can have a strong impact on what value an individual may receive from completing a task.

There is another implication in this theory that delves deeper into the psychological aspect of the model. If value is so subjective, then perception, true or not, can influence reality. In this theory, motivation is linked to performance. If a student is told that he is incompetent in Mathematics, his expectation for success and his motivation drops. Another's insult or compliment may directly impact his performance. Working in the reverse direction, reality can be self-reinforcing. Imagine a student who enjoys taking Mathematics, he will be much more likely to take an advanced mathematics course as opposed to a student who does not enjoy Mathematics. For a learner, beliefs can have a snowballing effect growing in magnitude as beliefs impact performance, performance impacts belief and so on until a learner's approved spheres of study and interest are solidified.

There is an enormous amount of potential benefits to realising how connected motivation and performance are related. Ford and Nichols' *Taxonomy of Human Goals* (1987) provides a list of human motivations, goals and examples illustrating specific traits as illustrated in **Table 2.2**.

DESIRED WITHIN PERSON CONSEQUENCES	
<i>Affective Goals</i>	
Entertainment	Experiencing excitement; Avoiding boredom
Tranquility	Feeling relaxed and at ease; Avoiding stress
Happiness	Experiencing feelings of joy, satisfaction, or well-being
Bodily sensations	Experiencing pleasure associated with physical sensations
Physical well-being	Feeling healthy, energetic, or physically robust
<i>Cognitive Goals</i>	
Exploration	Satisfying one's curiosity about personally meaningful events
Understanding	Gaining knowledge or making sense out of something
Intellectual creativity	Engaging in activities involving original or interesting ideas
Positive self-evaluations	Maintaining a sense of self-confidence, pride, or self-worth
<i>Subject Organisation Goals</i>	
Unity	Experiencing a profound sense of connectedness, harmony
Transcendence	Experiencing optimal or extraordinary states of functioning
DESIRED PERSON-ENVIRONMENT CONSEQUENCES	
<i>Social Relationship Goals</i>	
Self-assertion	Maintaining or promoting oneself
Individuality	Feeling unique, special, or different
Self-determination	Experiencing a sense of freedom to act or make choices
Superiority	Winning, comparing favourably with others
Resource acquisition	Obtaining support, assistance, advice from others
Integration	Maintaining or promoting other people
Belongingness	Feeling attached or intimate with the community

Social Responsibility	Fulfilling social roles or keeping interpersonal commitments
Equity	Comparing equally with others
Resource Provision	Providing support, assistance, advice for others
<i>Task Goals</i>	
Mastery	Meeting a standard of achievement or making an improvement
Task creativity	Inventing new processes or products
Management	Organising people or things, handling tasks, being productive
Material gain	Obtaining or accumulating money or tangible goods
Safety	Avoiding threatening or depriving circumstances

Table 2.2 Ford and Nichols' Taxonomy of Human Goals (1987)

Understanding the human goals and the traits provides another excellent tool in evaluating why adults seek education. As discussed in Vroom's research, understanding the traits that relate specifically to an adult's decision to pursue further education, a researcher, policymaker, or teacher can choose what traits to specifically target in their student learners to provoke the best reaction to teaching. If a student is reinforced in the sphere of their motivation, it can lead to tangible enhancement in that sphere.

Examining all the broad categories of goals provides a framework for which to build the questionnaire responses. When the learners participated in the programme, it was essential to inquire their *affective goals, cognitive goals, subject organisation goals, social relationship goals and task goals*. Allowing students to reflect the learning experience and rank different outcomes is an appropriate way for measurement. The possible categories responses to the questions targeting each goal are listed as follows:

- i. *Affective Goals*: Was enjoyable / interesting, helped me to keep my brain active.
- ii. *Cognitive Goals*: Developed my knowledge / skills in the subject, encouraged me do more learning

- iii. *Subject Organisation Goals*: Boosted my confidence / increased my self-esteem
- iv. *Social Relationship Goals*: Made new friends / meet new people to extend my network
- v. *Task Goals*: Improve my ability to do my current job, helped me do something efficient with my time besides work / leisure

The design of *Question 11* inquires these factors but there are other approaches to measure students' learning outcomes, for example, their level of satisfaction of the programme. The next section of the research will put emphasis on measurement, namely: the outcomes of the CEF programme as well as methods to measure the lasting impact of the programme. The study will answer the research question if participants are more likely to continue their education after completion of the programme. Most importantly, it is significant to discover the value of the CEF programme from learners' perspective.

2.4 Adult Learner's Values and Satisfaction

Based on the research established above, there are many factors and incentives which motivate learners to succeed. Economic theory offers an explanation into why incentives work and establishes a good example for why subsidies can inspire learning to meet practical goals. It can be found that incentives can also address the higher level of needs such as self-development, social interaction, sense of belonging and skill acquisition through studying the work of cognitive psychologists. Although the higher-level needs differ from individual to individual, there is one metric that can be applied in an interview squarely: *Value*. It is noteworthy to examine what value students placed on the course or expect to receive and if they are satisfied with the value they receive. Hence, understanding the concept of consumer value in an educational context is crucial. Education has often been referred to as an investment. However, it is not just an investment, it is a product, a service bought by consumers and performed by specialists. Fortunately, there is a large body of scholarship that has already performed this task.

Lovelock (1983) who is a service marketing specialist listed distinct types of commodities in

services and he classified education as a service that provides intangible actions directed at people's minds and advocated treating students as consumers. According to Lovelock's research, consumers must input something for the satisfying transaction. Education most certainly falls into the high input category. A consumer of education must come into the situation understand what they want to learn and their willingness to accomplish tasks, listen attentively, complete assignments and tests to receive the product learners are paying for. The customer participation leads to higher individual investment in this principle. The chance for failure or not receiving one's reimbursement generates certain commitment in students. Learners are also responsible in part of their own satisfaction.

Regarding students as consumers is one of the trends emerging in a post-globalised world. As educational institutions homogenise and their standards begin to look more similar, students will be purchasing a product when they decide to enrol in university (Slaughter and Leslie, 1997). A customer-based approach can be an effective way to meet student needs as the commodification of education allows students to choose an institute, or a programme better suited to their needs (Stafford, 1994). A greater effort from the part of the consumer and education provider leads to the optimisation of students' learning experience and greater learning satisfaction. Therefore, viewing learners as customers offers individuals more choices and options which also implies that the customers' needs can be met easily, and the level of customer satisfaction can be raised correspondingly.

There is a basic formula that measures consumer value. From a utilitarian and functional approach, value is a tradeoff between the perceived benefits / quality minus perceived costs and price (Lovelock, 2000). If a consumer ends up believing they received equal or greater value than what they paid, they will feel satisfied. However, there are a few things to consider. The costs associated with education are not just monetary. A student must spend considerable time and energy on a programme which generates high opportunity cost. The genuine cost of something must be weighed against the next best option. If one is paying HK\$80,000 for a programme, the cost of the action is HK\$80,000 + the HK\$300,000 he or she could have made if not enrolled + the time spent in class

and studying.

On top of that, satisfaction is based largely on the perception of the consumer (Slaughter and Leslie, 1997). If the goal of the CEF programme is to create lifelong learners in Hong Kong, using customer satisfaction as a metric provides an incomplete picture. Subjective experiences may not account for differences between the perceived values of the programme in the students' eyes and the actual value of the programme to society. As a result, it is significant to measure both perceptions and outcomes (Boulton-Lewis & Tam, 2018).

2.4.1 Six Value Criteria, Applied to Education

There is an approach to determine why consumers make the choices they do and how much value they place in the product they received. Sheth, Newman and Gross (1991) examine perceived *consumer value* from a narrower perspective, adopting their theory of consumption values to explain why consumers purchase what they do. They suggest six main categories of consumptive value:

2.4.1.1 Functional Value (Monetary, Practical, Utilitarian Value)

The economic benefits of the consumption of a given service can be counted. Independent of all other factors such as difficulty, stress and time, it is important to examine if the service makes the consumer ultimately better off in the short or the long run. The monetary superiority must hold in relation to the next best option and the total functional value is dependent on the completion of the task or service. In this study, it can be measured by tracking student outcomes in the future, such as pay rise due to educational attainment or job promotion through additional knowledge and skills.

2.4.1.2 Convenience Value (Accessibility, Ease, Challenge Value)

All these factors refer to the speed and ease of achieving the consumptive task efficiently and conveniently. Accessibility means the ease of acquiring the service. The content itself is measured under this criterion as difficult or easy. Convenience will always be a positive factor in this category, but this does not always mean ease. Some consumers enjoy challenges particularly and their values can be gained through being pushed beyond their limits when receiving the service. However,

countless challenges can ruin value at the same time. No one wants to spend a large amount of money and receive nothing tangible. In this research, the convenience value can be measured by examining the passing rate of the CEF course or comparing results to the non-CEF participants.

2.4.1.3 Social Value (Symbolic and Group Membership Value)

Being a student or part of a class is an in-group descriptor. Many products or services have the extra appeal of adding the consumer to an 'in crowd' of other consumers. There is certainly value of being able to join others in a group or claiming a 'student' as an identifier. Although it is difficult to put a monetary value on something so subjective, there is something to be said in enrolling for the chance to form relationships. Joining social activities at the institute is one of the examples. In this research, students can be asked if their social aspects and connections have improved since joining the programme.

2.4.1.4 Emotional Value (Affective Response Value)

It is important to discover how the course materials make learners feel in the programme. Emotional value is the ability of a service to arouse affective states. Anything that impacts the emotions of consumers or induces them to feel something outside the ordinary spectrum of emotions has this sort of value. For example, watching a well-performed play or orchestral performance is a service which reduces a consumer's economic state and convert it into emotional value. Applying the concept to education, a course that offers interesting real-life learning materials can fulfill this need in the same way. The concept of emotional value can be properly applied in this research which measures how the participants emotionally engaged with the learning materials and examines if they find any intrinsic value in this stimulation.

2.4.1.5 Epistemic Value (Curiosity, Novelty and Knowledge Value)

Human beings are curious creatures. There is value in learning, satisfying curiosity, or in experiencing novel sensations. Directly applied to higher education as a commodity and knowledge is the root of the service, it should be obvious how epistemic value is transferred to a consumer.

Besides the economic incentive for learning, epistemic value is the greatest source of value in a consumer. The value can rise and fall depending on perceived quality of education. The knowledge must be transferred successfully for consumers to receive value. In this study, it can be measured by the academic results and attendance records of CEF participants compared to the non-CEF participants.

2.4.1.6 Conditional Value (Specific Situation Value)

There is no clear definition of the conditional value, and it can vary in diverse situations that fits the needs of the sample population. Consumer choice and judgment is the key in determining conditional value. For example, in the context of selecting elective class, the number of students is a notable example of a conditional value factor. Most learners would appreciate a low-class size while certain social learners would prefer the more the merrier.

Applying these values allows us to create a means of evaluating the effects of the programme on learners. *Question 12* inquires what the effects of the CEF programme were and allows participants to rank the following factors based on the six values in the above model.

2.4.2 The Relationship between Value and Satisfaction

Tying satisfaction to value is simple but for the sake of completionism, satisfaction is defined by Taylor and Baker (1994) as ‘an overall affective response to a perceived discrepancy between prior expectation and perceived performance after consumption’. In other words, satisfaction is an aggregate response arising from the difference between what one thought they purchased and what they actually purchased which implies that value is different from satisfaction.

There are four distinct aspects that emerge when a consumer receives a service, *core service quality* (the promise), *relational service quality* (the delivery), *perceived value* and *satisfaction* (McDougall and Levesque, 2000). Perceived value is often set, predicated by the core service quality, before the service is even delivered. Also, while delivery does go far in influencing customer satisfaction, some parts of the customers’ minds are made up before. Satisfaction thus, refers to a

‘consumers’ post-purchase evaluation of the overall service experience (processes and outcome). It is an affective (emotional) state or feeling in which the consumers’ needs, desires and expectations during the course of the service experience have been met or exceeded. Value and satisfaction do share a close relationship but they are different.

The post-course questionnaire will attempt to measure satisfaction by using the value-satisfaction relationship. *Questions 17 and 18* directly address whether students are satisfied with the CEF programme by asking if it improves educational outcomes and if similar programmes would be beneficial for Hong Kong. McDougall and Levesque (2000) suggest that if perceived value is high, satisfaction will be high too. In other words, another way to measure, more indirectly but more accurately, satisfaction is to measure the effects of the programme. One of the main goals of the programme is to stimulate lifelong learning among adults in Hong Kong. *Questions 13, 14 and 15* measure ‘if students will continue to learn more’, ‘if they plan to pursue a higher degree’ and ‘if they plan on saving money to accomplish this goal’ respectively.

2.5 Learning from a Similar Model

Many governments around the world have introduced programmes in their quest to produce lifelong learners who are equipped to face the challenges in today's fast-changing world. Along with the growing popularity of lifelong learning in the growing economy such as that of Hong Kong, developed economies as Singapore are also keen on increased growth of the concept of lifelong learning (Woo, 2018).

According to the SG’s Department of Statistics (2020), Singapore is a small country which has a land area of 637.5 square kilometres with over 5,690,000 residents. In comparison, Hong Kong is over 1,000 square kilometres with 7,600,000 residents (C&SDHK, 2022).

Simplifying political situations, both Singapore and Hong Kong are semi-autonomous states that have found economic success in the last century. Both were classified as one of the ‘Four Asian Tigers’ alongside Taiwan and South Korea. The government’s initiatives towards lifelong learning in

Singapore are popular named ‘SkillsFuture’.

2.5.1 SkillsFuture – Lifelong Education in Singapore

Established in 2015, SkillsFuture is an initiative rooted in encouraging lifelong learning among the citizens of Singapore. It was developed in order to impact all Singaporeans, regardless of their work experience, educational experience, or interests. SkillsFuture is not just a government funding scheme, but a series of initiatives geared towards different incentive schemes to better match the needs of the citizens (Mara,2016). These policy instruments can target any number of beneficiaries over any number of years and afford the programme a great deal of flexibility in how it can allocate funds.

The most ‘famous’ initiative of the SkillsFuture Programme is the *SkillsFuture Credit*, an endowment of 500 Singaporean Dollars (HK\$2,720 which is offered to all citizens above the age of 25 in the form of credit. This expense can be tapped for use in local tertiary institutions, or it can be spent through qualifying, partnered courses such as edX (Yorozu, 2017). *SkillsFuture Earn and Learn Programme* matches graduates with work opportunities that allow them to generate an income while receiving job training and another funding programme which is named *SkillsFuture Engage* operates through community and assists Singaporeans to reach career choices. There are also targeted subsidies for mid-career Singaporeans who are required to reskill or upskill. According to the SkillsFuture, the four objectives are as follows:

1. Helping individuals make well-informed choices in education, training and careers.
2. Developing an integrated, high-quality system of education and training that responds to constantly evolving industry needs.
3. Promoting employer recognition and career development based on skills and mastery.
4. Fostering a culture that supports and celebrates lifelong learning.

The programme has been operating positively. Three years after its inception, 285,000 Singaporeans received the SkillsFuture Credit. 5,000 adults attended skill development workshops, 120,000 Singaporeans received a *SkillsFuture Mid-Career Enhanced Subsidy* (higher subsidy for

education on a case-by-case basis), 2,400 have received study awards and 4,600 have received digital workplace training. On top of that, there are still more initiatives and programmes to go (Yorozu, 2017). These numbers represent a small portion of the population and studies are starting to find that workforce capacity is increasing because of additional training funds (Tan, 2017).

Comparing the SkillsFuture Programme to the CEF seems simple because of the similar setting and background, but they are two different systems on closer inspection. The SkillsFuture Programme is a systematic initiative intended to develop continuing education in adults. The main difference here is that Singapore's Programme is preemptive. Each citizen receives the fund in the form of credit and there is no passing requirement. On top of that, enrolment remains the focus as opposed to Hong Kong's approach in incentivising high academic success to receive fundings.

2.6 Chapter Summary

The topics of andragogy and theories of motivation are broad in their own right, and can be explored from psychological, sociological, economic and educational perspectives. Primarily, Knowles spent much of his career exploring the principles of andragogy and discovering a model of lifelong learning where students are inspired to undertake self-directed learning projects satisfying their own needs and interests. His theory classifies the characteristics of adult learning and indicated how andragogy differs from pedagogy. However, the subjective nature of the study and the lack of measurements which practitioners in the education field can use are considered as a large issue in any discussion of Knowles' studies.

On top of that, Illeris regards the concept of motivation as a key to adult education and expands the work of motivational theorists and social scientists such as Knowles and Maslow. He created a learning model and separated several factors into internal and external conditions which are the basis of motivation. Nevertheless, the discussion of the intersection between motivation, culture, and localised policy dominated his research. Both of their theories show the importance of andragogy and discuss its traits. However, both of their theories fail to illustrate the effects of culture, policy factors

and local concerns in motivation, or to link andragogy to local policy suggestions. Moreover, it can be noticed that Maslow, Alderfer, Smith, Herzberg, and other theorists provided their own cross-disciplinary models developing aspects of what may inspire an individual to learn but those studies are deficient in showing the correlation of different motivation sources and learning outcomes of a funding programme for the development of a society.

Undeniably, it is particularly challenging to determine which motivational factors definitively matter the most for adult learners in Hong Kong as there is a difference between pursuing education for the opportunity to generate more income in the future and to enhance one's positive feelings of self-fulfillment. However, the review can serve as a solid foundation of the CEF programme research in Hong Kong. In particular, this chapter has investigated the four primary areas below:

1. The applications of andragogy and problems of the theory, with emphasis on the research study of Knowles.
2. Different theories of motivation in adult learning provided by other social scholars.
3. How the theory and motivation are related or can be related to the CEF programmes and education policy in Hong Kong.
4. A similar funding programme in Asia, comparing its benefits and drawbacks.

These areas serve as the basis of research for creating students' questionnaires and interview questions. The details behind the construction of this experiment and how it intends to assess the effectiveness of the CEF programme will be illustrated in **Chapter 3**.

CHAPTER THREE: RESEARCH METHODOLOGY

3.1 Introduction

The prime objectives of this research are to critically evaluate the impacts of the CEF programme on adult learners at a tertiary college in Hong Kong, and on their continuing motivation. The programme is believed to have significant impacts, and to be likely to influence the educational experiences of the adult learners taking into consideration their interests and financial obstacles (Leung, 2011).

This study also investigates the differences between the academic performance and participation rates of two groups of participants (namely: the CEF participants and the non-CEF participants), and their broader perceptions towards the CEF programme. In relation to the CEF programme it also focuses on the learners' motivation, perception, experiences and values. Notably, these aspects tend to be qualitative in nature; it can be quite challenging to represent them in a quantitative way (Gliner & Morgan, 2000). To address this, the study applies a systematic research design executed through a well-organized process for the collection of relevant data, as well as for data analysis.

Methodology is 'the strategy, plan of action, process or design lying behind the choice and use of particular methods and linking the choice and use of the methods to the desired outcomes.' Crotty, (2003: 3). It refers not only to the method of gathering data but also to the processes and techniques applied in order to attain the determined research objectives.

In other words, methodology refers to a systematic process orchestrated by researchers to create data that can be analysed, with success or failure determining the effectiveness and applicability of the data to the problem being investigated (Ethridge, 2004). It aims to describe, evaluate and justify the use of particular methods (Wellington, 2000). Methodology can therefore be considered a vital aspect of research as it depicts the effectiveness of the process of attaining the

objectives of the study. It should be based on the research objectives and aimed at obtaining relevant data and analysing them critically.

The interconnected concepts of ‘*ontology*’ and ‘*epistemology*’ are important for making theoretically informed choices in any scientific research (Cunliffe, 2011). The set of grounding assumptions about the nature of certain phenomena (ontology) determines and embodies a variety of assumptions regarding the nature of knowledge (epistemology) and the ways of studying those phenomena (*methodology*) (Morgan & Smircich, 1980).

According to Slevitch (2011), ontology can be defined as the study of reality or things that comprise reality. The ontological consideration is what the form and nature of reality comprise and, therefore, what can be known about it is ‘how things really are’ and ‘how things really work’ (Guba & Lincoln, 1994). Meanwhile, epistemology is concerned with the nature of knowledge and ways of knowing and learning about social reality. It influences how researchers frame their research in their attempts to discover knowledge. According to Bryman & Bell (2013), an epistemological issue concerns the question of what is (or should be) regarded as acceptable knowledge in a discipline. A central issue is whether the social world can be studied according to the same principles, procedures, and ethos as the natural sciences.

Ontologically, this study borrows from both ‘*Positivism*’ and ‘*Interpretivism*’, while focusing on the former and borrowing from the latter paradigms. Fundamentally, as a researcher, I believe that the world is measurable. Data collection through observation and interpretation can yield fruitful explanations (Neuman, 2014). Hence, the emphasis on data collection in this study via questionnaires. The effectiveness of the CEF programme and its impacts on adult learners can be measured in such a way, assuming the data collection methodologies are correct. However, as a researcher, I am not entirely in the positivism camp and consider that interpretivism also plays a significant role. It is believed that there are number of ways to interpret observational data and there are often unseen effects and force at play that cast doubt on research results. Therefore, this study

seeks to look deeper into interpreting the data via semi-structured interviews. While these interviews will not provide quantitative data (nor will the sample size be large), they will either reinforce, deny, question, confirm, or back the interpretations formed via the questionnaire data. This mixed approach is utilised to answer the research question and examine the possible interpretive errors.

Epistemologically, this blended approach signifies a '*constructionist*' approach: knowledge is not regarded as an insight into some objective reality, but instead constructed by humans, partly through social interactions. This view regards 'reality' as socially constructed (Denzin & Lincoln, 2005). In the case of the CEF programme, this is a funding course with real effects and consequences on adult education that can be measured, but explaining the exact effects is challenging without considering how it impacts both outcomes and motivations. Subjectively, each student will have different thoughts and experiences of the programme, particularly its impacts on motivation.

This study was constructed to measure how the CEF impacts adult education. The literature review concluded that changes in outcomes and changes in motivation are the two largest factors to measure. The former can be achieved by looking at more objective data- course results and demographics, while the latter requires a semi-blended approach in data collection, factoring in the subjective experience of how students experienced the programme (Neuman, 2014).

The literature review provided the individual motivational factors that will be measured in the research while the questionnaires provided the data about which of these factors differed between the CEF participants and the non-CEF participants. The information gathered are used to compare to see if either group subjectively reports vastly differing motivations before or after the programme, or vastly different experiences of the course which may be attributed to the CEF. As the issue of motivation is subjective, the semi-blended interviews are used to analyse any noticed trends in the data. Since any number of factors, foreseen or unforeseen, may temper a subjective

experience, these interviews will allow the study to ascribe changes in the subjective experience to the CEF more accurately.

Given the circumstances, some data are quantitative and is used to draw general conclusions between the two populations. Other data are qualitative and will test, or flesh out, those conclusions. The section below details the research question and all of its sub-questions and how these components can be represented in a quantitative or qualitative way depending on the methodology approach. It also addresses the details of the interpretive frameworks used to analyse each set of data.

3.2 Research Approach

Researchers may use two approaches in their studies: *qualitative* and *quantitative*. These differ in terms of the data collection method, analytic process and derivation of the research findings. Qualitative research emphasises descriptive data, avoiding statistical representation. On the other hand, quantitative research considers numerical data and seeks to represent findings by statistical means (Creswell, 2003). This study employs multiple data collection techniques, including surveys generating quantitative data and interviews for a more storied approach. There are a number of methods of the CEF's effectiveness, and qualitative or quantitative means were applied based on which could better assess each factor. Undoubtedly, one measure of effectiveness is the programme outcomes. Regarding the institutional processes such as attendance records and assessment results, the data has already been generated and is distinctly quantitative.

Regarding the impact of the CEF on motivations, perceptions, value, and experiences, the study requires a mixed-method approach. Although the highly subjective nature of these factors is qualitative, Likert scale and ranked choice questionnaire items can represent and compare these factors in a quantitative way. Representing this data numerically allows for a meaningful comparison between the CEF participants and the non-CEF participants. The analysis can be weighed in tandem with the semi-structured interview, a qualitative measure that should keep the analysis 'storied'.

As mentioned in **Section 1.3**, the main research question is divided into five sub-questions, each approached with a different research method to ensure that the limitations of one type of data are balanced by the strengths of another. Using a mixed-method approach has several advantages:

1. Compares Quantitative and Qualitative Data

Adopting mixed methods is especially useful for researchers to understand the contradictions between quantitative results and qualitative findings. It provides a nuanced look into the ‘reality’ of a situation. Numerical especially tends to encounter the classic ‘correlation or causation’ fallacy and while also not infallible, qualitative data can usually allow interpretation to distinguish between the two. Meanwhile, qualitative data tends to be specific and personal, but when mixed with quantitative data the personal potentially becomes the rule rather than the exception or can be proven the exception.

2. Reflects Participants’ Point of View

Mixed method studies give a voice to participants and ensure that study findings are grounded in participants’ experiences. Numbers can only offer a superficial glimpse into complex systems of decision making, as the experiences of the participants are known in their entirety only to participants themselves. From this perspective, quantitative data may help ask the right questions, and qualitative data may help to correctly explain the answers.

3. Collects Rich, Comprehensive Data

Mixed method studies also mirror the way individuals naturally collect information – by integrating quantitative and qualitative data. In this study’s case, quantitative data (scores or number of attendances) can be integrated with qualitative data (descriptions and perceptions) to provide a more complete story than either method would alone.

This research study adopts a ‘*triangulation design*’ mixed-method approach. Triangulation refers to the practice of using multiple sources of data or multiple approaches to analyse data with the aim of enhancing the credibility of a research study as shown in **Figure 3.1**. Triangulation allows

researchers to investigate a question from a different point of view and discover parts of the answer that were not previously apparent. The ‘triangulation’ strategy synthesizes the strengths and weaknesses of quantitative methods (including large sample sizes and trend determination) with the strengths of qualitative methods (including small sample sizes with more depth) (Patton, 1990). It also allows segments of the interview process to be interpreted within the same framework as the questionnaire results. The quasi-numbers derived from interviews will not constitute the entire interpretative value of the data set.

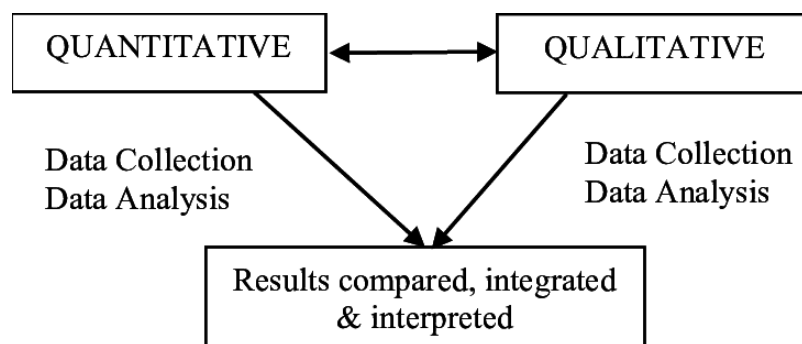


Figure 3.1 A Visual Diagram of the Mixed-Method Triangulation Strategy

Furthermore, quantitative data gathered in the questionnaire including Likert-scale rankings provides easy transition into quasi-numbers. Rather than reporting on discordant accounts of the effects of the CEF, quasi-numbers from the questionnaire suggest a simple comparison between subjective experiences. By selecting the right terms depending on the question, both individual expression and concrete data points create a system of analysis showing quantitative and qualitative results.

A mixed-method study includes all the strengths mentioned above. However, there are certain limitations that must be considered as the implementation of mixed methods is complex. Firstly, more time and resources are required for a researcher to plan beforehand and execute the data collection process. On top of that, it can be difficult to apply one method using the results of another and to resolve discrepancies that arise in the interpretation of the results. The greatest potential challenge for this research is that the respondents must be willing to respond in both pre-course and

post-course questionnaires and participate in interviews after the programme. Only a small number of participants with strong feelings may be willing to take part in the whole research process and provide the satisfactory responses.

Particularly, raw score data combined with demographic data and CEF participation records can provide an accurate picture of the CEF programme's impact on adult learners. However, data alone are not able to explain whether the CEF is advantageous or not. The educational theories explored in **Chapter 2** allows me to explain what effects the CEF has.

As mentioned in **Section 1.3**, the main research question is divided into five sub-questions, each approached with a different research method to ensure that the limitations of one type of data are balanced by the strengths of another. Fundamentally, the questions are derived from the motivational theories covered in the literature review. Each measurement is of certain factors addressing andragogy and the effectiveness of the CEF programme. The contrasting motivation theories offer a number of possible factors that could inspire students to join the programme, as well as interpretive frameworks through which to view the answers. These theories focus attention on the primary differences in motivation between the CEF participants and the non-CEF participants and assist in analysing both the pre-course and post-course questionnaires as well as the semi-structured interviews.

3.3 Review of Research Questions

Table 3.1 outlines the questions discussed in **Section 1.4** with an additional column which illustrates the methodology of data collection.

Main Research Question (RQ)		
In what ways does the CEF affect adult learners studying at a tertiary institute in Hong Kong?		
Sub-Questions (SRQs)	Means of Data Collection	Research Approach
1. To what extent does the CEF enhance students' motivation to learn before enrolling in the programme?	Pre-course questionnaire	Descriptive Statistical Analysis, Likert Scale
2. What are the main sources of motivation to learn for those adult learners who are applying for the CEF compared with those who are not applying?	Pre-course questionnaire and Interview	Mixed (Triangulation), Likert Scale
3. Is there any evidence to suggest that the CEF students perform better and achieve a better outcome compared with those non-CEF students in the same course?	Assessment results and Attendance rates	Descriptive Statistical Analysis
4. What major benefits and limitations can be recognised in the CEF programme?	Post-course questionnaire and Interview	Mixed (Embedded)
5. Will the CEF students have any intention to pursue further education or training in the future after completion of the programme?	Post-course questionnaire and Interview	Mixed (Embedded and Triangulation), Likert Scale

Table 3.1 Research Questions and Methodologies

Following the sub-questions in order, this study will collect and analyse its data as follows:

1. To what extent does the CEF enhance students' motivation to learn before enrolling in the programme?

A pre-course questionnaire composed of 'true and false', ranked lists and short answers allowed me as a researcher to see relevant facts about the participants' lives in numerical terms, such as: income, educational achievement, age and the costs associated with enrolling in the course. These questions establish a baseline, especially after respondents are separated into two groups – the CEF recipients and the non-CEF recipients. These questions and subsequent analysis may yield some information about the motivation of respondents. However, the next set of questions use ranked lists to address the heart of the question. Noticing how each respondent (a CEF participant or a non-CEF participant) ranks motivating factors differently reveals a numerical view of how the CEF impacts on motivation. Subsequently, these findings can be cross checked with the initial baseline findings to determine whether any extenuating trends are having an impact on the data. For example, the baseline questions determine a higher correlation between age and motivation than CEF enrolment and motivation; the data can be reapplied from a new baseline using age to determine new distinctions between CEF participants and non-CEF participants.

2. What are the main sources of motivations to learn for those adult learners who are applying for the CEF compared with those who are not applying?

In a similar way, this sub-question will be answered with a pre-course questionnaire composed of 'true and false' ranked lists and short answers that both establish and then measure the baseline demographic information for the CEF participants and the non-CEF participants then compare those findings to motivation-based questions in order to draw a picture of differing main sources of motivation. This question hinges more upon differing analysis of the baseline than the last. As pointed out, what if it is found in the question that another factor apart from the CEF has

a higher influence on motivation? It is necessary to properly discern which factors emerge because of the CEF and which appear unrelated. Essentially, this question necessitates an eye in analysis for the ‘stories’ that emerge from the survey results. Any trends that emerge that seem to affect specific indicators of motivation must be marked and considered. The second part involved in answering this question is far more quantitative. Direct questions pertaining to the participant’s motivational factors in applying for the CEF are expected to arise during the interview process. The purpose of this qualitative data is to hear the more implicit stories the data show; it is significant to verify if the greater trends shown in the survey match with the interview content and to what extent there is a discrepancy between the two. While this is harder to quantify and analyse, it is essential to mark the interview transcripts for key words and phrases dealing with the research question systematically.

3. Is there any evidence to suggest that the CEF students perform better and achieve a better outcome compared with those non-CEF students in the same course?

This question is possibly the easiest to answer as it involves taking the scores and attendance figures of all students (both the CEF and non-CEF participants) at the beginning and scrutinising whether the participants of the CEF programme achieve better outcomes than their peers. Given that only two factors are measured against one factor, it is not complicated to extrapolate an answer. However, the analysis involves examining the data to check if any additional correlation impacts outcome an amount equal to or greater than participation in the CEF.

4. What major benefits and limitations can be recognised in the CEF programme?

This question is primarily addressed quantitatively with a post-course questionnaire. The same baseline is established on a participant basis and a set of questions regarding overall feelings on the CEF is enquired in ranked format. Those questions focus on the perceived effectiveness of the programme as well as the participants’ thoughts about the scope and execution of the

course. The trends revealed in this stage are cross examined with participants' baseline data to conclude who is being served, over-served or underserved by the CEF. On top of that, the semi-structured interviews after completion of the programme inquire about students' views and opinions regarding the benefits and limitations of the CEF programme. Notably, collecting students' views is essential as their opinions are utilised to confirm or deny the data found in the questionnaires. Additionally, if students' opinions are sufficient, they can form the backbone of a solid analysis and provide a comprehensive policy suggestion.

5. Will the CEF students have any intention to pursue further education or training in the future after completion of the programme?

The most effective method to obtain the answer to this question is to inquire whether the CEF participants plan to continue their education or not after the programme at the interview stage. Unquestionably, this primary source of data collection is the most straightforward and trustworthy. The post-course questionnaire also reveals if the CEF impacts further education by breaking up the question into components in advance.

3.4 Research Hypothesis

The section above demonstrates how qualitative data and quantitative data can support each other. It can be noticed that quantitative data in this study will assist in building up the in-depth questions afterwards while qualitative data will help interpret the quantitative data. Both sets of data adopted in a blended approach is necessary to define hypotheses within the context of the research question in order to define the relationship between the variables. Hypotheses tend to fit in a quantitative approach. However, they are used to guide the discussion in this blended setting. The following sub-questions are shown below to illustrate the hypotheses which are predicted and predicated by the literature review.

1. To what extent does the CEF enhance students' motivation to learn before enrolling in the programme?

According to the McCluskey's theory of margins, the demands of life on an individual (load) are offset by the resources available to that individual (power). Load is the demands made on a person by self and society, and power is the resources a person commands to cope with the load (1963). If considering further education as a positive commodity or an investment, educational achievement, and all the associated benefits produce additional 'power' in an individual. Meanwhile, the costs associated with receiving an education, be they literal monetary costs or costs of time and effort, add to the 'load' of receiving education. Assuming in an individual the 'power' outweighs the 'load', the benefits will outweigh the costs and the individual will seek or continue to seek education. The CEF changes this equation by subsidising the cost, or 'load' of education. This load reduction does come with some strings attached – having to maintain passing scores may in itself be considered a load, but a lesser one.

2. What are the main sources of motivations to learn for those adult learners who are applying for the CEF compared with those who are not applying?

Based on economic cost benefit analysis, it seems safe to conclude that the CEF will attract additional motivation based on the money it provides. Hong Kong has a vastly under-saturated market for commodities and education (Cheung, 2006) and education is an incredibly efficient investment despite any market state (Nica, 2012). As an incentive programme, the CEF will subsidise education for those who already desired it but are not able to afford it. The relationship between the CEF and overall motivation will be positive, and primarily due to lack of funding. It is predicted that participants will cite relationships, personal development and curiosity in their motivational profile, but consider all of these motivators to be predicated on financial ability.

3. Is there any evidence to suggest that the CEF students perform better and achieve a better outcome compared with those non-CEF students in the same course?

Combining economic cost-benefit analysis with Theory of Margins (1963) leads to a concept which is similar to Vroom's Expectancy Theory (1964). Assuming CEF participants are aware of their 'ownership' of their tasks which they will only be rewarded if they perform satisfactorily, they will respond with higher productivity. On top of that, the application procedures behind the CEF make it clear that the funding will only be accessible upon passing the programme. Based on the factors above, the CEF participants will have more reasons to achieve a better outcome in terms of academic results and attendance records compared to the non-CEF participants.

4. What major benefits and limitations can be recognised in the CEF programme?

It is assumed that the benefits of the CEF strongly outweigh the drawbacks. However, the question is, how much does it help? Referring to SkillsFuture, an initiative operates on a wider scope with a higher funding budget can benefit more people in Singapore (Yorozu, 2017). It is assumed that the benefits provided by the CEF include an increase in the number of students enrolled in tertiary education and an improvement in their results. However, the benefits are limited by the scope and budget of the funding itself.

5. Will the CEF students have any intention to pursue further education or training in the future after completion of the programme?

Based on the principles of andragogy, it is assumed that independent of the CEF, students who participated in the CEF will be more likely to pursue further education in the future. In his model of lifelong learning (1973), Knowles describes the development of a spiral of 'Learning Projects'. Adults learn best when given 'ownership' of their own education and do not learn a subject so much as they learn how to learn (Knowles, 1975). Thus, a proper adult education course imparts more than situational knowledge on its students: it will spark more independence,

creativity and the capacity to learn more in a self-directed way. It is assumed that the CEF is a trigger, provoking a passion for lifelong learning that snowballs into more eventual consumption of education among participants.

3.5 Sources for Data Collection

Generally, the two branches of data collection, qualitative and quantitative, each include their own approaches across different mediums. A qualitative inductive research approach might include focus groups, individual interviews and observations. On the other hand, quantitative data collection methods include close-ended surveys, statistical gathering and any source that organises numbers in a logical and objective way. In this study, using mixed data sources, the data collection process is predicated on combining these two components: interviews and questionnaires, the former mostly targeted towards participants of the CEF and the latter for both the CEF participants and the non-CEF participants. Additionally, the students' assessment data will be analysed to discover what variables had an impact on course success. In total, therefore, there are five sources of primary data collection: a pre-course questionnaire, a post-course questionnaire, an interview, students' final scores, as and attendance figures.

3.5.1 Primary Sources

The primary sources of this study, two questionnaires, one interview and academic transcripts collected from 65 respondents (N=65) students from the course of 'Principles of Marketing' (POM) delivered at a tertiary college where I was employed in 2019. Each student had a choice of just answering the questionnaires or answering the questionnaires followed by an interview. The data collected from the survey is intended to give a basic understanding of the students' backgrounds and motivation. The answers also help direct the interview content and questions. The interview, meanwhile, was intended to be an extension of the survey for seeking details of why the subject decided to make a specific decision. The transcripts were used to establish how the variables indicated in the surveys impacted on course outcomes.

The pre-course questionnaire was given to the students to fill independently, along with an option to be interviewed. The questionnaire itself was also entirely optional. The students would face no repercussions for not turning in a post-course questionnaire or opting into an interview (or not). Upon completing the pre-course questionnaire, the students in question are hereafter referred to as ‘respondents’ to differentiate them from the rest of the class.

After completion of the course, respondents were given a post-course questionnaire. This was again presented as optional. The post-questionnaire was completed independently and returned to me. In tandem with the questionnaire time frame, the interviews were also performed after the course, in a closed and private environment with just the respondents and me. The interviews were performed in a variable time frame from between 30 minutes to an hour.

After the interview, the subject’s interview transcript was provided to the participant, and they were asked to read their transcripts carefully to ensure the answers given in the interview were accurate. This provided them another opportunity to ponder the interview questions again and to clarify any points. Any additional changes or clarifications were added to the transcript.

Finally, the subject’s attendance and passing rates were used to form a complete picture of the CEF’s impact on academic performance. The use of these statistics was made transparent to the respondents, and their consent obtained; the data were used anonymously. Five students undertook the oral interview.

3.5.1.1 Setting the Criteria for Respondents

As stated, all respondents are students from the POM course. To a degree, all students are considered passive respondents, i.e., their non-responses to the survey were recorded and their scores used at the end of the course as part of establishing average benchmarks for the class. Students could opt in as active respondents by turning in the pre-course questionnaires and then opt in further by choosing to participate in a round of interviews. Finally, respondents could again opt in or out of the final post-course questionnaire. Adult learners eligible for the CEF in Hong Kong were considered

potential respondents irrespective of their age, race, ability, gender and employment status. It is worth mentioning in this context that perceptions of motivation possessed by the learners likely differ according to their age and experiences, which can provide vital data pertaining to the CEF. Allowing a diverse cross-section of respondents is essential from a socio-economic point of view.

3.5.1.2 Basis for Data Analysis / Method for Results Calculation

This study will analyse its three quantitative data sources (pre-course and post-course questionnaires as well as course outcomes including assessment results and attendance rates) via a matrix analysis framework and the quasi-statistical framework, and two analytic tools focused on providing empirical evidence that addresses the study questions. Data derived from these analytic tools is calibrated to reduce biases and minimise confusion between correlation and causation fallacies. The matrix analysis framework organises data points in relation to one another, allowing me to quickly see trends or outliers among the set. Increasing matrix vectors or changing the base variables and redrawing the matrix derived from previous findings is another useful tool to test the validity of correlations. A quasi-statistical framework will then be deployed to allow for the easy dissemination of findings into facts. Statistical accounting is also a powerful tool that will allow me to narrow in on certain data points in the matrix for closer investigation. These tools mentioned above should provide a logical flow of ideas adaptable to tie three sources of data points together at key intersections, while keeping the data derivations mutable and intelligible.

It should be noted that obtaining empirical evidence through an interview process, however, can be quite challenging due to the subjective nature of all gathered data. The subjects' own experiences temper the raw data, while my experiences colour interpolation. With these concerns, this research study also focuses on secondary from the literature review to round out the relevant factors the interview will focus on. For example, each of the motivational theories covered contributes factors each respective author assumed responsible for driving educational responses.

Economic theory might dictate we look towards financial incentives, while ERG theory would also remind me to keep the participant’s employer or employment history in mind.

The framework involves coding interview transcripts based on these key topics (and further derived sub-topics) that are demonstratively linked to the research questions. Coding the interviews allows me as a researcher to extrapolate the frequency of certain ideas and place them in a statistical matrix to gain insight as to the importance of each variable. Focusing the numerical frequency of each idea is essential as it can be weighted in a way that the studied motivational factors can then be compared to the questionnaire results to extrapolate similarities and differences.

The coding of the interview transcripts is shown as **Table 3.2**, based on ‘motivational factors’, ‘learning experiences and outcomes’, ‘plans for future education’ and ‘programme opinions and suggestions’ as well as including sub-criteria helpful for organising ideas:

<p style="text-align: center;">Motivational Factors</p>	<ul style="list-style-type: none"> ■ Social Group (e.g., Family, Friends, Colleagues etc) ■ Job Enhancement and Work Environment ■ Employability and Competition ■ Self-Improvement ■ Employer ■ Personal Interest ■ CEF
<p style="text-align: center;">Learning Experiences and Outcomes</p>	<ul style="list-style-type: none"> ■ Andragogy in Learning ■ Self-improvement (e.g., Self-confidence / Self-esteem etc) ■ New Knowledge and Skills ■ Career Advancement
<p style="text-align: center;">Plans for Future Education</p>	<ul style="list-style-type: none"> ■ Continuing Education ■ Seeking a Degree

Programme Opinions and Suggestions	<ul style="list-style-type: none"> ■ Able to Facilitate Learning Motivation of Citizens in HK ■ Insufficient Amount of Funding ■ Funding Increased by Inflation Rate ■ Funding Adjusted by Percent / Proportion of Tuition Fees ■ Additional Resources and Programmes to Meet Society Demands
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Table 3.2 Coding of Interview Transcripts

3.5.1.3 Semi-Structured Interview Questions

The following is a guide to the interview questions, semi-structured to allow for a natural flow of conversation. Each question related in some way to one of the research questions and all should involve a reply somehow connected to the factors of motivation listed above. Follow up questions may deviate slightly from the wording in the question, as long as key words and phrases remain the same, but follow-up questions may be more free form in their composition.

The interview was constructed after the results of the pre-course and post-course questionnaire had been turned in and analysed. The semi-structured interview questions in **Appendix VIII** indicate information derived from the findings pertinent to the programme that warranted special instruction, observation, or follow-up.

3.5.1.4 Questionnaire Construction

Each questionnaire was constructed with two goals in mind: creating a subject baseline and determining the motivation of each subject. Specifically, the first nine questions in each questionnaire gather basic demographic information, such as: gender, age, resident status, income, employment status, educational achievement, CEF status, cost of the course and if the course was compulsory. Note that while this may provide the ‘baseline’ for participants, variation in these answers will be subject to analysis. These questions will be essential in determining basic demographic differences between participants in the CEF, as well as what effect demographic has on outcomes in the CEF. It

also allows me to separate subjects into two easily comparable groups (CEF participants versus non-CEF participants, male versus female, etc.).

The next questions involve self-reported motivational factors that reach the centre of the study. The questions allow the participants to rank factors from least important to most important. The answers provided by the subjects generated comprehensive data which demonstrates how the ranks shifted before and after the course. Additionally, the integration of raw score data and coded interview results creates more detailed and solid information.

Finally, the post-course questionnaire contains questions that address the CEF as a whole and answers in retrospect. These questions should provide insight into how former students view the programme as alumni, or more interestingly, having not used the fund for their own benefit.

3.5.1.5 The Questionnaires

Two Questionnaires in **Appendix VI and VII** were distributed to student participants, one before the course 'POM' was administered while the other after completion.

3.6 Ethical Considerations

Ethical considerations have emerged as a significant aspect of any kind of social research, especially when engaging with human respondents. An outstanding researcher requires providing with an in-depth and generalized understanding of the problem identifying almost all the factors related to the research objective with the purpose of the good of the society. This includes emphasising the privacy of the respondents or human subjects to avoid harm caused to the research participants affecting their right for privacy. In the qualitative research approach, ethical considerations are termed to be quite significant as the approach is observed to be highly dependent on the skills and understanding of the researchers (Gallagher, 2005).

This study began by seeking and receiving approval from the School of Education Research Ethics Committee at the University of Nottingham in **Appendix XII**. Privacy and consent were guiding features in gathering data from participants. Each subject was allowed to opt in or out of the

questionnaires or interviews at any time and all the responder's personal information is kept separate from any identifying criteria. Additionally, all subjects were informed of the aims and purposes of the study in order that they could acknowledge their own role in the study freely and without reserve.

The interviews themselves were conducted on a consensual basis with a promise of privacy and efforts were made to meet respondents in a natural, comfortable setting. As a researcher, I took care to separate any social context they might be bringing (i.e., prior relationships) so as to not sully the data or make the subjects uncomfortable. As for my own prior relationships, the POM class from where the participants were chosen from was taught by my colleague. I have no prior relationship with any of the students. However, I have had to be careful not to let my impression of the course, as reported by the participants, be tempered by my pre-existing (and largely positive) impression of my colleague.

Finally, it is hoped that my own bias in the course of the study can be minimised, by relying primarily on matrix analytic and statistical frameworks, in order to reach conclusions. With the quantitative data, a number of constraints such as the semi-structured interview framework and the transcript coding framework are employed to minimise the subjective nature of the data. Additionally, the coded transcripts are released in the study's **Appendix IX** so that other students' results may reach the same conclusion.

3.7 Data Gathering

The subjects comprised in total 65 students in a course called 'Principles of Marketing' (POM) delivered in 2019 at a tertiary college in Hong Kong. Among these 65 students, 40 applied for the CEF while 25 did not, implying 61.5% of subjects could speak to the efficacy of the CEF, while the other 38.5% of subjects comprise a group that allowed measurements to determine where outcomes may differ between the CEF participants and the non-CEF participants.

The return rate for the pre-course and post-course questionnaires was satisfactory at around

70% and 60% respectively. Forty-five students responded to the pre-course questionnaire and 39 students to the post-course questionnaire, marking a 13% decline between questionnaire responses. Of the pre-course respondents, 38 applied the CEF. Thus, 95% of the responses are coming from CEF participants. Of the post-course respondents, 32 were CEF participants and seven were non-CEF participants, thus 80% of the respondents applied the CEF. This figure should provide a logical basis for investigating the main sources of motivation for adult learners and examining how adult learners' perceptions of the CEF differed before and after the course. Unfortunately, the response rates for non-CEF participants were quite low and, while there are still sufficient to draw general conclusions about their motivations, it may imply something that the non-CEF participants were less likely to respond to either survey, in general. These effects will be discussed and analysed in detail in **Chapter 4**.

Last but not least, it should be noted that the preliminary data collection was completed in 2018 before this updated research. Some technical terms and unfamiliar wordings of the questions were changed and clarified because of the shifting CEF policy in Hong Kong. For example, the amount of the CEF endowment in both sets of questionnaires was amended from \$10,000 to \$20,000. In addition, an answer option for Q12 in the post-course questionnaire 'achieved self-actualisation beyond my job' was replaced by 'got more satisfaction out of the work I was doing'. In fact, the effects of this 'unplanned piloting' were minimal. The method of data collection and the interpretive approaches are consistent with the updated research findings.

CHAPTER FOUR: RESEARCH FINDINGS

This chapter includes the findings of the study which organised visually in table format and accompanied with an interpretation of results and outcomes. Subjects for the data collection are the adult students of the course ‘Principles of Marketing’ (POM) at a tertiary college in Hong Kong. The data for students’ learning outcome include assessment results and attendance rates in the same programme. On top of that, the two sets of questionnaires, namely: a pre-course questionnaire (PRCQ) and a post-course questionnaire (POCQ) as well as semi-structured interviews are formulated to illustrate the research findings.

4.1 Principles of Marketing Outcome Indicators

The following data shows the learning outcome of 65 students on the POM course at a tertiary college in Hong Kong. It includes the overall assessment results and attendance records of each student. The purpose of including this data is to discover if the CEF students tend to have high attendance and high marks in comparison with the non-CEF students.

Table 4.1 indicates the students’ results of the POM course which includes the participants of the CEF and the non-CEF group.

N=65 students in the course of ‘Principles of Marketing’

Students	Grades				
	High Distinction	Distinction	Credit	Pass	Fail
CEF	1	16	15	8	0
Non-CEF	0	2	2	13	8

Grades: High Distinction = 85-100, Distinction= 75-84, Credit= 65-74, Pass = 50-64, Fail= 0-49

Table 4.1 Assessment Results of CEF and Non-CEF Students in POM

Academic achievement was strong amongst the CEF participants who were sampled. Of 65 students, the 40 CEF participants had a 100% pass rate and, on average, stood to receive high ‘credit’ or low ‘distinction’. Among the 25 non-CEF participants, the overall pass rate was 68% and most

students who passed only did so with a relatively low ‘pass’ score. For the entire class, the mean score was 61%, or low ‘credit’. Adjusting for the CEF participants, the mean score was 69%. The non-CEF participants scored a mean 49%. In this course, it appears that students who were in receipt of the CEF funding received a 40% increase in total scores compared to students who were not funded.

Table 4.2 shows the differences in participation rates of CEF participants and non-CEF participants in the same course.

N=65 students in the course of ‘Principles of Marketing’

Students	Participation Rates										
	100%	90%	80%	70%	60%	50%	40%	30%	20%	10%	0%
CEF	14	18	8	0	0	0	0	0	0	0	0
Non-CEF	3	8	8	0	1	1	0	4	0	0	0

Table 4.2 Participation Rates of CEF and Non-CEF Students in POM

Total participation rates showed a strong positive impact on the CEF participants. In all, the attendance rate for all students, regardless of the CEF status, was 86%. The CEF participants alone, however, had a 92% attendance rate. The non-CEF participants had a 76% attendance rate. This indicates that in this course, CEF students achieved a 21% higher attendance rate than non-CEF students.

4.2 The Pre-Course Questionnaire

The pre-course questionnaire in **Appendix VI** collects 45 respondents and asks 11 total questions. Eight involve gathering demographic information, while the last three involve the motivation behind participating in the CEF.

4.2.1 Establishing a Demographic Baseline

This section is an analysis of the demographic breakdown of the students including the CEF and the non-CEF applicants. The goal of this section is to establish an ‘average’ CEF applicant and reveal broad demographic differences between subjects who choose to apply for the CEF or not.

Gender, age and income are the three main demographic distinguishers chosen for this study. Of these, age was chosen as a key factor in noting what ‘stage’ of adulthood is most drawn to and most impacted by the CEF. Income was chosen to measure if financial need is a strong motivator in CEF participation. It is hypothesised that the programme draws those who are eager to receive higher education but cannot afford it; income data will help the research answer the hypotheses and provide additional insights on intersectionality of public funding programmes and wealth. Note additionally, that the cross-segment of students in this study represent less a cross-section of adult learners in Hong Kong who may or may not apply for the CEF, and more a cross-section of adult learners in Hong Kong with an interest in the course, ‘Principals of Marketing’ who may or may not apply for the CEF. In other words, demographic information will help this paper draw conclusions about the motivations behind and effects of the CEF, but as applied locally rather than universally.

Table 4.3 illustrates the gender of CEF and non-CEF applicants in number and percentage in the POM course.

N=45 respondents of the pre-course questionnaire

Students	Gender		Percentage of Gender	
	Male	Female	Percent of Male	Percent of Female
CEF	16	22	42%	58%
Non-CEF	4	3	57%	43%

Table 4.3 Gender of CEF / Non-CEF Applicants in POM

As shown in **Table 4.3**, 58% of the CEF participants were female, compared to 42% who were male. Meanwhile, 43% of the non-CEF participants were female compared to 57% who were male. Females thus, participated in the CEF at an 88% rate, while males participated at an 80% rate. With N=45, a T-test analysis would suggest that there is little disparity between the genders in overall likelihood to apply for the CEF.

Table 4.4 indicates the number of different age groups of CEF participants and non-CEF participants in the POM course.

N=45 respondents of the pre-course questionnaire

Age	No. of CEF applicants	No. of Non-CEF applicants
18 ~ 23	10	1
24 ~ 29	12	3
30 ~ 34	9	2
35 ~ 39	3	1
40 ~ 44	3	0
45 ~ 50	1	0
51 or above	0	0

Table 4.4 Age Group of CEF / Non-CEF Applicants in POM

Students from the ages of 18-23 were 10 times more likely to apply for the CEF to their course than students who were not CEF-funded. Twenty-six percentage of the CEF participants came from this age range while making 24% of the population. Students aged from 24-29 were the most likely age group to apply for the CEF than not, and 31.5% of participants came from this age range while making 33% of the population. Students aged 30-34 were roughly four and a half times more likely to apply for the CEF and composed 24% of all CEF participants while making 24% of the population. Students from the ages of 35-39 were three times more likely to apply for the CEF and composed 8% of all CEF participants while making 9% of the population.

The overall proportions of the CEF participants to the non-CEF participants demonstrates that the CEF demand stays mostly constant at least until the age of 40 years and up, after which there is insufficient data to draw any conclusions from this group of 65 students.

Table 4.5 illustrates the income brackets of CEF learners compared to non-CEF learners in the POM course.

N=45 respondents of the pre-course questionnaire

Monthly Income	CEF Learners (38)	Non-CEF Learners (7)
Below HK\$10,000	3	0
HK\$10,001~ HK\$20,000	22	2
HK\$20,001~ HK\$30,000	10	2
HK\$30,001~ HK\$40,000	3	2
HK\$40,001~ HK\$50,000	0	0
HK\$50,001~ HK\$60,000	0	1
More than HK\$60,000 or above	0	0

Table 4.5 Monthly Income of CEF Learners / Non-CEF Learners in POM

Regarding the income data of participants, 66% of the CEF participants come from the lower end of self-reported income. 8% reported earning less than HK\$10,000, while 58% report making between HK\$10,001 and HK\$20,000. 26% report higher earnings. In this group of students, there is a majority who both earn less than the mean of income and apply for CEF funding. Meanwhile, the non-CEF participants held an even distribution, except in the HK\$10,000 range. This implies the same connection; that lower demand for financial assistance is higher as income is lower. However, the low sampling size of participants prevents speculation of a causal relationship.

4.2.2 Establishing a Baseline for Motivation

The final three questions of the post-course questionnaire in **Appendix VII** deal with motivation, more specifically in the context of gauging why (or why not) a subject chose to apply for the CEF to their course. It is also necessary to see where the students started their experience in terms of motivation so that the post-course questionnaire can measure how (or if) the impetus for their motivation changed during their studies.

Table 4.6 shows the motivational factors that influenced the CEF participants to pursue further education in the POM course.

N=38 CEF students of the pre-course questionnaire

Importance / Groups of People	Very Important (5)	Fairly Important (4)	Important (3)	Slightly Important (2)	Not at all Important (1)
Friends, Relatives or Work Colleagues	8	16	5	6	3
My Employer or Professional Body	12	12	7	5	2
Government Promotion of Lifelong Learning	8	9	13	4	4
School or Evening Institute	6	8	9	11	4
Newspapers / Magazines / Websites	1	5	11	8	13

Table 4.6 Rated Importance of Motivational Factors on Students Decision to Pursue Further Education Among CEF Participants in POM

The most consistent finding was that 42% of students view the factors of ‘friends, relatives or work’ as ‘fairly important factors’. Adding in those who indicated the category as ‘very important’, the percentage jumps to 63%, meaning that social connections account for over half of all students’ decisions to pursue further education. Barely 7% did not consider it important at all.

The factor of 'my employer or professional body' had the second greatest impact on the subjects, with 63% of them polling it as 'very important' and 'fairly important'. The fewest number of subjects, at 5%, indicated this factor was 'not important at all'.

The factor 'government promotion of lifelong learning' most resembles a bell curve seeming to indicate a level of consistency. However, this factor has the strongest variance between the CEF and the non-CEF participants, 58% of them polling it as 'fairly important' and 'important'. The data implies that even to the most CEF participants, other factors remained more important.

Most subjects indicated the school itself was only 'slightly important', By T-test analysis, it is the most consistent, which means that it is the factor that owes the most to students internal and preconceived biases; it is also the factor least predicated on external motivators such as the CEF.

The final indicator, 'newspapers, magazines, websites', is undoubtedly the least influential. 55% of subjects indicated it was 'slightly important' to 'not at all important'. Only a single student indicated it was very important. This could be identified as a possible growth area for the HKG in future promotions.

Table 4.7 depicts the motivational factors that influenced non-CEF participants to enrol in further education in the POM course.

N=7 non-CEF students of the pre-course questionnaire

Importance / Groups of People	Very Important (5)	Fairly Important (4)	Important (3)	Slightly Important (2)	Not at all Important (1)
Friends, Relatives or Work Colleagues	2	2	1	2	0
My Employer or Professional Body	1	2	3	1	0
Government Promotion of Lifelong Learning	0	0	2	3	2
School or Evening Institute	2	1	0	2	2
Newspapers / Magazines / Websites	0	0	1	2	4

Table 4.7 Rated Importance of Motivational Factors on Students Decision to Pursue Further Education Among Non-CEF Participants in POM

When adjusted to only reflect non-CEF participants, the importance of different groups of people in influencing higher education stays mostly constant. As above, peer groups, employers and the school itself are the strongest motivators with government promotion of lifelong learning and newspapers or magazines being the least likely to influence subjects. If there is any difference, no non-CEF participants reported the indicator ‘government promotion of lifelong learning’ as fairly important to very important while 45% of CEF learners did. This seems self-explanatory, non-CEF learners

taking the course were able to do so by funding it independent of government programmes, yet it is still a marked difference.

Table 4.8 shows the factors ranked by importance which influenced learners to enrol in the POM course regardless of the CEF status.

N=45 participants of the pre-course questionnaire

Importance / Factors	Very Important (5)	Fairly Important (4)	Important (3)	Slightly Important (2)	Not at all Important (1)
Funding (CEF) provided by the Government	16	4	10	7	8
Learn something new / personal interest	14	17	6	5	3
Improve my ability to do my current job	17	14	10	0	4
Meet new people	2	4	14	15	10
Increase my self- confidence	6	15	16	8	2
Get a new job or new career / promotion	14	15	12	3	1
Increase my income	12	17	12	3	1
Get a higher qualification	22	13	8	0	2

Table 4.8 Factors Effecting Learner's Decision to Take Part in POM

By and large, responses between CEF and non-CEF participants were fairly uniform in learner's decisions to take part in the course. Overwhelmingly, the desire to 'receive a higher qualification' with 78% indicating it was at least 'fairly to very important'. Only 4% indicated it was not a consideration. A similar indicator, 'improve my ability to perform my current job' ranked as the second most important with 69% deeming it 'fairly to very important'. Of course, knowing how to perform a job better and having the qualifications to show for it are two sides of the same coin.

The third highest indicator 'funding by the government' also happened to be one of the only indicators with noticeable variance between the CEF and the non-CEF respondents. Predictably, the CEF participants reported that the fund was 'important to very important', while the non-CEF participants reported it was 'not important'.

Three more indicators had the same basic distribution pattern, 'learn something new', 'get a new job/promotion' and 'increase income' were all skewed strongly towards 'very important', but still fell short of the top indicators.

'Increasing self-confidence' is the first indicator to be skewed more towards the middle of the scale, with 58% ranking it less than fairly important. The only indicator to show a negative connection was 'meeting new people' which featured 56% of subjects reporting little to no importance and only 13% indicating 'fairly to high importance'.

4.3 The Post-Course Questionnaire

The set of post-course questionnaires in **Appendix VII** was distributed to the research participants after completion of course but before final grades were determined. It collects data from 39 subjects, 32 CEF participants and seven non-CEF participants. There are, in total, 18 questions, 11 involve gathering demographic information, three ask the CEF participants specific questions about their motivations, while the last four involve measuring the perceived effectiveness of the CEF among subjects.

Table 4.9 indicates the learning experience reported by the CEF-participants, as reported in the post-course questionnaire for the POM course.

N=32 CEF students of the post-course questionnaire

Extent of Agreement / Learning Experience	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2)	Strongly Disagree (1)
Developed my knowledge / skills in the subject	20	9	3	0	0
Helped me to keep my brain active	16	10	5	0	1
Made new friends / meet new people to extend my network	6	11	12	2	1
Improve my ability to do my current job	7	12	10	2	1
Helped me to do something efficient with my time besides work / leisure	7	16	4	1	4
Was enjoyable / interesting	9	13	9	1	0
Boosted my confidence / Increased my self-esteem	12	18	2	0	0
Encouraged me do more learning	16	9	7	0	0

Table 4.9 Learning Experience of CEF Students in POM

Among the CEF participants, the top learning experience reported by students involves the indicator ‘Boosted my self-confidence’. A full 94% reported some amount of increase to their self-

esteem, a surprising figure considering only 58% indicated it was 'fairly important' to 'very important' on the pre-course questionnaire.

Closely behind, 91% of subjects reported that the course 'developed their knowledge'. Other indicators, such as 'was enjoyable', 'helped me keep my mind active' and 'encouraged me to do more learning' held largely positive rates with few respondents reporting negatively. 'Helped me to do something efficient with my time besides work/leisure' was the exception, having an overall positive value but containing a 16% rate of 'disagree' or 'strongly disagree' compared to other indicators with 0%-3% in the same category.

59% reported that the course 'helped them perform better in their job', odd considering no subject disagreed that they would not be likely to continue future learning. The most negative response fell in the indicator 'Made new friends/meet new people to extend my network'. While only 10% said they disagree, only 53% agreed the course helped them achieve this goal. Still, this is higher than the 44% that indicated it was a motivator for them to try and achieve higher learning.

Table 4.10 illustrates the learning outcomes reported by the CEF-participants, as reported in the post-course questionnaire for the POM course.

N=32 CEF students of the post-course questionnaire

Extent of Agreement / Learning Outcome	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2)	Strongly Disagree (1)
Learned new skills for my job	5	18	7	0	2
Was able to do my job more efficiently	4	15	11	1	1
Got a new job / promotion	3	6	16	3	3
Stayed in my job, which I might have lost without this learning	4	10	11	3	4
Was able to deal with the current work problems	4	14	10	0	4
Got more satisfaction out of the work I was doing	4	14	9	4	1
Earn more money (wage, commission, bonus or other sources of income)	5	8	14	3	2

Table 4.10 Learning Outcome of CEF Students in POM

Of all the questions on the questionnaires, this one had the most consistent indicator distribution. In all, ‘learned new skills for my job’ had the highest positive feedback with 72% agreeing, followed by ‘able to do my job more efficiently’. However, all indicators follow a trend of around 56% positive responses, 31% neutral responses and 13% negative responses. The most negatively correlated

indicator was ‘stayed in my job’, with 44% agreeing in some fashion and the most neutral answer was ‘earn more money’ at 44%.

Table 4.11 shows the learning outcomes reported by the non-CEF participants, as reported in the post-course questionnaire for the POM course.

N=7 non-CEF students of the post-course questionnaire

Extent of Agreement / Learning Outcome	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2)	Strongly Disagree (1)
Learned new skills for my job	0	3	3	1	0
Was able to do my job more efficiently	0	6	1	0	0
Got a new job / promotion	0	3	2	1	1
Stayed in my job, which I might have lost without this learning	1	3	1	1	1
Was able to deal with the current work problems	1	3	3	0	0
Got more satisfaction out of the work I was doing	1	4	1	1	0
Earn more money (wage, commission, bonus or other sources of income)	0	3	3	0	1

Table 4.11 Learning Outcome of Non-CEF Students in POM

Compared to the CEF participants, the non-CEF participants weighted overall slightly more neutral, but not by much. ‘Was able to do my job more effectively’ won out among positive indicators at 86%, while ‘got a new job/promotion’ had the lowest positive rate at 43%. The overall positive response rate is 58%, negative is 14% and neutral is 28%. The distribution is similar to the CEF participants, leading some credence to the theory that CEF participants and non-CEF participants may be a false dichotomy, as many non-CEF participants have previously tapped into the CEF.

Table 4.12 indicates the perceived effectiveness of the CEF programme in facilitating continuing education for society in Hong Kong among the CEF and the non-CEF participants in the POM course.

N=39 participants of the post-course questionnaire

	Extent of the Agreement				
Students	Strongly Agree	Slightly Agree	Neither Agree nor Disagree	Slightly Disagree	Strongly Disagree
CEF	11	15	5	1	0
Non-CEF	0	6	1	0	0

Table 4.12 *Extent of Agreement with the Statement: ‘The Implementation of the CEF Helps Facilitate Learning Motivation of Society Members in HK’ in POM*

Overall, there was overwhelming support among all subjects that the CEF helps Hong Kong society, at least in respect to its educational goals. Only one subject disagreed and 82% thought it was helpful in some way. Respectively, 81% and 86% of the CEF participants and non-CEF participants agreed. While the rate of approval among the non-CEF participants was slightly higher, not a single non-CEF participant agreed strongly, while 34% of the CEF participants agreed strongly.

Table 4.13 compares the perception of the CEF award amount among the CEF and the non-CEF participants in the POM course.

N=39 participants of the post-course questionnaire

Students	Sufficient	Insufficient
CEF	11	21
Non-CEF	1	6

Table 4.13 Suitability of the CEF Award Amount in POM

Overall, subjects agreed that the amount awarded via the CEF was insufficient at 67%. Oddly however, while 34% of the CEF participants expressed that the award amount was sufficient, only 14% of the non-CEF participants shared the sentiment, expressing a great concern that funding should be higher, and it is essential to discover the reasons. Some students wrote in their questionnaires on the ‘are you applying for the CEF’ question ‘already applied in the previous course’. A number of the non-CEF participants are the CEF participants that had merely used their fund allotment at the previous time. This may be the single most important finding that definitely demonstrates how widely used the fund is. Undoubtedly, students who used the fund and are still seeking education would indicate the award amount is insufficient.

Table 4.14 compares the likelihood of pursuing further education in any capacity over the next two years among the CEF and the non-CEF participants in the POM course.

N=39 participants of the post-course questionnaire

Students	Degree of Likelihood				
	Most likely	Very likely	Fairly likely	Not very likely	Not at all likely
CEF	14	13	5	0	0
Non-CEF	1	2	2	1	1

Table 4.14 Likelihood of Pursuing Further Education, Learning or Training in Next 2 or 3 Years

Among the CEF participants, 100% indicated they would at least be ‘fairly likely’ to pursue further education in the near future, with 44% giving the highest possible positive response ‘most likely’. Among the non-CEF participants, 71% indicated they would be at least ‘fairly likely’ to pursue further education, with 15% indicating they would each ‘not be very likely’ or ‘not likely at all’. It is striking that the distribution of responses varies so greatly between participants and non-participants, but it bears mentioning yet again that N=7 is hardly grounds for blanket generalisations.

Table 4.15 compares the probability of pursuing higher education (*Bachelor’s / Master’s Degree*) in the indefinite future among the CEF and the non-CEF participants in the POM course.

N=39 participants of the post-course questionnaire

Students	Degree of Probability				
	Definitely	Quite likely	Possible	Not at all likely	Definitely not
CEF	18	9	5	0	0
Non-CEF	2	1	2	0	2

Table 4.15 Probability of Pursuing Higher Education (Bachelor’s/Master’s Degree) in the Future

As with above, 100% of the CEF participants indicated they would likely seek a Bachelor’s or Master’s degree in the future and 71% of the non-CEF participants indicated the same. The number of breakdowns is similar to the graph measuring continuing education likelihoods, except an even higher proportion of the CEF participants indicate they will definitely pursue a Bachelor’s or Master’s degree in the future at 56%

To sum up, there are some differences that can be drawn between the CEF and the non-CEF participants in the survey. It can be noticed that the CEF participants tended to be slightly younger and in a lower income bracket. Although these figures do not represent any result of statistical significance, it does show a marked difference of assessment results. The CEF participants record a higher attendance rate and outperform their non-CEF participant counterparts in the survey.

The pre-course questionnaires largely demonstrated that both groups of students enrolled for

the same reasons and the post-course questionnaires revealed that they reported similar outcomes. Differences arose, however, in a couple of categories. The CEF participants tended to report a higher likelihood of continuing their education into the future. On top of that, a considerable portion of the non-CEF participants indicated that the CEF did not provide sufficient funding. This finding is also contextualized by the semi-structured interviews in the following section: some non-CEF participants are the former CEF participants. The complications of this situation will be discussed in **Chapter 5**.

4.4 Interview Data

As discussed in **Chapter 3**, a semi-structured approach was utilized to evaluate the interview data. This approach seeks to measure the intensity of the mentioned subjects, so that data driven conclusions can be drawn from interview transcripts. This was completed by coding the interview transcripts for topics related to the research objective and then weighing whether the topic was incidental or a key discussion point. These were then measured together to have a sense for the most prominent issues to examine if it matches the survey data.

Questions in four broad topics were asked to deal with ‘motivational factors’, ‘learning experiences and outcomes’, ‘plans for future education’ and ‘programme opinions and suggestions’. After the presentation of the raw data, the discussion topics in the interviews are followed to illustrate the fundamental part of the study.

Each instance of one of the topics was given a score of 0, 1, or 2. If the topic was not mentioned in an interview, or not deemed important, it was allocated 0. If it was cited briefly or seemed of secondary importance, it was allocated 1. If a topic came up multiple times or was cited strongly by the subject, it was given a score of 2. These were tallied over five interviews to create a scale of 0-10 in how these factors impacted the interview subjects.

Table 4.16 shows the topics were covered with a score indicating the frequency/intensity of the topics mentioned according to the interviews.

Motivational Factors		Learning Experiences and Outcomes	
Topic	Intensity (1-10)	Topic	Intensity (1-10)
Social Group (e.g., Family/Friends/Colleagues)	9	Andragogy in Learning	8
Job Enhancement and Work Environment	6	Self-improvement (e.g., Self-confidence/ Self-esteem)	9
Employability and Competition	6	New Knowledge and Skills	7
Self-Improvement	5	Career Advancement	5
Employer	3	Plans for Future Education	
Personal Interest	2	Topic	Intensity (1-10)
		Continuing Education	10
CEF	4	Seeking a Degree	5
Programme Opinions and Suggestions			
Topic		Intensity (1-10)	
Able to Facilitate Learning Motivation of Citizens in HK		4	
Insufficient Amount of Funding		10	
Funding Increased by Inflation Rate		4	
Funding Adjusted by Percent / Proportion of Tuition Fees		4	
Additional Resources and Programmes to Meet Society Demands		9	

Table 4.16 Intensity of Interview Discussion Topics

Among discussions about the students, motivation to take the course, regardless of the CEF participation was triggered by ‘social group’. The interviews revealed how much that social pressure is connected to the principles of globalisation discussed earlier in this paper. The research subjects claimed that the normal is a bachelor’s and there is some amount of impetus to gain an education to compete with friends, family and colleagues that are increasingly better educated than they have been in the past. *Participant 2* mentioned “*everyone has a degree or two degrees...this is a really common thing in Hong Kong actually*”. Most of the interview responses suggested that all the subjects are seeking further education because they are required to. It is the trend of the time and they do not want to be left behind. Undoubtedly, this pressure came from separate sources. The following statement shows that high-achieving siblings or intelligent social groups trigger their desire to learn more. According to *Participant 1*, “*among my family members, I am not the only one who has got a degree. (Family pressure) is one of the most important things you know*”. In the case of these participants, these two factors were more connected than they were separate. Should all social influence factors be aggregated, as a Maslow’s Hierarchy of Needs or Six Value Theory might suggest, it would challenge employability for the top ranking.

Regarding the career, both ‘job enhancement and work environment’ and ‘employability and competitiveness’ were stated as the second motivators largely. This was echoed by every interview at multiple stages. *Participant 3* said “*(the course) can help me to do something efficient for my work*”. A frequent point in the interviews was that the baseline for employment in Hong Kong was now a bachelor’s degree, or even advanced job training. *Participant 1* mentioned “*when you compete with other interviewees doing interviews, (without higher qualifications) you lack something*”. As a result of high educational levels in society and global competition, and changing technology, *Participant 5* stated “*in the market there are so many competitors...you have to fight with others and the technology is changing every moment, so we need to keep on the trends of the market with continuing education. We cannot just stay because everything will be changed, we must keep pace with the market*”. This

sentiment was also reflected in the pre-course questionnaire.

Self-improvement, in a holistic or emotionally empowering sense which takes precedence over the benefits to the participant's careers and the idea of 'self-improvement' focusing on 'increase in self-confidence and self-esteem' also reflected by the questionnaires. *Participant 1* answered "I have increased confidence a lot" and *Participant 2* stated "(further learning will continue to) enhance my self-esteem when I work with them (the colleagues)". The improvement in self-confidence is one of the driving factors behind their desire for continuing education. While they did express the need to continue education for purely utilitarian purposes, the self-improvement aspect coloured the whole discourse with a sense of optimism. They are eager to learn more because it feels good and improves their lives. It is suggested that Alderfer's ERG Theory or Ford & Nichols' Taxonomy of Human Goals may be at play more than economic motivation. This form of educational attainment contains a concrete goal. However, the purpose and effect are subjective and difficult to verbalise. Both the pre-course and post-course questionnaires demonstrated that students' self-confidence and self-esteem enhanced dramatically beyond their expectations. As the interviews took place after the post-course questionnaires. It reaffirms that this growth was an essential part of what the participants received for their participations.

As Knowles might have predicted with his spiral of self-learning, and as Maslow may have predicted with his hierarchy, the data from the questionnaires and interviews indicate a link between confidence, ownership of educational materials, and a desire to improve. *Participant 4* cited "I feel that there is self-satisfaction because there were so many assignments from the course and once I completed, I got good marks so I would build more confidence and also get the self-satisfaction so I know I can also handle this kind of things". This statement matches very precisely what the literature review indicated of functional andragogy which experienced by interviewees. *Participant 2* mentioned "THE INSTRUCTOR - is a really good teacher. He used a lot of his own experience to explain some complicated theories" and "listening to his lectures is always fun to me, like learning something new

and knowing something you never know before". Participant 3 also added "*our teacher shared some new cases or maybe examples and I feel that this can be useful for the real life*" and "*the teacher would give us some real examples and inspire us to have discussions during the class*".

Regarding their opinion of future education, all suggested that they would be continuing their education, with an emphasis on gaining a degree. Participant 1 stated "*I am interested in Hermitage. After the course, I will take another degree somewhere else*" and Participant 2 mentioned "*I am going to pursue a bachelor's degree of business studies*". There is again, a sense that the learners both want to continue learning and have no option but to continue their education to keep pace. The outcomes of the course were largely consistent with theories of self-directed adult learning. Self-improvement was mentioned to a considerable extent, specifically in how the course taught learners to think critically, apply knowledge, study and give presentations. All the subjects cited some parts of the class they enjoyed, with mostly every example matching perfectly with what an andragogic classroom should resemble. For example, Participant 4 proposed launching a self-directed learning initiative because it is constructive to learn the topics they enjoy, "*Maybe later on, I will try and see if I will study further on this business subject, and also, I have some satisfactions from the course once I complete the assignments. The feeling is so good*". In the case of the interview subjects, it shows that satisfaction with the CEF programme and satisfaction with the course are linked. According to the five participants, satisfaction was very much linked to Knowles' sense of andragogy.

Undeniably, every subject agreed that the CEF did not offer sufficient fundings and that the HKG should implement more similar funding programmes. According to Participant 2, education should take a higher priority than infrastructure development. There was a very real sense that investing in education is not a privilege the government may provide but as something integral to the success of the city in the long run. Participant 1 further mentioned "*people are the sources of (Hong Kong's) productivity*".

Two participants suggested that the amount of funding should at least keep pace with inflation.

One subject claimed that the figure should be HK\$50,000. Another two participants proposed that the funding amount can be tied to a certain percentage or proportion of the total course fees up to a dollar amount.

Surprisingly, one of the interesting proposals suggested that the percentage of the funding awarded to any given programme can be reduced to 50% but make the total award higher at HK\$50,000. *Participant 5* clarified that “*The condition is...maybe proposed 50% reimbursed but have the cap to the maximum HK\$50,000*”. He suggested that the learning outcomes would be better if students are required to contribute more to the programme.

4.5 Conclusion

This study relied on different sets of data to compare two groups of students, namely: the CEF and the non-CEF participants of the course ‘Principles of Marketing’ (POM) at a tertiary college in Hong Kong.

The first set of data, the basic course information revealed no major distinctions between the demographic divisions in these groups, but it did point towards the CEF participants improved learning outcomes, both in attendance and course results.

Moreover, the set of pre-course questionnaire revealed that CEF and non-CEF participants tended to pursue education for roughly the same reasons. It can be found that ‘friends, family, work colleagues’ as well as ‘employers’ and ‘increased job prospects’ stimulate these learners to pursue continuing education. While the funding provided by the CEF seemed to have an impact on the CEF-participants, it is impossible to measure the number of students did not take this course because of lack of funding, removing the ability to accurately measure the CEF’s impact on financial motivation between the two sets.

On top of that, the set of post-course questionnaires largely focused on learning outcomes. The largest difference in reported outcomes between the two groups was an ‘increase in self-confidence’ reported by the CEF participants. Otherwise, both groups remained constant, reporting their ‘job

performance and professional capabilities' were most impacted by the course. As for the question of continuing education, another difference arose, with the CEF participants are more likely to indicate a desire to continue their education into the future. Moreover, while the CEF participants tended to believe the award amount should be raised, a higher proportion on the non-CEF participants considered the same.

The final set of data is the semi-structured interview questions. These are largely backed up, explained and reached the conclusions above. Particularly, they revealed that a few non-CEF participants had applied the reward in previous courses and were thus ineligible to apply for it in this programme. It clearly explains the reason why that group would consider that the award amount is insufficient at a high level.

CHAPTER FIVE: DISCUSSION OF ARISING ISSUES

5.1 Answering the Research Questions

The purpose of this chapter is to illustrate the implications that can be drawn for the CEF from the 'Principles of Marketing' (POM) course delivered at a tertiary college in Hong Kong by adopting different sets of available data. The main research question (RQ) along with the five sub-questions (SRQs) and a complete breakdown of the data that answers each of the research questions are shown below.

1. **To what extent does the CEF enhance students' motivation to learn before enrolling in the programme?**

Conclusion: The study indicated that among the CEF participants and the non-CEF participants, motivational factors remained fairly similar. Regardless of whether students decided to apply for the CEF or not, they were largely enrolled to get a higher qualification, (*Table 4.8*). Almost all of the students entered with a similar aim: to improve their employability, whether or not they applied to the CEF. The study found, via the responses of the participants, that some of the non-CEF participants had been the CEF participants in the past. Therefore, most discussions dealing in differences in motivation between these two classes of students are unrewarding. Probably the two participant groups are in different stages of their respective education, but each have accessed the CEF programme. As a result, their consistency in their motivations, in particular with regards to the emphasis on employability. The most distinguishable factor between the CEF and the non-CEF students' motivations to learn before enrolling in the programme is funding. While not explicitly measured, every interview led to the conclusion that to the student's adult education is completely necessary to their future employability, the award amount is beneficial in allowing some students to reach some level of educational achievement and that the level of funding is not sufficient (*Table 4.15*). The students participating in the CEF may not be able to afford adult education on any level without it. Within the subject population, every adult learner has already,

is now, or plans to fully utilize all the fundings. This indicates that engagement with the CEF programme is high among the students surveyed. Among participants in the Principles of Marketing Course, the findings illustrate that those adults who demand education at the current funding level would consume more adult education in the future if a higher level of funding was available. The existence of the CEF does not seem to have an impact on the reasons for seeking higher education reported by those surveyed. Based on the literature review, and semi-structured interviews, those reasons are already strongly reinforced by the globalised labour market, peer groups and desire for higher employability. The economic model of motivation explored in the literature review would suggest a positive relationship between the total amount of funding and the enrolment of students in higher education. This research, however, could not determine whether the funding of the programme was directly driving students who were otherwise not able to pursue higher education to receive it. The value of the CEF is to enable those students who are not otherwise able to afford higher education to receive it. While the exact amount of funding is not measurable without a survey of the broader public outside a tertiary university, the association is certainly positive and likely strong.

2. What are the main sources of motivations to learn for those adult learners who are applying for the CEF compared with those who are not applying?

Conclusion: Aggregating all data on pre-course motivational sources, two factors rise to the top. For the CEF participants, the factor ‘my employer or professional body’ was measured as the most important. By a very slight margin, the non-CEF participants reported that their peer group, ‘friends, family, or co-workers’ were the most important (*Table 4.7*). These two factors were both high in importance to each group and so this study cannot claim that either indicates a distinct adjustment in motivation based on the CEF. The only discernable difference between the CEF and non-CEF participants lies in the indicator ‘Government promotion of lifelong learning’. The CEF participants reported this was a strong motivational factor to them, but not by an

overwhelming degree, whereas the non-CEF participants reported it was not as important (*Table 4.7*). The finding is not particularly surprising as it demonstrates that the funding assistance generates partial motivation to the CEF participants while students who were able to pay for their classes without CEF funding were not motivated by it. This is in line with expectancy theory explored in the literature review. The greatest difference in motivational factors was intrinsically linked to government programmes. However, the interviews yielded limited discussion about the reimbursement of course fees based on outcomes. This link is more implicit than explicit. It is worth focusing on the lack of any other distinguishable difference between the motivation of CEF participants and non-CEF participants. This seems to demonstrate that the two groups are not that different from each other. Their strongest motivational factors remain the same, although their levels of reliance on government programmes may differ. Overall, among participants, motivational factors remained consistent despite enrolment status, with slight variations appearing only in economic based factors. The semi-structured interview suggests that the result may be due to a larger and unexpected connection between the CEF participants and non-CEF participants. Essentially, an unknown number of non-CEF participants reported themselves to be former CEF participants. Therefore, conclusions on the CEF's impact on motivational factors are inconclusive.

3. **Is there any evidence to suggest that the CEF students perform better and achieve a better outcome compared with those non-CEF students in the same course?**

Conclusion: As stated above, motivational indicators analysed in this study suggest that the CEF and the non-CEF participants are not all that different from each other. This is not true when looking at academic outcomes. The CEF participants performed dramatically better than their non-CEF participant counterparts. In this study, 100% of the CEF participants passed and with a mean score of 69%. Meanwhile, only 68% of the non-CEF participants passed and with a mean score of 49% (*Table 4.1*). Attendance was correlated similarly. The CEF participants attended on

average 92% of all classes while the non-CEF participants attended 76% of classes (*Table 4.2*). The two sets, the CEF participants and non-CEF participants included roughly the same proportion of males and females, with the non-CEF group skewing slightly male (*Table 4.3*). The non-CEF participants were slightly older on average (*Table 4.4*) and outside of the lowest income brackets, earned more money (*Table 4.5*). The proportion of average wealth and age between the CEF participants and the non-CEF participants is disproportionately narrow compared to the gap in their academic outcomes, but CEF participants tended to be younger and less wealthy than the non-CEF participants. As stated before, however, a portion of these participants may themselves be programme alumni. This does suggest, however, that active enrolment in the CEF plays at least some part in enhancing academic performance. It would appear that among those surveyed the incentive scheme of the CEF, specifically the reimbursement that comes with high marks, has a positive relationship with achieving better outcomes. Therefore, it indicates that those whose reimbursement hinges on their outcome tend to perform better in the course. The possibility of not receiving reimbursement based on performance is a more powerful motivator than simply paying for a programme. As in, students may feel the ‘bite’ of paying for a programme in greater degrees if they had and lost the chance to earn back the money. One action represents a transaction, the other failure. This could, alternatively, be rooted as well in demographics, with those who apply for the CEF tending towards viewing a loss of possible reimbursement as worse than simply paying for the course (although the outcome, the price of the course, is the same). Demographics could play a part, considering demographic data determined that those who applied the CEF were not as wealthy as those who did not. Based on the economic motivation theory research explored in the literature review, it is suggested that those who apply for the fund are generally more dependent on the fund for their enrolment. Although some wealthier students may apply for the fund and continue to support their own education, the demographic receiving most benefit from the fund are the low-income students. They may not consider pursuing higher

education if they are not provided with funding to incentivize them to achieve higher academic outcome. Meanwhile, wealthier students may apply for the fund, but failing to earn the reimbursement due to bad grades would represent less of a financial shock to them. Lower income students may depend on the funding, and thus have higher motivation to achieve high marks. There is a demonstrable link between the CEF participants and achievement within the course. This may hinge on demographic distinctions, but it is also reasonable to assume the reward scheme (reimbursement upon completion) within this course effectively has some positive correlation with learning outcomes.

4. **What major benefits and limitations can be recognised in the CEF programme?**

Conclusion: Answering this question requires data from a few various sources. *Table 4.1* and *Table 4.2* demonstrate that the CEF leads to better educational outcomes. However, according to *Table 4.10* and *Table 4.11*, the CEF shows less of an effect on the learning outcomes. It should be mentioned that learning outcomes in this context refers not to grades, but the feeling among students that they learned something effectively. Both groups seem to have benefited from the course and in roughly the same way. The success of the CEF in promoting higher grades and attendance rates appears to be due to the economic incentive directly imparted by the programme, while the learning outcomes are, in accordance with the learning theories of Knowles and Illeris, more connected to the course itself. The subjects reported in their interviews which aspects of the class they enjoyed the most or felt the most enriched by and their answers pointed specifically to the teaching techniques implemented by the instructor. In other words, the learning outcomes of the course have little to do with the CEF and more with the quality of instruction. Undoubtedly, this can be a major limitation to studying the specific effects of the CEF programme. While the programme seemed to spur higher classroom achievement among those surveyed, the effectiveness of the course remains dependent on the quality of the course and its instructor. By looking at the discrepancy between grades and attendance versus learning outcomes among the

two groups, it would appear that the CEF impacts grades, but has much less bearing on the personal learning outcomes of the learners. Additionally, most learners agreed that the total award amount of the CEF was insufficient (*Table 4.13*). Surprisingly, the non-CEF participants claimed it was insufficient at a higher rate than the CEF participants. This can be explained by considering that most of the non-CEF participants are participants from the past who have limited financial resources at the moment, or that some of the CEF participants have taken the question to mean the funding is sufficient for the class they are currently taking. Either way, it shows that the financial support via the CEF is insufficient to meet the reported needs of those surveyed, and the interviews provided many suggestions for how the programme could be expanded. Students who applied the CEF undoubtedly performed at a higher level than those who did not. As stated above, this could be due to the incentive structure inherit in the CEF, or possibly attributed to the demographic differences between the two groups. CEF participants tended to be younger than non-CEF participants. While there was an apparent link between grades plus attendance and CEF status, there was no distinct connection between learning outcomes and CEF status, with students in each group reporting roughly the same degree of satisfaction. The CEF thus did not seem to spur, within the measured responses in this survey, an impact on course satisfaction, information retained, or changes in motivation. The literature review suggests that these aspects are more dependent on the quality of instructor rather than a funding programme. That said, it was universally reported among those surveyed that they would access more fundings for higher education. Finally, learning outcomes may be similar between the two groups because an unknown amount of non-CEF participants are the former participants.

5. Will the CEF students have any intention of pursuing further education or training in the future after completion of the programme?

Conclusion: In the post-course questionnaire, every CEF participant in the programme, 100%, indicated they would at least be ‘fairly likely’ to pursue further education in the near future, with

44% giving the highest possible positive response ‘most likely’. Among the non-CEF participants, 71% indicated they would be at least ‘fairly likely’ to pursue further education, with 15% indicating they would each ‘not be very likely’ or ‘not likely at all’ (*Table 4.14*). Although the sample scale is small, it illustrates a clear positive correlation between the CEF participants and a desire to continue their education. These results indicate that the CEF may stimulate additional further education among those surveyed. The weakness of the data is that it is not known how many of the participants had accessed CEF funding previously. These students reported in the interview or wrote in the questionnaire that they ‘had already applied’ for the CEF, or ‘would if eligible again’. Based on the volume of these comments, – some of the non-CEF participants had some prior exposure to the CEF which makes the measurement of the exact impact of the CEF on further adult education difficult. It is possible that a portion of the non-CEF participant group has already pursued further education. Their continued presence in a tertiary institute at their own expense has already demonstrated that a subset of the CEF alumni will continue learning after completion of the programme. The questionnaire data reflects a trend but possibly understates the impact. What can be concluded is that those who participated in the CEF programme are more likely to report a desire to continue their education than those who did not apply for it. The strength of this desire is unknown because a portion of the non-CEF participants may be prior participants pursuing higher education. This does not necessarily imply that the CEF stimulates an interest in continuing education. The funding allows higher education to be more attainable, but it may equally find the learners who are generally interested in higher education.

Finally, that brings the issue to the main research question: In what ways does the CEF affect adult learners studying at a tertiary institute in Hong Kong?

Conclusion: The lifecycle of an adult learner under the CEF reveals the extent of its impact on the tertiary landscape in Hong Kong. After completing compulsory education, it is evident that the

potential learner will consider continuing education more positively if the CEF is available to them. Demand for higher education, retraining and upskilling is increasingly intense in Hong Kong and the CEF encourages students who otherwise would not have the funds to pursue further education. Even among students who have strong financial power, the incentives offered by the CEF will encourage them to pursue further education. 78% of subjects participating in the CEF or not, indicated that government assistance programmes were at least 'important' factors in their decision to achieve higher education (**Table 4.6**). The CEF is encouraging higher participation rates in higher education. It does appear that the CEF incentive structure is effective in reinforcing positive assessment and participation outcomes, or that the group of students applying for the CEF have some higher stake in their own academic success. In the programme this research study focused on, 100% of the CEF participants passed compared to 68% the non-CEF participants. The mean score for the CEF participants was 69%, while for the non-CEF participants it was 49% (**Table 4.1**). This indicates a dramatic increase in academic outcomes as well as the participation rate, with the CEF participants attending at a 92% rate and the non-CEF participants attending at a 76% rate (**Table 4.2**). The students participating in the CEF programme outperform their peers. After the programme was completed, 94% of the CEF participants reported a boost to their self-confidence. 78% went on to report that the course encouraged them to do more learning in the future (**Table 4.9**). All the CEF participants reported they would be at least 'fairly likely' to pursue further education, compared to only 71% among the non-CEF participants, (**Table 4.14**) and 84% claimed they would be 'quite likely' or would 'definitely' pursue a degree in the future compared to only 43% of the non-CEF participants (**Table 4.15**). This is supported by the interview participants emphasizing the impact of the CEF on their ability to learn. Moreover, many of the non-CEF participants explained that they had already applied to the CEF. The non-CEF participant group ended up partially confirming that the participant group would continue their education when the time came. It is difficult to make a claim with this information, but this could be the preliminary stages to a follow-up study showing that the CEF drives

lifelong learning in the future. Overall, the CEF boosts adult learning achievement in those who receive it.

5.2 Discussion of Results

The data demonstrates that the CEF was correlated with improved student attendance and grades within the course. Among a few classes at a single class, the results are overwhelmingly in support of the success of the programme. However, this does not imply that the CEF scheme cannot be improved. There are different areas that could be improved to ensure a sustainable and progressive development for the CEF. It requires additional studies with a narrower perspective. Hopefully, this section can be regarded as a roadmap to any future researchers interested in tackling a new research aspect of the CEF or policymakers seeking to adopt data-driven solutions to enhance the state of tertiary education in Hong Kong.

5.2.1 Summary of Findings

The following summarizes the results of the data analysis, framed by findings in the literature review. Overall, this study yielded a mix of applicable information and questions for follow-up research. Within the Principles of Marketing Course, the CEF was highly correlated with stronger attendance records and better grades.

Students who applied the CEF attended class and passed at considerably higher rates, 100% of CEF students passed the course, compared to 68% of non-CEF participants. They held a 92% attendance rate versus a 76% attendance rate. This could be due to the economic incentives to succeed (Cheung, 2006), differences in expectancy value between the two groups (Lovelock, 2000), or demographic differences as a younger population.

1. Demographically, students who applied the CEF in this course were younger and less financially wealthy.

This is in line with conventional thinking that less wealthy consumers of education would value an educational subsidy higher than someone wealthier (Sheth, Newman and Gross, 1991).

Considering the revelations that some of the non-CEF participants have applied the CEF in the past, it also makes sense that those reporting CEF participation participate earlier in their adult education journey than those who have already accessed it and continue to enrol in courses.

2. Students enrolled in the CEF programme indicated a higher desire to pursue further education. Citing consumer expectancy theory, a student who received a product or service at a subsidized cost is more likely to rate it as worth their while (Slaughter and Leslie, 1997). Independent of prior CEF status, students currently applying for the subsidy reported a higher likelihood of immediately continuing their education. This is in line with prior work linking intervention with increased learner satisfaction (Boulton-Lewis & Tam, 2018).
3. Pre-course motivational factors varied little between the two groups. Current CEF participants and non-CEF participants reported roughly the same motivational factors. This either speaks to the similarity of the two groups in either the context of their educational and socio-political backgrounds (residents of Hong Kong have similar motivations) (Peltz & Clemons, 2018), or their similarity in that a certain number of non-CEF participants had applied it before. This either points to a theory whereby motivational factors are consistent despite the CEF, or they are influenced by the CEF, with no conclusive data to support either side. The following claims were revelations spurred either by the data or by realizing certain shortcomings in the methodology. Each yields an additional opportunity for follow-up studies.
4. An undisclosed number of non-CEF participants had previously applied it in the past. As discussed above, a number of non-CEF participants have applied the CEF at some time in the past. This makes it incredibly difficult to discern general changes in motivation as opposed to specific changes in motivation due to current status as a CEF participant. Therefore, it is challenging to analyse the whole effects of the CEF on motivation, independent of the students' 'current' status as a CEF participant.
5. Any programmes adhering to 'good andragogic practices will affect post-course questionnaire

results.

Connecting good teaching practices to the effects of the CEF on motivation to continue learning is necessary. A skilled teacher can ‘trigger’ continued adult learning (Knowles, 1984) while a bad one could potentially turn students off to continued education, despite any funding endowment. Additionally, different pre-existing motivations respond better or worse to different andragogic practices (Illeris, 2008). Therefore, it is challenging to measure how the CEF has played any part in generally influencing motivations or satisfaction reported on the post-course questionnaire.

6. A larger sample size could yield more possibilities.

Differences in effective teaching practices could be accounted for, and the impacts of the CEF could be more broadly measured if the sample size were large-scale. A questionnaire could be constructed to measure what practices a teacher used and how a learner perceived those practices as effective or ineffective.

7. It is possible to comprehensively measure the impacts of the CEF but this study is a beginning.

Student motivations do respond to policy change (Clover, 2019). The data above is necessary to accurately measure it as it allows a researcher to ask 1) which practices were effective 2) which teachers effectively executed the practices, and 3) which practices yielded a change in CEF satisfaction. This study found that the use of the CEF is widespread among learners, and it changes some outcomes among those who applied it. It is suggested that more research can be undertaken to measure and uncover the full impact.

8. Economic motivation appears to be the largest driver of success in CEF participants.

While more work requires to be done to expand the sample size and gather demographic data, it is undeniable that in this course the CEF is highly correlated with positive outcomes. Given that reported motivational factors seemed consistent between the two groups, and that an undisclosed number of non-participants applied the CEF in the past, there is a strong possibility the incentive scheme of the CEF reimbursement is partially responsible for the differences in outcomes. The

reimbursement scheme is in line with the economic motivational theories like expectancy theory uncovered in the literature review and given that the only major demographic differences in the two groups was that the CEF participants were younger and less wealthy, it makes sense that the possibility of payment tied to high marks is a highly effective motivator.

5.3 Importance of Quality Assurance in Follow-up Studies

This study spent a great deal of time on background research, searching through various sources to determine the best practices in adult education. This was undertaken largely to create the questionnaire in an attempt to accurately isolate motivational factors. However, it is noticeable that an understanding of andragogy is significant when examining if the programme in the research was satisfactory from the perspective of andragogy which produces positive results respond to the CEF's effectiveness. It is recommended that further studies can put emphasis on the teaching practices directly cited by students in their interviews on the significance of andragogy in the success of the CEF programmes, in addition to the themes of adult education and motivation covered in the background research.

Undoubtedly, good teaching practices are essential to the success of any adult education programme. The overall pass rate on the POM course was 88% which implies that the quality of the course is acceptable (**Table 4.1**). Analysis of the post-course questionnaire revealed that the majority of both CEF and non-CEF participants stated positive indicators that reflected a positive outlook on the course. All indicators are evidenced to follow a trend of around 56% positive responses, 31% neutral responses and 13% negative responses (**Table 4.10**) which illustrates that the students were satisfied with the overall quality of the POM course.

The survey results indicated overall satisfaction with the learning outcomes of the course. The interviewees reported that the most effective outcomes of the course are 'self-improvement' and 'career development' (**Table 4.16**). Feedback indicated students enjoyed performing their independent research which is a finding in line with Knowles's research on adult education. In

addition, group presentation and individual assignments received favourable comments from the students' feedback. These techniques illustrate the concept of 'self-directed learning' feature in Knowles' model. Adult learning must be self-directed, and teachers are the facilitators. Adult learners take ownership of their own education via a series of self-directed initiatives, spurred in the beginning by an instructor is the ultimate goal of andragogy. From the examples above, adults are the richest source of experience for one another. Group work can assist adults to share specialised information and synthesise it. The goal of an andragogic classroom should be self-motivated learning. Based on the students' feedback, it can be noticed that the course incorporated techniques that encouraged this paradigm, and this theory aligns properly with the stated objectives of the CEF. Therefore, it is recommended that the principles of andragogy should be considered when determining if a programme is qualified to be subsidised by the CEF. The policy should include auditing courses that are reimbursable via the CEF to ensure a high quality of adult teaching and learning. Executing an annual inspection is advised to assure instructors who teach CEF courses have certain knowledge of andragogy and experiences of adult teaching. On top of that, colleges and institutes which are authorised to offer programmes funded by the CEF in Hong Kong must assume quality liability by monitoring the course progress and development to ensure good teaching and learning practices.

CHAPTER SIX: RESEARCH SUMMARY

It is widely believed that Hong Kong has been through a period of good transition over the past few decades. There has been a number of challenges, including the trend towards globalisation, which have resulted in unprecedented changes at every level of society. However, it should be viewed that these challenges do come with numerous opportunities and allow the population to capitalize on through better knowledge and skillset enhancement. These initiatives include the retraining of workforces to transit to new industries or retooling existing workers to function with modern technologies and methods.

The HKG has responded to these challenges by introducing a number of initiatives geared towards equipping the population of Hong Kong for lifelong education. One such funding programme is the CEF which targets adults seeking to further their education through tertiary institutions. The fund could grant up to HK\$20,000 (proposed to revise to HK\$25,000 as of 2022) to qualifying adult learners, payable upon the successful completion of a pre-approved course. This fund is open to most adult citizens of Hong Kong and was launched with the intention of allowing a higher percentage of the workforce to achieve continual education and training to meet the changing needs in the labour market.

The programme has been phenomenally successful and popular in a certain extent and assisted to inspire other similar programmes around the world such as Singapore's SkillsFuture. However, there has been relatively minimal research work done to measure its precise effects, particularly on the level of motivation on adult learners to pursue higher education and the effectiveness of its goal to promote lifelong education. This study seeks to measure the effectiveness of the CEF by examining learning outcomes of adult learners in a 'Principles of Marketing' course at a tertiary college in Hong Kong. Both the RQ and SQRs of this study can be reviewed as follows:

In what ways does the CEF affect adult learners studying at a tertiary institute in Hong Kong?

1. To what extent does the CEF enhance students' motivation to learn before enrolling in the programme?
2. What are the main sources of motivation to learn for those adult learners who are applying for the CEF compared with those who are not applying?
3. Is there any evidence to suggest that the CEF students perform better and achieve a better outcome compared with those non-CEF students in the same course?
4. What major benefits and limitations can be recognized in the CEF programme?
5. Will the CEF students have any intention to pursue further education or training in the future after completion of the programme?

To answer the questions above, the theory and concept of andragogy from its early development to its modern form along with a wide range of adult learning and motivational theories were profoundly researched for a broadened perspective. The most productive thread focused on adult education and andragogy, the study of adult education. Through the research, a baseline for effective adult education and a passable understanding of what motivates learners to mentally improve themselves was acquired. An in-depth look of the work of Knowles demonstrated what factors contribute to an adult classroom. The works of Illeris extended that foundation of motivation and a number of motivational theories from different experts were consulted to formulate the questionnaire. This study also reviews economic incentive theories, information on similar programmes and data-testing methods.

With a sizable amount of research, a study constructed to measure these different andragogic factors was created systematically. According to the Working Family and Student Financial Assistance Agency (2021), 25% of Hong Kong's adult population has some involvement with continuing education and 17,000 CEF claims were made in 2019. From this population, the primary source of the present research were 65 respondents (N=65) students with a mix of CEF participants and non-CEF participants from the 'Principles of Marketing' (POM) programme. Each student could

participate in a set of pre-course questionnaire (PRCQ), post-course questionnaire (POCQ) and/or face-to-face interview at their own option.

The PRCQ focused on demographic groups and queried what motivational factors would lead to a student's decision to pursue higher education. The POCQ questionnaire gathered demographic data and followed by emphasizing on class outcomes, future plans to continue education and general feelings and perceptions on the CEF. Finally, the interview aimed to inquiring a wide variety of questions in order to set a foundation with the goal of collecting additional information and uncovering data relationships that could not be conveyed via questionnaires. On top of that, the study adopted the aggregated scores and attendance records to measure outcomes.

It is believed that the study successfully established a few important links between the CEF and adult education and was able to express these in concrete policy decisions supported by the data and background research. The following sections summarize the findings of the study, including policy suggestions based on the data on how the programme can continue to progress and develop.

6.1 Contribution of Andragogy in the CEF Programme and Best Practice

The study found that the CEF had a strong influence on adult education among the study's population among students in the POM course. It can be assumed that this success is indicative of the CEF's broader success in the landscape of Hong Kong education. However, further research with a large-scale survey which investigates whether these results are replicable in other classroom settings is recommended. As regards the 65 students in this study, the levels of performance were significantly higher by the CEF participants when compared to the non-CEF participants. As discussed in **Chapter 5**, this is possibly due to the economic incentive structure established by the CEF appears to be the strongest factor in differentiating between outcomes of the two groups. Only students who achieved the course requirements could receive the funding and the course requirements included results above a certain level. As motivational factors across the board remained constant among CEF participants and non-CEF participants, it can be assumed that the differences between

the two groups stemmed from economic incentive or demographic data (i.e. younger, less wealthy). A major contribution of this research is to reaffirm the effectiveness of the CEF implementation and to illustrate strong differences in outcomes which are rooted in the incentive scheme. Moreover, it demonstrates that a future initiative to promote adult education is likely to have positive outcomes if it includes a non-repayment grant after successful completion of the course.

On top of that, there was a single motivational outcome that was clearly different among the two groups: CEF participants had a higher likelihood of continuing their education. The exact cause of this difference is beyond the scope of this study. However, it can be assumed that it is related to the concept of ‘spiral of self-directed learning’ proposed by Knowles and Illeris. In this research, it can be safely concluded that this trend would continue across other similar tertiary programmes in Hong Kong. It is suggested from this research that the existence of the CEF at its current level can lead higher numbers of adult learners performing better on average than their peers and likely to continue their education into the future. This study recommends that given the impact of the CEF on learners’ outcomes and motivation, the HKG should consider further development in adult education with corresponding enhancement to the scope of the CEF.

6.2 The Impacts of the CEF

The broad impacts of the CEF measured by this study on the POM course in which it was conducted can be divided into six parts.

1. The study found that CEF had a strong influence on adult education among the study’s population. In particular, students aged from 18 to 34 and earning less than HK\$20,000 in this POM course demonstrated different outcomes than their peers. Notably, this demographic made up the overwhelming majority of CEF participants in the course.
2. The levels of performance in terms of academic results and attendance rates were significantly higher by the CEF participants when compared to the non-CEF participants. Given relative similarities of motivational factors in their pre-course questionnaire, the only measured

differences between CEF participants and non-CEF participants included their status within the programme, difference in age and difference in wealth. The correlation between CEF participation and positive outcomes is extraordinarily strong.

3. Almost all participants in this study rated ‘career / employability’ as a major factor in their decision to pursue higher education. More specifically, respondents overwhelmingly reported the influence by ‘their bosses, colleagues and the possibility of job advancement’ as their most powerful motivational factor. On top of that, they reported that their ‘peer groups’ operate as a strong motivational factor, exerting a powerful influence on participant’s decision to enrol. Furthermore, the semi-structured interviews revealed how much that social pressure is connected to the principles of globalisation discussed earlier in **Chapter 1**. Each of the five interview subjects indicated that pressure from ‘peers via work or social circles’ or pressure via ‘the forces of globalisation on their own professional security’ was the greatest concern. Both CEF participants and non-CEF participants (at least within this POM course), expressed a sentiment that continuing education was essential to their long-term viability as professionals.
4. The feedback from the post-course questionnaire on learning motivation reinforced the theories of andragogy proposed by Knowles. ‘Self-improvement’ was emphasised, specifically in how the instructor taught learners to think critically, apply knowledge and deliver presentations. About 80% of students reported in their questionnaires that they felt a sense of self-improvement, and five respondents mentioned in the semi-structured interviews, learning experiences similar to Knowles’s conception of a ‘Spiral of Self-Directed Learning’. While the economic motivation is a powerful force differentiating the CEF participants and non-CEF participants, the similarities between motivational outcomes between the two groups suggests that Alderfer’s ERG Theory or Ford & Nichols’ Taxonomy of Human Goals correctly assess the metrics for fulfilment within an andragogical setting. The effect can be found in both groups, but a higher ratio of CEF participants reported a ‘boost to their self-confidence / self-esteem’ at 94%.

5. Regarding the possibility of continuing further education, all of the CEF participants reported they would be at least 'fairly likely' to pursue further education and 84% claimed they would be 'quite likely' or would 'definitely' pursue a degree in the future compared to only 43% of the non-CEF participants. Given the high amount of satisfaction reported by both the CEF and non-CEF participants, it suggests that the CEF plays some parts in motivating adult learners to continue their education in the future.
6. Every subject, regardless of their participation status, agreed that the CEF did not provide sufficient funding and the amount of funding should be raised. One respondent in the semi-structured interview suggested that education should take a higher priority than infrastructure development in Hong Kong. Two students proposed that the amount of CEF should at least keep pace with inflation while another two persons suggested that the amount of funding should be raised and tied to a certain percentage of the total course like Singapore. Another participant advised HKG to make the process of CEF application simpler.

Undoubtedly, the CEF can be regarded as largely successful as a means to facilitate continuing education among adult learners in Hong Kong. Post-course questionnaires from the CEF participants show that they are rewarded with 'a sharp increase in self-confidence and self-esteem' and the same group indicated a 100% desire to further their education after the programme. The research demonstrates a large difference in academic performance and learning outcome between CEF participants and non-CEF participants. Notably, it can be observed that the financial incentive scheme behind the funding creates a substantial and powerful effect, and this effect enhanced participant motivation (Cheung, 2006). On top of that, there is a much higher demand for education than the CEF currently subsidises. This study suggests that the availability of sufficient funding or incentives would create a larger group of lifelong learners, which in turn would lead to a better educated workforce in Hong Kong; and that any future expansion of the programme - regardless of whether by an increase in total funding or an extension of scope – should refer to similar

reimbursement models as reference.

One surprising finding of the research is that there were few differences between the CEF and the non-CEF learners. Besides, this observation of the study highlights how essential the funding is to continue further education in Hong Kong. Although the research shows that the CEF does not change why a student is studying, it does show that the majority of students would hope to pursue further education in the future if they do not have financial concerns. Almost every CEF participant indicated they would continue their education and most non-CEF participants agreed. Some of the non-CEF participants in the study were former CEF. This suggests that CEF funding can kick-start adult learning for life, as per expectancy theory (Eccles & Wigfield, 2000).

To sum up, this study demonstrates that the CEF mechanism is beneficial as there is a demand for life-long education in the society and it enables more adult learners to continue further education and pursue self-enhancement. If the HKG wishes to further facilitate higher learning among permanent adult residents, the CEF programme is definitely an effective tool by which to do this.

6.3 Policy Suggestions

Synthesizing research findings with literature review materials also indicates a few suggestions for the future policy improvement. This study concludes that the CEF did have positive impact on learning outcomes for the adult learners in the programme, and there is a great desire for the larger scale of financial fundings in Hong Kong.

Based on the results of this study, it is noticeable that the implementation of the CEF is a successful incentive scheme as it triggers adult students to continue further education and become life-long learners. Given its goals of preparing the population of Hong Kong for the challenges of globalisation by encouraging lifelong learning, the CEF has lived up to its promises, albeit on a scale that could be improved. As stated, this study has demonstrated the effectiveness of the CEF at meeting these two goals, at least in one programme among a small group of students. Additionally, the background research on andragogy, motivation and similar programmes do provide leads for how the

programme can be expanded upon or improved. This study does not intend to have all the answers, but it is hoped that those reading will discover the value of the programme in place and the potential it can offer if expanded upon. Basically, the CEF can be viewed as a successful means to stimulate high-quality adult-oriented learning. Additional initiatives or more fundings distributed through the same programme will also likely be achieved with success.

The following section shows some suggestions for the development of the CEF programmes to meet its goals more effectively.

6.3.1 Increasing the Financial Scope of the CEF

Up to 67% of subjects in *Table 4.13* agreed that the grant awarded by the CEF is insufficient to meet Hong Kong's costly educational needs. In consideration of the importance of continuing adult education and the established effectiveness of the CEF, and assuming the HKG sanctions increasing educational capacity, the CEF can become the trusted programme with strong growth potential and offers an easy and flexible policy tool for improvement. There are several ways being recommended to expand the financial scope of the CEF.

- **Align the CEF with the inflation rate:** Since its inception, the CEF award amount has steadily increased to HK\$20,000 (proposed to revise to HK\$25,000 as of 2022). However, in the last 14 years, the cost of education in the city has increased by 20%. It is suggested that an annual review could be implemented to endow the course fees with more funding at a percentage of the total cost of education, or at the very least, align the money award to the yearly inflation. This could ensure the financial support is sufficient for adult learners of Hong Kong to facilitate the development of the society.
- **Alternatively, the CEF could draw inspiration from similar successful international programmes.** The comparable Singaporean programme known as the SkillsFuture encourages firms and individuals to invest in continuing education by awarding them a percentage of the total fees rather than a flat amount. In this government-backed programme, qualifying Singaporeans

receive subsidies ranging from 50% to 95% of total course fees. For 35 years old and above, Workfare Skills support (WSS) funds 95% of course fees for Singapore citizens who earn \$2300/month or less (HK\$13378/ GBP \$1241 or less). Besides, SkillsFuture Credit account (For 25 years and above, \$500 SkillsFuture Credit can be used to pay for courses on top of the subsidy. This strategy would provide maximum impact for the CEF with the HKG sanctioning considerable funding expansion. One point of note is that SkillsFuture Endowments automatically provide 500 Singaporean Dollars to all eligible citizens, regardless of whether or not they co-paid or passed the course. While this may encourage more adult learners to attend adult education, it may also remove some of the academic benefits measured by the CEF. It appears in this study that the economic incentive of endowments for reimbursements was a powerful motivator.

6.3.2 Expanding the CEF to Online Learning

Expanding the range of the CEF to include online programmes can accommodate more learners without any constraints and limitations even during the outbreak of pandemic. Through analysing recent developments within the programme and the CEF can be seen as feasible in determining the long-term viability of online learning. It can be witnessed that online learning provides a natural point of extension in the post COVID-19 world, and it will become a necessity in the future.

The COVID-19 pandemic sparked a considerable shift in educational landscapes across the world and specifically in Hong Kong. It led the CEF to approve courses which 70% of the total teaching time can be conducted online, as well as to allow for the possibility of online assessments. Currently there is no certainty on the duration of this change and whether it will be permanent. This section of the findings seeks to examine the possible strengths or drawbacks a permanent shift to online, or allowance of certain online portions can bring to the CEF.

6.3.2.1 Benefits of Online Learning

In review of the principles of the CEF, which is fundamentally the upskilling and retraining of the Hong Kong workforce to better prepare for globalisation, it can be appreciated that the programme should change to respond to and address the challenges of the world. It is difficult to predict and qualify the post COVID-19 world and the impact of long-term school closure. It remains unknown the duration the virus will remain a threat and what lasting social distancing policies alter social norms. It can be drawn from the experiences for Taiwan during the 2009 H1N1 outbreak, which was globally more limited in scope than COVID-19 but far extreme locally. The findings included 27% of families being unable to work and directly attributable to school closures as a direct result of the outbreak. Regardless of the lasting effects, the economic and educational effects of schools shutting down are disproportionately borne by less educated and less affluent members of society (Nicola et al., 2020).

The CEF programme seeks to widen social mobility in the workforce to ensure continuing education in adult workers will have the resources to respond to globalisation. Specifically, online learning can benefit disadvantaged adults. According to the study of the Researcher Wendy Knightley across Australia and the UK, those students with significant learning difficulties, subjected to racial discrimination or suffering from economic troubles had a marked increase in the quality of their education when transitioning to online learning (Knightley, 2007). Nearly half of these students responded that they signed up for these classes to enjoy the heightened flexibility offered by a virtual classroom. During an interview period, most participants cited easy access to resources and course materials as one of the key benefits of online learning. Participants would not have to travel to classrooms for lectures, visit libraries or bookstores for text materials and they had the flexibility to participate in lectures from home or at work. Another 22% indicated that in addition to these benefits, they were able to acquire additional technical skills by virtue of interacting with a virtual classroom. While participants may have had approached the courses looking for only certain set of skills, being

part of an online course forced them to learn additional technical and computer skills.

Although the study above was conducted in 2007, the internet and online learning are much more established and well supported. The author further concluded and discussed the equalising effect online learning has on demographics:

“Learning online transcended geographical, physical, visual and temporal barriers to accessing education and reduced socio-physical discrimination. The students in this research recognised that the online delivery of courses had enabled them to access education more easily and flexibly than traditional, print-based, distance learning courses. This supports the long-identified benefit of the multi-media approach within online learning... Indications were that taking part in online learning had enhanced participants’ academic performance, identity as a learner and possibly their economic potential.”

(Knightley, 2007)

It can be seen from a generational lens that older adult learners acquired invaluable computer skills, and all students had equal access to course materials without the transportation and time difficulties. Furthermore, demographically all students could adapt the pace of learning to their own situations and schedules.

Another study of 210 adult learners in the US determined that the work-life balance of students learning online was dramatically improved over their peers studying in brick-and-mortar facilities (Berry & Hughes, 2020). The main benefit from learning online was actually the time savings in completing the course. Not only were travel times to the classroom reduced but time spent learning and studying would be less for comparable results. Certain tools and features, such as being able to rewind and pause lectures allowed students to take notes and review learning materials more effectively. More importantly, respondents overwhelmingly indicated that online learning allowed them to continue professionally and adapt their learning schedules to convenient times in their days. Also, the same course could accommodate a classroom practitioner accustomed to arriving to class early and studying primarily in the evening. There would be a marked quality of life improvement if the potential CEF participants could arrange lessons fit into their professional schedule and access

the funding via online learning. Job market upskilling, cross-skilling and training would then become more easily accessible and the CEF could benefit a larger percent of the HK workforce.

The following section of ‘online training and learning advantages’ from Web Trainer and Adult Education Specialist Gary James was adapted to show how online learning could benefit the CEF.

■ **Extendibility, Accessibility and Suitability**

Course benchmarks can be accessed and achieved according to the pace and needs of the learner. Classes are overall more accessible to working adult learners and those with unique scheduling situations. CEF learners can pace themselves as appropriate, spending more or less time during each learning session, as opposed to a monolithic and standardised block of time each day.

■ **Quicker Turnaround of Finished Course**

The subtraction of commute times and customised learning schedules will imply the CEF programme can be completed faster on average.

■ **Collaborative and Exploratory Learning Environments**

Online learning forums provide collaborative tools that bridge the social gap between CEF students by eliminating classrooms, such as message boards, shared resources, direct messaging and app tools. Online classes make the standardisation of collaboration more possible.

■ **Easy and Affordable Training Delivery**

The costs associated with learning drop significantly when on an online forum. The increased classroom sizes can reduce the costs without becoming a hindrance on learning. The net impact from the CEF would rise dramatically.

■ **Cross Platform**

Certain web-based training programmes can be accessed on any browser and any device. CEF learners could access course materials on a smartphone or iPad while sick students could learn from a laptop in their homes.

■ **Travel Cost and Time Savings**

It allows CEF learners from far away location in Hong Kong, or citizens out of the country, to access tertiary institutions and pursue continuing education.

■ **Web Browsers and Internet Connections are Widely Available**

Internet access is increasingly common, low-cost, and reliable for CEF students. Web-based training development is easier to learn and pick up than classroom-based development. There are already a vast number of programmes, templates and applications that make adapting a course to online learning arguably easier than organising the same materials in the classroom. Not only are more resources available, but all resources are accessible to all learners with PDF textbook far cheaper and easier to acquire than a physical copy.

■ **Vast, Untapped Market for Training**

The market for online teaching is still under populated around the world, it is likely the same is true in Hong Kong, particularly when attached to an incentive programme like the CEF. There would be more overall participants for the programme.

■ **Controllable Access**

Monitoring and directing courses are now vastly simplified online. Tools can track the pace of students, track grades, provide instant feedback, and keep records. This can make the process easier for both students and teachers in the CEF programme.

■ **Billing Options**

It may require some technical set up, but it would be possible to blend the CEF website with an online learning portal, easing the transition between the programme and its effects. The surveys at the end of this study indicate, to some degree, that the reimbursement funding portion of the CEF is a possible point of programme improvement.

■ **Direct Access to many other Training Resources**

The Internet is a gateway to an incredible number of educational resources. Using hyperlinks to

relevant materials or encouraging self-directed extra learning is more possible to integrate with the CEF programme using an online platform.

(James, 2002)

Overall, there are quite a number of compelling reasons to permanently allow online courses to be eligible for CEF reimbursement. The only work which requires to be completed is to create a set of easily measurable standards for online courses to be eligible. These guidelines could direct future online courses to be more in line with the current CEF operational standards.

6.3.2.2 Drawbacks of Online Learning

While this study is primarily taking the view that online learning is generally a positive development that will enhance the effects of the CEF in Hong Kong, online learning is not 100% perfect. It can be viewed as another approach to reach more participants, particularly in the current pandemic situations. Undoubtedly, andragogical principles must be applied to how an online course is taught for it to be effective. Not all adult learners will respond to an online classroom capably as well as a face-to-face learning environment. Indeed, some types of learning proficiencies and certain types of classroom engagements may not complement well with online classrooms.

A study in 2018 by Amber Dumford and Angie Miller used the National Survey of Student Engagement (NSSE), a database of tertiary education across the US and Canada, to determine the relationship between student engagement and taking online courses. The data was controlled to include a number of different demographics, including first-year college students and long-time participants. It was revealed that the students who were engaged more often with online classrooms showed greater quantities of quantitative reasoning. They showed lesser capacity, however, in engaging with facilities, fellow students, collaborative learning and basic content discussions (Dumford & Miller, 2018). It was observed that some students engaged with more online learning rated the quality of their teachers as lower and reported less effective teaching practices. The study shows that online learning may be conducive to certain types of learning for some students, but

acknowledges that online learning does have shortcomings, particularly with how students synthesise course ideas in discussion and engage with their teachers.

Beyond the social effects, online learning also generates a number of physical and practical disadvantages. Dung (2019) conducted a survey of over 200 university students and faculty members to determine the positive and negative effects of online learning in Vietnam. While the positive aspects uncovered were largely in line with observations made in the chapter above (including a 100% positive response rate that online learning was good for public health), his findings revealed a set of negative externalities as shown in this extracted graph as *Table 6.1* below:

The Difficulties and Obstacles of Online Learning	Percentages
1. Extensive time staring at digital screens	93.6
2. Lack of body movements	91.1
3. Lack of conditions for developing social interaction skills	89.2
4. Fear of online assessment	80.2
5. Suffering from concentration loss	78.2
6. Lack of peer interaction in virtual classroom	75.6
7. Difficulties in hearing the voice of the instructors	72.3
8. Lack of time and condition to practice speaking with peers and teachers.	66.8
9. Difficulties in acquiring the contents of the lessons	59
10. Lack of interaction with instructors	56.7
11. Difficulties in following the study schedules, lack of self-discipline	51

Table 6.1 Difficulties and Obstacles of Online Learning (Dung, 2020)

Surprisingly, a number of these concerns are purely physical. Time staring at the screen was marked as a huge detractor, as was lack of body movements. These are both common factors in a regular classroom that seem exaggerated by online learning. In addition, while boredom frequently

happens in a regular classroom, it seems to be much more of a distraction online. Furthermore, in terms of certain technical difficulties, such as the lecturer being hard to comprehend, challenge of conducting test due to logistical and technical difficulties such as slow Wi-Fi, and the lack of direct interaction with teachers and other students.

In addition, Dung mentioned that lecturers report less engaged students or lateness of students during online scenarios. However, despite these challenges, certain fields like ‘Academic Writing, English Grammar, Reading Comprehension, Listening and Speaking and Linguistics’ are appropriately delivered and even synergistic for online learning.

In conclusion, online learning is a future necessity with many opportunities but also challenges. As it becomes increasingly necessary and inevitable, the CEF will be certainly required to analyse the effects of its current emergency protocol, as well as test or research possible methods of integrating online learning curriculums into eligible courses.

6.4 Limitations of the Study

One key strength of this study was its in-depth analysis into the data received, both in background information and in interpretation. It investigated quantitative data from three sources to establish a foundation and adopted qualitative interviews, coupled with a blended qualitative and quantitative approach, to give depth and character to the theme supported by the data. While effective in gaining the above results, there were some factors that limit the effectiveness of the study as follows.

1. One drawback was that the clear currents and trends were measured with a small survey size. The study involved 65 learners from three different classes at its maximum. Forty-five of these completed the pre-course questionnaire, among which only seven were non-CEF participants and the post-course questionnaire received only 39 responses, of which seven were non-CEF participants. The low proportion of non-CEF participants is a limitation. Both groups of learners requested a higher amount of funding but an explanation for this has been proposed in earlier

analysis; some of the non-CEF participants who responded to the questionnaire are the CEF alumni with a vested interest and/ or loyalty towards the programme and their views are likely to be similar to those of current CEF participants. This meant that distinguishing the relationship between the CEF and motivation was difficult. Additionally, the sample size of responses was low in some cases. Demographically, the only differences between the group of CEF participants and the non-CEF participants were the age group and income level which assists to explain one of the biggest discrepancies between the two groups in the post-questionnaire: prior CEF participants who sought further education would certainly argue that a higher amount of fundings is required and they would utilise it.

2. The parameters of this study being restricted to a single POM course is another limitation. While the data indicate CEF participants strongly outperforming their non-CEF participant counterparts, it is difficult to extrapolate the data as valid in other classrooms, or even as a representation of all the CEF programmes in Hong Kong. Consequently, the research result that ‘The CEF had a positive effect on adult education in Hong Kong’ should be stated more accurately as ‘The CEF had a positive effect on a single POM course at a tertiary college in Hong Kong’. In other words, this study can produce a few good inferences about why and how effective the CEF is, but these results would require to be tested in another settings. There is, however, one large benefit engrained within this limitation: The ever-important factor ‘quality of education’ is held at a constant. Even armed with background research into andragogy, it is incredibly challenging to imagine holding multiple classrooms with different instructors to the same andragogic standard. As the literature review concluded, poor teaching practices could make or break the motivational factors measured by the study.
3. The research outcome would be completely distinct if the quality of teaching were different. Fortunately, most students held a favourable opinion of the course and the learning materials. The interviews also indicate that the lecturer of the POM course applied sound teaching

techniques particularly the self-driven learning techniques prescribed by Knowles (1984). If the class taught by an inferior lecturer was selected for the research study, students' opinions of the CEF and the future of their continuing education would be largely different. Hence, a baseline of good teaching practices is necessary to replicate the successes of the CEF in this research and overall effectiveness of the entire programme. Alternatively, there remains a possibility that no feedback and data from post-course questionnaires or semi-structured interviews hinge on the CEF. For example, if the quality of teaching is high enough, it may stimulate adult learners to pursue further education in the future without the consideration of funding.

4. The research was conducted before the COVID-19 pandemic. The importance of online learning has since become a focal issue for students over the world including the CEF programme learners. There is a brief discussion about online learning and how it applies to the programme, but it is unfortunate that the questions about online learning were not raised in the questionnaires or the interviews. Therefore, it is desirable to conduct research related to the feasibility of online learning programmes funded by the CEF in the post COVID-19 world.

6.5 Future Questions

For the future researchers seeking to learn more about the CEF, the following questions are suggested to yield more information related to the possible ways to improve the programme development and learning outcomes for adult learners in the society. These questions are inspired by shortcomings in this study, or from questions raised by the findings of this study.

1. What are the differences in outcomes between a class using principles of andragogy and one without?

By comparing multiple CEF eligible classes and evaluating which ones utilize the andragogical techniques in higher proportions, one could measure how dependent on the adult-centric education the outcomes are. By student's accounts, it appears that the POM class which this study used as a baseline was taught by a lecturer well reviewed by his students. Some possible questions

can be asked as follows: Would similar findings be observed in a class where the perception of the teacher's competence was lower? Would it yield fruitful information to be included on the questionnaire on the quality of teacher? Finally, is it productive to consider how CEF programmes could be standardised or monitored to include effective andragogical teaching practices?

2. What possible benefit is there in adopting certain aspects of other adult learning initiatives around the world, namely SkillsFuture in Singapore?

SkillsFuture presents a model for distributing award money in an efficient, equitable way via co-payments and is economically proven to enhance motivation. It may be able to prove that participation would go up if the programme is extended or a new programme is created to allow adult learners to 'catch up'. Additionally, the micro scale of the courses could inform the CEF on how to expand more permanently into online teaching. Further research can be done to test the effectiveness of these policy solutions in Hong Kong's situation.

3. What is the overall financial impact of the CEF on adult education in Hong Kong?

This is a challenging question to answer, but it gets into the whole scope of the CEF. Reviewing the total amount of CEF learners who enrolled in the current year, the inception year, and the total number of tertiary learners eligible for the CEF the year before it was implemented, would allow an economist to create a supply and demand graph to demonstrate the total positive externality of the CEF in comparison to the total cost of running the programme. Basically, they would look at the increase in supply and calculate the area of the surplus triangle to come to a dollar amount. This bit of geometry should actually inform the government how much their investment is being multiplied, or divided, in benefits to the citizens of Hong Kong.

4. Given current events surrounding COVID-19 as well as the changes demanded by globalisation, is it time for the CEF to consider more deeply the ramifications of permanent online learning?

Temporary measures are currently in place now and these should be studied in order to

demonstrate the effectiveness, or ineffectiveness of online teaching. If online classrooms were to become permanent, it is important to examine how to make the transition effective. For example: What type of classes would be conducted well online? What standard should online courses follow? Additionally, surveys could be conducted to determine whether the demographic populace of Hong Kong is prepared for online learning, and the quantity of additional participants the online options may attract.

6.6 Conclusion

The research has investigated the effectiveness and values of the CEF by measuring specific indicators in one POM course at a tertiary college in 2019. An in-depth study of andragogy and theories of motivation was conducted in order to understand in what ways the CEF might affect adult learners studying at a tertiary institute in Hong Kong.

Knowles (1970, 1973, 1980, 1984) provided a baseline definition of andragogy; Illeris (2008, 2016) concisely established that the root of effective adult education lies in motivation. The concept of andragogy, and role of economic factors, social aspects, globalisation and values in motivation were discussed. The factors studied in these theories also became the basis of a set of questionnaires and interviews conducted before and after the students undertook the programme.

Regarding the motivators of learning, the results of CEF participants and non-CEF participants were similar. Before the programme, they viewed their 'peer group' (friends, family, work colleagues), 'employers', and 'increased job prospects' as the strongest motivators. However, CEF participants were far more likely to report a desire to continue their education after the programme and tended to view the course more favourably.

The research found that the CEF students participating in the POM course recorded a higher attendance rate and outperformed their non-CEF participant counterparts, achieving better learning outcomes. The average CEF participants were younger and less financially well off, but with the economic incentive granted by the government they were much more likely to pass the course. On

top of that, the success of the CEF is directly attributable to the economic reimbursement scheme built into the programme: the reimbursement is only be made after completion of the course. In other words, the mechanism for paying the endowment appears to generate better learning outcomes. Some prior CEF participants were present in the programme; this suggests that the CEF does have a positive effect on the desire to continue with education. Among current CEF participants, there was a high intension to pursue further education in the future. Based on the students' opinions from the interviews, it is recommended that an expansion of the CEF programme would be supported by sufficient demand.

Undoubtedly, the CEF has had positive impacts on the state of adult education in Hong Kong. However, further research is required to determine whether these outcomes are a product of the government's CEF or of the programme adhering to 'good andragogic practices. After all, the study concludes that apart from the government promotion of CEF and lifelong learning, ensuring a high quality of teaching practices is a significant element in the success of adult education programmes in Hong Kong. Colleges and institutes which are authorised to offer programmes funded by the CEF must monitor the progress and development of the programmes to ensure good teaching which leads to 'self-directed learning' classrooms.

Most notably, during the COVID-19 pandemic, certain courses under the CEF were placed online for the first time. It would be interesting to measure the effects in an online classroom. Such results could determine whether it is feasible to expand the range and availability of online courses in the long turn.

In summary, the CEF provides overall a positive service for the citizens of Hong Kong in pursuing continuing education and facilitating their self-enhancement. The incentive scheme behind the CEF improved students' learning experience vastly across the board for a group of 40 students in one POM course at a tertiary college in Hong Kong, and almost all of them wished to continue learning in the future. It is hoped that the research offers in-depth analysis and detailed suggestions

which can enhance the development of the CEF programme to further address the needs of Hong Kong adult citizens, as well as showing the importance of a substantial conceptual foundation in adult learning for the development of CEF programmes in the future.

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APPENDIX

I. *Principles of Marketing Course Outline*



ROYAL BRISBANE INTERNATIONAL COLLEGE

Diploma of Business / Advanced Diploma of Hospitality Management

Subject Title	:	Principles of Marketing
Assessment	:	Individual Assignment (15%) Team Assignment (35%) Examination (50%)

Section 1: Academic Content

This module highlights the need for managers to view the role of marketing as critical to their organization. On completing the module, students will be able to:

- ☞ gain a thorough overview of Marketing concepts and its importance to business
- ☞ analyze the changing marketing environment, engage in creative, market oriented thinking, and
- ☞ be aware of the interplay between marketing and other managerial roles within an organization.
- ☞ the crucial role of marketing in contributing to the success of organizations will be emphasized.

Aims and Learning Outcomes:

At the end of this module, learners should be able to:

- ☞ research, present and evaluate information gathered
- ☞ understand issues related to evaluating client research needs
- ☞ identify, justify and demonstrate orally and in writing the critical knowledge, skills and attitudes that tourism and hospitality staff must possess in order to perform effectively
- ☞ design, collect and analyze qualitative and quantitative data

Section 2: Content Outline

Topics
Understanding Marketing Marketing's role in Business and Society
Understanding Strategic Marketing and Its Environment
Customer Relationships
Target Market Selection (1)
Target Market Selection (2)
Consumer Behaviour and Business Buying Behaviour
Marketing Mix - Product
Marketing Mix – Pricing
Marketing Mix – Distribution and Promotion
Customers in a global world
Marketing Management
Course Overview & Examination Preparation
Examination

Section 3: Learning resources

Marketing for Hospitality and Tourism, Kotler, Bowen & Makens, 4th Edition, Prentice Hall

Additional Resources

Hospitality and Travel Marketing, Alastair M. Morrison 3rd Edition, Barnes & Noble
Principles of Marketing, Kotler & Armstrong, 10th Edition, Prentice Hall

Section 4: Policy

Attendance: A minimum of 80% attendance is required to pass the course. You are also required to attend all presentation sessions.

Plagiarism, cheating, and other misconducts:

Academic dishonesty will NOT be tolerated. All materials submitted in this course must be your own original work. Any material not completely original must be credited to the proper source.

Assignment submission: Assignments must be submitted on the due day. Late submission will NOT be accepted.

Section 5: Assessment

To achieve the minimum of Pass Grade, learners are required to complete all assessments and attain an overall mark of 50% and above.

There are two main components of grade assessment:

1. **Examination** (worth 50% of final grade)

The final examination will be taken by students during the examination week at the end of the semester and it will test their knowledge and understanding of the materials covered in the entire course. It normally lasts 2 hours.

2. **Continuous assessment** (worth 50% of final grade)

This component of assessment consists of:

A. Individual assignment (15%)

B. Team assignment (35%) : Oral Presentation (15%) + Written Report (20%)

Section 6: Grades

To achieve the minimum of a Pass Grade, learners are required to complete all assessments and attain an overall mark of 50% and above. For final assessment in the subject, the result will be one of the following letter grades: HD, D, C, P, or F.

Grade/percentage	Description
High Distinction (HD) 85-100	Work of outstanding quality on the learning outcomes of the subject, which may be demonstrated in areas such as criticism, logical argument, and interpretation of materials or use of methodology. This grade may also be given recognize particular originality or creativity.
Distinction (D) 75-84	Work of superior quality on the learning outcomes of the subject, demonstrating a sound grasp of content, together with efficient organization and selectivity.
Credit (C) 65-74	Work of good quality showing more than satisfactory achievement on the learning outcomes of the subject, or work of superior quality on a majority of the learning outcomes of the subject.
Pass (P) 50-64	Work showing a satisfactory achievement of the learning outcomes of the subject.
Fail (F) 0-49	Work showing an unsatisfactory achievement of one or more learning outcomes of the subject, and not qualifying for the grade of pass or conceded pass.

Assessment Detail

Your task:

A new Chief Executive Officer working in the company who would like to hold a meet with all department heads in order to gain a better understanding of each department. You are one of the department heads in a company (your choice of the department/outlet/product/service) and would attend the meeting with other department heads. Everyone was asked to show the marketing information in written (assignment one). The CEO would have a good look on all projects and would put some resources on promoting a specific product or service among the projects (assignment two).

Assignment One individual written report, no fewer than 1,000 words

The basic marketing information must be gathered before making any action. The following information (at least three of them) should be included in the assignment.

- ☞ Marketing Strategic
- ☞ Marketing Environment
- ☞ SWOT
- ☞ Customer Relationships
- ☞ Target Market Selection

Assignment Two a team of 2-3 students, including a written report, no fewer than 1,000 words for each member, and a presentation

With the information researched from the first assignment, you are going to tailor-made the marketing mix (4Ps) with the specific buying behavior of the target market.

- ☞ Consumer Behaviour
- ☞ Marketing Mix - Product
- ☞ Marketing Mix - Pricing
- ☞ Marketing Mix - Place (Distribution)
- ☞ Marketing Mix - Promotion

Report Format

The written reports of assignment one and two should follow the following format

1. Assignment Cover Page
 - ☞ Please approach the college for this cover sheet which is printed in the specific format.
2. Title page
 - ☞ This one-page section should include all necessary information such as name, class, student name, number, assignment topic, submission date, etc.
3. Executive summary
 - ☞ This one-page section should be the summary of the whole project. The content should be written in essay form that summarizes the whole project; in the other word, readers should be able to gain the whole draft meaning of the project. You may take this part after finish the whole report.

4. Table of contents
 - ☞ Instead of typing the “table of content information” by hand that may cause mistakes and defective format, this section must be done by computing function. One of the ways to compute the “table of content” can be done from “reference→ table of content→ insert table of content” after assigning the “styles” of each “heading”.
5. Introduction
 - ☞ Different to the executive summary, this section should contain the reasons of writing these topics, creative idea or interesting opinion can be used in order to draw the readers’ attention.
6. The main body (please do not write “the main body” in your project)
 - ☞ In this section, student should take the following as the consideration.
 - (for assignment one)
 - ☞ Marketing Strategic
 - ☞ Marketing Environment
 - ☞ SWOT
 - ☞ Customer Relationships
 - ☞ Target Market Selection
 - (for assignment two)
 - ☞ Consumer Behaviour
 - ☞ Marketing Mix - Product
 - ☞ Marketing Mix - Pricing
 - ☞ Marketing Mix - Place (Distribution)
 - ☞ Marketing Mix - Promotion
7. Conclusions and/or recommendations
 - ☞ After analyzing the above topics, student should wrap-up the information and/or to make recommendations to the company / product / service.
8. Reference
 - ☞ This should include all reading materials you “actually” used.
9. Appendices (optional)
 - ☞ Please provide copies of the materials that you cited or referred in the project.

Requirements for the assignment

- ☞ Assignments must be typed in Times New Roman using 12 of font size, with single line spaced, and please leave 1 cm on left and 1cm on right margins. The report should be in essay form, and point form will be appropriate for few sections only. You may wish to include supporting information as appendices at the end of the research project. On top of the appendix section if there is, the written report of the project should not fewer than 1,000 words.
- ☞ Please note that only the introduction, the body, the recommendation, and the conclusion are included in the word length. All assignments are expected to have correct grammar, spelling.

II. Letter of Invitation for Survey Research

Principal

Institute of Advanced Learning

Dear Dr. Richard Wong,

The purpose of this letter is that I would like to ask for official permission to conduct research with students at Institute of Advanced Learning. I have satisfied the ethics requirements of the British Educational Research Association (BERA). BERA have transparent guidelines regarding educational research undertaken by UK researchers outside of the UK. Researchers must adhere to the same ethical standards as research in the UK. Appropriate consent should be sought from local authorities in cultures that adopt a collective approach to consent (e.g., community or religious leaders or local government officials) but cultural sensitivity should not extend to excluding the individuals concerned from making their own informed decision to take part in the research (<https://www.bera.ac.uk/>). This reflects my approach to gaining permission to conduct research at Institute of Advanced Learning. In my research I use a pseudonym to protect the name of the institution and I will also use this approach to protect the identity of individual participants.

It is intended as an opportunity for the participants to express their views on issues related to Continuing Education Fund (CEF) programme. The participants I will do research with are all classified as adults by the definition in the UK, therefore I do not require the permission of parents. I will make it clear before I conduct the research with students that this is not part of the assessment requirements of the course, and it is completely voluntary need.

The main data collection including questionnaires and surveys will take place during the period from May to August 2019. Regarding the course outcome, I will also access students' assessment results and attendance rates after the course for detailed data analysis. Once the thesis arising from this research has been completed, a brief summary of the findings will be made available by the researcher upon application. It is also possible that the results will be presented at academic conferences and journals. The data will be kept securely for ten years from the date of publication, before being destroyed.

Your permission and assistance with this matter would be greatly appreciated.

Yours sincerely,

Maggie Pua

Maggie Pua

III. Consent Form for Principal


CONSENT FORM FOR PRINCIPAL

Project Title - The Perception of Lifelong Learning by Adult Learners under the Context of Education Transformation in Hong Kong: A Study of Adult learners' Values and Experiences of Continuing Education Fund (CEF) Program

Researcher's Name - Maggie M.W. Pua

Supervisors' Names' - Professor John Holford, Professor Sarah Speight

1. I have read the research information and understand the purpose of the research project.
2. I understand and agree that Ms. Maggie M. W Pua will be conducting her EdD research related to the "Continuing Education Fund (CEF) program" at my college "Institute of Advanced Learning".
3. I understand that Ms. Maggie M. W Pua will be offering a voluntarily opportunity with the students in the class of "Principles of Marketing" and will ask the participants to complete questionnaires followed by the interview at the end of the course.
4. I understand that students' assessment results and attendance records will be obtained by Ms. Maggie M. W Pua after the program for data analysis.
5. I understand that the students or supervisors who participate in the research may contact for further information about the research
6. I understand that the students have the rights to contact the Research Ethics Coordinator of the School of Education, University of Nottingham if they wish to make a complaint relating to the school or researcher's involvement in the research.
7. I understand that Ms. Maggie M. W. Pua will store the data collected during the research within the school premises for 10 years before shredding disposal.
8. I understand that my institution and my name will not be identified and remain anonymous in the study.

Signed  (Principal)
Print name WONG, Kin Wa Date 29.14.2019

Contact details

Researcher: Maggie M.W. Pua
University of Nottingham
E-mail: ftxmwp@nottingham.ac.uk

Supervisor's Name: **Professor John Holford** (John.Holford@nottingham.ac.uk)
Supervisor's Name: **Professor Sarah Speight** (Sarah.Speight@nottingham.ac.uk)

The contact details of the Research Ethics Coordinator should participants wish to make a complaint on ethical grounds are: educationresearchethics@nottingham.ac.uk

IV. Information Sheet for Student Participants

Postgraduate Research Study: The Perception of Lifelong Learning by Adult Learners under the Context of Education Transformation in Hong Kong: A Study of Adult learners' Values and Experiences of Continuing Education Fund (CEF) Programme

Researcher: Maggie M.W. Pua

Information Sheet for Student Participants

You and other willing students are being invited to be involved in this research study. Before you decide whether you want to take part, it is important for you to understand why the research is being conducted and what your participation will involve. Please take time to read the following information carefully and discuss it with other members of staff from your school if you wish. Please contact me if anything is unclear or if you would like more information. Take time to decide whether or not you wish to take part. Thank you for reading this.

Aims: The aims of the project are to gather information about Continuing Education at tertiary level in Hong Kong in order to gain a better understanding of adults' motivations to learn and their perceptions to the learning experiences. It is hoped the study will contribute research to the on-going policy reforms related to Continuing Education in Hong Kong and more broadly at the international level.

Requirements: The pre-course and post-course questionnaires will be carried on the campus at the first day of the course and after the course ends within one month respectively. Some of the participants will be invited to participate in the interview after the end of the programme following the completion of the post-course questionnaire. The interview will be based around a semi structured interview pattern and will take approximately 45-60 minutes. These interviews are intended as an opportunity for you to express your views on the learning motivations and experiences. The interviews will be recorded, and later transcribed into text form. On top of that, course outcomes including assessment results and attendance rates will be analyzed after completion of the programme.

Anonymity/Participation: As part of the presentation of results, your own words may be used in text form. This will be anonymised, so that you cannot be identified from what you said. All of the research data will be stored in a secure place in a separate, password protected file from any data supplied.

Please note that:

- You can decide to stop the interview at any point
- You need not answer questions that you do not wish to
- Your name will be removed from the information and anonymised. It should not be possible to identify anyone from my reports on this study.

It is up to you to decide whether to take part or not. If you decide to take part, you are still free to withdraw during the interview or any time and without giving a reason. If you withdraw from the study all data will be withdrawn and destroyed.

If you do decide to take part, you will be given this information sheet to keep and be asked to sign a consent form.

Once the thesis arising from this research has been completed, a brief summary of the findings will be made available by the researcher upon application. It is also possible that the results will be presented at academic conferences and journals. The data will be kept securely for ten years from the date of publication, before being destroyed.

If this study has harmed you in any way, you can contact the University of Nottingham using the details below for further advice and information:

Supervisor's Name: Professor John Holford

Email: John.Holford@nottingham.ac.uk

Supervisor's Name': Professor Sarah Speight

Email: Sarah.Speight@nottingham.ac.uk

The contact details of the Research Ethics Coordinator should participants wish to make a complaint on ethical grounds are: educationresearchethics@nottingham.ac.uk

V. Consent Form for Student Participants

CONSENT FORM FOR STUDENT PARTICIPANTS

Project Title - The Perception of Lifelong Learning by Adult Learners under the Context of Education Transformation in Hong Kong: A Study of Adult learners' Values and Experiences of Continuing Education Fund (CEF) Programme

Researcher's Name - Maggie M.W. Pua

Supervisors' Names - Professor John Holford, Professor Sarah Speight

1. I have read the Participant Information Sheet.
2. The nature and purpose of the research project has been explained to me.
3. I understand that ethical approval has been granted by the University of Nottingham ethics committee.
4. I understand the purpose of the research project and my involvement.
5. I understand that I may withdraw from the research project at any stage and that this will not affect my status now or in the future.
6. I understand that the name of the institution I am studying in, and my name will not be identified and remain anonymous in the study.
7. I understand that my assessment results and attendance record will be accessed and analysed.
8. I understand that I will be audiotaped during the interview.
9. I understand that electronic data only will be stored in a password protected computer that only the researcher has right to access to.
10. I understand that all information provided during the research may be analysed and published by the researcher after completion of the programme. The researcher has the rights to use the data collected without further approval.
11. I understand that I may contact the researcher or supervisor if I require further information about the research, and that I may contact the Research Ethics Coordinator of the School of Education, University of Nottingham, if I wish to make a complaint relating to my involvement in the research.
12. I understand that the data I will provide will be retained for 10 years as required by British Educational Research Association (BERA) guidelines.

Signed (Research participant)

Print name **Date**

Contact details

Researcher: Maggie M.W. Pua

University of Nottingham

E-mail: ttxmwp@nottingham.ac.uk

Supervisor's Name: **Professor John Holford** (John.Holford@nottingham.ac.uk)

Supervisor's Name: **Professor Sarah Speight** (Sarah.Speight@nottingham.ac.uk)

The contact details of the Research Ethics Coordinator should participants wish to make a complaint on ethical grounds are: educationresearchethics@nottingham.ac.uk

VI. Pre-course Questionnaire for Student Participants

1. Please circle your gender

Male Female

2. Please indicate the age group you are included in

18-23	24-29	30-34	35-39
40-44	45-50	51 or above	

3. Are you a permanent resident of Hong Kong?

Yes No

4. Please choose your employment status

- Employee in full-time paid job (30 hours per week or more)
- Employee in part-time paid job (less than 30 hours per week)
- Self-employed full-time (30 hours per week or more)
- Self-employed part-time (less than 30 hours per week)
- Unemployed and available for work
- In full-time education
- Looking after family / home
- Retired from paid work

5. What is the highest level of education you have achieved, as of today?

- Less than High School Completion
- High School Graduate or equivalent
- Some College Courses
- Associate Degree or High Diploma
- Bachelor's Degree
- Graduate Degree (Masters, Doctorate, etc)

6. How much is your monthly income?

- Below HK\$10,000
- HK\$10,001~ HK\$20,000
- HK\$20,001~ HK\$30,000
- HK\$30,001~ HK\$40,000
- HK\$40,001~ HK\$50,000
- HK\$50,001~ HK\$60,000
- More than HK\$60,000 or above

7. Have you applied for the Continuing Education Fund (CEF) in this course?

Yes No

(If not, state the reasons) _____

8. How much does the course of 'Principles of Marketing' cost to you?

_____ Free (Employer to pay)

_____ HK\$900 / HK\$1,800 (CEF by the Government)

_____ HK\$4,500 (Full course tuition)

9. Is this learning made compulsory by any of these organisations or do you have a choice of whether or not to do it?

_____ Employer made it compulsory

_____ Professional body or some organizations made it compulsory

_____ I had a choice

10. How important were the following groups of people, organisations or sources to you when deciding to pursue further education?

Very Important (5)

Fairly Important (4)

Important (3)

Slightly Important (2)

Not at all Important (1)

_____ Friends, Family or Work Colleagues

_____ My Employer or Professional Body

_____ Government Promotion of Lifelong Learning

_____ School or Evening Institute

_____ Newspapers / Magazines / Websites

11. How important was each of the following factors in your decision to take part in the programme?

Very Important (5),
Fairly Important (4),
Important (3),
Slightly Important (2),
Not at all Important (1)

- _____ Funding (CEF) provided by the Government
- _____ Learn something new / personal interest
- _____ Improve my ability to do my current job
- _____ Meet new people
- _____ Increase my self confidence
- _____ Get a new job or new career / promotion
- _____ Increase my income
- _____ Get a higher qualification

VII. Post-course Questionnaire for Student Participants

1. Please circle your gender

Male Female

2. Please state the age group you are included in

18-23	24-29	30-34	35-39
40-44	45-50	51 or above	

3. Are you a permanent resident of Hong Kong?

Yes No

4. Please choose your employment status

- Employee in full-time paid job (30 hours per week or more)
- Employee in part-time paid job (less than 30 hours per week)
- Self-employed full-time (30 hours per week or more)
- Self-employed part-time (less than 30 hours per week)
- Unemployed and available for work
- In full-time education
- Looking after family / home
- Retired from paid work

5. What is the highest level of education you have achieved, as of today?

- Less than High School Completion
- High School Graduate or equivalent
- Some College Courses
- Associate Degree or High Diploma
- Bachelor's Degree
- Graduate Degree (Masters, Doctorate, etc)

6. How much is your monthly income?

- Below HK\$10,000
- HK\$10,001~ HK\$20,000
- HK\$20,001~ HK\$30,000
- HK\$30,001~ HK\$40,000
- HK\$40,001~ HK\$50,000
- HK\$50,001~ HK\$60,000
- More than HK\$60,000 or above

7. How much does the course of 'Principles of Marketing' cost to you?
 _____ Free (Employer to pay)
 _____ HK\$900 / HK\$1,800 (CEF by the Government)
 _____ HK\$4,500 (Full course tuition)
8. Is this learning made compulsory by any of these organisations or do you have a choice of whether or not to do it?
 _____ Employer made it compulsory
 _____ Professional body or some organizations made it compulsory
 _____ I had a choice
9. Have you applied for the Continuing Education Fund (CEF) in this course? If no, please go to Q11.
 Yes No (If not, state the reasons) _____
10. Is the amount refunded by the government, (i.e., Total HK\$20,000, 80% of the tuition fee for the first HK\$10,000 subsidy and 60% of the tuition fee for the second HK\$10,000 subsidy) sufficient to support the learners?
 Yes No (If not, state the reasons) _____
10. Thinking about the time you spent on the course, please indicate your response using the below scale and fill in each blank below.

Strongly Agree (5), Agree (4), Neutral (3), Disagree (2), Strongly Disagree (1)

- _____ Developed my knowledge / skills in the subject
 _____ Helped me to keep my brain active
 _____ Made new friends / meet new people to extend my network
 _____ Improve my ability to do my current job
 _____ Helped me to do something efficient with my time besides work / leisure
 _____ Was enjoyable / interesting
 _____ Boosted my confidence / Increased my self-esteem
 _____ Encouraged me do more learning

12. Would you say that any of the things stated below actually happened as a result of doing the course?

Please indicate your response using the below scale and fill in each blank below.

Strongly Agree (5), Agree (4), Neutral (3), Disagree (2), Strongly Disagree (1)

- Learned new skills for my job
- Was able to do my job more efficiently
- Got more satisfaction out of the work I was doing
- Earn more money (wage, commission, bonus or other sources of income)
- Got a new job / Promotion
- Stayed in my job, which I might have lost without this learning
- Was able to deal with the current work problems
- None of the above

13. Apart from the current learning, how likely is it that you will do any further education, learning or training in the next two or three years?

- Most likely
- Very likely
- Fairly likely
- Not very likely
- Not at all likely

14. How likely would you say you are to pursue a bachelor's degree/master's degree at a college at some point in the future?

- I definitely intend to
- It is quite likely
- It is possible
- It is not at all likely
- I definitely will not

Please state the reasons: _____

15. If you were planning to do some learning in the future, would you be willing to save money towards it?

- Yes
- No
- Unable to save

16. To what extent do you agree or disagree that if you want to succeed at career you need to keep improving your knowledge and skills

_____ Strongly Agree

_____ Slightly Agree

_____ Neither Agree nor Disagree

_____ Slightly Disagree

_____ Strongly Disagree

17. If yes, to what extent do you agree or disagree that the implementation of the Continuing Education Fund (CEF) can help facilitate the learning motivation of society members in Hong Kong.

_____ Strongly Agree

_____ Slightly Agree

_____ Neither Agree nor Disagree

_____ Slightly Disagree

_____ Strongly Disagree

18. Do you think that the government should continue introducing similar funding programmes in Hong Kong education system?

Yes

No

VIII. Interview Questions

1. Have you applied for the Continuing Education Fund (CEF) in this course?

Yes → Q2

No → Q3

2. Was the Continuing Education Fund (CEF) an important factor in your decision to take part in this course?

Yes → Why was the CEF important in the decision?

No → Why was the CEF unimportant in the decision?

3. If not, what were your reasons of not applying for the Continuing Education Fund (CEF) provided by the government?

And would the funding provided by the government be a significant factor in your decision to take part in this course if you were able to apply for it now?

Yes →

Why would the CEF so significant in the decision if you were able to apply for it now?

No →

Why would the CEF so insignificant in the decision if you were able to apply for it now? → **Q4**

Possible Factor: Employer or Professional Body

✧ Why do you think that ‘your employer / professional body’ affects your decision to take part in the programme?

✧ How does your employer / professional body affect your decision?

✧ Would you mind sharing your personal experience with me?

Possible Factor: Friends, Family or Work Colleagues

✧ Why do you think that the social group ‘Friends, family or work colleagues’ affects your decision to take part in the programme?

✧ And how do your friends, family or work colleagues affect your decision?

✧ Any real-life examples to share?

Other factors:

Besides the people we mentioned above, what are other reasons for you to take part in this programme? Why?

4. If the factors mentioned are not found in the questionnaire, what are the main reasons behind to stimulate you to take part in the programme? Why?

5. Is getting a higher qualification is an important factor for you to take part in this programme?
Yes → Why is it very important? How important is that?
No → Why is it not very important?

6. Do you believe that if you want to succeed at career you need to keep improving your knowledge and skills?
Yes → Why?
 - ✧ From your point of view, what kind of knowledge and skills do we need in order to succeed at career nowadays in Hong Kong?
 - ✧ How do you acquire them?
No → Why?
 - ✧ Why are you taking this programme then?
 - ✧ From your point of view, what do we need if we want to succeed at career nowadays in Hong Kong then?

7. What is (are) the best part(s) of the 4-month learning process? Why are the best parts?
Would you please share your learning experience with me?

8. The whole programme has been completed for a while; would you please tell me what benefits you have gained from the course individually?

9. In your opinion, what are the strengths and weaknesses of the Continuing Education Fund (CEF) in Hong Kong?
Pros → Any suggested improvement?
Cons → Any suggested solutions?

10. Is the amount refunded by the government, (i.e., Total HK\$20,000, 80% of the tuition fee for the first HK\$10,000 subsidy and 60% of the tuition fee for the second HK\$10,000 subsidy) sufficient to support the learners?
Yes → Why?
No → From your point of view, how much should the HKG support each learner in his or her lifetime?

11. Would you consider any further education, learning or training in the future after completion of the programme?

Yes → Why?

No → Why not?

12. All in all, do you think that the government should continue introducing similar funding programmes in Hong Kong education system?

Yes → Why?

No → Why not?

IX. Coded Interview Transcripts

*Note the abridgements were made to emphasize clarity. Verbal ticks such as “um”, “er” etc. were removed for ease of study. Verb tenses and other grammatical mistakes were fixed only if the error detracted from comprehension. No tenses or other mistakes were fixed if the meaning of the sentence were originally unclear. *

Colour coding:

Red: Main themes

Purple: Sub-themes

Blue: Illustrative quotations

Interviewer - Pua Mei Wah Maggie (P)

Participant 1 – CEF applicant (A)

P: I would like to ask you some questions, A. Have you applied to the CEF in this course?

A: Yes, I did.

P: So, the CEF is an important factor in your decision to take part in this course?

A: Yes, **CEF is very important to me in this course** because **it will improve my career.**

P: Do any other reasons facilitate your decision to take part in this course?

A: Yes, because you know...I **take part in this course** is because of **my boss**...I probably **have the chance to be in charge of one of the branches in Taiwan, so I want to improve my education**...you know for the time being.

P: Ok, so according to pre-course questionnaire, you mentioned ‘Government promotion of lifelong learning’, ‘employer or professional body’, ‘friends, family or work colleagues’ are actually very important in your decision when deciding to pursue further education. So why do you think that your ‘employer or professional body’ affects your decision to take part in this program?

A: Actually, I really want to improve my education for so long but just you know...I haven’t got time. As you know, In Hong Kong it’s very long-hour working for everyone, but **my eldest brother encouraged me to continue education** which you know the government has the support such as **CEF**...you know **it offers HK\$20,000 for learning. This is my incentive to take the course.**

P: So, you mean your social group ‘friends, family or work colleagues’ affect your decision to take part in this programme. How about your employer? How does your employer affect your decision?

A: Actually, I work at one of the contemporary furniture companies and most of our clients are western people. **I need to speak well and communicate well with my clients.** On the other hand, **my boss always encourages me to have more education...to improve my mentality or to improve my management skill**...**one day I could have a much more important job for me. So, I decided to take the**

course.

P: You mentioned...your brother actually affected your decision to take part in the CEF course. Can you tell me more about it in detail? How did your brother actually stimulate you to take part in this programme?

A: My brother is a person who really enjoys studies...by the way, he has two different master's degrees. Among my family members, I am not the only one who has got a degree. Yeah, that is one of the most important things you know...

P: Ok so based on your pre-course questionnaire, you mentioned there are two very important factors in your decision to take part in this programme. The first thing is 'getting a higher qualification' and the second thing is the 'funding' which is provided by the government. So, is 'getting a higher qualification' an important factor for you to take part in this programme?

A: Yes.

P: Why it is very important?

A: Um it's because of many things you know...for my job...for my family, I am sure that if I get a higher education, it will improve my career...maybe one day I will change my job in somewhere else. And you know, I want to have further education because most of my family members have higher education already, so I want to improve myself as well and finally I just want to be a better person.

P: Ok better person. But you mentioned 'CEF provided by the government' is also one of the factors to initiate you to take part in this programme. How important is that?

A: CEF funding is very important for anyone you know who wants to get a higher education because Hong Kong is all about the service industry...we need to meet different people in our jobs our lives...and we need to have very well communications with everyone and to involve different parts of jobs or everything we don't know, to be better you know...improve people's mentality in the society.

P: Thank you. So according to your post-course questionnaire, you mentioned two important things as well. You actually strongly agree that the programme has helped you to 'develop your knowledge and skills' and the second thing is 'improve your ability to do your current job'. So, can you tell me how did it actually help you to 'develop your knowledge and skills' in this subject?

A: Um in my job, I used to be a person who never talked too much with my colleagues because we are busy every day and you know also I have two staff follow me for some administration work...but after the course of the marketing, I recognised that I have to change myself first...I have to understand my staff, their skills and their mentality. You know we got to share everything in office to make the job done more efficiently and keep everyone open and happy in work.

P: Ok so how did the course 'improve your ability to do your current job'?

A: After taking the course, I know how to motivate my staff and that reinforcement is important as well. So, this is what I learnt from the course.

P: So, do you believe that if you want to succeed a career you need to keep improving your knowledge and skills nowadays in Hong Kong?

A: Yes.

P: What kind of knowledge and skills do we need in order to succeed at career nowadays in Hong Kong?

A: Actually, you know at the moment Hong Kong...well the world is changing so fast, and Hong Kong is not a city you know for industry work...we focus on something very technical... and service industry, so we need to have more skills to handle it at the moment.

P: Just like what you said, we have to acquire some technical skills, some service skills. So how can we actually acquire them? How can we learn them? From the courses or somewhere else?

A: I think 'both'. We can learn the theories from the courses and some examples from the lecturers you know and then we can digest everything you know and apply to our jobs and our lives together.

P: Ok so what are the best parts of the 4-month learning process?

A: I think... I have increased confidence a lot and I can learn more theories about the subject in the course. You know it's difficult to describe the process, but I can tell from the results in my career and my job. First you know, my boss appreciates what I have changed in my job duties and second is I get along well with my colleagues and staff you even in the critical time we know how to sort out things together... cooperation is very important in the workplace.

P: So, based on your post-course questionnaire, you also mentioned you have 'learned new skills for your job' and are 'able to do the job more efficiently' and you strongly agree with all of this. So, the whole programme has been completed for a while, would you please tell me what benefits you have gained from the course individually?

A: Very much. You know I want to have a degree of Hermitage and something like the old buildings in Hong Kong. How to modify the old buildings. I am sure it will be one of the most important things in Hong Kong because the tourist industry is very important. But they need degree holders to take the job so for the time being you know...I decided to take the marketing course first and the next step will be the 'hermitage' degree somewhere else.

P: Ok so it's like a steppingstone for you to pursue higher education.

A: Yes yes.

P: So, in your opinion, what are the strengths and weaknesses of the continuing education fund in Hong Kong? Talk about the pros and cons of the CEF programme

A: My suggestion is...well the strength for the CEF is the contribution for our higher education and the bad thing is well...it depends on student's income because some students may have lower income and they probably need to have a lot of expenses in their lives as well. Because the CEF only offers HK\$20,000...it can increase a little bit more by inflation for the students...that will be a very strong incentive to attract more students you know...to continue education

P: So, you think the amount refunded by the government somehow is not sufficient to support the learners because the HK\$20,000 should adjust according to the inflation rate.

A: Correct.

P: So how much should the Hong Kong Government support each learner in his or her lifetime in general?

A: How much? Well probably 3-5% increase every year you know...it would be grateful

P: Would you consider any further education, learning or training in the future after completion of the programme?

A: Yes, as I said, I am interested in Hermitage. After the course, I will take another degree somewhere else.

P: So, the CEF programme is a steppingstone for you to pursue your dream. Further education can help you to develop your skills and knowledge...and also help you to pursue your future career. Is that right?

A: Correct.

P: All in all, do you think that the government should continue introducing similar funding programmes in Hong Kong?

A: That would be grateful.

P: Ok and can you tell me why?

A: Just like I said, I always encourage people to continue education, it would be, this is my opinion, it would make the people better. The government needs to do something to lead everyone to improve their ability. Continuing education is one of the most important things.

P: So why the government should improve everyone's education and knowledge? Why should the government do this?

A: People are the sources of productivity. one of the tools for the government. That's it.

P: That's the reason?

A: Yes.

P: Ok thank you for joining my interview. It helps my research a lot. Thank you very much.

Interviewer - Pua Mei Wah Maggie (P)

Participant 2 - CEF applicant (B)

P: Thank you for coming. So, have you applied to the Continuing Education Fund in this course?

B: Yes, I did.

P: Was the Continuing Education Fund an important factor in your decision to take part in the course?

B: Yes, it is. CEF is really attractive.

P: So, I have seen your pre-course questionnaire...You told me that 'employer, professional body' are very important to affect your decision to take part in the programme. So how does your employer or Professional body affect your decision?

B: Basically, I want to make my CV look better. When my friends ask me what your weaknesses are all I can say is I lack a good academic background so I can prove that besides, like this amount of work experience, I can do some part-time studies as well.

P: Did your current employer actually force you to take part in the CEF programme?

B: No.

P: Would you mind sharing your personal experience how your employer affects your decision?

B: It's not really the employer that affects my decision. It's more about **the whole company atmosphere.** **My colleagues** are from famous schools, and they have a really high education and when you talk to them and work with them, you know there is some difference. They have seen one thing; **they can think out of the box.** So yeah, that makes me want to continue studies and maybe be like them...

P: Can I say that the work colleagues this group of people affect your decision to take part in this programme?

B: Yes, and actually **you feel a little bit low self-esteem when you are around with all the professionals working in the bank.** Everyone is like money-makers.

B: So, I feel like keep studies will **enhance my self-esteem** when I work with them.

P: Ok employer, office environment and your work colleagues actually factor to affect your decision to take part in the programme. Can I say that?

B: Yeah.

P: So, are there any main reasons behind it to stimulate you to take part in this programme?

B: **I want to go for a degree so, but I cannot just like apply for a degree, I have to study a course before a degree. So, I chose business diploma in this school.**

P: Getting a higher qualification is also a very important factor.

B: Yes.

P: Ok, so besides, why is it an important factor nowadays in Hong Kong to get a higher qualification?

B: I think more likely because everyone has it...**Everyone has a degree or two degrees...This is a really common thing in Hong Kong actually.** If you don't have one, it doesn't mean that you are stupid. Of course, it doesn't mean that you are not educated. But **when you compete with other interviewees** doing interviews, you lack something.

P: All right. So, are there any factors in your decision to take part in this programme? Besides getting a higher qualification?

B: **Learn something new** is also one of the points and um I want to...I have been working for a couple of years. I started working since I was 18. I started working for like very young age and **I found that I just keep working every day and I don't do any maybe learning. My life is too bored.**

P: Ok let's look at your post course questionnaire. You mentioned the whole programme, the time spent on the course you have already helped you to keep your brain active and encourage you do more learning. So, do you believe that if you want to succeed at career you need to keep improving your knowledge and skills?

B: Yes, at a certain level. Because **I am still at entry level of my career. But um in the future, when I do the management part, maybe I still need those knowledge and skills. Better prepared than not.**

P: Right. So, from your point of view, you are a representative of a Hong Konger, what kind of knowledge and skills do we need in order to succeed at career nowadays in Hong Kong?

B: I'm not sure how to succeed at career nowadays in Hong Kong. If I know, I will be very successful. I guess it would be something maybe skills like communication.

P: Communication skills.

B: What kind of knowledge...Like I don't know. When I was at school, it's like...as you see like **only 10% of knowledge is from school actually using for work**. So, I think the more important thing is if you go to continuing study is **to interact more with the teachers and the students** and you know, **exchange your knowledge, exchange what you know and that would improve**. You would **get something from the interactions and also experience**.

P: So, it's like interpersonal skills, right?

B: Yes.

P: So how do you acquire communication skills and interpersonal skills like what you mentioned?

B: How can I acquire? I don't understand.

P: How do you learn - how do you learn communication skills and interpersonal skills?

B: As long as you are not afraid to make mistakes and you always learn something like when you are maybe studying marketing and like when I was in business diploma I did **learn some maybe problem-solving skills and critical thinking skills** like **how I solve the problems and if I have some questions...where I can get the answers**. Yes, **I did learn something like this kind of knowledge and maybe when doing the projects, I learnt how to communicate well with other teammates**.

P: Ok. It's like the time spent on the course is quite worthwhile. So, what are the best parts of the learning process?

B: Only focusing on the marketing course?

P: What have you gained from the marketing course?

B: Well personally I actually think – **THE INSTRUCTOR** - is a really good teacher. He used a lot of **his own experience to explain some complicated theories**.

P: Right.

B: And **that's what he did (used a lot of his own experience to explain some complicated theories) in the lecture and the most enjoyable part, we actually had some interactions with the teacher instead of just the teacher talking** and...listening to something I don't know...**listening to his lectures is always fun to me, like learning something new and knowing something you never know before**.

P: So, have you gained the communication skills or interaction skills from the CEF course?

B: Yes.

P: Ok right. Ok based on the results of your post-course questionnaire, you told me that you 'got more satisfaction out of work' you have been doing. So, the whole programme has been completed for a while, would you please tell me what benefits you have gained from the course individually? From your perspective, what have you gained from it?

B: Now I got the entrance ticket for the...for my degree and what I am studying right now is quite you know... I can handle because I had the basic knowledge when I had my business courses like marketing and HRM, so these are some benefits that I earned from the diploma. I feel like I have learnt this before, so now I don't feel too awkward or too difficult when I go advanced level for it.

P: Ok so in your opinion, what are the strengths and weaknesses of the CEF in Hong Kong? For HK\$20,000, what are the strengths and weaknesses?

B: Strengths and weaknesses, of course, when I started this programme, the programme fee is around 30k and it's a quite attractive amount. This 20k covers about two-thirds but it's only 20k for one lifetime. This is way not enough because if you want to continue study, you have to spend a lot of money as well and the...now my degree costs around like 100k so compared to that amount, 20k seems not very helpful amount but still it's a really good point to start like when people are thinking 'oh maybe I want to do more study', continue study maybe for a diploma and if you tell them there is a fund, you can get like 20k fee, that would be one of the points that they might be interested to go for study.

P: So, I understand that. HK\$20,000 for lifetime is one of the weaknesses. Now you are the Hong Konger, can you tell me, how do you improve the situation? Can you think of any solutions to help?

B: Anyhow I am not the government. I hope there are more fundings if you support those students who are working, or maybe part-time students like me. Of course, I know, where the money comes from but if you can maybe have more amounts of funding.

P: Ok can you suggest the amount?

B: Um I don't know. Maybe not by lifetime but if you go for a course, you can apply for the subsidies or funding. I don't know about the certain amount, perhaps percentage instead of just one fixed amount for your whole lifetime.

P: Ok so I still have to ask you this question. Is the amount refunded by the government which is HK\$20,000 sufficient to support the Hong Kong learners?

B: No.

P: So, from your point of view, how much should the Hong Kong government support each learner in his or her lifetime?

B: Well, lifetime...I'm not sure because everyone pursues different kinds of knowledge, but I would be very happy to see if this kind of more funding in different kinds of maybe industry or maybe different kind of subjects in different schools. Like if I go for diploma, one-third CEF funding supporting and now I go for degree, maybe I can apply some subsidies for...I don't know such as some percentage and I don't know maybe one-third again. It would be very attractive.

P: Right so would you consider any further education, learning or training in the future after completion of the programme?

B: Yes.

P: You can tell the doctorate degree panel. Actually, you are going to peruse your bachelor's degree.

B: Yeah, I am going to pursue a bachelor's degree of business studies.

P: You did it after completion of the CEF programme?

B: Yes yes.

P: Ok right so all in all, do you think that the government should continue introducing similar funding programmes in Hong Kong education system?

B: Yeah, just like what I just said. Yes absolutely. The government should spend more resources on education system instead of, I don't know, building something.

P: Infrastructure.

B: Yes, that would kind of weigh too much and the result is not very, you know the people are not benefit from it and if you want to enhance the education level in Hong Kong, um funding is very good point.

P: Um ok so thank you. Thank you for your valuable advice on improving CEF programme.

Interviewer - Pua Mei Wah Maggie (P)

Participant 3 - CEF applicant (C)

P: Thank you C for coming to the interview. So, I would like to ask you some questions related to the course and the CEF programme. Have you applied to the CEF (Continuing Education Fund) in this course?

C: Yes, I have applied to the CEF in this course.

P: Ok. I want to ask, 'Was the Continuing Education Fund and important factor in your decision to take part in this course?'

C: Yes, because this is quite important because of the money, the course fee in this college is not cheap, not everyone can afford it and the CEF can support parts of the school fees.

P: According to the pre-course questionnaire completed by you, I found that there are some factors like 'friends, family or work colleagues' and 'employer or professional body', these two factors are fairly important to you when you decide to pursue further education. Why do you think 'friends, family or work colleagues' affect your decision to take part in the programme?

C: Yes, um Why I think the friends, family and work colleagues, for me to make this decision because their education and knowledge can inspire me a lot. They have the positive energy for me to learn something new from the course and when I talk with them daily. I would have the same Knowledge and same education or maybe I can bring something new from them.

P: How do your 'friends, family or work colleagues' affect your decision to take part in this course?

C: You mean my friends? It's because my friends are not only from secondary school classmates, and I met some friends after starting to work. So the education level of my friends are different, some friends have degrees, they got degrees or master degrees, and I saw that when they are talking or have the discussion for some news, I felt that they are very professional and also can bring new mind sets for me, to make me go to school to continue my learning and get some experience from

the school.

P: So actually, they inspired you to take part in this programme. How about another group of people 'employer or professional body'? So, can you tell me how does your employer affect your decision?

C: Because **my employer** also supports all colleagues, employees, to have a higher education. **They support us because they will give the extra holiday and also extra time if you have exam. If you are going to the examination in school, the whole day, they will give you an extra annual leave.** And also, if you finish the course, I mean you got the degree even the master's degree, they will have the **promotion**. I mean it's not exactly the promotion, but just an **opportunity for promotion**. **You can have more opportunities to have interviews in other departments.**

P: All right. That's perfect. So, can you share more real-life examples? Some real experience? Because you work in a Sweden company, so is it essential for the employees to get a higher degree or further education in your company?

C: Yes, I can tell you one of the cases, is a real case happening in my company. I have one **colleague** previously **she just got secondary school certificate and she spent three years to get the degree. She previously was working in the merchandising department,** and **after she finished the degree, she got the opportunity to move from merchandising department to the retail sales department.**

P: So, based on your results of your pre-course questionnaire, I also found that you think getting a higher qualification is a very important factor. So, is getting a higher qualification very important factor for you to take part in this programme?

C: Yeah.

P: How important is that? Why you think it's important?

C: I feel that **my education level** currently is not enough, because **a lot of new things will happen in life so I think different areas will have different improvements** and then education can **train my mindset**, use my brain, **to consider the problems**. **My brain can make me think how to solve the problems**, maybe I can learn something from the course. You know **our teacher** **shared some new cases or maybe examples and I feel that this can be useful for the real life.**

P: So, what else you think is also a factor in your decision to take part in the programme? Can you tell me?

C: **Learn something new** and **personal interest**, and also **increase my self-confidence**.

P: Okay in the programme did you increase your self-confidence? Can you tell me more about this?

C: You know in the college there are more chances to speak English, more chances to learn more about the HR Human Resources because previously I never learned business, but I am very lucky because I go to the Sweden company, and I got the chance to take the job from the HR. I never touch the HR but after I learned from the human resources course, I can have some...it's not control...it's handle...e.g. no one will think the benefits are enough, but **after taking the course, I have learned when I talk to the staff** and have some complaints regarding the benefit from the company, **I feel confident to reject or maybe have discussion with them...on why the company cannot offer more**

benefits. This makes me feel more confident because I can convince them to turn down their thoughts.

P: So actually, increase your self-confidence, to increase your self-esteem is also part of the reasons why you take part in this programme.

C: Yup.

P: But why is learning something new is also the reason to take part in this programme?

M: Yup. I told you I never touched the business courses, so taking the course of marketing, I also learned organisation behaviour. I learned economics. I learned commerce, so it's new for me and also some topics are interesting.

P: Ok so according to your post-course questionnaire, you agreed that the whole programme helped you to develop your knowledge and skills in the subject. You also tell me it helps you to keep your brain active as well as encouraging you do more learning, right?

C: Yes.

P: So, okay. Do you believe that if you want to succeed in career in Hong Kong, you need to keep improving your knowledge and skills?

C: Yes, I think so. Um because the knowledge is not enough in the real life. Er a lot of new things will happen...can be found every day...Also in this course, some of the knowledge doesn't only come from the book and then also some of the news and knowledge come from the teacher...to show us the real situations.

P: Okay can you tell me what kind of knowledge and skills do you need in order to succeed in career nowadays in Hong Kong?

C: For example, 'accounting'. You know that Hong Kong is the economic city, business is needed in every company. If you have the basic knowledge of business, you can handle your banking, personal finance and also for the company.

P: Is it the only subject? Only accounting is important? Any other subjects?

C: And also, the 'organisation behaviour'. I think it is very good for me, in Hong Kong for the career, because you know, different people have different characters. After learning the subject, I know what type of people they are, and how to manage that guy, maybe when I can identify their strengths and weaknesses to do the related job.

P: So, what you mentioned like accounting, organisation behaviour. Those are business subjects. So you think those subjects are the knowledge and skills you need to succeed at career nowadays in Hong Kong.

C: Yes.

P: Okay but how do you acquire them besides these studies?

C: Um besides the studies, it's quite tough for a person. You know that a lot of finance issues will happen on each person. For example, when you receive the salary, you need to count on how to use it. For example, the housing and also the traffic and also the daily eating. A lot of things are related

to money, economics and also accounting.

P: Okay so what you acquired at school; in the college you can apply in real life. So that's why you go to the school and learn business subjects and try to apply it to your career and your work and your real life as well?

C: Yes.

P: Okay right. So, what is the best part of the learning process? What is the best part? Can you share your learning experience?

C: This can help me to do something efficient for my work, and also this boost my confidence.

P: In your pre-course questionnaire, you mentioned you want to increase your self-confidence and in your post-course questionnaire, you also said the learning process helps you to boost your confidence. So, it's not just simply, like what you said, just getting a higher qualification. 'Want to learn and apply it to your job' and 'improve ability to do your current job', 'boost your confidence and increase your self-esteem' is very important.

C: Yeah.

P: So, what else? What are the best parts of the learning process when you recall the CEF programme?

C: Yes, in the evening class, we have the individual assignment and also the exam in the evening. Because I'm an adult, I left school for so long, and then I made the decision to back to school, to get education in this course. And for the homework and also the exam. For me it was like long time ago. I will not remember the feeling how to prepare for this. It's quite interesting to go back to the school for 4-month for this course. For the homework, I mean individual assignment, it was quite hard at the beginning, but I tried to search info, I tried to go to the library to get some reference books. I can tell you that I have never read a lot of books to do the homework previously in my life. After starting this course, it encouraged me to go to the library to search for reference books.

P: So, what kind of assessment methods do you like? You like group discussion? PowerPoint presentations? Individual assignment or what? Can you tell me?

C: Actually, you can find different assignments. For group assignment, individual assignment and also the presentation, it's different. For example, the individual assignment, it's your own work. Because you know you have the deadline for every homework, every assignment, you need to finish this by yourself, so the time arrangement is so important. For the group assignment but it's not only done by one guy so you need to group the classmates to finish the group assignment and also you will know more about your classmates.

P: Okay so you need more interactions and try to interact with other classmates.

C: Yes, and also the presentation, it's another thing because you know there are not many chances in the company to have the presentations. It's the real life and at the beginning I didn't how to present my homework. I feel very nervous. But after my first presentation in the first 4 months, now of course my presentation is going very well.

P: Ok so overall what have you learned from different assessments in the CEF course? What have

you learnt?

C: In the class I can learn...the teacher would give us some real examples and inspire us to have discussions during the class. It's different because after the work, you may not want to speak a lot but our teacher in the class can encourage us to raise our hand and answer the questions. It was funny and we paid more attention to the course.

P: Ok thank you. Based on the result of your post-course questionnaire, you agree that you have 'learned new skills for the job', you also said you are 'able to do the job efficiently' and also you mentioned you are 'able to deal with the current work problems' and also 'got more satisfaction out of the work'. So, the whole programme has been completed for a while, would you please tell me what benefits you have gained from the course individually?

C: For learning new skills, I can actually tell you I haven't studied accounting, finance and also economics before...It's quite new for me also I never knew that the skills from this course can apply it in my real life and also the job.

P: So, is it the skill you have learnt essential in Hong Kong nowadays?

C: Yes.

P: Ok right. So, you can see CEF course is so important. Can I say it actually helped you to do the job efficiently after this course?

C: Yes, I can say yes. I know how to be efficient because I know it's necessary to search to do research on the internet.

P: So how do you apply it to your current problem? You said you actually 'learned something from it' and you are also 'able to deal with the current problems. How is that?

C: Yes, because when I got the complaints - there're always complaints in Hong Kong.

P: So, you know how to give response to your customers properly right.

C: Yes.

P: Right but the most important thing is you can get more satisfaction out of the work. What kind of satisfaction you can get from the course?

C: Because I can solve the problem, that's why my manager is satisfied with this.

P: Ok so based on the result of the same questionnaire, what do you think? Does the implementation of CEF help facilitate learning motivation of society members in Hong Kong?

C: I think so because the money support is very important in Hong Kong. The course is not cheap, and you know that people don't have a lot of support from other parties so the CEF supporting is so important.

P: So, any suggested improvements for the CEF?

C: Can increase the money and also simplify the application.

P: Simplify the application... so how much should the government provide to every citizen over 18 years old? Now it's HK\$ 20,000 right?

M: Yes.

P: So, what do you think?

C: I think can be counted by the percentage of the amount of the course

P: All right. Counted by percentage instead of just giving HK\$20,000 for the lifetime...

C: Yes, because not everybody would use the HK\$20,000 in their life. Maybe somebody dislike learning, maybe somebody want to continue to different learning in their life. So, the HK\$20,000 for that type of person is not enough. So, I think it's better to have percentage for each course. For example, if the course is HK\$200,000, maybe the CEF can provide the support like 10% or 15% of the course amount. I think it's much better than only HK\$20,000 for one person in his life.

P: Ok I think you actually provide a good solution for improving the CEF programme, so I still have to ask you. Is the amount of refund by the government sufficient to support the learners?

C: Not sufficient enough because the current the government can only support HK\$20,000 so if they accept my suggestion.

P: Your suggestion means that giving maybe 10% or 20% of the total course

C: Yes.

P: Ok. It's quite nice. I think it's a good idea. Would you consider any further education learning or training in the future? Because you have finished the CEF programme. Would you consider further education?

C: Yes, I will consider further education.

P: Ok but can you tell me why? Why you still consider it?

C: Yes, because after studying the CEF course, I feel that the continuing education is very important. This course brings a lot of new things for me and also the things what I have learnt can help my job, do it more efficiently.

P: So, can you tell me. Based on your observation, would your classmates do further education after completion of the course?

C: Some of the classmates yes, some of the classmates no. I think it's because of the money, because of the course fees yes.

P: So now the course fee is HK\$60,000, but if the government sponsors, HK\$20,000, that would be 33% of the total course. So, students may find it reasonable. However, if they go on like degrees or MBA, they actually find it hard.

C: Expensive.

P: Expensive and not affordable, right?

C: Yeah.

P: That's your observation when you talk to your classmates.

C: Yeah.

P: So, what do they say besides this? What do they think?

C: Also fixed schedule is one of the concerns and also most of my classmates have families, they need to spend more time on the family and also, they have day job. After work, they may feel tired

and also **the course is expensive**. The diploma course is HK\$60,000 something but for the degree, it is almost HK\$100,000 something, so it's almost the double. **Not each person can afford...**

P: It's about...ok...the high cost of the programme and the second thing is the family, and the third thing is the time limit.

C: Yes.

P: Ok right. So, all in all, do you think that the government should continue introducing similar funding programmes in Hong Kong education system?

C: Yes.

P: Actually, Hong Kong has the 12-year free education system. Is it sufficient...enough for the adults...working adults?

C: No, I don't think so.

P: But how come? If we have the 12-year free education already, why it's still not enough in Hong Kong?

C: It's different because some of the courses in the regular school, the learning, the knowledge from them is different. **After you got a job in the company, maybe you need more different skills and different knowledge. So, you need to go back to school and learn and also if the government can continue to give the support to the people for higher education, I feel the whole situation in Hong Kong will be much better.**

P: And also, we can find that some of the subjects in the CEF courses are quite different from the HKDSE or HKCEE. What subjects did you take before?

C: **Organisation behaviour, marketing, these we never studied in the 12-year free education in Hong Kong.**

P: That's why the CEF is still needed, and the government should still continue introducing similar funding programmes.

C: Yes.

P: Ok thank you very much. Thank you very much for the interview.

Interviewer - Pua Mei Wah Maggie (P)

Participant 4 - Non-CEF applicant (D)

P: Thank you for coming to the interview for research, D. I would like to ask you some questions related to your feelings and views of the CEF course. So, have you applied to the Continuing Education Fund in the course?

D: I remember that the first time was like, nearly 10 years ago.

P: Ok so you applied it 10 years ago. But how about this course? You applied it in this course?

D: No, no, no because just two times for one person, so I want to apply it for further education which is more expensive.

P: Ok so now you didn't apply the CEF this time. So, would the funding provided by the government

be a significant factor in your decision to take part in this course if you were able to apply it now?

D: Of course, I will use but **this is not the major or the only reason to consider for the course.**

P: According to your pre-course questionnaire received, you just told me some factors that would actually affect your decision to pursue your further education. So, can you tell me more about this? Because you just told me CEF is not the only reason. What are the other reasons for you?

D: The course is **useful for my career.** I am **interested in the course subject** and also **gain the recognised professional qualification** after I study the course. I think that's the reason.

P: Ok so you think that 'employer or professional body' is actually one of the factors to affect your decision to take part in this course?

D: **Once I got the qualification from this course so I can use this qualification to apply for other jobs.**

P: ok so how does your employer or professional body affect your decision? Would you mind sharing your personal experience with us? Just for example your employer, colleagues those factors to affect your decision.

D: To me, most of **my friends or relatives,** **they studied at universities already** and also nowadays this is the basic, we can say it's the **basic elementary qualification for job application** so I think this is maybe the main reason that **I want to take this course because you need to have some similar condition as others so maybe it will be helpful to my further career or further studies.**

P: Ok. What you said is the main reason is actually the social groups like friends, family, work colleagues to help affect your decision to take part in this course?

D. Yeah.

P: This is the main reason?

D: Um...

P: Or there are actually different reasons?

D: I can say it's not the main reason. Maybe it is another way, another reason to push me to decide to study the course.

P: Ok so you mean employer, professional body is one of the reasons and another reason is the social groups?

D: Yeah Yeah...

P: Your friends, your colleagues, maybe just like what I said, relatives have the qualification to push you to have further qualification

D: Yeah Yeah...

P: Ok any real-life examples would you like to share with us? How do they or this society like friends, family affect your decision in the real scenario?

D: Maybe **some friends** I know that...**they already have double degree or double master.** **It's so general in society nowadays so I think I need to...maybe to achieve the minimum entry of this level.**

P: Ok right. So, any other reasons behind to stimulate you to take part in this programme besides your employer, social group like friends, family and work colleagues. Any other reasons? Is school

or evening institute part of the reasons as well?

D: When I considered to take the course, I found some research on different schools...different institutes so maybe the reputation of the school would be one of my considerations.

P: Ok.

D: Because you know that so many courses, so many institutes, they have many of this kind of course.

P: And choices.

D: Yeah Yeah besides the course also need to have a real education institute so before this course, I also checked the Australian government website to find this. Our college is the recognised institute for education.

P: Ok right. Thank you. So, based on your result of pre-course questionnaire, I found that you mentioned 'getting a higher qualification and learning something new' are very important, right? Is getting a higher education higher qualification is an important factor for you to take part in this programme? Why you think it's so important? Or why you think it's very important?

D: I feel that it's kind of the status in your personal...personal...

P: Career path?

D: Yeah, and also if you want to study some professional courses, they most likely ask you to have degree background so maybe I would like to, maybe I am not sure, take the exam to apply for the CFA. So, it's the basic requirement.

P: Ok it's the basic requirement so you need to pursue higher education and because you want to pursue professional credentials. So how important is that? What do you think? It's very important or you just think it's fairly important?

D: Very important.

P: Ok very important. Alright okay. So according to your post-course questionnaire, let me check it...you just mentioned the course helped you to 'encourage you to more learning', 'developed knowledge and skills in the subject', 'keep your brain active'. Ok Can you tell me, do you believe that if you want to succeed at a career you need to keep improving your knowledge and skills?

D: Yes yes. I agree.

P: Okay can you tell me why? Especially in the Hong Kong situation.

D: It's a kind of competition. In the market there are so many competitors. You have to fight with others and the technology is changing every moment, so we need to keep on the trends of the market with continuing education. We cannot just stay because everything will be changed, we must keep pace with the market.

P: Ok.

D: Otherwise, we will be behind. You cannot get involved in the field.

P: Ok right. From your point of view, what kind of knowledge and skills do we need in order to succeed at career nowadays in Hong Kong?

D: In Hong Kong nowadays?

P: What kind of knowledge and skills do we need?

D: In my opinion, I feel that the information technology is very important now because you know that AI or something is so popular. It's talking about not just manpower. We need to use the technology to improve in many kinds of industry and so information technology is important. I think financial knowledge is also important especially for the business world. So, if you have some knowledge on this, you may know how the company runs or if you are the top management, you need this knowledge because you can see from the report of the company, to see some problems or know where the problem is.

P: Ok so financial knowledge and I.T. knowledge is so important nowadays in Hong Kong. Can you share, because you told me that this is your experience like you feel it 'enjoyable and interesting' and 'boost your confidence'. How did completion of the course 'boost your confidence and increase your self-esteem'?

D: I feel that there is self-satisfaction because there were so many assignments from the course and once I completed, I got good marks so I would build more confidence and also get the self-satisfaction so I know I can also handle this kind of things.

P: Um ok so what are the best parts of the learning process? What are the best parts of the learning process for the CEF course? You can share your learning experience with us. What have you gained actually?

D: I just feel that it's a good thing to get the subsidy for the course fee.

P: But this time you didn't get the subsidy, so what's the best part? But the last time you got it, right? 10 years ago. What are the best parts of the whole learning process?

D: To me I feel, it was quite interesting when I prepared the materials for the assignment. I shared with my group partners to do the group assignment.

P: Interesting. Were there any group presentations or projects you have to do together?

D: Yes

P: It is one of the best parts, isn't it?

D: Yes, and also because of this course, I have learnt PowerPoint by myself. Before I planned to learn this, but I had no time or some excuses. This time I have to do this, I have no choice but learn the PowerPoint. This is the thing I got from the course.

P: Ok so actually from this course, you can learn some IT skills and you can learn some financial information, is that right?

D: Yeah

P: Ok. The whole programme has been completed for a while; would you please tell me what benefits you have gained?

D: Some knowledge such as 4P... I did not have this kind of knowledge before, so that time I got some basic knowledge. Quite helpful and interesting for me...

P: You can learn something new.

D: Yeah, also at that time, I read some books about this, so the course is quite interesting for me.

P: So, it facilitates your personal interest, doesn't it?

D: Yeah. Maybe later on, I will try and see if I will study further on the business subject, and also, I have some satisfactions from the course once I complete the assignments. The feeling is so good.

P: So, you can get satisfaction after the assignments are completed?

D: On time.

P: On time.

D: Yeah, mostly I just do the assignments just 2 or 3 days before the deadline. Once it completed, it's great satisfaction.

P: So, in your opinion, you have completed the course but this time you didn't use the CEF funding. But can you share with us, what are the strengths and weaknesses of the CEF in Hong Kong?

D: The CEF has been launched a long time ago. More than 10 years. But the amount is still \$20,000 which is really not enough nowadays, even for elementary certificate course can't be covered. Also, one time is not enough for me.

P: Ok. If you were the government officials now, can you suggest some solutions to fix this problem?

D: I will suggest that the government should put more subsidies on studies, the amount is too low for the inflation.

P: So, what would you suggest?

D: At least to raise the amount of the CEF. Because HK\$10,000 is like long time ago. At that time maybe enough but nowadays HK\$20,000 for lifetime is too low still. Because some institutions will raise the course fees because they know that some students will apply to this. It's business, they will try to earn more.

P: So, I understand that you think the amount funded by the government which is HK\$20,000 is not sufficient to support the learners for lifetime. So, from your point of view, how much should the government support each learner in his or her lifetime?

D: I think nowadays maybe at least HK\$30,000 for each learner.

P: For aged 18 or below, what do you think? How do you allocate the education resources? For everyone or for Hong Kong citizens aged 18? What will you suggest?

D: I feel that people above 18 is appropriate because we have the free education until form 6. So, after studying in high school, they can apply for it.

P: Now if you were able to use the continuing education fund, would you consider further education, learning or training in the future?

D: Sure.

P: Ok let me see...You said you will definitely want to pursue bachelor's degree or master's degree sometime in the future. Can you tell me the reason?

D: Just like what I said, the bachelor's degree qualification is the minimum requirement for some

jobs, careers, and further studies. Yeah, you know that. What we can see from the classified post or job sites, you can see most of the jobs require degree qualification.

P: Ok so let me ask you the last question. Do you think that government should continue introducing similar funding programmes in Hong Kong?

D: Yes.

P: Ok, can you tell me the reason? Why the government should invest, just like what you said, HK\$30,000 per citizen who aged 18 years old?

D: Because I think some people in Hong Kong also want to upgrade themselves, especially some people from low-income families and also I know that some people finished high school and they are looking for jobs and maybe they need to learn something more, which is helpful to their career and to improve their skills. It's a benefit for them to get a better job or get a promotion to management roles.

P: Ok thank you very much for your interview. I think the information you provided is so useful for my research. Thank you.

Interviewer - Pua Mei Wah Maggie (P)

Participant 5 – Non- CEF applicant (E)

P: E, welcome to my research and I would like to ask you some questions regarding the feelings and views of taking the CEF programme. So, have you applied to the continuing education fund in this course?

W: I haven't applied to the CEF in this course because I have already applied such kind of fund before, over 5 years ago in other courses.

P: Oh, you took the funding before, many years ago?

W: Yeah.

P: Ok, so now, if you are able to apply now, would the funding provided by the government be a significant factor in your decision to take part in this course?

W: Sure.

P: So why would the CEF so significant in the decision if you were able to apply it now?

W: Actually, I think the most attractive factor is the financial support because it is one of the major decisions that to choose whether the course is expensive or cheaper, so if the course can be reimbursed from the government support. I think this is good for me to choose.

P: Ok so according to your pre-course questionnaire, you mentioned the following groups of people like 'friends, family or work colleagues' are very important when you decided to pursue education. So now can you share with us, why do you think the social group 'friends, family or work colleagues' affect your decision to take part in this course?

W: Yeah, after I work in the society, I have my friends, we have gatherings frequently outside. We have drinks and talk too much on their further education. Most of my friends have further education

after graduated from high school, so this is the major factor that interest me for this further education. For another, before I chose this course, I also, because I'm a married man, I informed my wife that I will take such kind of course because I may be used my nighttime for learning, so she also supports me so much.

P: So, go back to the question, so why do you think 'friends, family or work colleagues' affect your decision? And any real-life examples? They induce you and effect your decision to take part in this course?

W: Yeah, I think. One of my best friends, he has already completed a bachelor's degree in another college. He also told me that it can help and support him so much after this nighttime learning.

P: So that's the main reason. So, any other main reason to stimulate you to take part in this programme?

W: Yeah, I think, other than my friends and my relatives, I can see though the website because through the website, I can learn more about the college and the kind of the course I can choose, and I can get much of the information through the website. So, this caused me to choose this course.

P: Ok based on your pre-course questionnaire, you also mentioned 'getting a higher qualification' is a very important factor. So why is it very important? For getting a higher qualification?

W: Yeah, because I am not at young age, before that I just graduated from the HKCEE. I worked for 20 years, but for me, all the new staff in my company graduated from universities... that's why I should have further education to get a higher qualification. So, this is one of the major purposes.

P: Ok so any other factors in your decision to take part in this programme?

W: Yeah, I think one of the major reasons is to increase my self-confidence because from the qualification, I think this is one of the proofs for me, for the education level.

P: Ok. So, I checked out your post-course questionnaire, you actually mentioned the whole course, thinking about the time spent on the whole course, it helped you to 'keep your brain active', right?

W: Yeah.

P: How did this course helped you to 'keep your brain active'?

W: Yes, because throughout the course, throughout the learning, the lecturer always asked us questions and we have to use our brains. We can think more deeply the questions. We can answer the questions accurately. We also had to do some exercises or some projects. We had to investigate or find out more information through internet, we could do the exercises more completely.

P: Ok how does it help boosting your self-confidence?

W: I think throughout the learning, actually it can let me learn more knowledge, I think it can prove everything I meet in my job so that it can also increase my confidence because the learning is matched with my working environment.

P: Ok so do you believe that if you want to succeed at career in Hong Kong you need to keep improving your knowledge and skills?

W: Sure sure. I think keeping improve throughout the learning. I think it is one major factor.

P: Ok so from your point of view, what kind of knowledge and skills do we need in order to succeed at career nowadays in Hong Kong?

W: I think nowadays in Hong Kong ICT is moving very fast in Hong Kong, so that I think for ICT in the future I think we have to learn more about this category.

P: Ok what does 'ICT' mean actually?

W: Information and communication technology. I think for example through the internet, we can see many kinds of information and some techniques are more advanced. We have to learn more in order to catch up with the technology.

P: Ok you mentioned, you actually think that 'ICT' is very important. But how do we actually acquire it? How do we learn this 'ICT'?

W: For ICT, I think we have to catch this through... maybe through some investigations or some maybe um...

P: From the courses maybe?

W: I think courses. One of the basic knowledge areas to obtain but we have to investigate through some further, investigation though the internet and maybe do more seminars. Maybe some seminars we have to learn more this kind of the news

P: Ok so thinking about the learning, what are the best parts of the 4-month learning process in the marketing course? What are the best parts?

W: I think the best for me is the presentation part. Because we have to prepare some presentations for the topics, we have to do more preparations. And for me we can learn much through investigations and chance to present our results. I think we learn much in this process and throughout the course, we can learn much from the lecturer, because he can present more related to maybe his current job and his last job, so this is not just for book reading, reading the Power Points but also related to his previous job so I gained much from him.

P: Alright. So based on your result of your post-course questionnaire, you also mentioned it helps you to 'able to do your job more efficiently' and also 'got more satisfaction out of the work'. Can you tell me how does this course help you to do your job efficiently?

W: I think something I can learn from my job experience but something I can learn from the course. I think the learning can help me working smoother so that I think it can make working a good experience for me, so it would make more efficiently. I can gain more satisfaction from the course.

P: Right. So actually, I know that you didn't apply the CEF this time. But overall, in your opinion what are the strengths and weaknesses of the Continuing education fund in Hong Kong? What are the strengths means what are the benefits?

W: I think CEF is one of the good funding to support the finance, for every candidate to apply this because I think everything needs money, so I think this is one strong point to motivate the candidate to use this to keep learning. Yes, on the other hand, the weakness maybe because the funding is no cost, maybe 100% reimbursed so that for some of the candidates their attitude may not be quite

positive because they may just sit in the class around 80% of the 出席率 (Attendance rate)

P: Attendance rate?

W: Yes attendance. As I know, it's 80% so that they can reimburse 100%. This is maybe not all the students...candidate have good attitude to sit in the class

P: So, any suggested solutions for that?

W: I think the reimbursement maybe drop from 100% to maybe say 50% or 80% so the candidate may have some contributions throughout the contributions, they may improve their attitude.

P: Ok so is the amount refunded by the government, 80% and 60% of the total course fee or HK\$20,000 whichever is lesser) sufficient to support the learners? Do you think it's sufficient?

W: I think the 80% of the course is better than 100% reimbursed.

P: So, do you think HK\$20,000 is sufficient to support the CEF learners?

W: From my point of view, I am sure that HK\$20,000 is not enough for the candidate who would like to have continuing learning.

P: Ok so from your point of view, how much should the Hong Kong government support each learner then?

W: I think at least HK\$50,000, at least for the candidate who would like to have continuing education.

P: So, is it supposed to be every learner who aged 18 years old should get HK\$50,000?

W: I think from my point of view, I think first of all, the condition is not 100% reimbursed. The condition is maybe proposed 50% reimbursed but have the cap to the maximum HK\$50,000. So, the age should be over 18 and so this kind of arrangement. I think to increase the supporting amount is the key, but every candidate should have the contributions.

P: Ok so would you consider any further education, learning or training in the future after completion of the programme?

W: Future.

P: In the future after completion of the programme. Would you consider further education?

W: Sure. I will continue education.

P: Ok but why? Can you tell me? Share with us your reasons?

W: I think learning is a non-stop process for me. I will keep continuing education until the last stage of my life.

P: So, all in all, do you think that government should continue introducing similar funding programs, just like what you said maybe HK\$50,000 funding programmes in Hong Kong education system?

W: I think the government should continue this kind of education funding support because I think high education for all the citizens can upgrade the citizens in Hong Kong, their knowledge, skills, and their thinking should be upgraded. This is good to Hong Kongers.

P: So, is it for all the generations or for the older generation or new generation? What do you think?

W: I think all kinds of generation should have this kind of support.

P: Thank you.

X. Student Assessment Results

Class A



Royal Brisbane International College (Hong Kong)
 Royal Brisbane International College
 Diploma of Business/Advanced Diploma of Hospitality Management

"Principles of Marketing" (A Module from the Diploma of Business / Advanced Diploma of Business / Advanced Diploma of Hospitality Management offered by Royal Brisbane International College)

CEF Institute Code : 538

CEF Course Code : 21Z05691-3

Mon

Student number	Student Name	Individual Assignment	Team Assignment Presentation	Team Assignment Written Report	Examination	Total	Grade
		15%	15%	20%	50%		
S00010497	CEF Participant 1	69	87	80	78	78	D
S00010268	CEF Participant 2	74	57	77	66	68	C
S00010269	CEF Participant 3	84	87	87	86	86	HD
S00010320	CEF Participant 4	76	74	84	81	80	D
S00009151	CEF Participant 5	72	57	57	70	66	C
S00009042	Non-CEF Participant 1	70	84	80	73	76	D
S00010500	Non-CEF Participant 2	72	57	67	50	58	P
S00010995	CEF Participant 6	63	64	64	68	66	C
S00010271	Non-CEF Participant 3	52	57	80	45	55	P
S00011101	CEF Participant 7	52	57	80	45	55	P
S00010273	CEF Participant 8	50	87	87	76	76	D
S00010274	Non-CEF Participant 4	75	57	67	0	33	F
S00010911	CEF Participant 9	71	84	64	60	66	C
S00010275	CEF Participant 10	76	74	84	63	71	C
S00010819	Non-CEF Participant 5	51	84	77	46	59	P
S00010595	CEF Participant 11	61	74	74	65	67	C
S00010988	CEF Participant 12	81	64	80	77	76	D
S00010277	CEF Participant 13	51	84	80	67	70	C
S00010278	Non-CEF Participant 6	58	57	77	62	64	P

X. Student Assessment Results

Class B



Royal Brisbane International College
 Diploma of Business/Advanced Diploma of Hospitality Management
 "Principles of Marketing" (A Module from the Diploma of Business / Advanced Diploma of Business / Advanced Diploma of Hospitality Management offered by Royal Brisbane International College)
 CEF Institute Code : 538
 CEF Course Code : 21Z05691-3

Wed

Student number	Student Name	Individual Assignment	Team Assignment Presentation	Team Assignment Written Report	Examination	Total	Grade
		15%	15%	20%	50%		
S00009511	Non-CEF Participant 7	52	0	0	0	8	F
S00010986	CEF Participant 14	79	57	50	69	65	C
S00010223	Non-CEF Participant 8	54	57	0	0	17	F
S00010259	CEF Participant 15	81	77	80	73	76	D
S00010972	CEF Participant 16	52	57	64	43	51	P
S00011082	Non-CEF Participant 9	52	40	74	52	55	P
S00010260	CEF Participant 17	71	87	87	68	75	D
S00010390	CEF Participant 18	75	70	80	68	72	C
S00010261	Non-CEF Participant 10	55	40	50	0	24	F
S00010270	CEF Participant 19	69	87	84	72	76	D
S00011111	Non-CEF Participant 11	55	64	74	52	59	P
S00010262	Non-CEF Participant 12	55	40	50	0	24	F
S00010263	CEF Participant 20	81	80	77	72	75	D
S00010593	CEF Participant 21	71	87	80	73	76	D
S00010265	Non-CEF Participant 13	66	64	74	40	54	P
S00010247	CEF Participant 22	64	64	80	71	71	C
S00010257	Non-CEF Participant 14	51	77	77	31	50	P
S00010319	Non-CEF Participant 15	0	0	67	0	13	F
S00011085	Non-CEF Participant 16	68	64	74	61	65	C
S00011088	CEF Participant 23	56	57	77	44	54	P

X. Student Assessment Results

Class C



Royal Brisbane International College (Hong Kong)
 Royal Brisbane International College
 Diploma of Business/Advanced Diploma of Hospitality Management

"Principles of Marketing" (A Module from the Diploma of Business / Advanced Diploma of Business / Advanced Diploma of Hospitality Management offered by Royal Brisbane International College)

CEF Institute Code : 538

CEF Course Code : 21Z05691-3

Fri

Student number	Student Name	Individual Assignment	Team Assignment Presentation	Team Assignment Written Report	Examination	Total	Grade
		15%	15%	20%	50%		
S00011145	CEF Participant 24	77	80	80	72	76	D
S00011098	Non-CEF Participant 17	75	64	77	40	56	P
S00011144	CEF Participant 25	67	77	84	74	75	D
S00010281	CEF Participant 26	75	84	80	74	77	D
HIH1384	CEF Participant 27	65	84	74	56	65	C
HIH1331	CEF Participant 28	77	87	84	68	75	D
HIH1560	Non-CEF Participant 18	0	64	77	0	25	F
HIH1479	Non-CEF Participant 19	44	64	67	75	67	C
S00011095	Non-CEF Participant 20	66	80	64	83	76	D
S00010824	CEF Participant 29	78	84	84	60	71	C
HIH1547	CEF Participant 30	53	74	67	76	70	C
S00009169	Non-CEF Participant 21	40	64	64	62	59	P
HIH1325	CEF Participant 31	50	84	74	67	68	C
S00010604	CEF Participant 32	56	74	80	54	62	P
S00011002	CEF Participant 33	77	80	80	51	65	C
HIH1523	CEF Participant 34	50	87	84	67	71	C
S00010267	CEF Participant 35	76	64	77	38	55	P
S00010989	CEF Participant 36	76	64	64	37	52	P
S00011150	Non-CEF Participant 22	50	0	0	0	8	F
S00011097	Non-CEF Participant 23	50	45	64	47	50	P

S00010916	CEF Participant 37	68	77	80	36	56	P
S00010496	CEF Participant 38	82	77	84	74	78	D
HIH1392	Non-CEF Participant 24	0	80	64	75	62	P
S00011116	Non-CEF Participant 25	54	45	64	54	55	P
HIH1520	CEF Participant 39	70	84	84	70.5	75	D
S00010252	CEF Participant 40	80	84	84	77	80	D

XI. Student Participation Record

Class A



Royal Brisbane International College (Hong Kong)
 Royal Brisbane International College
 Diploma of Business/Advanced Diploma of Hospitality Management
 "Principles of Marketing" (A Module from the Diploma of Business / Advanced Diploma of Business / Advanced Diploma of Hospitality Management offered by Royal Brisbane International College)
 CEF Institute Code : 538
 CEF Course Code : 21Z05691-3
 Time: 19:00 - 22:00

Present = ✓

Absent = Abs / X / O

Remarks: Students will be counted as "Late" if they attend the class after the class commences over 60 minutes.

Mon

Student Name	1	2	3	4	5	6	7	8	9	10
CEF Participant 1										
CEF Participant 2										
CEF Participant 3										
CEF Participant 4										
CEF Participant 5										
Non-CEF Participant 1										
Non-CEF Participant 2										
CEF Participant 6										
Non-CEF Participant 3										
CEF Participant 7										
CEF Participant 8										
Non-CEF Participant 4										
CEF Participant 9										
CEF Participant 10										
Non-CEF Participant 5										
CEF Participant 11										
CEF Participant 12										
CEF Participant 13										
Non-CEF Participant 6										

XI. Student Participation Record

Class B



Royal Brisbane International College (Hong Kong)
 Royal Brisbane International College
 Diploma of Business/Advanced Diploma of Hospitality Management
 "Principles of Marketing" (A Module from the Diploma of Business / Advanced Diploma of Business / Advanced Diploma of Hospitality Management offered by Royal Brisbane International College)
 CEF Institute Code : 538
 CEF Course Code : 21Z05691-3
 Time: 19:00 - 22:00

Present = ✓

Absent = Abs / X / O

Remarks: Students will be counted as "Late" if they attend the class after the class commences over 60 minutes.

Wed

Student Name	1	2	3	4	5	6	7	8	9	10
Non-CEF Participant 7										
CEF Participant 14										
Non-CEF Participant 8										
CEF Participant 15										
CEF Participant 16										
Non-CEF Participant 9										
CEF Participant 17										
CEF Participant 18										
Non-CEF Participant 10										
CEF Participant 19										
Non-CEF Participant 11										
Non-CEF Participant 12										
CEF Participant 20										
CEF Participant 21										
Non-CEF Participant 13										
CEF Participant 22										
Non-CEF Participant 14										
Non-CEF Participant 15										
Non-CEF Participant 16										
CEF Participant 23										

XI. Student Participation Record

Class C



Royal Brisbane International College (Hong Kong)
 Royal Brisbane International College
 Diploma of Business/Advanced Diploma of Hospitality Man
 "Principles of Marketing" (A Module from the Diploma of Business /
 Advanced Diploma of Business / Advanced Diploma of Hospitality
 Management offered by Royal Brisbane International College)
 CEF Institute Code : 538
 CEF Course Code : 21Z05691-3
 Time: 19:00 - 22:00

Present = ✓

Absent = Abs / X / O

Remarks: Students will be counted as "Late" if they attend the class after the class commences over 60 minutes.

Fri

Student Name	1	2	3	4	5	6	7	8	9	10
CEF Participant 24										
Non-CEF Participant 17										
CEF Participant 25										
CEF Participant 26										
CEF Participant 27										
CEF Participant 28										
Non-CEF Participant 18										
Non-CEF Participant 19										
Non-CEF Participant 20										
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Non-CEF Participant 21										
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CEF Participant 36										
Non-CEF Participant 22										
Non-CEF Participant 23										
CEF Participant 37										
CEF Participant 38										
Non-CEF Participant 24										
Non-CEF Participant 25										
CEF Participant 39										
CEF Participant 40										

XII. Research Ethics Approval



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Our Ref: 2017/53

Dear Pua Mei Wah Maggie
CC Professor John Holford and Professor Sarah Speight

Thank you for your research ethics application for your project:

The Perception of Lifelong Learning by Adult learners under the Context of Education Transformation in Hong Kong: A Study of Adult Learners' Values and Experiences of Continung Education Fund (CEF) Program

Our Ethics Committee has looked at your resubmission and has the following comments regarding the amendments requested:

1. Thank you for providing a table to indicate where each of the matters highlighted in earlier correspondence has been addressed.
2. We remain unclear about the rationale for retaining data for 10 years and are hopeful this will be discussed again with your supervisors.

Based on the above assessment, it is deemed your research documentation:

- **Approved**

We wish you well with your research project and look forward to receiving copies of the instruments as they are designed.

Yours sincerely



Dr Kay Fuller
Chair of School of Education Ethics Committee