Lingnan University

Digital Commons @ Lingnan University

Theses & Dissertations

Department of Sociology and Social Policy

2005

Lifelong learning for older persons in Hong Kong

Sze Sze, Stephanie HUI

Follow this and additional works at: https://commons.ln.edu.hk/soc_etd

Part of the [Adult and Continuing Education Administration Commons](#), [Education Policy Commons](#), [Gerontology Commons](#), and the [Social Policy Commons](#)

Recommended Citation

Hui, S. S. S. (2005). Lifelong learning for older persons in Hong Kong (Master's thesis, Lingnan University, Hong Kong). Retrieved from http://dx.doi.org/10.14793/soc_etd.17

This Thesis is brought to you for free and open access by the Department of Sociology and Social Policy at Digital Commons @ Lingnan University. It has been accepted for inclusion in Theses & Dissertations by an authorized administrator of Digital Commons @ Lingnan University.

Terms of Use

The copyright of this thesis is owned by its author. Any reproduction, adaptation, distribution or dissemination of this thesis without express authorization is strictly prohibited.

All rights reserved.

LIFELONG LEARNING
FOR OLDER PERSONS IN HONG KONG

HUI SZE SZE , STEPHANIE

MPHIL

LINGNAN UNIVERISTY

OCTOBER 2005

LIFELONG LEARNING
FOR OLDER PERSONS IN HONG KONG

by
HUI Sze Sze , Stephanie

A thesis
submitted in partial fulfillment
of the requirements for the Degree of
Master of Philosophy

LINGNAN UNIVERSITY

2005

ABSTRACT

Lifelong Learning for Older Persons in Hong Kong

by

HUI Sze Sze, Stephanie

Master of Philosophy

Lifelong learning (*LL*) has been widely regarded as one of the activities that can enhance well-being of the society and benefit older persons in terms of psychological, physical, mental, and cognitive well-being. In foreign countries like the United States of America, the United Kingdom, Finland, France, Australia, and also China, LL among older persons had been developed successfully. Hong Kong, in contrast, has no systematic planning for the development of LL even though the aged population is increasing rapidly. This research aims at constructing a LL model for older persons in Hong Kong. The theoretical framework of study focused on figuring out the breaches between satisfactory models proposed by older persons and the existing lifelong learning model in Hong Kong.

Interview survey and documentary study have been employed in this study. Interview survey was carried out from March to April of 2005 in order to understand older persons' expectations towards LL. A questionnaire consisting of 39 big items was constructed. The author successfully interviewed 54 out of the 60 older persons originally intended, including 31 female and 23 male. The samples of this study were older persons aged 55 or above, and the median age of the respondents was 67.84. Also, 26 respondents had had learning experience in the six months prior to the survey being carried out. In the documentary study, both formal and nonformal learning programmes in Hong Kong were studied. Seven major older persons' education providers were included, including one tertiary institution, one radio broadcasting company and five active NGOs.

The findings show the gaps between older persons' expectations and present

provision of LL programmes. The Hong Kong Lifelong Learning Model should have tertiary institutions actively involved in the provision of both formal and nonformal learning programmes. Face to face interviews should be adopted. Formal learning programmes should be made available on the internet or radio. Moreover, older persons would be more satisfied if they could learn at tertiary institutions or centres most convenient for them. Thus, various organizations should have stronger cooperation with each other so that resources can be shared. Older persons preferred a greater variety of courses and lessons and would like to receive grants or travel subsidy. Most of the elder learners were willing to be instructors, therefore they could be recruited as voluntary teachers, and more courses to train older learners as instructors should be offered. The duration of formal learning programmes may be too long for the elderly learners, and they asked for a credit-accumulating system to be implemented in those programmes. A central data bank and newsletters should be made available so that older persons could gain access to information more easily. In order to improve the quality of courses, evaluation and needs assessments should be carried out regularly by service providers, and they should consider designing the course curriculum with elder learners. In order to help those who did not receive much education when young, foundation literacy courses could be offered. In addition, instead of written course work, tests, and examinations, oral presentations and examinations could be carried out. Finally, certificates, qualifications, and public and large scale graduation ceremonies are found to be good reinforcements for older persons' learning behaviour.

In conclusion, Hong Kong, as a beginner in the systematic development of LL for older persons, has much to do to improve the existing system. Irrefutably, making it perfect is arduous because both the service providers and the government have their own constraints. Nonetheless, trying the best to fill in the gaps between the ideal and the reality will bring the greatest benefits to older persons and the society.

I declare that this is an original work based primarily on my own research, and I warrant that all citations of previous research, published or unpublished, have been duly acknowledged.

(HUI Sze Sze, Stephanie)

October, 2005

TABLE OF CONTENTS

Table of Content	i
List of Tables	vi
List of Figures	vii
Acknowledgement	viii

Chapter ONE

Introduction

1.1	Background of the Study	1
1.2	Rationale of the Study	3
1.3	Significance of the Study	3
1.4	Objective of the Study	4

Chapter TWO

Literature Review

2.1	Promoting Learning Among Older Persons	5
2.1.1	<i>John Dewey's Philosophy of Education</i>	6
2.1.2	<i>Education and Social Integration</i>	7
2.1.3	<i>Older Persons are Capable to Learn</i>	9
2.1.4	<i>Learning helps Adapting to the Change of Life in Later Age</i>	10
2.1.5	<i>Lifelong Learning and Activity Theory</i>	13
2.1.6	<i>Lifelong Learning and Quality of Life</i>	14
2.2	Lifelong Learning and Lifelong Education	16
2.2.1	<i>Lifelong Education</i>	17
2.2.2	<i>Lifelong Learning</i>	21
2.3	Shifting from Lifelong Education to Lifelong Learning	24
2.4	Lifelong Learning of Older Persons	26
2.5	Theories in Explaining Learning Activities	29
2.5.1	<i>Kjell Rubenson Expectancy-Valence Paradigm</i>	30

	<i>in explaining the motivation of participation in learning activities</i>	
2.5.2	<i>A Congruence Model from Roger Boshier: Explanation of Participation from the View of Non-Participant</i>	31
2.5.3	<i>Cross's "Chain-of-Response Model" Explaining Older Persons' Participation in Learning</i>	32
2.5.4	<i>Social reinforcement perspective on explaining continuous participation in learning activities.</i>	34
2.6	Lifelong Learning Models of Foreign Countries	36
2.6.1	<i>Experience of other countries</i>	36
2.6.2	<i>The British Model and the Australian Model</i>	41
2.7	Lifelong Learning in Hong Kong	43
2.7.1	<i>Development of Lifelong Learning Model in Hong Kong</i>	43
2.7.2	<i>Current Learning Programs for Older Persons in Hong Kong</i>	46
2.8	Learning Motivation and Barriers of Older Persons in Hong Kong	47
2.8.1	<i>Learning Motivations of Older Persons</i>	47
2.8.2	<i>Learning Barriers of Older Persons</i>	48
2.9	Summary	49

Chapter THREE

Theoretical Framework: Constructing a Lifelong Learning Model for Older Persons in Hong Kong

3.1	Maslow's Hierarchy of Needs	51
3.2	Mapping older persons' view of lifelong learning model with existing lifelong learning model in Hong Kong	54
3.2.1	<i>"Self - Justifying, Experiencing & Reinforcing" (SER) Model</i>	54

3.3	Construction of Questionnaires	59
3.4	Review of Present Lifelong Learning Model in Hong Kong and Foreign Countries	65

Chater FOUR

Research Design, Methodology and Analysis

4.1	Research Design	67
4.1.1	<i>Structure of the study</i>	67
4.1.2	<i>Two research methods adopted in this study</i>	68
4.2	Documentary Study of Lifelong Learning Programmes in Hong Kong	69
4.3	Interview Survey	70
4.3.1	<i>Sampling Frame: Method and Size</i>	70
4.3.2	<i>Modes of Observation</i>	74
4.4	Operant Definition	75
4.5	Data Collection	79
4.6	Methods of data entry and analysis	79

Chapter FIVE

Research Findings

5.1	Findings of Interview Survey	80
5.1.1	<i>Background Information</i>	80
5.1.2.	<i>Learning Experience</i>	82
5.1.3	<i>Learning Motivation and Barriers</i>	86
5.1.4.	<i>Views of Measures to Improve Lifelong Learning Model of Hong Kong</i>	95
5.2	Findings of Documentary Study	104

5.2.1	<i>Formal Learning Opportunities</i>	105
5.2.2	<i>Nonformal Learning Opportunities</i>	106

Chapter SIX

Gaps between Older Persons' Need and Present Lifelong Learning Model	109
---	------------

Chapter SEVEN

Discussion and Conclusion

Proposed Lifelong Learning Model in Hong Kong

7.1	Proposed Lifelong Learning Model in Hong Kong	122
7.1.1	<i>Formal learning</i>	122
7.1.2	<i>Nonformal Learning Opportunities</i>	125
7.2	Two Important Factors of Foreign Countries' Successful Experience	128
7.2.1	<i>Culture of Volunteerism</i>	128
7.2.2	<i>Presence of Central Organizational Body</i>	129
7.3	Limitations of Research	130

APPENDIX 1	Questionnaires of " <i>Lifelong Learning for Older Persons in Hong Kong</i> " (English Version)
APPENDIX 2	Questionnaires of " <i>Lifelong Learning for Older Persons in Hong Kong</i> " (Chinese Version)
APPENDIX 3	Questionnaires of " <i>Learning Needs and Preferences of Members of Multi-service Centres for elderly and Social Centers for Elderly</i> " (HKCSS)
APPENDIX 4	Questionnaires of " <i>Learning Needs of Older Persons in Tuen Mun District</i> " (APIAS, Lingnan University)
APPENDIX 5	Summary of Formal and Nonformal Learning Programmes in Hong Kong

Bibliography

LIST OF TABLES

Table 5.1	Respondent's Gender	80
Table 5.2	Respondent's Age	80
Table 5.3	Respondent's Age by Learning Experience	81
Table 5.4	Educational Level	81
Table 5.5	Educational Level by Learning Experience	81
Table 5.6	Marital Status	82
Table 5.7	Living Status	82
Table 5.8	Learning Experience in the Past Six Months	82
Table 5.9	Non-Learners's Intention to Learn	83
Table 5.10	Types of Course Taken	83
Table 5.11	Venues of Courses	83
Table 5.12	Satisfaction of Course	84
Table 5.13	Ways to Know About the Courses	84
Table 5.14	Criteria for Choosing Courses	85
Table 5.15	Organizing Body of Courses	85
Table 5.16	Learning Motivation	86
Table 5.17	Does Motivation to Learn Being Attained and Will Unsuccessful Experience Decrease Intention to Learning in Future.	87
Table 5.18	Learners and Non-learners' Views towards Learning Barriers	89
Table 5.19	Do intentions to Continue Learning Activities Affected by Barriers	90
Table 5.20(A-J)	Comparison between Learner and Non-learner's View Toward Measures of Eliminating Learning Barriers	91-94
Table 5.21	Views of measures to improve lifelong learning model in Hong Kong (A. Formal Learning)	95
	Views of measures to improve lifelong learning model in Hong Kong (B. Nonnormal Learning)	99

LIST OF FIGURES

Figure 2.1	Life-long and Life-wide Perspective of Learning	22
Figure 2.2	Cross's "Chain-of-Response Model"	34
Figure 3.1	Mapping Framework of older persons' view of LL model with present LL model in Hong Kong	54
Figure 3.2	"Self - Justifying, Experiencing & Reinforcing" (SER) model	58
Figure 4.1	Important Elements in Kjell Rubenson Expectancy-Valence Paradigm in Explaining the Motivation of an Adult Participation in Education	76
Figure 4.2	Important Elements in Roger Boshier's Congruence Model of Explaining Participation from the View of Non-Participant	77
Figure 4.3	Important Elements in Cross's "Chain-of-Response Model" Explaining Elderly Participation in Learning	78
Figure 4.4	Important Elements in Social Reinforcement Perspective on explaining continuous participation in learning activities.	78
Figure 6.1	Gaps between Older Persons' Wants and Present LL Model: Organization & Entry	110
Figure 6.2	Gaps between Older Persons' Wants and Present LL Model: Venue and Time	112
Figure 6.3	Gaps between Older Persons' Wants and Present LL Model: Type of courses and lesson	114
Figure 6.4	Gaps between Older Persons' Wants and Present LL Model: Course Fee & Instructor	116
Figure 6.5	Gaps between Older Persons' Wants and Present LL Model: Duration, Information & Satisfaction	118
Figure 6.6	Gaps between Older Persons' Wants and Present LL Model: Curriculum	119
Figure 6.7	Gaps between Older Persons' Wants and Present LL Model: Reinforcement	121

Acknowledgements

I would like to express my heartfelt gratitude particular to my chief supervisor, Professor Alfred, C.M. Chan, who has given me professional opinions and supervisions throughout my study. I will never forget his tolerance, patient and support to me. He has taught me a different way of thinking and attitude towards life which I treasure for a lifetime. I also want to give gratitude to my co-supervisor, Professor, David R. Phillips. For his kindness guidance and support in assisting my completion of thesis.

I would like to give special thanks to the 53 respondents, who devoted their time to the research interview, without their kind offer, the thesis can never be finished. Furthermore, I would like to acknowledge Sai Cho Wan Lutheran Centre for the Elderly, The Hong Kong Society for the Aged, North Point Kai Fong Association, North Point Alliance church and Asia Pacific Institutes of Ageing Study (APIAS) of Lingnan University, which assist me in obtaining sample and providing me with information of elderly learning programmes.

With regard to English language assistance and the proof-reading of this thesis, I would like to thank Mr. Andy Goh for his advice.

I would like to thank Carmen Wong, Olive Ho, Jessie Lam, Ceci Lau, Sharon Chan, Siu Sin, Fiona Tang, "3/F Guys"- SO, YuenLong, Toby, Ah Man, "4/F Girls"-Julie, Sandy, Jessica and Siu Huen, Charles Yuen, Siu Keung and Siu Man. They are the source of energy for me. I would also like to express my heartfelt thanks to my dear teachers, Ms. Lilian LAW, Dr. Ping LIN, Dr. K.C. LEI, Dr. Jimmy RAN, Dr. Alex LO and Mrs. Sandy KWOK. They have given me great support during my 5 years in Lingnan.

Special thanks are extended with warm gratitude to Dick, who has vitalized my life and always stand by me during difficult time.

I dedicate this thesis to my Mum, Dad, Grandma, three brothers. They have given me everlasting love, support and allow me to concentrate on my study in these two years.

Last but not least, TNANKS GOD.

Chapter 1

Introduction

1.1 Background of the Study

The aging population is increasing rapidly around the world. Currently, around 11% of the world's population is over 60, with the number increasing by one million every month. As people's lifespan increases, it is expected that by the year 2050, this percentage will increase to 22% (The Hong Kong Council of Social Service, 2002). According to the World Health Organization, a society is considered to be an aging society if the percentage of people who are above 60 exceeds 10% of the whole population, or if more than 7% of the whole population are above 65. In the Asia-Pacific region, the aged population is expected to increase to 750 million, or 14.9% of the total population by 2025. Their figures also show that as the population size of Asia increases by 1%, the number of aged Asians increases by 3% (The Hong Kong Council of Social Service, 2002).

China is one of the countries with a rapidly increasing rate of population aging. The aged population will increase from 129 million in 2000 to 288 million in 2025. In 2020, Japan will become the country with the largest number of aged people in the world, around 31% of the population (Wu, 1999). In Hong Kong, census data shows that people over 60 accounted for 4.8% of the population in 1961. This figure rose to 5.6 % in 1976 and 7.5 % in 1996. Hong Kong became a WHO defined aging society in 1981, with an aged population of 500,000, which was equal to 10.2 % of the population then (Wu, 1999). In 1999, 14% of the population, or 965,000 people, are considered aged (Lui, Leung, Jegede, 2002). Currently, people over 65 accounts for

11% of the total population. By 2025, there will be 2.5 million aged people, and it is estimated that 20% of the population will be over 65 in 2031 (Census and Statistics Department, 2002). Hong Kong has an even faster rate of growing of aged population than China. This can be explained by increased life expectancy and reduced fertility due to economic development and improvement in health care, nutrition and social care (Philips, 1999; 2000).

Although life expectancy is increasing worldwide, now up to more than 80 years old in some developed countries, early sixties is socially defined as old age, and retirement from work is expected. In terms of material needs, older persons have to rely on pension, their adult children or government welfare provision in the last 20 years of their life, and this does not include their psychological and mental needs. Existing social policies concerning the aging population focus on remedial measures like health care provision and Comprehensive Social Security Assistance (CSSA), while ignoring the importance of contributions older persons can potentially make to societal well-being. It is important to note that a rapid increase in aging population does not necessarily mean that government welfare burden will increase. As living standard improved over the past few decades, increasing number of adults entering old age are well-educated, healthy, economically secure, and political astute. They have the ability to make significant contribution to the society, but the government has done little to take advantage of their potential. In many countries, the mismatch between older persons' abilities and their social roles has led to discussions on related social policies. Developing social policies that can increase the productivity of older persons while reducing the burden of having to support a growing dependent older population has become the main objective of policy makers.

1.2 Rationale of the Study

The Hong Kong Government aware the importance of promoting learning among older persons in the late 1990s' and researches about this topic are no longer rare. Couple of researches has been done by the tertiary institutes and elderly service providers in Hong Kong (Open University, 2002; Asia Pacific Institutes of Ageing Study, 2003; Hong Kong Council of Social Service, 2002). However, most of these studies focused on investigating learning needs of older persons only. The two most popular topics the researchers concerned were what kinds of courses older persons preferred and, the learning motivations and barriers. Then researchers gave suggestions according to the findings. Most of the studies stopped at this stage, i.e. studying the individuals, but without testing whether the suggestions are really wanted by older persons or if those measures are suitable for them. Furthermore, researchers did not pay much attention to 'hidden possibilities of choice'. Foreign countries has much more experience in lifelong learning provision, but none study has been touch on investigating whether the experience in other countries can be applied in Hong Kong Thus, in this research, work will not stopped at studying what older persons' wants only, but will be carried on investigating whether the suggestions are favorable to older persons and suitable for them.

1.3 Significance of the Study

This study not only investigates older persons' learning barriers and motivations, but also the feasibility of measures on improvement lifelong learning model of Hong Kong. Measures suggested are theoretically supported by four elder learning theories

and practically supported by experience of foreign countries¹. It is hoped that this study can give insight for a systematic development and improvement of lifelong learning model for older persons in Hong Kong. Therefore, this study has both academic and policy relevance.

1.4 Objective of the Study

(1) Review the existing model of older persons' lifelong learning in foreign countries and contrast with those in Hong Kong.

Research Question 1: What is the model of lifelong learning in other countries and lifelong learning programmes in Hong Kong?

Research Question 2: What are the similarities and differences between the lifelong learning model of Hong Kong and other countries?

(2) Examine the elements that should be included when providing learning opportunities for older persons in H.K.

Research Question 3: What elements have to be included in the lifelong learning model in Hong Kong?

(3) Explore older persons' expectations towards lifelong learning programmes.

Research Question 4: What do older persons want and need in lifelong learning?

(4) Construct a lifelong learning model suitable for older persons in Hong Kong

Research Question 5: How can the Hong Kong model be improved?

¹ Elder learning theories and foreign countries experience of lifelong learning will be illustrated in Chapter 2, Literature Review

Chapter 2

Literature Review

Older persons' participation in lifelong learning is highly valued and strongly encouraged in many foreign societies such as France, Britain, America, Australia, Norway, and China. It is because learning activities are believed to increase social well-being by creating healthier older persons and increasing social capital. However, in Hong Kong, both the government and the public have put insufficient attention on this issue. Limited resources have been allocated on promoting lifelong learning, and only few researches regarding this topic have been done.

Therefore, the aim of this research is to construct a lifelong learning model for older persons in Hong Kong. This will be done, firstly, by supporting the argument with theories. Sociological background in terms of John Dewey's education theory and social integration will be adopted. Furthermore, the benefits that lifelong learning brings to an individual will be illustrated in terms of quality of life by applying the activity theory. Secondly, the concept of "lifelong learning" will be thoroughly investigated. This includes its definitions, content, and implications. Thirdly, lifelong learning particularly related to older persons will be discussed. In addition, it is important to consider the lifelong learning models in other countries and compare them with the development of lifelong learning model in Hong Kong. Lastly, because an user (older person)-oriented approach will be adopted in constructing lifelong learning model, the learning motivations of and learning barriers for older persons in Hong Kong will be investigated too.

2.1 Promoting Learning Among older persons

Before going into the illustration of the concept of “lifelong learning”, two sociology theories will be used to show the importance of learning in a society, and thus, why it is necessary to encourage people to learn in the later age.

2.1.1 John Dewey's Philosophy of Education

Enjoying education should be the right of all people regardless of their age, ethnicity, and skin color. It should not be merely for a few privileged individuals in society. It is expected that lifelong learning can greatly contribute to the society, and the benefits can be maximized if “increasing and widening participation, particularly from groups who are underrepresented in higher education, including people with disabilities and young people from semi-skilled or unskilled family backgrounds and from disadvantage localities”(Walker, 1996, p.5). As claimed by John Dewey (1949), “it is the very nature of life to strive to continue in being. Since this continuance can be secured only by the constant renewal, life is a self-renewing process. What nutrition and reproduction are to physiological life, education is to social life” (p.9). Education is a crucial way of letting the public share a wide variety of interests and to attain a common interest. This is important because having only a limited number of people in the society to attain a common interest is just equal to “educated some into master, educate some into slave” (Dewey, 1949, p.22). This is dangerous as it could easily lead to the unfairness in the society. John Dewey (*ibid*) linked democracy and education together. He suggested, “a government resting upon popular suffrage cannot be successful unless those who elected and who obey their governors are educated. Since a democratic society repudiates the principle of external authority, it must find a substitute in voluntary disposition and

interest. These can be created only by education” (p.88). He provided a strong reason explaining why everyone in the society should have the right to access education. It is because people with knowledge and information would benefit the on-going of a society. Furthermore, those who are not educated, or those who can only acquire imperfect information would easily become a disadvantaged group. It would be a pity if older persons in the society are unable to access learning activities, as it would be very difficult for them to attain the common interest of most people as suggested above, and as a result, they would end up being excluded from the society. Apart from Dewey's theory concerning democracy and education, his other popular thought related to education, ‘Experiential Philosophy of Education’ (cited in Dewey, 1956), also contributed greatly to the peculiarly American connotations of lifelong learning. He believed that any experience one perceived could become one of the tools to create personal growth, and thus, people should respect all sources of experience. Consistent to the democratic egalitarianism, older persons should also be given opportunities to experience (e.g. learning opportunity) in order to have a sustainable personal growth.

2.1.2 Education and Social Integration

It is common that education is not viewed as necessary for older persons. However, as suggested by Coombs and Ahmed, education should be considered as occurring throughout the life cycle of each individual (cited in Bostrom, 2003). Paul Oliver, quoting the United Kingdom government's vision on lifelong learning, stated that “learning contributes to social cohesion and fosters a sense of belonging, responsibility and identity” (1999, p.6), which means that older persons should also be provided with learning opportunities.

Before the bourgeois revolution, the relationship between the individual and community was defined in terms of cosmological order, which is, "man was allotted his place by God" (Heyting, pg385) and during that period, the aims of education followed such universal order. Along with the industrial revolution and growth of the capitalist society, this ideology could no longer sustain. "Consensus", an agreement between individuals in the society, became the foothold that societal cohesion rests upon, and this led to the emergence of the social contract theory. Consensus was viewed as man-made social contracts. Durkheim and Weber advocated that, for a social institution that could enforce order irrespective of differences in opinion or beliefs, if consensus on their legitimacy could be reached, social integration could be enhanced subsequently. This was the first time the idea of "social integration based upon a consensus of opinion on values" manifested itself. Talcott Parsons' view on value-based consensual social integration was clear. He believed that "the integration of any interaction system presupposes normative orientations that are shared - at least up to point - by all actors within the system" (cited in Heyting, pg.386) or else deviant behaviour might occur. According to him, "normative orientations" can be defined as social role and role expectations. Social role and role expectations regulated social interactions in various contexts. Parsons emphasized that normative orientations were based upon values that ultimately justify social integration and these values had to be shared throughout the society (Heyting, 2002). In this sense, Parsons implied that it is necessary for *every* member in the society, including older persons, to have common values; otherwise, people would lose their social roles and role expectation would be destroyed. Education, as a kind of socialization, is important to the integration of society because it furthers and strengthens people's consensus on these basic values. Like Heyting, Kruithof and Bulder claimed, "internalization of these basic social values is essential on the level of society as a whole, which makes the transfer of values the most important, even crucial, task of all education and schooling" (pg.

386).Therefore, it is clear that neglecting the importance of providing education to older persons is not only depriving them of their learning opportunities, but also damaging the integration of the society by failing to transmit social values to older persons.

2.1.3 Older Persons are capable to learn

In contrast with people's common idea that older persons are not capable to learn, a couple of past researches has verified that unless there were physiological, psychological or sociological barriers, most adults can experience personal growth and learning throughout their lives. (Clough, 1992; Hiemstra, 1975; Moody, 1986; Peterson, 1983). Peterson (1983) suggested that the cognitive stability of older persons could be maintained throughout the year. Furthermore, it was found that continued education under a supportive environment could enhance the growth. Whitbourne and Weinstock (1979) supported the idea that older persons are capable of learning. Cross and Florio (1978) even suggested that learning may increase one's life expectancy.

A research on lifelong learning among seniors was presented during the 40th Annual meeting of the American Society on Aging at San Francisco in March 1994. Its purpose was to develop a plan for a comprehensive lifelong learning programme for the seniors in the community. An empowerment perspective was used in the project. Empowerment means not only giving power to the people, but also enabling them to exercise their power. The project included 3 phases: (1) Education; (2) training seniors as research associates; and (3) needs assessments, documentation, and evaluation. In the first phase, seniors were taught to perform research on the literature of lifelong learning and conduct inquiries with various agencies. The second phase began with discussions to clarify the facts and issues to be incorporated into the questionnaire and the survey used for the

interview. In the evaluation of the program, Gross's (1967) lifelong learning profile was used to determine the effectiveness. Result of the evaluation showed that learning in the later life was beneficial to the seniors' mental, physical, and social health. Their level of self-esteem, ability to express ideas, and the feeling of being heard were found to have increased (Cusack, 1995).

Moreover, it was claimed that people who are "the most satisfied with their lives are most often engaged in regular activities outside the home that provide challenge and relationship with friends and family" (Maddox et al., 1995). Both the environment and one's lifestyle have effect on physical health as well as psychological and social health, in the later age. Robert Havighurst's (1963) Activity Theory suggested that keeping active is the best way to enjoy a satisfying old age, because older persons had the same social and psychological needs as they were young (cited in Maddox et al., 1995).

2.1.4 Learning helps Adapting to the change of life in later age

The quality of life of older persons cannot be defined by just seeing how materialistic their lives are, or by merely calculating how much pension they have been receiving since retirement. It is also related to how they could get used to the gradually changing lifestyle as they approach the later part of their lives. This is a long process, and it is very crucial for older persons to pass through this aging process successfully, healthily, and productively.

(I) Successful aging

Balon (1999) defined successful aging as multidimensional (cited in Rowe, 1987). It encompassed the low risk of disease and disease-related disability, the maintenance of

high physical and mental function and sustained active engagement in social and productive activities. He also emphasized that there was more evidence showing that the rate of physical aging was not only determined by genes but also lifestyle factors. Individual lifestyle choices in diet exercise and pursue of the mental challenges, self-efficacy, and involvements with other people also determined successful aging. Rowe and Kahn (1987) stated that successful aging referred to the reaching of one's potential and arriving at a physical, social, and psychological well-being level that was pleasing both themselves and others. Rowe and Kahn (1998) defined "usual aging" as most of older persons normally experience, and "successful aging" which the individual avoided functional loss or enhanced functional capabilities.

(II) Productive aging

In successful aging, the emphasis was on the individual physiological and psychological capacity and performance, whereas in productive aging, the emphasis was on the role that people can play in society (Bass, Caro&Chen, 1993).

Productive aging perspective viewed older persons as a major and valuable resource. As Butler and Schechter (1995) stated that productive aging was a term created to draw attention toward the fact that aging and productivity were not necessarily opposed (cited in Bass,1993). Ageism, barriers to employment and other practices were a waste of older persons'kills.

Productive aging was somewhat broader than paid work. It included any activities that produced good and services no matter older persons were paid or not paid. It included activities such as housework, childcare, volunteer work or acquiring training to enhance the capital to perform such tasks. (Herazog, Morgan & Kahn, 1993). With reference to

this definition, we can understand that productive aging not only includes economical activities but also social activities. Thus older persons who are engaged in activities that include both social and economic components can be considered aging productively.

(III) Healthy aging

Health is widely understood as a variable that is the most influential on the measures of subjective well-being, life satisfaction or morale. (Walker, 1997). Most of the social scientist adopted the concept of health to be a set of complete physical, mental and social well-being and not merely the absence of disease, as defined by the World Health Organization (WHO) in 1978 (Abeles, Girt & Ory, 1994).

Healthy aging is a holistic concept including physical, psychological, social and spiritual health, not just being free from disease. In order to achieve healthy aging, an individual have to maintain or enhance physical and mental functions by adopting behaviors, being active, productive and involved in society, maintaining independence while living in a stable social environment and maintaining meaningful personal relationship.

With reference to Woo (1999), health encompassed physical, mental and social dimensions, independent factors associated with healthy aging included financial independence, satisfaction with living arrangement of body mass index between 20-25kg/m², diversified dietary intake, little trouble with sleep, and a high satisfaction score.

From the above, it is clear that functioning physically should not be the only focus when talking about healthy aging. The psychological and social domains should also be included. Successful aging and active aging are very similar to the concept of healthy

aging, since successful aging includes the concept of absence of illness and social engagement in the later life. In order to achieve healthy aging, an individual has to achieve successful and productive aging as stated above. It is believed that continued learning in the later life can help older persons achieve these goals. Gerontological prophylaxis also suggested that receiving education could enhance positive and health promoting behaviours for older persons. Educational strategies are not only used to solve existing problems, but can also be used to prevent future problems (Berdes, Dawson & Zych, 1992).

2.1.5 Lifelong Learning and Activity Theory

Activity theorists proposed relationships among (1) activity; (2) equilibrium; (3) adaptation to role loss; and (4) life satisfaction. They claimed that letting older persons drop out from the society after they have retired is not beneficial to the adaptation of changes in the later life as previously stated, whereas “maintaining both level and pattern of activities from middle age into old age would lead to the highest level of life satisfaction in old age” (Maddox et al., 1995, p.5). It is because the needs of older persons are actually no different from those of middle-aged people. They should keep themselves active in order to maintain equilibrium in their later lives, as they would be having more leisure time and may not know how to utilize it. Furthermore, when seniors retire, they lose their role as a worker. In order to substitute for the lost role, they should find another role that is suitable for their needs, such as becoming students again. Both activity and disengagement theorists agree that life satisfaction is a very important criterion in justifying the aging process. Havighurst, Neugarten and Tobin (1963) suggested that life satisfaction should be composed of zest and enthusiasm, resolution and fortitude, a feeling of accomplishment, self esteem, and optimism (cited in Maddox

et al., 1995).

In the research ‘Overseas Experience in Providing Continuing Education for Older Persons’ (2002), the authors talked about the benefits for older persons to continuing learning, and reached a conclusion that is consistent with the Activity Theory. They suggested that older persons who study continuously could spend their time in a more meaningful way and have a sense of success. Furthermore, studying offers an opportunity for them to learn new knowledge and abilities and to continue to better themselves. Older persons could develop new interests that provide them with new linkage to the society, minimizing the adverse effects that occurred due to the changes in lifestyle after retirement. Seniors are able to make up for what they have missed when they were young through lifelong education. Moreover, education could also enhance older persons’ communication with others by act as a medium for older persons to express their feelings and ideas. Also, quality of life of older persons could be enhanced, so that they would be able to keep contributing to the society.

2.1.6 Lifelong Learning and Quality of Life

The goodness of one’s later life could not be measured only in terms of one’s wealth or physical health. The importance of taking psychological health into consideration has been noted by some researchers. Thus, quality of life (hereafter referred to as QOL) is widely adopted as a measurement of the states of well-being of older persons. As stated in Chan (in press), QOL was first formally studied in 1930s by Ogburn and his colleagues in the Harvard Research Centre.

(I) Definition of Quality of Life

There are numerous attempts to define QOL in the literature. Fisher and Schuessler provided the definitions of different scholars in their paper. They quoted Dalkey & Rourke (1973), who suggested that QOL is related to a person's sense of well-being, like his or her degree of happiness or degree of satisfaction with life. Allaedt (1976) had even proposed that QOL should include the feeling of love and self-realization arising from interpersonal relationships, whereas Michalos (1980) suggested that QOL means perception of the worth or value of life. Furthermore, the definition, "a dynamic blend of satisfactions elicited by freedom from hunger and poverty, opportunity of personal growth, self fulfillment and self-esteem", was generated in the Report of the President's Commission for a National Agenda for the Eighties (1980) (cited in Fisher, 1985). Generally, most specialists agree that 'quality' means 'grade', which can range from high to low or good to bad. In 1993, WHO defined QOL as "individuals' perceptions of their position in life in the context of the culture and value systems in which they lived and in relation to their goals, expectations, standards and concerns" (cited in Chan, pg. 2). This definition encompasses the whole picture of QOL, in which not only physical health, but also mental health, like satisfaction or dissatisfaction, social well-being, environmental condition, and spiritual commitment (Chan, in press), is considered important.

(II) Learning enhance Quality of life

Many researches have proven that learning is beneficial, especially for older persons, by enhancing their qualities in many different ways.

Firstly, learning can enhance older persons' physical, mental, and psychological health. Many older persons are found to be capable of learning and a couple of researches have proven that the cognitive stability of older persons can be maintained throughout the year, and continued education under a supportive environment could enhance its growth. Furthermore, learning activities are beneficial to the prevention and slowing down of declining mental ability. Elder learners were also found to rate themselves higher in level of happiness and have increased life expectancy (Shelon, Cox & Rathee, 1983; Hiemstra, 1994, Whitbourne & Weinstock, 1979; Cross and Florio, 1978; APIAS, 2003; HKCSS, 2002).

Secondly, many older persons are found to keep participating in the formal or informal courses because they can acquire a sense of achievement and recognition by attaining a qualification. Qualification in whatever means is a evidence of their ability in their perception and it can provide them with a sense of fulfilment. They find themselves being recognized by and thus can have a better relationship with their family member. Furthermore, it is claimed, "the most satisfied with their lives are most often engaged in regular activities outside the home that provide challenge and relationship with friends and family" (Maddox et al., 1995).

2.2 Lifelong Learning and Lifelong Education

Lifelong education was first addressed in the 1920s in Britain due to the prevalence of adult education in European countries in the mid 18-century. It drew attention from the public since people were having growing demand for lifelong learning. At the beginning of the 1970s, the information revolution had led to the quick obsolescence of knowledge. People were increasingly aware of the importance of education as it contributed to a

rapid growth of the economy in a knowledge-based society. Moreover, increasing life expectancy and reducing fertility due to economic development and improvement in health care, nutrition, and social care resulted in an aging society. Longer lifespan also brings about longer working life. All these factors increased people's willingness to keep learning throughout the working years (Wang, 1987). The studies of lifelong learning and lifelong education were also increasingly addressed among scholars in the past decades.

2.2.1 Lifelong Education

According to A.J. Cropley's (1980) definition, education involves the influences that guide or encourage learning. Coombs and Ahmed (1974), Dave (1976), Rao (1979), Hawes (1975), and Malcolm Adieshiah (1973) all suggested that education not only encompasses a vertical continuum but also a horizontal continuum.

Hawes (1975) noted, "lifelong education seeks continuity and articulation along the vertical or longitudinal dimension... lifelong education also seeks integration at its horizontal and depth dimension at every stage of life". Dave (1976) advocated "the field should embrace the vertical time dimension from birth to death, and the horizontal space dimension including education in the home, school, community, places at work...". Dave (1976) further suggested that flaws might be present in the study of lifelong education, for example, the results were too preliminary, or focuses were usually put on the vertical continuum of education process in people's life. However, he reiterated that in reality, it is possible to deliberate both the vertical and horizontal dimensions of the total life cycle, and the direction of further studies on lifelong education should not overlook this point.

Lifelong education is commonly perceived as a synonym for adult education or further vocational training for the working population. However, lifelong education as a way to facilitate lifelong learning does not only mean retraining or education for the middle-age group in the population. Dave (1976) provided a definition for lifelong education in a broad sense: “A process of accomplishing personal, social and professional development throughout the lifespan of individuals in order to enhance the quality of life of both the individuals and their collectives. It is a comprehensive and unifying idea which includes formal, non-formal and informal learning for acquiring and enhancing enlightenment so as to attain the fullest possible development in different stages and domains of life” (Dave, pg. 35). Coombs and Ahmed (1974) also categorized the education into formal, non-formal, and informal. Not surprisingly, they defined formal education as “education provided by the highly institutionalized, chronologically graded and hierarchically structured ‘education system’, spanning lower primary school and the upper reaches of the university.” Non-formal education, to a certain extent, is comparatively less serious. It is provided by “any organized, systematic, educational activity carried on outside the formal system to provide selected types of learning to particular subgroups in the population, adults as well as children” (cited in Bostrom, 2003, pg.12). Education for older persons in Hong Kong is mainly non-formal education. Informal education is what we are experiencing all the time. It is “the lifelong process by which every person acquires and accumulates knowledge, skills, attitudes and insights from daily experiences and exposure to the environment-at home, at work, at play; from the example and the attitudes of the family and friends; from travel, reading newspapers and books or by listening to the radio or viewing films or television” (ibid, 2002, pg.96). Although it is difficult to make a clear distinction between these three types of education formal education and non-formal education are both used to reinforce the informal

education that one perceives. It promotes and facilitates certain valued types of knowledge (such as reading and writing) that individuals cannot readily or quickly acquire through ordinary exposure to their environment. Cropley (1980) also agreed that lifelong education should last for the whole life of each individual. He claimed lifelong education lets one acquire, renew, upgrade, and complete knowledge, skills, and attitudes. The ultimate goal of lifelong education of each individual is to have self-fulfillment. This is necessary considering the constantly changing conditions of modern life. One of his vital arguments is that lifelong education should be able to increase one's ability and motivation to take part in self-directed learning activities.

UNESCO Institutes of Education (UIE) (1996) later developed a systematic philosophical principle of lifelong education that is widely used among educators. It stated that lifelong education should contain the following characteristics:

1. The three basic terms upon which the meaning of the concept is based are *life, lifelong, and education*. The meaning attached to these terms and the interpretation given to them largely determine the scope and meaning of lifelong education. (*Meaning and Operational Modality*);
2. Education does not terminate at the end of formal schooling, but is a *lifelong process*. Lifelong education covers the entire life-span of an individual;
3. Lifelong education is not confined to adult education. Rather, it encompasses and unifies all stages of education – pre primary, primary, secondary and so forth. Thus it seeks to view *education* in its *totality*;
4. Lifelong education includes *formal, non-formal, and informal patterns of education*;
5. The *home* plays the first, the most subtle, and the most crucial role in initiating the process of lifelong learning. This process continues throughout the entire life-span of an individual through *family learning*;

6. The *community* also plays an important role in the systems of lifelong education right from the time the child begins interacting with it. It continues its educative function both in professional and general areas throughout life;
7. *Institutions of education* such as schools, universities, and training centres are important, but only as one of the agencies for lifelong education. They no longer enjoy the monopoly of educating people, and can no longer exist in isolation from other educative agencies in the society;
8. Lifelong education seeks continuity and articulation along its vertical or longitudinal dimension (*Vertical Articulation*);
9. Lifelong education also seeks integration along its horizontal and depth dimensions at every stage in life (*Horizontal Integration*);
10. Contrary to the elitist form of education, lifelong education is *universal* in character. It represents the *democratization of education*;
11. Lifelong education is characterized by its *flexibility* and *diversity* in *content*, *learning tools* and *techniques*, and *time* of learning;
12. Lifelong education is a *dynamic approach* to education that allows adaptation of materials and media of learning as and when new developments take place;
13. Lifelong education allows *alternative patterns* and forms of acquiring education;
14. Lifelong education has two broad components: *General* and *professional*. These components are not completely different from each other, but are *inter-related* and *interactive* in nature;
15. The *adaptive* and *innovative functions* of the individual and the society are fulfilled through lifelong education;
16. Lifelong education carries out a *corrective function*: To take care of the short-comings of the existing system of education;
17. The ultimate goal of lifelong education is to maintain and improve the *quality of life*;

18. There are three major *prerequisites* for lifelong education, namely *opportunity*, *motivation*, and *educability*;
19. Lifelong education is an *organizing principle* for all education;
20. At the *operational level*, lifelong education provides a *total* system of *all* education.

2.2.2 Lifelong Learning

The term “lifelong learning” seems to be self-explanatory. However, scholars have put in a lot of effort to illustrate the idea with clearer definitions. Cropley expounded that learning is a process of change occurring within people as a result of experience (1980). It is somewhat ongoing throughout the whole life: On the one hand, it includes attending classes in formal and structured institutions such as universities and vocational schools, where people intend to learn systematically with purpose; on the other hand, it comprises of what Cropley called ‘unsystematic and unorganized’ activities, such as parents playing with children and friends chatting with each other. People are usually not aware that they are learning through these activities, and thus it is unconscious and more or less spontaneous. Therefore, in terms of Cropley’s words, lifelong learning is strongly correlated to the day-to-day experience of each person in the rapidly changing society. In this rapidly changing world, new knowledge and technology emerge everyday, especially in the business world, where advanced communication leads to the rapid growth of the economy, and globalisation leads to a more competitive environment worldwide. From an economic approach, human beings’ wants are unlimited though resources are limited. Continuously learning throughout one’s life is a unique way of deriving more innovations and greater profits. Moreover, lifelong learning can equip people with up-to-date information and skills, and thus older persons can still contribute to the society after retirement if they receive education in the later age. Therefore,

learning should be ongoing throughout one's life. Dave (1976) shared the same view. He pointed out that learning "should take into account the entire life-span including the various educative agencies operating the life-space of an individual, rather than follow a narrow conception of education as formal schooling during childhood and youth" (Dave, 1976, p.31). UNESCO Institute for Education (UIE) defines lifelong learning as, "a process of individual learning and development across the life-span, from cradle to grave - from learning in early childhood to learning in retirement. It is an inclusive concept that refers not only to education in formal setting, such as schools, universities and adult education institution, but also to 'life-wide' learning in informal settings, at home, at work and in the wider community" (cited in Tuijnman, 2002, pg. 101).

Berman also had high regards for lifelong learning. In his point of view, since "learning is something that all people do and want to do for reasons which are intrinsically valuable to their human existence and quality of life" (ibid), lifelong learning is a process that can make young and old alike "connoisseurs of the past, implementers of the present and visionaries of the future" (cited in Cribbin, 2002, pg.17).

Figure 2.1 Life-long and Life-wide Perspective of Learning. (Bostrom, 2003, pg.18)

To conclude, lifelong learning is “an essential part of one’s growth and development as a human being, as a citizen in a participative democracy, and as a production and efficiently operating agent in a process of economic change and advance” (Cribbin, 2002, pg.173).

Taking all the above definitions and description of lifelong learning into consideration, it is crucial to highlight that the term “life-wide” has been used frequently in the discussion of lifelong learning, indicating that the learning process no longer refers only to systematic organized learning activities associated with formal education. Apart from the formal learning process, more attention has been paid on learning under informal or non-formal circumstances. Scholars also agreed that the needs of the individuals are more important, and the individual should be the heart of the learning process (Tuijnman and Bostrom (2002)). So, more effort should be put on a lifelong learning model rather than remaining at a stage of talking about the lifelong education model. The Organisation for Economic Co-operation and Development (OECD) (1996) had drawn a comparatively holistic description of lifelong learning, ‘despite its all-embracing nature, the new concept of lifelong learning has several features that give it an operational significance for education and training policy in distinction from other approaches:

- ✧ the centrality of the learner and the learner’s needs, that is, an orientation towards the ‘demand side’ of education and training rather than just the supply of places;
- ✧ an emphasis on self-directed learning, and the associated requirement of ‘learning to learn’ as an essential foundation for learning that continues throughout life;
- ✧ a recognition that learning takes place in many settings, both formal and informal;
- and,

- ✧ a long-term view, which takes the whole course of an individual's life into consideration.” (cited in Albert, pg.102)

It is not difficult to understand the notion that “lifelong learning poses nearly insurmountable conceptual problems for scholars and policy analysts alike” (Albert, pg.105), because its institutional context involves all the educational institutions in one's lifespan. One will engage in pre-schooling and care in nursery, receive primary and secondary schooling and experience tertiary schooling, take part in vocational training in various labour – market institutions, on the job informal learning and self-directed and cooperative learning in the society. Thus, along with the lifelong plus life-wide perspective of learning, the meaning of lifelong learning may vary according to the policy goal in different countries. Where a human-capital perspective is preferred, emphasis might be put on adult education, and where a social-capital perspective is adopted, the development of learning at the retirement age might be seen as more crucial.

2.3 Shifting from Lifelong Education to Lifelong Learning

Considering the definitions of lifelong education and lifelong learning illustrated in the previous two sections, the most obvious distinction between these two concepts is that policy makers' (usually the government) interests weigh highly in lifelong education, whereas learners' autonomy and interests are emphasized in lifelong learning. In this research, focus will be put on lifelong learning rather than lifelong education because, as suggested by Hostler, the ideal type of education should take “student's autonomy, individuality and his equality with the tutor” (cited in Javis, 1985, p.28) into consideration. This argument suggests that the education system should be tailored to suit the learners' desires.

(I) The shift of the social democratic approach to neo-liberal welfare reform models of lifelong learning.

The older-learner-oriented approach can be supported by the increasing proclamation of “learning as a function of individual and social life, rather than as an object of public policy”. When the concept of lifelong learning first emerged, it was always mixed up with that of lifelong education, or more precisely, lifelong learning was being equalized with lifelong education, and thus, it was considered a social policy. Attention was put on and the government dominated the provision of education and training opportunities. Individuals could only take what the government had provided, and their choices were limited. This is known as the social democratic approach to lifelong learning.

However, neo-liberal welfare reform models of lifelong learning began to gain popularity as the individual’s choice of lifestyle is increasingly being recognized as fundamental to one’s life, and learning is seen as a function of survival or growth on both individual and social terms. This caused a shift of lifelong learning from being a social policy to being a social function. Learners’ interests overtook policy makers’ will as the most important factor in deciding what kind of services should be provided.

(II) Older persons have different learning styles due to different models of retirement

The provision of adult learning, more commonly known as continuing learning, depends on the attitude of the government or service-provider to a large extent, but elder learning is a very different case. Older persons are different from the rest of the population in that they have experienced the life-transition of retiring from work. Retired people usually

face these situations :

- Disengaging from paid work;
- Reassessing finances;
- Being concerned with personal health care;
- Searching for new outlets for achievement;
- Managing leisure time;
- Adjusting to a more constant marriage companion (the home for lunch problem) ;
- Searching for the meaning of life;
- Adjusting to a single role (after death or departure of a spouse);
- Becoming reconciled to death;
- Problem solving;
- Managing the stress accompanying change (Lamdin, 1997, pg.28).

Different models of retirement arose because retired people have to deal with all these situations. As Joanna Walker (1996) suggested, people having different models of retirement have different learning styles, and require different content of educational programmes. Thus, in order to attain the highest effectiveness in the education programmes for older persons, it is necessary to construct the lifelong learning models from the point of view of the individuals.

2.4 Lifelong Learning for Older Persons

According to Aspin and Chapman (2001), lifelong learning policy can be divided into four categories according to the targets of the recipients and the goals of education. The four categories are as follows:

- (1) Entailing a compensatory education model aimed at making up for inequalities in the system of initial, formal schooling;
- (2) Constituting a model of continuing vocational training;
- (3) Constructing a social innovation model that can promote socio-economic transition and democratization;
- (4) Leisure-oriented model of lifelong learning.

These 4 categories constitute the learning opportunities available to individuals across their lifespan. Children and teenagers receive compulsory education, taken for granted in the developed countries. After they have finished formal education and enter the workforce, they have to continue learning in order to acquire specific skills and up-to-date knowledge. People aged 30 to 50 learn in order to make more profit or to prepare for any challenges that could appear suddenly in their career. After retirement, people learn as a leisure activity, to spend time or to gain knowledge in health maintenance. In this sense, it appears that only the leisure-oriented model of lifelong learning is related to lifelong learning for older persons. However, this conclusion may be dangerous. The 4 categories of lifelong learning policy can be regarded as 4 stages, as they make up the complete path for learning across the lifespan. It is difficult to believe that one can fully enjoy the learning process in the later age with some previous stages missing. An obvious example is that an older person may not be interested in learning after retirement because of his or her low literacy level. Therefore, when considering the lifelong learning model for older persons, we cannot ignore the importance of the linkage between each stage. Here, 5 aspects will be particularly addressed because of their importance towards the construction of a lifelong learning model for older persons. These 5 aspects are: (1) How formal is the learning opportunity; (2) accessibility and flexibility; (3) literacy level of the recipients; (4) funding; and lastly (5) qualification.

(1) Formal, Non-formal and Informal

Older persons may have different expectations towards the formality of learning. Some may hope to learn in formal institutions like the University in order to compensate for the lack of opportunity in the younger age (formal learning). However, some may not want to have too much pressure and would just like to take some interest classes in community centres (non-formal learning). Where the culture of volunteerism is stronger, some seniors may prefer to learn through service (informal learning).

(2) Accessibility and flexibility

Although more and more people are remaining healthy in their old age, some older persons may have physical difficulties that prevent them from going to the institutions to participate in the courses. Furthermore, some grandparents have to rear their grandchildren and may have other commitments like volunteering. Thus, besides having community centres and other formal institutions as venues for learning, courses should also be provided through more media, like the radio and the internet, so that more older persons can be benefited. Furthermore, a system for credit accumulation and transfer and cross-institution recognition of qualifications are necessary in order to provide greater flexibility in finishing a programme.

(3) Literacy Level

Since the 9 year free education policy was not implemented until 1978, most of older persons have low literacy level. This has become the main barrier for them to continue learning in the old age and has restricted them to fields that do not require high qualifications. Therefore, it is necessary to provide them with the opportunity to access fundamental schooling and avoid setting a lot of demanding pre-requisites.

(4) Funding

Older persons receiving pension could be able to afford the tuition fee for the courses. However, because there was no mandatory provident fund system in the past, many older persons encounter financial difficulties in their retirement life, and this will definitely deprive their chances of continuing to learn. As a result, the government has to provide funding for older persons in order for them to achieve lifelong learning. The rationale for this is the same as that for Continue Education Fund and Funding Scheme for Workplace English Training.

(5) Qualification

Older persons consider completing a course as a kind of self-fulfillment. Providing qualifications and awards can increase their interest in continued learning because they will have a sense of achievement. Furthermore, with the qualification, older persons can start their second career. In many cases, older persons who have completed a course became instructors for similar courses.

2.5 Theories in Explaining Learning Activities

This section attempts to investigate the important elements, such as possible motivations and barriers to learn and attitude towards learning, regarding older persons' participation in learning activities by studying various learning theories. Before 1970s, the field of adult education was regarded a conceptual desert because it was hard to find any related theory. When various scholars, such as Roger Boshier, Kjell Rubenson, Harry L. Miller and Patricia Cross, became aware of the lack of theories in this field, they started to put more effort into the development of theories in order to support their own arguments.

After years of hard work, there are now plenty of theories to explain the phenomenon of adult participation in learning activities. However, a theory particularly devoted to older persons' motivations for learning has yet to be developed.

The study of older learners will mainly focus on their behaviours of participating or not participating in learning activities, and 4 theories will be adopted in order to provide possible explanations for older persons' attitudes towards learning. The 4 theories are Kjell Rubenson Expectancy-Valence Paradigm, Congruence Model from Roger Boshier, Cross's "Chain-of-Response Model" and Social Reinforcement Perspective. Through these 4 theories, important elements in older persons' learning behaviours can be figured out. The key element that can be obtained from each theory will be addressed particularly after its description.

2.5.1 Kjell Rubenson Expectancy-Valence Paradigm in explaining the motivation of participation in learning activities

Rubenson (1997) modified Vroom's (1964) explanation of the motivations and incentives for people to work. His expectancy-valence model utilizes the psychological theories of motivation to illustrate that human behaviour is a product of the interaction between the individual (with his acquired experience) and the environment (as he perceives and experiences it). He stated whether one has the motivation to learn is determined by the net force existing between the individual and the environment. Rubenson's model consists of 2 components, of which one is "expectancy" and the other is "valence". "Expectancy" is the result of "the expectation of personal success in the educational activity", It is also the "expectation that being successful in the learning activity". "If the individual does not perceive himself as able to participate successfully

or if there seems to be no reward for doing so”, one will have no motivation to learn. “Valence” is related to the effect caused by the learning activity. If an individual considers the benefit coming from the learning activity can outweigh the loss, then the motivation to learn will be higher

Rubenson’s theory had already taken the external-barrier into account. This means that any external-barrier will directly affect one’s motivation to learn, rather than becoming another factor that has to be considered.

2.5.2 A Congruence Model from Roger Boshier: Explanation of Participation from the View of Non-Participants

Boshier held the same view as Rubenson, believing that motivation for learning is a product of the interaction between internal psychological factors and external environmental variables. However, Boshier’s research conclusion was drawn from the view of non-participants, explaining why they had no incentives to learn or decided to drop out from the learning process.

“Both adult education participation and drop out can be understood to occur as a function of the magnitude of the discrepancy between the participant’s self-concept and key aspects of the educational environment. Non-participants manifest self or institution incongruence and do not enroll”. The discrepancies between self and the ideal self and self and the institutional environment, to name a few, are the “incongruence” in Boshier’s words. All these incongruence are additive: The greater the incongruence, the greater the chance of not participating in learning or dropping out. Thus, those who have lower self-esteem are less likely to have high expectations towards the learning process

(in Rubenson's theory) and less likely to experience congruence with the educational environment (in Boshier's theory).

2.5.3 Cross's "Chain-of-Response Model" Explaining Older persons Participation in Learning

Cross's "Chain-of-Response Model" is originally and widely used to explain adult participation in learning activities. It was found to be also applicable to explain older persons' learning behaviours. Cross's model consists of seven factors that are consecutively linked together, and all these factors influence people's choice of whether or not they will take part in any courses. Cross combined the internal psychological factors with the external environmental factor to present the full picture of adult education participation.

The model starts from the view of the individual because participation in learning is a person's own decision to start with. It is definitely not worth discussing if one does not have any intention or interest to learn. Cross suggested that "individual's self-perception (**A** in the figure below) on his or her ability to learn tend to influence his or her attitude toward education (**B**)". However, the self-perception will be largely affected by some other factors such as own experience in learning and the attitude of people around. The positive attitude towards education coming from a positive learning experience, such as the gain of happiness, meeting new friends through taking courses, and family or friends' encouragement, will help build a positive self-perception and vice versa. If one has negative attitude towards learning or less confidence in learning, he or she will be less successful in the learning process. Similarly, an individual's attitude towards education is influenced by other factors. "The value he or she places on the goals to be

achieved through participation in learning and the expectations that participation will meet such goals (C)” will affect the individual’s attitude. A higher value being placed on education and a higher expectation of goal being achieved will contribute constructively to the individual’s attitude.

As Bandura (1997) suggested, “psychological functioning is illustrated by a continuous reciprocal interaction of personal and environmental determinants, and self-regulatory processes adopt an important role”. The influences existing among factors (A), (B) & (C) are two-way. If one can reach (C), then the external environmental factors will have their effects on (C) at this stage. External environmental factors, named “Life Transitions” by Cross, are things that bring “forefront new needs or previously hidden needs that can be fulfilled by participation (D)”. In his words, life transition is “periods of change calling for adjustment to new phases of the life cycle”, such as loss of a job or retirement from work. Usually a life transition can provide positive forces for learning.

With the encouragement of (D), an older person who has reached (C) is expected to have a stronger motivation to explore new opportunities and overcome barriers, because their willingness to learn is reinforced. Not surprisingly the existence of barriers and lack of learning opportunities may also discourage one to learn. Furthermore, “lack of information”, which means difficulties in getting information on learning opportunities and finding ways to overcome barriers will amplify the negative effects of (E).

To conclude, “positive experience in any of the seven areas leads to higher likelihood of participation”. If older persons can overcome the difficulties of transiting from one stage to another and finally take part in any program, the learning episode will be formed and this serves as the experience to influence their self-perception and attitude again. Thus,

the arrow finally goes back to Box (A).

Fig. 2.2 Cross's "Chain-of-Response Model" (HKCSS, 2002, pg.6)

The Cross model mainly provides the factors for explaining how one starts to participate in learning activities. In terms of continuous participation, he only suggested that if one were finally able to participate in learning, such experience will serve as a positive influence towards his or her perception, and the cycle runs again. However, there should be a longer story after Box (G). In order to explain the behaviour of continuous participation in learning activities, social reinforcement perspective is adopted

2.5.4 Social reinforcement perspective on explaining continuous participation in learning activities.

Cross did not explain how a learning experience can affirm positive self-perception and

attitude towards education. To investigate the reason behind, the first thing to be done is to reveal the positive impact of learning activity. Such information will be the foundation for developing an explanation for the continuous participation in learning. As stated in Chapter 1, lifelong learning can increase one's QOL by leading to better mental and physical health, lesser depression, fewer phobias, and higher levels of self-esteem and self-confidence. Furthermore, learners are found to enjoy life more than non-learners, are better at coping with daily life, and are more active socially.

The positive consequences of learning are called “reinforcements” in the social reinforcement perspective. Pavlow (1927) suggested certain kinds of reward are required in order to make one respond to a stimulus. “Reward” can be tangible, such as money and certificates, or intangible, such as feeling of happiness coming from the appreciation from others.

In the learning process, older persons may perceive both the intrinsic or extrinsic reasons to sustain their continual participation of learning. Both kinds of reasons are important and the sustainability will decrease if either one were missing.

Intrinsic reasons Intrinsic reasons are driven by the older persons themselves, through their internal cognitive thinking. They will interpret and evaluate the positive aspects of learning experience. By going through the evaluation and appraisal towards the learning experience, older persons will find themselves benefiting from the learning activity (like an increase in QOL). However, self-reinforcement has only short effect on one's willingness to continue learning. In the long run, extrinsic reasons are essential to the sustainability of continued learning activities.

Extrinsic reasons Extrinsic reasons are generated by all other means except by the older persons themselves. These include appreciation from others and recognition from the public. It was found that rewards or certificates are desired by older persons because they act as proofs of their abilities. Besides tangible items, intangible awards like public recognition are also important. Older persons need external support in response to their learning behaviour.

The intrinsic and extrinsic reasons and forces, which include a more positive self-perception of own ability and attitude towards learning, are the reinforcements that affirm older persons' initial intention of participation in learning activity. All these reinforcements in turn strengthen their continuous participation in learning activity.

2.6 Lifelong Learning Models of Foreign Countries

In Hong Kong, the development of programmes for learning among older persons is still at its beginning stage. With its short history, it would be difficult to facilitate a discussion without a world-wide perspective. Studying the experiences of other countries is crucial and can give us insight on how to meliorate the existing Hong Kong model. Some countries have a pretty long history of lifelong learning and have stronger atmosphere of third age learning. The experiences of France, Britain, America, Finland, and China will be studied in the following paragraphs.

2.6.1 Experience of other countries

(I) France

The first University of the Third Age (U3A) was established in 1972 by Pierre Vellas at the University of Social Sciences at Toulouse, France. It aims at improving the quality of life for older persons through providing education opportunities. From 1973 to 1975, other U3As were set up in France, Belgium, Canada, Spain, Italy, Switzerland, and Poland. The Third Age University at Warsaw in Poland was set up in 1975. It offers 60-65 hours of classes per week. Classes include academic courses, self realisation groups such as art classes and choral groups, and health and physical education, which purposely included medical and psychological aspects of gerontological prophylaxis. It also cooperates and works with other U3As in Poland and abroad. Moreover, it cooperates with the Polish Association of Gerontology through participation in symposia and conferences. It was claimed that students are more intellectually and physically active and they have higher motivations to pursue their life interests and objectives when compared with other older persons. (Berdes, Dawson & Zych, 1992).

(II) Britain

In Britain, the National Institute of Adult Continuing Education (N.I.A.C.E.) is an important organisation that is responsible for the coordination of older persons' education provided by different groups in the society. Four categories of organisations provide education for seniors in the society. They were, namely, "higher education division", "further education division", "local authorities", and "volunteer organisations". Open University of United Kingdom is a U3A provided by the higher education division. One in every five students there is over 50 years old. There are no prerequisites for admission and there is no specific duration to finish the program. It makes use of the remote teaching method so that the tuition fee can be cheaper. Comparatively, the courses provided by local authorities and volunteer organisations are closer to informal

education, covering areas such as art and physical education. The teachers are mostly voluntary workers and the classes are held in libraries or community centres. (Lui, Leung, Jegede, 2002)

(III) United States

Same as in Hong Kong, in America, those who are scholastically challenged contribute to the largest percentage of older learners in the community. Seniors who were educated in the early 1900s only had basic skills of reading and writing. Most of them had eight years of schooling in average.

As early as the 1970s, community colleges in the United States had started to demonstrate their commitment to lifelong learning by providing various programmes specifically designed for the older adults. Those programmes were free of charge and were mostly held in senior citizen centres, neighbourhood centres, older adult housing projects, and college campuses. They provided not only informal education programmes like money management and preparation for retirement, but also formal courses such as 20th century America and creative writing.

The Committee on Education for Aging was established in 1949. Education for older persons was mainly provided by universities, Institutes for Learning in Retirement, or “I.L.R”, Elderhostel, and churches. Eisen (1998) divided the learning process into teacher oriented and learner oriented (cited in Lui, Leung, Jegede, 2002). Teacher oriented approach refers to the traditional way of teaching, while the student oriented approach emphasizes on self-learning among the students themselves and they could control the pace of learning. In the States, it was found that older persons prefer

student-based learning for tertiary education, whereas teacher-based is better for older persons in non-tertiary education, such as interest classes. Elderhostel is uniquely American. It aims at providing people over 55 with an opportunity of learning through travelling and socializing. Elderhostel is very successful and popular in the United States because older persons could get a lot of new challenges and fun from the programmes. I.L.R. was formed by a group of retired people over 50. 50% of them had received tertiary education. Courses last for 6-15 weeks, and include many perspectives such as art, humanities, local history, and foreign affairs. There is no grading assessment and classes are held during daytime (Lui, Leung, Jegede, 2002).

(IV)Finland

Finland is the country with the longest history of older persons' lifelong learning. It has a more developed policy for older persons' education and the government plays a more intensive role. In Finland, U3A is a kind of Open University, similar to the British Open University in that there is no pre-requisite for admission. The difference is that it only offers part-time courses. Open University in Finland is a non-profit organisation according to the law so the tuition fee is cheaper. In the U3A, inter-disciplinary talks, seminars, information technology courses, learning through travelling, research and publication, and remote teachings are provided. (Lui, Leung, Jegede, 2002)

(V)Australia

The awareness of promoting lifelong education has increased a lot in Australia in recent years because the government believes that social cohesion is very important and lifelong learning can "minimize the socially dysfunctional gap between the have and the

have-nots.” (Australia Government, n.d.) It claimed in the policy pronouncement that elements in lifelong education that are “better co-ordination and rationalization of educational provision; establishment of qualification frameworks; encouraging competition among provider; reducing costs and increasing flexibility through information and communication technology” (Cribbin, p.171) should be paid more attention to. There should not only be a good articulation among schools, universities, and work, but also a good linkage between formal schooling and education for seniors. The government actively supports the promotion of the lifelong education and it is even the policy of some states like Tasmania and Victoria. The government believes that lifelong learning does create stronger citizen and better community. They have different policy statements concerning lifelong learning and in as early as 1997, the central government advocated that public bodies should maximise the lifelong learning opportunities available to the citizen. The policy document published claimed “all adults, regardless of background and circumstance, should have access to a range of diverse and affordable learning opportunities to meet their needs to become lifelong learners and help them participate fully in society.” The lifelong learning path consists of formal schooling like high schools and universities, vocational and technical training, and adult and community education. Adult Learning Australia is responsible for the adult and community education. They run more than 30 community-based programmes and over 130 non-accredited programmes in South Australia. The University of the Third Age, U3A, which is flourishing widely across Australia, provides another opportunity for adult and older persons to receive education. The success of lifelong education in Australia is due to several reasons. Firstly, a reward system called “Australian Qualification Framework” has been set up in order to have a comprehensive and nationally consistent yet flexible framework for all qualifications in post-compulsory education and training. Secondly, there is a great development in the credit transfer

system and the articulation arrangements, which can increase the incentive for people to continue learning. Furthermore, secondary school teachers, schools and academics work hard to cooperate with each other in enhancing the coherence. Within each district in each state, there is a district U3A Committee to organise the programmes. Australia is a country with one of the most flourishing lifelong education programmes in the world, and they are even better at integrating information technology into course provision. The University of Queensland, for example, has published course lists and structures on its website, and some other institutions provide distance-learning on the web.

(VI) China

In China, the U3As are different from other countries in that they are administered according to cities, districts, prefectures and areas. U3As in China have branches and older persons schools at a local level. Furthermore, a remote teaching U3A was established in Shanghai in 1995. It utilises television broadcasting as a medium of teaching. The classes are designed to focus on the applicability and are divided into different levels. Generally speaking, classes do not have a particular syllabus, and students and teachers who are usually also older persons) could decide the curriculum together. (Lui, Leung, Jegede, 2002)

2.6.2 The British Model and the Australian Model

By studying the experiences of other countries, lifelong learning models all over the world can be classified into two categories, namely the British Model and the Australian Model, both developed from the French Model.

The British model is the framework of the lifelong learning programmes in Britain. The coordinator for all these courses is National Institute of Adult Continuing Education. Local authorities and some other voluntary organizations take the role of course providers. The tuition fee is comparatively cheaper because the workforce is mainly voluntary, and they use libraries and community centres as the teaching venues. Students usually have at least high school education level, and they mostly participate in interest-based courses. There is no set curriculum. The content of a course would be decided by the course tutor and its participants. Unlike formal education, courses provided usually do not have a set duration, and can vary from a couple of weeks to a couple of months, though most of them are short. Even though most of the participating older persons have medium to high education level, there is no prerequisite for entering the programmes, and this allows wider participation in the community.

France is the country with the longest lifelong education history, and coordination is done by the government. Compared to the British model, courses cost a lot more because people are hired to do the administrative work and to be tutors. Also, classrooms in universities were rented to hold the classes, and professional organizations are invited to be course providers. The courses have prerequisites, so the participants often have medium to high education level. The duration of programmes is set to be several months, and both academic and interest-oriented courses are provided to those who are interested. Unlike Britain, the curriculum is structured. So, interested persons have to consider whether the course content and teaching style are suitable for them.

The Australian model, developed from the French Model, is somewhat in-between the British Model and the French Model. On the one hand, it is the same as the British model in that course providers mostly rely on voluntary workers to perform

administrative tasks and to teach in the district. The tutors have great autonomy. They decide the prerequisite and the curriculum after discussing with those who are interested to join. The classes last for 6-8 weeks usually. On the other hand, it is similar to the French experience in that a wide variety of courses are provided, ranging from less formal interest classes to more formal academic classes like politics and history. Classes are held in community halls, universities, or places that are convenient for the participants.

2.7 Lifelong Learning in HONG KONG

2.7.1 Development of lifelong learning model in Hong Kong

The review of the education system by the Education Commission (EC) in 1999 marks the first time policy makers mentioned the learning process in terms of a “lifelong” perspective. “Learning for life” was adopted as the theme at that time. In the Hong Kong society, until recently, the public viewed lifelong learning as a tool to tackle with economic and social changes, so people considered it as necessary for the working class only. Scholars pointed out that the Hong Kong economy had shifted from labour-based to service-based and knowledge-based industries. People are required to equip themselves with the latest and most applicable knowledge, so that they have to participate in the so-called “lifelong learning”. Not surprisingly, educators and policy makers are concerned with the learning stages that begin from age 5 to 22 or 23 and end around 50. Working people below 50 have to acquire skills and knowledge continuously because they have to perform well in the workplace.

Policy makers and educators have overlooked the needs of retired people and those who

are going to retire. As a result, most of the studies about lifelong learning in Hong Kong are actually not from a lifelong perspective. Most of the studies covered continuing, professional, adult, distance, and open education but not older persons' education. In this sense, there are many government funded or privately funded institutions providing learning opportunities to the working class. The government funded organizations are mostly branches of tertiary institutions that include Hong Kong University School of Professional and Continuing Education, School of Continuing Studies of the Chinese University, University of Science and Technology College of Lifelong Learning, City University School of Continuing and Professional Education, Baptist University School of continuing education Division of Continuing Professional Education in the Institute of Education, Lingnan Institute of Further education from the Lingnan University, and various schools in the Hong Kong Polytechnic University. In the non-university sector, there are the Vocational Training Council, NGOs like the Caritas, and the government's evening adult education provision. In the private sector, there are now many profit-making institutions and from the companies per se.

In 1997, the government advocated the idea of providing older persons with 'a sense of security, a sense of belonging and a feeling of health and worthiness' (Hong Kong Special Administration Region Government). Although then Chief Executive Mr. Tung Chee Hwa had a side-glance of lifelong learning in the 1998 policy address, no systematic planning of lifelong learning for seniors in Hong Kong was laid out. Older persons' education in Hong Kong remains on the level of interest classes like those provided by the senior centres, clubs, and labour unions. When compared with other countries, such as China, America, and European countries, Hong Kong is just at the beginning stage, and there are only a few of researches on older persons' education in Hong Kong.

Nonetheless, the demand for older persons' education is going to increase in the future. As cited by Hiemstra (1994), Courtenay (1989) pointed out that a paid aging in America, accompanied by increasing educational levels, "simply means that today there are more potential learners at retirement time" (pg. 523). In 1978, the Hong Kong government started the 9 years free education programme, allowing more people to attain higher education level than in the past few decades. When this generation grows old, there will be a boom in the demand for older persons' education due to the fact that people are better educated when they are young. They will have a higher willingness to continue learning in the later age. Also, as most of the older persons in this generation never received or received only little education in the younger age, they may encounter greater difficulties when studying in the U3As. This is one of the reasons why there are only a small number of older persons taking part in tertiary education now. Since the number of people receiving basic education has grown within these decades, we can foresee that more older persons will be willing to study again during the later age.

Furthermore, many researches (Brockett & Hiemstra, 1991; Ralston, 1981; Chiu & Chiu, 2002) have demonstrated that seniors are willing to acquire knowledge even in the later age. They are engaged in some self-learning activities for many hours annually and are found to be highly active in and enthusiastic about participating in the class (cited in Kingston & Drotter, 1983). These findings indicated that there is a real desire for lifelong learning. Hence, developing a plan for the lifelong learning for older persons is something that should not be delayed.

Scholars believe that there will be more older and healthier people in Hong Kong in the future. It will be a very rapid increase that results from increased life expectancy and

improved health care, nutrition, and social care (Philips, 1999; 2000). As the retirement age is usually between 60 and 65 nowadays, older persons are still going to have 10-20 years of life after retirement. Continued learning can provide them with a sense belonging and they will feel less boring. This will benefit their psychological health. Furthermore, in some foreign countries, like America and Japan, seniors could begin a second career after retirement since they are still physically and psychologically healthy. Education can equip them with up-to-date skills and knowledge to help them in their second career.

2.6.2 Current learning programmes for older persons in Hong Kong

Most of the learning opportunities for older persons in Hong Kong are non-formal. They are offered by all sorts of organizations, from private profit-making companies to political parties, non-governmental organizations, and government departments. RTHK-R5 is a public-funded radio broadcasting company that offers distant learning for seniors and provides interested-based courses varying from Chinese history to health knowledge. Neighbourhood Older persons Centre (NEC) and the Hong Kong Society for the Aged are the major NGOs that provide older persons' education. In profit-making institutions, various interest classes, like internet browsing and homepage making courses, do not have any restriction on the age of participants. However, those classes can cost thousands of Hong Kong dollars because they are not financially supported by the government. Thus, seniors tend to participate in NGO-provided classes that cost less or are even free. Apart from informal courses, formal courses leading to the award of recognized qualifications are slowly made available by tertiary institutions or professional organizations like the first U3A set up by The Hong Kong Society for the Aged (SAGE) and Lingnan Institute of Further Education (LIFE) in 2003 (Asia-Pacific

Institute of Aging Studies, 2003),

2.8 Learning Motivation and Barriers of Older Persons in Hong Kong

Due to the higher prevalence of research into learning activities among older persons in the late 1990's, a couple of this kind of research have been done in Hong Kong too (APIAS, 2003; Chiu & Chiu 2002; HKCSS, 2002). By studying those researches, it is easier for service-providers and government officials to know more about elder learning motivations and barriers, and it is believed that the provision of lifelong learning programmes for older persons can be improved.

2.8.1 Learning Motivations of Older Persons

According to the research done by the Hong Kong Council of Social Service in 2002, older persons who have had learning experience have higher motivation to learn when compared to those who have never taken part in any learning activities in the later age. The greatest motivation for older persons to learn is to keep abreast of the society and not to fall behind. The result reflects that older persons do not want to be excluded from the society. As a result, it is observed that many older persons signed up for computer courses. Secondly, they want to show their ability to their family and the public. This may be related to the negative image of older person in the society. They are usually regarded as a burden to the society rather than a capital. They feel that they would be recognized by others if they successfully finish the courses. Thirdly, lots of older persons are found to take courses because they want to fully utilize their spare time. This is not surprising because they have more time to learn after retirement. Furthermore, older persons spend most of their time on making money before they retired, so they see

learning as a substitute of work after retirement. Fourthly, “own interest” is another factor that motivates many older persons. They would like to take courses that they are interested in. Thus, learning programmes for older persons are mainly non-formal courses at this stage, such as drawing, calligraphy, and Tai Chi. Fifthly, older persons would like to have more exposure and make new friends through participating in various courses. What should be noted is that quite a lot of older persons learn because they want to compensate for the lack of opportunity to learn in their earlier age. Due to the reason that 9 year free education was enforced only since 1978, older persons usually have lower literacy level. Also, because of the traditional Chinese thinking, girls do not necessarily have the chance to go to school. This may contribute to the fact that more female older persons participate in the courses.

2.7.2 Learning Barriers for Older Persons

When investigating the learning barriers of older persons, results showed different characteristics between learners and non-learners (HKCSS, 2002).

For those who have ever taken part in elderly learning programmes, the main barriers are “fail to catch up with the course” and “low literacy level”. It is suggested that these two barriers are closely related. Low literacy level creates difficulties in the learning process. Older learners may find it difficult to understand the content of the courses and answer the examination questions. Such difficulties will prevent them from catching up with coursework and make them feel frustrated. Secondly, most of the older persons feel that the time of the classes is not favourable to them. It may due to the reason that many older persons have other engagements like taking care their family members and volunteering. Another barrier is “health-status”. Many older persons reveal that they

have to stop learning because they suffer from illness. This barrier is especially apparent because distant learning is seldom provided. Fourthly, quite a lot of older persons indicated that the courses provided do not meet their needs. They may not be interested in the courses provided, or there is limited quota in the courses they want to join. Finally, course fee is another important consideration. Quite a lot of them find difficulties in affording the courses.

A higher percentage of those who have never taken any courses agree with the barriers stated by learners. The main difference is that those who have not joined any classes have lower self-confidence and are less optimistic towards learning when compared to those who have learnt. More of them think they are too old to learn and it is meaningless for them to learn.

2.9 Summary

In summary, lifelong learning benefits both the society and the older persons. As suggested by John Dewey (1956), learning activities can enhance social integration, and according to him, opportunities to learn should be the right of every individual in the society. Furthermore, evidence has shown that learning can enhance the quality of life of older persons and it helps them to adapt to changes in the later life. Therefore, constructing a lifelong learning model for older persons in Hong Kong is essential and should not be overlooked.

By studying the experience of foreign countries and comparing them with the Hong Kong experience, it is obvious that the present lifelong learning model can be improved, and lifelong learning models of foreign countries can be used as good references.

However, various theories on older persons' learning tell us that learning is not a simple process. It consists of many elements, including what makes an older person decide to learn, what may hinder their decision, how the learning experience affect their participation in the future, and what can reinforce participation in learning activities. Moreover, researches have shown that older persons have different learning motivations and barriers. Therefore, the goodness-of-fit between older persons' expectations and the existing provision of lifelong learning programmes will be the key to success in lifelong learning model.

Consequently, a mapping framework, which aims at figuring out the gaps between older persons' expectations towards the lifelong learning model and the existing provision in Hong Kong, will be adopted as the theoretical framework of this research, and will be illustrated in Chapter 3.

Chapter 3

Theoretical Framework

Constructing a Lifelong Learning Model for Older Persons in Hong Kong

A user-oriented approach is adopted for this research. This means that a lifelong learning model is developed from the point of view of older persons. Carl Ransom Roger, one of the most famous humanistic psychologists, supported the idea that education systems should be learner-oriented. Learning, in terms of humanistic psychology, is effective and meaningful only when the internal potential of learners is fully developed, and learners are actively involved in the learning process. Another prominent humanistic psychologist, Abraham Harold Maslow, mentioned that the ultimate goal of learning is to fulfill “self-actualization needs”, the most difficult to be fulfilled in his hierarchy of needs.

3.1 Maslow’s Hierarchy of Needs

Abraham Harold Maslow first published the Need Hierarchy Theory in his book, “Motivation and Personality”, in 1943 (cited in Maslow, 1968). In the book, he illustrated human beings’ seven needs, and suggested that it is the needs that create motivation.

Two Categories of Human Needs.

Maslow divided human needs into two categories. One of them he called “Basic Needs” (deficiency needs, or D-needs), and the other he called “Growth Needs” (being needs, or B-needs).

In Maslow's words, D-needs are consisted of physiological needs, safety needs, belongingness and love needs, and esteem needs.

- ✧ Air, warmth, food, sleep, stimulations, and activities are examples of physiological needs. This category concerns biological balance and stable equilibrium. Physiological needs can be very strong because a person would die if these needs are deprived over time.
- ✧ Living in a safe area and away from threats are examples of safety needs. This level is likely to be more important to children as they have a great need to feel safe.
- ✧ Belongingness and love needs include the need for love from family and friends. Such needs occur when physiological and safety needs are fulfilled.
- ✧ Esteem needs focus on human's need for self-respect and respect from others. If such needs are fulfilled, people will have self-confidence and feel capable to overcome difficulties.

B-needs consist of the desire to know and to understand, aesthetic needs, and self-actualization needs.

- ✧ The desire to know and to understand is also referred to as the "need to know". Maslow said that everyone has such needs because human beings were born to be curious. Human beings want to know as many things as they can, and through the process of knowing, they desire to understand and try to explain those phenomena. According to Maslow, this need is very crucial because without knowing and understanding the world, it would be very difficult for human to fulfill the safety, aesthetic, esteem and self-actualization needs.
- ✧ Aesthetic needs include the needs for order, regularity, and structure. Even though Maslow did not put much emphasis on this need and he said the linkage

between aesthetic needs and other needs is not clear, fulfilling aesthetic needs has the same importance as water and air, and can also help vitalize one's life.

- ✧ Self-actualization needs are at the highest level in the hierarchy. It represents one's motivation to strive for the highest target. One's potential and talent will be fully utilized at this stage.

According to Maslow, growth needs emerge only after basic needs are fulfilled. Thus, safety needs only arise after physiological needs are fulfilled, and belongingness and love needs come after physiological and safety needs are fulfilled. Similarly, esteem needs only develop after physiological, safety, and belongingness and love needs are fulfilled. Therefore, self-actualization needs occur only when all the other needs are fulfilled. Because the various needs are strongly related to each other, a mapping framework is adopted to see if older persons' needs in pursuing learning opportunities are fulfilled.

3.2 Mapping older persons' needs with existing LL model in Hong Kong

Fig. 3.1 Mapping Framework of older persons view of LL model with present LL model in Hong Kong

3.2.1 “Self - Justifying, Experiencing & Reinforcing”(SER) Model (Fig.3.2)

In the mapping framework, elements of older persons' participation in learning activities were first studied. In the literature review, various elder learning theories had been studied, including Kjell Rubenson's “Expectancy-Valence Paradigm”, “Congruence Model” from Roger Boshier, Cross's “Chain-of-Response Model”, and Social reinforcement perspective. These four theories were integrated to construct the “Self - Justifying, Experiencing & Reinforcing” (SER) model. It illustrates the elements that can affect elderly learning behaviours during three different stages, namely self-justifying, experience of participation, and reinforcement.

“Self - Justifying, Experiencing & Reinforcing”(SER)

(A) Self-Justification

It is believed that prior to actually participating in learning activities, every older person undergoes a self-justification process to value the importance of learning in terms of one’s own benefits. Older persons who have a will to learn tend to outweigh the losses incurred from taking part in learning activities by considering the rewards they could gain. This self-justify process is different from that of those who are not willing to learn, who tend to magnify the losses associated with learning and ignore the benefits.

AI Willing to learn.

Older people who have a will to learn usually have higher self-confidence. Their attitude towards learning is positive and they believe that learning can bring them goodness to a certain extent. They usually have higher confidence in their own “learning-ability”, and see learning in the later life at a higher value. A deterministic factor affecting their will to learn is the trade-off between the rewards and the losses associated with the learning activities. Older people usually see qualification obtained as a kind of reward. Furthermore, they also consider the ability to begin second career, better physical, mental, and psychological health, ability to teach others, as well as higher social status as rewards too. Older people will hesitate to join a learning programme if they think that losses, including money and time spent, and giving up of other activities such as volunteering and child-rearing, outweigh the rewards. As a result, it is crucial to create a model for those who have a will to learn that can minimize the losses, in order to increase their intention to participate in

learning activities.

A II Do not Have a Will to Learn

Older people who have never joined any learning activities in their later life nor have any intention to learn usually have a lower confidence in self learning ability. They may magnify the unfavourable conditions in the learning environment, and thus not willing to take part in any learning activities. As stated in the Congruence Model, “Non-participants manifest self or institution incongruence and do not enroll”. They have more demand from the educational environment, like asking for lower tuition fee as they are not willing to spend lot of money, requesting for remote learning to be offered as they treasure other activities more, and desiring for a wider variety of courses and qualifications as they learn for some particular aims rather than for leisure. In this sense, in order to increase their willingness to learn, besides making the educational environment more favourable, it is important to manifest the benefits of learning activities to them.

(B) Experience of participation

BI Information failure

After undergoing the self-justification process, if the older persons who intended to learn cannot outweigh the losses with the rewards, or if the older persons who did not intend to learn magnify the unfavourable conditions too much and neglect the benefits, they will not have any learning behaviour. For the others, the next step would be the process of choosing courses. At this stage, it is possible for the potential learners to encounter problems in accessing elder learning information. This occurs when the lifelong learning model is not fully developed, and a central data bank of elderly learning activities is absent. It may also occur if some service providers only think of protecting their own benefits and hide the information offered by other

providers. Thus, it is important to ensure that information failure would not exist.

BII Opportunities and Barriers

The learning experience in class is important in determining whether older people will have a stronger will to learn or drop out from learning in the future. If they encounter a lot of difficulties during learning, like difficulties in catching up with the syllabus or dissatisfaction with the courses, their intention to learn will decrease, leading to decreased participation. On the other hand, it is believed that if they are happy with their learning experience, their confidence in learning would be reinforced, leading to a positive self-perception and a higher willingness to continue learning. Thus, at this stage, the most important thing is to minimize the existing barriers and make the courses more favourable to the learners.

(C) Reinforcement

Apart from positive experiences obtained from previous learning activities, measurements to reinforce the elderly learning behaviour are also important in maintaining the motivation for continuous learning. In terms of social reinforcement theory, both extrinsic and intrinsic reinforcement are of equal weight. Extrinsic reinforcements come from the people around, like “appreciation from others”, “recognition from the public”, and certificates, whereas “better cognitive well-being” and “physically and psychologically healthy” are some examples of intrinsic reinforcements. Under the encouragement of extrinsic and intrinsic reinforcements, older people are believed to have a stronger tendency to learn, and thus the model can be sustainable.

3.3 Construction of Questionnaires

A: Self-Justification process

(1) As stated above, people who are willing or not willing to learn undergo different self-justification processes:

Question 1 : Did you participate in any learning activities in the last 6 months?

Answer: Yes/ No

Question 2 : Have you ever decided to participate in learning activities but finally haven't?

Answer: Yes/ No

AI : Willingness to learn

(1) KJell-Rubenson: Learning behaviour is determined by the net force existing between expectancy & valence.

Question 9: What is your learning motivation?

Answer: fully utilized spare time / interest in the courses provided / deal with daily life / keep update with the society / compensate for the loss when young / to show own ability to learn / like to learn new things / meet new friends / improve the relationship with family and friends / keep the brain active / support from the family / affected by friends / others

Question 9: How strong do you agree with the Option?

Answer: 1 = strong disagree / 2-disagree / 3=agree / 4= strongly agree / 0= not applicable

(2) Kjell-Rubenson: What can hinder their behaviour is the trade off between rewards and losses coming with the learning activities.

(3) Minimize the losses caused to increase intention to learn.

AII : Not Willing to learn

(1) Roger Boshier: Learning behaviour is a function of magnitude of the discrepancy between participant's self-concept and key aspect of educational environment.

Question 10 & Question 11: What learning barrier have you ever encountered?

Answer: low literacy level / too old, useless to learn / no courses interested in / unable to obtain information about the courses, e.g. don't know which organization provided / don't know the curriculum / quota is limited and have to wait for long time / cost too much money / unhealthy / time for classes are not favorable / can't catch up with the pace / location is not favorable / family or friends discourage / don't have require appliances

Question 10 & Question 11 : How strong these options affecting your willingness to learn?

Answer: 1 = strong disagree / 2-disagree / 3=agree / 4= strongly agree / 0= not applicable

(2) Making the learning environment favourable and magnifying the benefits of learning in order to increase their intention to learn.

Suggested measurements to eliminate the barriers			
Barriers	Measurements	Can / Cannot eliminate the barriers	
(a) Low literacy level	1. Free basic literacy courses available	Yes	No
	2. Course have no pre-requisite	Yes	No
	3. No test/ examination in the course	Yes	No
	4. No time restriction on finishing the course	Yes	No
	5. Can design the curriculum with course tutor	Yes	No
(b) Too old, useless to learn	1. Do you know the following research findings?		
	1a.Learning can make an older person healthier, and decrease the probability of suffering from Parkinson's		
	1b.Elderly who learn in the later life have better communication skills	Yes	No
	1c.Elderly who learn have higher life satisfaction than those who don't learn	Yes	No
	2. If You don't know these findings before, will they motivate you to learning in the future?		
	3. If you know these findings, why you don't learn?		
(c) Not interested in courses	Which types of courses you want to take?		
	If the courses are related to retirement life or later life, e.g. fitness and medicine	Yes	No
	Regular needs assessment is carried out.	Yes	No

(d) Unable to obtain information about the courses	Central data bank of elderly learning activities is available	Yes	No
	Information on courses is mailed to you regularly	Yes	No
	Buffering period is available, so you can decide to quit or continue learning after the start of courses	Yes	No
(e) Quota is limited and have to wait for long time	How long do you think is a reasonable waiting time?		
	You can be transferred to other organizations providing the same course	Yes	No
(f) Cost too much money	What is a reasonable price for a course that has 10 lessons and lasts for 3 months		
	Government can provide financial assistance	Yes	No
	What should be the amount of the financial assistance?		
	Traveling allowance is available	Yes	No
(g) Unhealthy	More courses available online or through radio broadcasts, so you can learn anytime at home	Yes	No
	You can divide the course into certain phases and finish within a period that you feel comfortable.	Yes	No
(h) Time for classes are not favourable	What time slot is favourable to you?		
	More courses available online or through radio broadcasts, so you can learn anytime at home	Yes	No
	You can divide the course into certain phases and finish within a period that you feel comfortable.	Yes	No
(i) Can't catch up with the pace	More courses available online or through radio broadcasts, so you can learn anytime and any pace at home	Yes	No
	You can design the curriculum and teaching pace with the course tutor	Yes	No

(j) Location is not favorable	What is a favourable location to you?		
	More courses available online or radio broadcasts, you can learn anytime and any place at home	Yes	No
(k) Discourage ment from family or friends	What are their reasons?		
	Do you think Government promotion on elderly lifelong learning is enough?		
(l) Don't have require appliances	What appliances do you require most when learning?		

B: Experience

(1) Accessibility of Information

Question 27a : Do you think it is easy to obtain information on the elderly learning programmes?

Answer: Yes/ No/ Neutral

Question 27b: Do you think it is good to set up a central data bank for all the elderly learning programmes information?

Answer: Yes/ No/ Neutral

Question 27c: Do you think it is easier for older persons to attain information on learning programmes if newsletters of elderly learning programmes are mailed to interested older persons?

Answer: Yes/ No/ Neutral

(2) Can information accessibility reinforce or hinder learning behaviour

Question 10d I-III: Can these suggestions eliminate your learning barriers

- Central data bank of elderly learning activities is available
- Information on courses is mailed to you regularly
- Buffering period is available, you can decide to quit or continue learning

Answer: Yes/ No

(3) Barriers met during the learning process will hinder the willingness to learn in the future and have to be eliminated.

Answer: Same as A II 2

(4) People having happy learning experience will have their willingness to learn in the future reinforced.

Question 9:

- Can the learning activities meet your goal?

Answer: Yes/ No

- If yes, can it further reinforce your intention to learn?

Answer: Yes/ No

- If no, will it decrease your intention to learn?

Answer: Yes/ No

- Are you satisfied with the courses provided?

Answer: Yes/ No

C : Reinforcement

(1) Extrinsic Reinforcement

Question 27d: Do you think it is encouraging if older persons are awarded with certificate whenever they finish a course?

Question 27e: Do you think it is encouraging to have a large scale and public graduation ceremony for the elderly graduates every year?

Question 27f: Do you think it is encouraging for older persons to have opportunities to share their learning experiences publicly?

Question 27g: Do you think survey should be carried out by service providers regularly in order to assess the needs and preferences of older persons?

Question 27h: Do you think the promotion of lifelong learning among older persons from the government is enough?

Answer : Yes / No/ Neutral

(2) Intrinsic Reinforcement

Question 35 : Generally speaking, do you think you are living happily?

Answer:

1	2	3	4	5	6	7
<i>very unhappy</i>	<i>unhappy</i>	<i>quite unhappy</i>	<i>neutral</i>	<i>quite happy</i>	<i>happy</i>	<i>very happy</i>

Question 36 : Generally speaking, are you satisfied with your life?

Answer:

1	2	3	4	5	6	7
<i>very unsatisfied</i>	<i>unsatisfied</i>	<i>quite unsatisfied</i>	<i>neutral</i>	<i>quite satisfied</i>	<i>satisfied</i>	<i>very satisfied</i>

Question 39: Do you think learning can increase your quality of life?

Answer: 0-10

3.4 Review of present lifelong learning models in Hong Kong and foreign countries

Besides studying the elements involved in elderly participation in learning activities,

present lifelong learning models in Hong Kong and lifelong learning models of foreign countries will also be studied. Literature review on these two aspects is crucial, because existing lifelong learning models should match and fulfill the elements suggested above in order for the educational programmes to perform effectively, and this in turn will directly affect the number of people taking part in learning activities. The reasons for asking older persons to comment on the existing programmes are to:

- (1) Check whether the style of Hong Kong lifelong learning programmes is good enough in terms of the views of the users (older people);
- (2) See if older people really need the services provided by the government or service providers.

Apart from the existing learning model, older people will be asked to comment on measurements developed from the experience of other countries. This is to examine:

- (1) the applicability of foreign countries' experiences in Hong Kong;
- (2) if we can provide better choice to older learners.

All these steps are vital to the improvement of the Hong Kong model.

Chapter 4

Research Design, Methodology and Analysis

This chapter outlines the research methodology engaged in the study, including the research design, sampling method and size, instruments, measurements, and method of data collection and analysis.

4.1 Research Design

This research attempts to develop a suitable lifelong learning model for the elderly in Hong Kong, which is hoped to be sustainable into the future.

4.1.1 Structure of the study

A more ideal LL model is theoretically supported by “Self-justifying, Experiencing and Reinforcing” (*SER*) model suggested in Chapter 3. Such a framework is developed from various elderly learning theories, including Kjell Rubenson’s “Expectancy-Valence Paradigm”, “Congruence Model” by Roger Boshie, Cross’s “Chain-of-Response Model” and Social reinforcement perspective¹. The learning process of older people is assumed to be divided into three phases, and before they participate in any learning courses, they have to undergo a self-justifying process. For those who are willing to learn, what could hinder their behaviour is the trade off between the rewards and losses coming with the learning activities, which is “net force existing between expectancy and valence”, in Kjell-Rubenson’s words. Thus, in order to increase their intention to learn, losses have to be minimized. Roger Boshier

¹ For reviewing various elder learning theories, refer to Chapter 2, section 2.5

suggested that learning behaviour is a function of the magnitude of the discrepancy between participants' self-concept and the key aspect of educational environment. So, the most crucial point is to make the learning environment favourable and magnify the benefits of learning. "Experiencing" in the *SER* Model refers to the learning experience the older people will obtain if they have decided to take part. These experiences are not solely referring to those in the classroom, but also include accessibility of information concerning the courses. Information accessibility can reinforce or hinder learning behaviour, and happy previous learning experiences can reinforce older persons' willingness to learn in the future. In order to make the lifelong learning model feasible, it is important to suggest measures that could reinforce older persons' learning behaviour. In terms of intrinsic reinforcement, it is a self-valuing process in which older people think about whether they are healthier and happier than before or not. Extrinsic reinforcement includes tangible and intangible rewards. Tangible rewards consist of certificates and qualifications obtained, whereas intangible rewards are recognition from the public and appreciations from others.

Secondly, besides support from theories, concrete proofs are crucial too. Therefore, experiences of foreign countries, including France, Britain, America, Finland and China, and elements in the present lifelong learning programmes in Hong Kong, have been taken into consideration.

4.1.2 Two research methods adopted in this study

This study uses two research methods. The first stage is documentary study of both formal and informal learning programmes in Hong Kong. Totally, 7 main elderly education providers were included, one of them being a tertiary institute, one of them

is Radio Television Hong Kong, and the remaining are active NGOs. The five NGOs, including The Hong Kong Society for the Aged, Hong Kong Sheng Kung Hui Welfare Council, Hong Kong Christian Service, Hong Kong young Women's Christian Association and Neighborhood Advice Action Council. In total, they are running over 50 elderly centres in total. Since most of the NGOs are subsidized by the Social Welfare Department of the Hong Kong Government, they have to follow strict guidelines, and therefore, their classes are quite similar. Their official websites, leaflets, and booklets were studied in order to investigate the information of elderly learning programmes.

The second stage is interview survey. The prototypes of the questionnaire used in this research are "Learning Needs and Preferences of Members of Multi-service Centres for elderly and Social Centers for Elderly²" done by The Hong Kong Council of Social Service in 2002 and "Learning Needs of Older Persons in Tuen Mun District³" done by Asia Pacific Institutes of Ageing Study, Lingnan University in 2004. Because of the objectives of this research, the questionnaire was refined with reference to the *SER* model and LL model of foreign countries, "Guidelines of Questionnaires" is included as Appendix I The survey aims to study, firstly, the pattern of older people participation in learning activities; secondly, the motivation and barriers of learning; thirdly, whether the learners' experiences will encourage or hinder their learning behaviour in the future, and finally, their attitude towards the measures on improving the learning environment.

4.2 Documentary Study of Lifelong Learning Programmes in Hong Kong

² This questionnaire is included as Appendix 4 for reference

³ This questionnaire is included as Appendix 5 for reference

NGOs in Hong Kong are providing over 500 informal courses for the elderly every year. The five NGOs under investigation in this study are The Hong Kong Society for the Aged, Hong Kong Sheng Kung Hui Welfare Council, Hong Kong Christian Service, Hong Kong young Women's Christian Association and Neighborhood Advice Action Council. Furthermore, Radio-Television HK Radio (RTHK-R5), the only provider of elderly courses on radio and Lingnan University, the only provider of formal learning programmes at tertiary level, are investigated too. The investigation targeted on 13 elements. They are: (1) Organization, (2) Entry, (3) Venue, (4) Time, (5) Types of course, (6) Type of lesson, (7) Course Fee, (8) Instructor, (9) Duration, (10) Information, (11) Satisfaction, (12) Curriculum, and (13) Reinforcement.

4.3 Interview Survey

4.3.1 Sampling Frame: Method and Size

The target population of the study is older people aged 55 or above. It is because the official age for retirement in Hong Kong is set as low as 55 and could go up to 60, depending on the job nature. Furthermore, it is found that the age restriction of enjoying the services provided by most NGOs is mostly set at 55.

The whole population can be categorized into 3 subgroups according to the objectives of this research. As the types of elderly courses can be divided into formal learning and informal learning, two of the three sub-groups of the populations are “older people who are undertaking informal learning”, and “older people who are

undertaking formal learning”. Furthermore, as this study also tries to figure out the possible measures to encourage older persons to learn, the elderly who do not participate in any learning activities will be studied too, and they form the third sub-group of the population.

Ideally, the sample will be representative if it were drawn from the whole of the Hong Kong population aged above 55 by simple random sampling or systematic sampling. However, these sampling methods would not be used in this study due to the following reasons:

- (1) None of the governmental bodies has systematically recorded the number of citizens aged above 55;
- (2) In most researches concerning older people, samples are systematically drawn from elderly centres, where detailed information on most of the older persons can be found using the registration system of each centre. However, sample drawing from elderly centres are biased, as they are the more active group in the population. Those who are not active, that is, those who are not involved in learning activities, could not be reached.
- (3) One of the subgroups of the population: Older persons who have participated in formal learning activities, only make up very small proportion of the whole population.
- (4) Cost of simple random sampling and systematic sampling is very high and strong network with various elderly centres is necessary.

(I) Stratified Sampling as an alternative sampling method

As suggested by Babbies (1998) , “homogeneous population produces samples with

smaller sampling errors than does a heterogeneous population”, and stratified sampling method is developed base on this concept. The population of this study, people aged 55 or above, is composed of 3 homogeneous subsets, namely “not involved in any learning activities”, “involved in informal learning activities” and “involved in formal learning activities”. It should be stressed that the proportion of older people who are not involved in any learning activities is much larger than those involved in some kind of learning activities, and the proportion of older people involved in informal learning is much larger compared to those involved in formal learning. Thus, the samples will be drawn from the three homogeneous subsets respectively.

(II) Judgmental sampling to draw older persons who (1) are not involved in any learning activities, and (2) involved in informal learning activities.

As older people who are not interested in any learning activities are usually the inactive group in the society, it is not possible to reach them at elderly centres. Thus, older people in that group who have participated in the interview survey were drawn using the judgmental sampling method. 4 private apartment complexes located in Sha Tin, Tuen Mun, North Point and Chai Wan were chosen. Older people who were sitting in the park were randomly chosen for the interview survey. The reason for choosing these people is that it is reasonable to believe they do not go to elderly centres frequently, and so are not involved in learning activities.

Most of the informal learning opportunities are provided by elderly services providers such as elderly centres and various NGOs like YWCA. Thus, the confidence level is higher when the samples are darwn from these organizations. Due

to difficulties in contacting the organizations, only those who have connections with the researcher were contacted, and older people interviewed were selected by the staff of the organizations concerned. In total, 3 elderly centres, 1 Kai Fong Association and 1 church were involved in this research.

(II) Snowball Sampling to draw sample from those who have participated in formal learning

Here, formal learning, as stated before, refers to those who are taking part in Project Yi Jin, foundation diploma, and Association Degree programmes. As participation in formal learning is not high, it would be difficult to reach the target older people if snowball sampling were not used. Lingnan University has cooperated with the Hong Kong Society for the Ages (SAGE) to provide Project Yi Jin and Associate Degree programmes, and some samples were referred by the Asia Pacific Institute of Ageing Study (APIAS) of Lingnan University. Afterwards, more elderly students in these 2 formal learning programmes were referred by the initial interviewees.

Stratified sampling method is adopted and older people were drawn as samples to do the questionnaires according to 3 homogenous subset. Due to the limited time and manpower, only 54 people aged 55 or above were drawn and participated in interview survey. The composition of the sample is as follows: 6 had participated in formal learning activities; 20 had participated in informal learning activities, of which 15 were from elderly centres, 3 were from the church, and 2 were from Kai Fong Association; and the remaining 28 interviewees, 7 from each of the private apartment complex mentioned above, had not participated in any learning activities.

4.3.2 *Modes of Observation*

The questionnaire (Appendix 4)⁴ was originally developed in Chinese, as it is believed to be better understood by the respondents. It consists of 5 parts.

Part 1 is General Learning Experience. It runs from question 1 to question 8. Every respondent had to answer this part. It is used to collect information on learning experience, such as whether the respondent had participated in any learning activities, and if yes, which type. Also, the information on the courses they had taken, including how they learnt about the course and the organizations that provided the courses.

Part 2 concerns learning motivation and barriers, and it has two sub-questions. Only those who had learning experience or had ever considered to participate in learning activities had to answer this part. Question 9 asks about learning motivations. The questionnaire goes further to ask about whether the motivation can be fulfilled during the learning. If no, the reason for not being able to fulfill, and also whether such a situation would hinder the respondents' willingness to learn in the future, was asked for. Question 10 asks about learning barriers. The questionnaire goes further to investigate whether such barriers would hinder the respondents' willingness to learn in the future and whether the respective measures suggested can eliminate the barrier.

Part 3 concerns learning barriers of the respondents who had not participated in any learning activities. Only those did not participate in any learning activities in the previous six months had to answer this part. The only question in this part, number

⁴ The questionnaire, which originally in Chinese, was translated into English for academic use and attached as Appendix 5.

11, is the same as question 10, but the part, “Will it hinder your willingness to learn in the future” was deleted.

Part 4 asks about the respondents’ opinions towards some concrete suggestions on informal and formal elderly courses. Everyone was asked to answer this part.

Part 5 is used to collect the demographic information of the respondents.

The interviews were carried out by the researcher one by one rather than self-administered because this method ensures high response rate and completion rate compared to self-administered questionnaires. More important is that the “presence of an interviewer also generally decreases the number of don’t knows” and “no answer” (Babbie, 1998), which contributes to a higher reliability of the results. The questionnaire consists of 39 questions and more than 250 items, and it is found to be difficult for most of the respondents due to low literacy level and misunderstanding of questions. Even though the pilot study showed that some of the respondents were able to answer the questionnaires by themselves, especially those who are taking formal courses, all the interview survey were carried out by interviewer (*author of this thesis*) in order to ensure consistency in the understanding of questions and to minimize possible errors.

4.4 Operant Definition

Lifelong Learning in this research **refers to** Formal and informal learning activities among older persons.

Formal Learning **refers to** Learning at formal and structured tertiary institutes, with the condition that systematic grading systems exist and students can be promoted to higher levels, for example, Project Yijin, Foundation Diploma, Associate Degree and Degree in the present study.

Informal Learning **refers to** Learning at unstructured institutes such as elderly centres, community centres, NGOs and churches, where most of the courses are interest classes.

Kjell Rubenson's Expectancy-Valence Paradigm **refers to**

- a. Expectation --- Self-perception of own ability to learn, Value of learning in the later-life, Attitude towards learning, and Self-confidence
- b. Reward --- Gaining qualification, Ability to begin second career, Attaining better health (physically / mentally /psychologically), Higher social status, and Ability to help others
- c. Loss --- Money spent , Time spent , Giving up other activities like volunteering and child-rearing

Whether Older People will Learn			
	Expectation	Reward (=Benefit)	Loss
Operant Definition	● Self-perception of ability to learn	● Gain Qualification	● Money Spent
	● Value of learning in the later-life	● Able to begin Second career	● Time Spent
	● Attitude towards learning	● Attain Better Health (Physically/Mentally /Psychologically)	● Give-Up of other activities. (volunteering/ child-rearing)
	● Self-confidence	● Higher Social Status	
		● Can help others	

Table 4.1 Important Elements in Kjell Rubenson Expectancy-Valence Paradigm in Explaining the Motivation of an Adult Participation in Education

Roger Boshier's Congruence Model *refers to*

- a. Participant's Self-Concept --- How much money is he or she willing to spend on learning, Preference of the time of lesson, Preference of the curriculum, Literacy Level, Aiming at particular Qualification
- b. Educational environment --- Tuition fee of courses , Availability of financial assistance, Time of lesson, Remote learning is not provided, Only certain kinds of courses is provided, Only certain kinds of courses are provided, Learning needs assessment is absent , Requirement of certain literacy level, No qualification provided , No credit transfer within different organizations
- c. Incongruence --- Affordability of Older People, Availability of older people, Preferred courses are not offered. , Older people cannot catch up with the pace of teaching, His or her target cannot be attained

Why Older People not Learning/ Drop out from Learning			
	Participant' s Self-Concept	Educational environment	Incongruence
Possible Discrepancy	● How much the older people willing to spend on learning	● Tuition fee of each course ● Availability of financial assistance	● Affordability of Older People
	● Preference of the time of lesson	● Fixed time of lesson ● Remote learning is not provided	● Availability of older people
	● Preference of the curriculum	● Only certain kinds of courses is provided ● Learning needs assessment is absent	● Preferred courses are not offered.
	● Low Literacy Level	● Required certain literacy level	● Older people cannot catch up with the pace of teaching
	● Aim at particular Qualification	● No qualification provided ● No credit transfer within different organization	● Older people's target is not attained

Table 4.2 Important Elements in Roger Boshier's Congruence Model of Explaining Participation from the View of Non-Participant

Cross's "Chain-of-Response Model" *refers to*

- a. **Life Transitions** --- Retired from work, Loss of Spouse
- b. **Information** --- Whether one can access information on the courses, Only know about courses provided by a particular centre.
- c. **Experience of previous participations** --- Whether he or she was successful in the previous participation, Level of satisfaction in the previous courses

Whether Older People will Learn			
	Life Transitions	Information	Experience of previous participations
Operant Definition	● Retired from work	● Whether one can access information on the courses they want.	● Whether succeed in the previous participation
	● Loss of Spouse	● Only know about courses provided by the centres.	● Level of satisfaction of the previous courses

Table 4.3 Important Elements in Cross's "Chain-of-Response Model" Explaining Elderly Participation in Learning (*those included in the previous two theories are excluded in this table*)

Social reinforcement perspective *refers to*

- a. **Extrinsic reinforcement** --- Tangible rewards: certificate/degree , Intangible rewards: appreciation from others/recognition from the public
- b. **Intrinsic reinforcement** --- Physically and psychologically healthier , Better cognitive well-being

Whether Older People will Continue to Learn		
	Extrinsic reinforcement	Intrinsic reinforcement
Operant Definition	● Tangible rewards: certificate/degree	● Physically and psychologically healthier
	● Intangible rewards: appreciation from others/recognition from the public	● Better cognitive well-being

Table 4.4 Important Elements in Social reinforcement perspective on explaining continuous participation in learning activities.

4.5 Data Collection

This study is made up of 2 phases. The first phase, documentary study of LL programmes in Hong Kong, was carried out from December 2004 to January 2005. The questionnaire used in this research was constructed and refined from January to March of 2005. The second phase, the interview survey, was carried out from March to April of 2005. It took 45 to 75 minutes to finish one questionnaire, depending on the learning experience of the respondent and his or her understanding towards the questions.

4.6 Methods of data entry and analysis.

SPSS 11.0 for Windows was used for data entry, processing and analysis of the interview survey. Basically, data was analyzed into descriptive statistics.

Chapter 5

Research Findings

This chapter, which is divided into two parts, will present the findings of the research. In the first section, the result of the interview survey will be detailed. In Part 2, the findings of documentary study will be presented.

5.1 Findings of Interview Survey

5.1.1 Background Information

1. Respondents' gender

Table 5.1

	Frequency	%	Cumulative %
Male	23	42.6	42.6
Female	31	57.4	100
Total	54	100	

2a. Respondents' age

Table 5.2

	Frequency	%	Cumulative %
55-59	10	18.5	18.5
60-65	18	33.3	51.9
66-70	17	31.5	83.3
Above 70	9	16.7	100
Total	54	100	

2b. Respondents' age (in terms of learning experience)

Table 5.3

<i>Any learning experience In the past six months?</i>	Frequency (%)	
	<i>Yes</i>	<i>No</i>
55-59	5 (19.2)	5 (17.9)
60-65	10 (38.5)	8 (28.6)
66-70	6 (23.1)	11 (39.3)
Above 70	5 (19.3)	4 (14.3)
Total	26 (100)	28 (100)

3a. Educational level

Table 5.4

	Frequency	%	Cumulative %
Never	6	11.1	11.1
Private tutoring	8	14.8	25.9
Primary School	25	46.3	72.2
Secondary School	13	24.1	96.3
Tertiary Institute	2	3.7	100
Total	54	100	

3b. Education level (by learning experience)

Table 5.5

	Never studied	Private	Primary	Secondary	Tertiary Institution
Frequency(%)					
Yes	3(11.5)	1(3.8)	10(38.5)	10(38.5)	2(7.7)
No	3(10.7)	7(25)	15(53.6)	3(10.7)	0(0)

42.6% of the respondents are male, while 57.4% are female. Their median age is 67.84. Data shows that respondents who had no learning experience in the past six months have a higher median age and a lower education level. Only 10.7% of the non-learners attained secondary school level or higher, whereas 46.2% of the learners have studied in secondary school or even attained tertiary education.

4. Marital status

Table 5.6			
	Frequency	%	Cumulative %
Single	4	7.4	7.4
Married	40	74.1	81.5
Divorced	5	9.3	90.7
Widow	5	9.3	100
Total	54	100	

Most of the respondents, 74.1% of the total, are married.

5. Living status

Table 5.7			
	Frequency	%	Cumulative %
Living with spouse	31	57.4	57.4
Living with children	3	5.6	63
Living with spouse and children	11	20.4	83.3
Living with relatives	0	0	83.3
Living alone	9	16.7	100
Total	54	100	

More than half of the respondents (57.4%) live with their spouses only, and none of them live with their relatives.

5.2.1. Learning Experience

1. Any learning experience in the past six months?

Table 5.8			
	Male	Female	Total
	Frequency(%)		
Yes	12(46.2)	14(53.8)	26(48.1)
No	11(39.3)	17(60.7)	28(51.9)

In this research, 26 of the respondents had had learning experience in the past six

months. They will be referred to as “learners”, while those who did not have learning experience in the same period, totaling 28, will be referred to as “non-learners” hereafter.

2. If you did not learn in the past six months, have you ever *planned* to learn?

Table 5.9			
	Male	Female	Total
	Frequency(%)		
Yes	1(25)	3(75)	4(14.3)
No	10(41.7)	14(58.3)	24(85.7)

Among the 28 non-learners, only four (three of them female) indicated that they had planned to learn in the past six months.

3. Type of courses taken

Table 5.10		
Type of courses	Frequency	(%)
Language	7	26.9
Information Technology	5	20.0
Elderly Health	3	11.5
Daily Living	1	3.8
Technical Training	2	7.7
Interest Classes	20	76.9
Social Cultural	1	3.8
Interpersonal Relationship	1	3.8
Project Yijin	0	0
Foundation Diploma	0	0
Associate Degree	6	23.1

4. Where did the courses take place

Table 5.11		
Venue or medium	Frequency	%
Elderly Centre	14	53.8
Private teaching	2	7.7

RTHK	1	3.8
Tertiary Institution	7	26.9
Others: YWCA	1	3.8
Church	3	7.7
Community Centre	2	11.5
Kai Fong Association	1	3.8
FTU	2	3.8

76.9% of the elder-learners who had participated in informal learning joined interest classes such as singing and drawing. The second most popular courses were language classes, followed by courses on information technology. Elderly centres were the most popular venue for taking classes, accounting for 53.8% of the total.

5a. Satisfaction

Table 5.12

Satisfied or not	Frequency	%	Cumulative %
Yes	24	92.3	92.3
No	2	7.7	100
Total	54	100	

92.3% of the learners were satisfied with the courses they had taken. Only two out of 26 learners did not feel satisfied.

5b. Reason for not feeling satisfied

1. "It may take long time to get into a course sometimes."
2. "I cannot catch up with the syllabus, but instructors refused to teach slower."

6. How did you learn about the courses?

Table 5.13

Source	Frequency	%
Centres	18	69.2

Family or Friends	6	23.1
Newspaper / Magazine	2	7.7
Poster	4	15.4
Television	1	3.8
Others:		
Internet	1	3.8
Church	3	11.5
Employer	1	3.8

69.2% of the learners learnt about the courses through the centre they belong to. Here, 'centre' refers to elderly centres, Kai Fong Association, Community Centre and other associations the elder learners belong to. This is consistent with the fact that most of the learning programmes for older persons are carried out by NGOs in Hong Kong.

7. Criteria for selecting courses

Table 5.14

Criterion	Frequency	%
Applicability	5	19.2
Own interest	17	65.4
Location	8	30.8
Time	1	3.8
Organizing body	11	42.3
Course fee	2	7.7
Difficulty	3	11.5
Others:		
Qualification	4	15.4
Own ability	1	3.8
Accompany with friends	1	3.8

65.4% of the elder learners considered their own interest when choosing which courses to take, while 42.3% considered “organizing body”. It may be due to the reason that most of the learning elderly are members of different elderly organizations.

8. Course organizers

Table 5.15

Organization	Frequency	%
Elderly Centres	14	53.8
Tertiary Institutions	6	23.1
Other social organizations in community	5	19.2
Governmental bodies	2	7.7
Others		
FTU	1	3.8
Church	3	11.5

The most popular elderly education provider was elderly centres, accounting for 53.8% of the total.

5.1.3 *Learning Motivations and Barriers*

1. Question 9 in the questionnaire asked about the respondents' motivation for learning. Therefore, those who had joined courses in the past six months (26 respondents) and those who indicated that they had ever intended to learn in the same period (four respondents) had answered this part. The total number of respondents for this question is 30.

Table 5.16

Motivation	Frequency (%)				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Not Applicable
Want to spend time in a meaningful way	1 (3.3)	6 (20)	15 (50)	8 (26.7)	0 (0)
Interested in courses provided	0 (0)	6 (20)	20 (66.7)	2 (6.7)	2 (6.7)
For daily needs	4 (13.3)	20 (66.7)	3 (10)	1 (3.3)	2 (6.7)
Want to keep up with society	1 (3.3)	5 (16.7)	19 (63.3)	3 (10.0)	2 (6.7)
Compensate for the lack of opportunity when young	2 (6.7)	10 (33.3)	12 (40.0)	3 (10.0)	3 (10)

Affirm own ability	2 (6.7)	11 (36.3)	10 (33.3)	3 (10)	4 (13.3)
Want to learn new things / knowledge	0 (0)	3 (10)	23 (76.7)	4 (13.3)	0 (0)
Make new friends	8 (26.7)	15 (50.0)	4 (13.3)	0 (0)	3 (10)
Improve relationship with friends and family	8 (26.7)	18 (60.0)	2 (6.7)	0 (0)	2 (6.7)
To maintain mentally active	0 (0)	9 (30)	14 (46.7)	7 (23.3)	0 (0)
Encouragement from the family	5 (20)	9 (30)	8 (26.7)	5 (16.7)	3 (10)
Influence from friends	10 (33.3)	11 (36.7)	4 (13.3)	1 (3.3)	4 (13.3)

Among the 30 respondents, the most popular motivation for learning was ‘want to learn new things or knowledge’, with 27 respondents agreeing or strongly agreeing with it. The second most popular motivation was “want to spend time in a meaningful way”, followed by “interested in courses provided”, and “want to keep up with the society”.

- Whether motivation to learn was attained, and would unsuccessful experience decrease intention to learn in the future.

Only those who had chosen “agree” or “strongly agree” for a particular motivation in the previous section had to answer this section. Thus, the total number of respondents for each item in this section is equal to the number of interviewees who agreed or strongly agreed with having such motivation in the previous section.

Table 5.17

Frequency (%)				
Motivation	Motivation fulfilled?		If not, will intention to continue decrease?	
	Yes	No	Yes	No
Want to spend time in a meaningful way	21	2	0	2
	Total	23	2	

Interested in the courses provided	18	4	1	3
	<i>Total</i>	22	4	
For daily needs	3	1	0	1
	<i>Total</i>	4	1	
Want to keep up with the society	19	3	0	3
	<i>Total</i>	22	3	
Compensate for the lack of opportunity when young	15	0		
	<i>Total</i>	14		
Affirm own ability	11	2	1	1
	<i>Total</i>	13	2	
Want to learn new things / knowledge	27	0		
	<i>Total</i>	27		
Make new friends	4	0		
	<i>Total</i>	4		
Improve relationship with friends and family	2	0		
	<i>Total</i>	2		
To maintain mentally active	21	0		
	<i>Total</i>	0		
Encouragement from the family	0	0		
	<i>Total</i>	13		
Influence from friends	0	0		
	<i>Total</i>	5		

Most of the respondents indicated that their motivations were fulfilled after taking courses. This is consistent with the high level of satisfaction shown in question 5. However, most of the respondents expressed that their willingness to learn would not decrease even though their goal could not be attained. This is different from what Boshier claimed: “Willingness to learn will decrease if goal cannot be attained”. Some older persons said, “The government provides education for us, but we are different from young people like you; we cannot make money. Therefore, we should not have so many demands...” In a society where older persons consider learning a right, the result may be different.

3. Learners' and non-learners' views on learning barriers

Table 5.18						
Barriers	Learner ?	Frequency (%)				
		Strongly Disagree	Disagree	Agree	Strongly Agree	Not applicable
Low Literacy level	Yes	3 (11.5)	10 (38.5)	9 (34.6)	3 (11.5)	1 (3.8)
	No	0 (0)	4 (15.4)	21 (75)	3 (11.5)	0 (0)
Too old to learn	Yes	3 (11.5)	16 (61.5)	5 (19.2)	0 (0)	2 (7.7)
	No	0 (0)	9 (32.1)	10 (35.7)	8 (28.6)	1 (3.6)
Not interested in courses provided	Yes	3 (11.5)	14 (52.8)	7 (26.9)	1 (3.8)	1 (3.8)
	No	0 (0)	5 (17.9)	15 (53.6)	6 (21.4)	2 (7.1)
Cannot obtain Information on courses	Yes	2 (7.7)	12 (46.2)	12 (46.2)	0 (0)	0 (0)
	No	2 (7.1)	13 (46.4)	11 (39.3)	1 (3.6)	1 (3.6)
Quota is limited and have to wait for long time	Yes	1 (3.8)	10 (38.5)	10 (38.5)	4 (15.4)	1 (3.8)
	No	3 (10.7)	18 (64.3)	6 (21.4)	1 (3.6)	0 (0)
Course fee is too expensive	Yes	3 (11.5)	17 (65.4)	3 (11.5)	2 (7.7)	1 (3.8)
	No	4 (14.3)	16 (57.1)	4 (14.3)	0 (0)	4 (14.3)
Physically not healthy	Yes	1 (3.8)	8 (30.8)	14 (53.8)	3 (11.5)	0 (0)
	No	1 (3.6)	13 (46.4)	7 (25)	7 (25)	0 (0)
Time is not suitable	Yes	4 (15.4)	18 (69.2)	2 (7.7)	0 (0)	2 (7.7)
	No	6 (21.4)	20 (71.4)	0 (0)	0 (0)	2 (7.1)
Cannot catch up with the courses	Yes	3 (11.5)	7 (26.9)	15 (57.7)	1 (3.8)	0 (0)
	No	7 (26.9)	16 (57.1)	5 (17.9)	0 (0)	1 (3.6)
Location is not good	Yes	3 (11.5)	16 (61.5)	3 (11.5)	0 (0)	3 (11.5)
	No	9 (32.1)	14 (50)	1 (3.6)	0 (0)	4 (14.3)
Discouragement or objection from family or friends	Yes	6 (21.4)	13 (50)	0 (0)	0 (0)	7 (26.9)
	No	7 (25)	17 (60.7)	0 (0)	0 (0)	4 (14.3)

Do not have required facilities	Yes	9 (37.5)	14 (53.8)	1 (3.8)	1 (3.8)	1 (3.8)
	No	7 (25)	19 (67.9)	0 (0)	0 (0)	2 (7.1)

Within the learner group, 65.3% thought that the greatest learning barrier was “physically not healthy”. This was followed by “cannot catch up with the courses” and “quota is limited and have to wait for long time”.

For the non-learning elderly, 60% considered “low literacy level” the greatest learning barrier. It was followed by “too old to learn” and “not interested in courses provided”.

4. Whether learning barriers affect intention to learn in the future?

Only those who had chosen “agree” or “strongly agree” for a particular barrier in the previous section had to continue to answer this section. Thus, the total number of respondents for each item in this section is equal to the number of respondents who agreed or strongly agreed with having faced such barriers while learning.

Table 5.19

Frequency (%)		
Will intention to learn decrease?		
Barriers	Yes	No
Low Literacy level	5 (45.5)	6 (54.5)
	<i>Total</i>	<i>11</i>
Too old to learn	0 (0)	5(100)
	<i>Total</i>	<i>5</i>
Not interested in courses provided	7(100)	0(0)
	<i>Total</i>	<i>7</i>
Cannot obtain Information on courses	6 (54.5)	5 (45.5)
	<i>Total</i>	<i>11</i>
Quota is limited and have to wait for long time	8 (57.1)	6 (42.9)
	<i>Total</i>	<i>14</i>
Course fee is too expensive	4 (80)	1 (20)

	<i>Total</i>	5	
Physically not healthy		11 (64.7)	6 (35.3)
	<i>Total</i>	17	
Time is not suitable		0(0)	2(100)
	<i>Total</i>	2	
Cannot catch up with the courses		7 (43.75)	9 (56.25)
	<i>Total</i>	16	
Location is not good		1(50)	1(50)
	<i>Total</i>	2	
Discouragement or objection from family or friends		0	0
	<i>Total</i>	0	
Do not have required facilities		2(100)	0(0)
	<i>Total</i>	2	

Among the twelve learning barriers provided, five had more than 50% of the respondents considered as a discouragement for learning in the future, namely “not interested in the courses available”, “cannot obtain information on courses”, “cannot get into the courses because quota is limited”, “course fee is too high” and “physical health status is not good”.

5. Learners’ and non-learners’ views on measures of eliminating learning barriers.

A. Low literacy level

Table 5.20A

		(%)		
Measures	Learner?	Yes	No	Total (n)
AI Government provide free basic literacy course	Yes	83.3	16.67	12
	No	50	50	20
AII No entry requirements	Yes	27.27	81.81	12
	No	35	65	20
AIII No tests / examinations	Yes	83.33	16.67	12
	No	20	80	20
AIV No time restriction to finish the course	Yes	75	25	12
	No	40	60	20
AV You can decide the curriculum with the course instructor.	Yes	100	0	12
	No	70	30	20

12 learners and 20 non-learners indicated that “low literacy level” was one of their learning barriers.

Most learners pointed out that if free basic literacy courses were provided by the government, no tests or examinations were carried out, and there were no time restriction to finish the course, then the learning barrier “low literacy level” could be eliminated. Moreover, they would like to decide the course curriculum with the instructor. In the non-learner group, only option A V, “you can decide the curriculum with the course instructor”, had more than 50% of respondents (70%) consider as a solution for low literacy level.

B. Not interested in courses provided

Table 5.20B

		(%)		
Measures	Learner?	Yes	No	Total (n)
CIII the courses are related to later life, like physical fitness or medicine	<i>Yes</i>	25	75	8
	<i>No</i>	5.26	94.74	19

Eight learners and 19 non-learners indicated that “not interested in courses provided” was one of their learning barriers.

Within both the learner and non-learner groups, most of the respondents did not think that their intention to participate in learning activities would increase even if the courses were related to later life. Therefore, types of courses may not be the most important criterion in older persons’ deciding whether or not to participate in learning. Rather, how interesting the learning activities are in their perception may be more crucial. As a result, promotion of the benefits of lifelong learning among older persons should be increased.

C. Cannot obtain information on courses

Table 5.20C

		(%)		
Measures	Learner?	Yes	No	Total (n)
DI Government set up a central data bank of courses for older people	<i>Yes</i>	83.33	16.67	12
	<i>No</i>	90.90	9.09	11
DII Information on courses for older people are mailed to you regularly	<i>Yes</i>	66.67	33.33	12
	<i>No</i>	81.81	18.18	11
DIII Trial lessons are provided	<i>Yes</i>	53.85	38.46	12

	<i>No</i>	54.54	45.45	11
--	-----------	-------	-------	----

12 learners and 11 non-learners indicated that “cannot obtain information on courses” was one of their learning barriers.

Data showed that in order to facilitate the flow of course information, both the learner and non-learner groups considered it helpful for the government to set up a central data bank of courses for older persons, mail information on courses to them, and make trial lessons of elderly courses available,

D. Quota is limited and have to wait for long time

Table 5.20D

		(%)		
Measures	Learner?	Yes	No	Total (n)
EII Cooperation among various organizations.	<i>Yes</i>	92.31	7.69	13
You can be transferred to those providing the same course if quota is full	<i>No</i>	33.3	66.67	6

13 learners and six non-learners indicated that “quota is limited and have to wait for long time” was one of their learning barriers.

12 out of 13 learners preferred cooperation among various organizations so that they could be transferred to the same classes run by other organizations when those in their organization were full. However, only two out of six non-learners were positive towards such suggestion. This result indicated that the non-learners did not care much about the organizing body of elderly learning programmes.

E. Course fee is too high

Table 5.20E

		(%)		
Measures	Learner?	Yes	No	Total (n)
FII Government provide travel subsidy	<i>Yes</i>	100	0	5
	<i>No</i>	33.3	66.67	3
FIII Government provide grants for course fee.	<i>Yes</i>	100	0	5
	<i>No</i>	100	0	3

Five learners and three non-learners indicated that “course fee is too high” was one of their learning barriers.

All of the five learners supported the idea of the government providing both travel

subsidy and grants, whereas non-learners preferred to receive grants from the government rather than travel subsidy.

F. Physically not healthy

Table 5.20F

		(%)		
Measures	Learner?	Yes	No	Total (n)
GI More courses are provided on the internet, you can learn any time at home	Yes	35.29	64.71	17
	No	16.67	83.33	12
GII No time restriction to finish the courses, you can divide the courses into certain phases according to your own situation.	Yes	82.35	17.65	17
	No	58.33	41.67	12

17 learners and 12 non-learners indicated that “Physically not healthy” was one of their learning barriers.

In both of the groups, most of the respondents would like to have the time restriction on finishing the courses removed, and would like to be able to divide the courses into certain phases according to their own situation. Surprisingly, in each group, more than half of the respondents did not think that making classes available on the internet could help. It may be due to the case that many older persons are not familiar with computer application.

G. Cannot catch up with the courses

Table 5.20G

		(%)		
Measures	Learner?	Yes	No	Total (n)
II No time restriction to finish the courses, you can divide the courses into certain phases	Yes	70.59	29.41	17
	No	100	0	3
I II You can decide the curriculum and teaching pace with the course instructor.	Yes	82.35	17.65	17
	No	0	100	3

17 learners and three non-learners indicated that “cannot catch up with the courses” was one of their learning barriers.

Most of the respondents in the learner group thought that it would help if there were no time restriction on finishing the courses, and they would also like to have the possibility to decide the curriculum and teaching pace with the course instructor. However, non-learning elderly preferred having the courses divided into certain

phases to being able to decide curriculum and teaching pace with the course instructor.

5.1.4. Views of measures to improve lifelong learning model in Hong Kong

(Table 5.23)

Questions 12 to Question 27 in the questionnaire were about the respondents' view on the concrete measures suggested for improving the lifelong learning model in Hong Kong. Findings in this section are separated into learner and non-learner group, and then listed in three columns: The first and second columns represent the percentage of respondents agreeing and disagreeing with the statements respectively, whereas the last column is the percentage of respondents who were neutral towards the statements. Furthermore, data was shown according to.

A. Formal Learning Programmes

	Questions		% (n)		
		Learner ?	Yes	No	Neutral
12 (a)	Existing formal learning opportunities for the older people include the university programme provided by Lingnan University and SAGE, and also courses for adults provided by other tertiary institutions. Do you think it is enough?	Yes	26.9 (7)	38.5 (10)	34.6 (9)
		No	25 (7)	32.1 (9)	42.9 (12)
	(b) Do you think there should be more tertiary institutions like the Institute of Vocational Education and the Vocational Training Council, to provide courses for older people?	Yes	65.4 (17)	3.8 (1)	30.8 (8)
		No	25 (7)	21.4 (6)	53.6 (15)
13 (a)	Currently, formal learning opportunities include Project Yijin, foundation diploma and associate Degree programmes. Do you think there should be more types of formal programmes like HKCEE, HKALE etc.?	Yes	53.8 (14)	15.4 (4)	30.8 (8)
		No	17.9 (5)	28.6 (8)	53.6 (15)
	(b) Do you think the scope of current courses is enough? Should more categories of courses be provided? For example, courses other than Applied Gerontology Associate Degree.	Yes	53.8 (14)	23.1 (6)	23.1 (6)
		No	14.3 (4)	17.9 (5)	67.9 (19)
14 (a)	Do you think older people's willingness to	Yes	88.5	3.8	7.7

(b)	participate in formal learning will increase if they learn on the University campus?		(23)	(1)	(2)
		No	50 (14)	17.9 (5)	32.1 (9)
	Do you think older people's willingness to participate in formal learning will increase if they learn at older persons centers or community centres?	Yes	53.8 (14)	38.5 (10)	7.7 (2)
		No	39.3	28.6	32.1
	Do you think older people's willingness to participate in formal learning will increase if they are provided with more field trips besides regular lessons?	Yes	92.3 (24)	7.7 (2)	0 (0)
		No	78.6 (22)	3.6 (1)	17.9 (5)
15 (a)	Formal courses may cost thousands to tens of thousands of dollars, do you think it is affordable?	Yes	3.8 (1)	88.5 (23)	7.7 (2)
		No	3.6 (1)	89.3 (25)	7.1 (2)
	(b) Do you think older people's willingness to participate in formal learning will increase if they are provided with grants from government?	Yes	92.3 (24)	7.7 (2)	0 (0)
		No	78.6 (22)	7.1 (2)	14.3 (4)
	Project Yijin and Foundation Diploma requires students to take 600 hours of lessons, and AD takes 900 hours, do you think numbers of hours is appropriate?	Yes	69.2 (18)	19.2 (5)	15.4 (4)
		No	28.6 (8)	32.1 (9)	39.3 (11)
16 (a)	(b) Do you think the willingness to participate in formal learning will increase if elder learners are allowed to divide the course into different phases?	Yes	65.4 (17)	19.2 (5)	15.4 (4)
		No	28.6 (8)	42.9 (12)	28.6 (8)
	(c) Do you think the willingness to participate in formal learning will increase if elder learners are allowed to accumulate credits and finish the course according to their own situation?	Yes	57.7 (15)	23.1 (6)	19.2 (5)
		No	53.6 (15)	32.1 (9)	14.3 (4)
	Do you think older people's willingness to participate in formal learning will increase if elements such as service learning and practicum are integrated into the formal elder learning programmes?	Yes	92.3 (24)	7.7 (2)	0 (0)
		No	67.9 (19)	0 (0)	32.1 (9)
17 (a)	(b) Do you think older people's willingness to participate in formal learning will increase if courses can be provided on the internet or through broadcasting?	Yes	50 (13)	30.8 (8)	19.2 (5)
		No	32.1 (9)	17.9 (5)	50.0 (14)
	Do you think it is most appropriate to have university academic staff as course instructors?	Yes	50.0 (13)	26.9 (7)	23.1 (6)
		No	75 (21)	7.1 (2)	17.9 (5)
18 (a)	(b) Do you think it is most appropriate to have experienced teachers or elderly service workers as course instructors?	Yes	73.1 (19)	15.4 (4)	11.5 (3)
		No	64.3	17.9	17.9

			(18)	(5)	(5)
19 (a)	Most formal learning courses require students to fulfill certain education level requirements; do you think it is easy for older people to attain?	Yes	34.6 (6)	23.1 (6)	42.3 (11)
		No	10.7 (3)	53.6 (15)	35.7 (10)
	(b) Do you think older people's willingness to participate in informal learning will increase if older people are provided with grants from the government?	Yes	50.0 (13)	30.8 (8)	19.2 (5)
		No	17.9 (5)	17.9 (5)	64.3 (18)
	(c) Do you think older people's willingness to participate in formal learning will increase if they are provided with free basic literacy course?	Yes	61.5 (16)	23.1 (6)	15.4 (4)
		No	25.0 (7)	46.4 (13)	28.6 (8)

Q.12 Organization

Most of the learners thought that the number of organizations providing formal courses is inadequate, and they would like to have more tertiary institutes providing courses. However, most of the non-learners were neutral towards the adequacy of organizing bodies and the suggestion of having more tertiary institutions providing courses. This shows that experienced learners had a stronger demand for different organizing bodies.

Q.13 Courses

Results of question 13 indicate that learners were asking for more varieties of formal programmes, such as HKCEE and HKALE, and more categories of courses. However, there is no evidence that non-learners had the same kind of demand on types and scope of formal programmes.

Q.14 Location

In questions 14(a), (b), and (c), most of the respondents in both groups agreed that taking courses on university campuses might provide older persons with higher incentives for learning. At the same time, most of the respondents were also positive towards taking formal courses at elderly centres or community centres. It may be

because university campuses have a stronger symbolic meaning for older persons, while it is more relaxing and less pressuring to learn at elderly centres. Furthermore, having classes outside the classroom, such as going on field trips, appeals to both the learner and non-learner groups.

Q.15 Fee

Both groups of respondents considered tuition fee of formal learning programmes expensive, and they indicated that grants from government could help.

Q.16 Duration

Most of the respondents in the learner group were satisfied with the number of hours required for completing the formal learning programmes, whereas most of the non-learners were neutral towards this. For items b and c, more than half of the learners agreed that if older persons were allowed to divide the courses into different phases or to accumulate credits, their incentive to learn might be higher. However, the possibility to accumulate credits is the only option that gained a majority of support in the non-learner group. This result shows that accumulation of credits can help older persons to a larger extent in terms of finishing formal programmes, as it provides them with greater flexibility.

Q.17 Teaching Style

A majority of both learners and non-learners agreed that older persons' willingness to participate in formal learning would increase if elements such as service learning and practicum were integrated into the formal elder learning programmes. However, while most of the learners thought that learning through radio broadcast or the internet is good, most of the non-learners were neutral to such suggestions. The possible reason is that the non-learners had lower education level and might not know how to access the internet.

Q.18 Teachers

In both groups, most of the respondents agreed that academic staff, experienced teachers or elderly service workers would serve as appropriate courses instructors for the formal learning programmes.

Q.19 Entry Requirements

Most of the non-learners said that the educational level requirements for formal learning programmes are too hard for them to fulfill, while most of the learners were neutral towards this statement. This difference can be explained by the lower education level of respondents in the non-learner group.

Whereas most of the learners agreed that face to face interview could be used as one of the screening processes, most of the non-learners were neutral towards this idea. Furthermore, in 19(c), most of the respondents in the learner group were positive towards the suggestion of free basic literacy courses being provided as a supplement to formal learning programmes, while most of the non-learners did not think that free basic literacy courses can help. This result indicates that literacy level is one of the greatest difficulties faced by older persons wanting to join formal learning programmes, but at the same time, this is a difficulty that could not be solved easily.

B. Informal Learning

	Questions		% (n)		
		Learner ?	Yes	No	Neutral
20 (a)	Most of the informal courses are provided by elderly centres and other elderly service providers. Do you think the number is enough?	Yes	50.0 (13)	34.6 (9)	15.4 (9)
		No	42.9 (12)	17.9 (5)	39.3 (11)
	(b) (For those having learning experience) Do you think you have enough choices of organizations which providing informal courses?	Yes	56.9 (15)	26.7 (7)	15.4 (4)
		No	NIL	NIL	NIL
	(c) Do you think the willingness of the older people to participate in informal learning will increase if tertiary institute also provide informal courses	Yes	61.5 (16)	3.8 (1)	34.6 (9)
		No	46.4 (13)	14.3 (4)	39.3 (11)
21 (a)	Do you think there are enough types of informal courses?	Yes	46.2 (12)	11.5 (3)	42.3 (11)

(b)	Do you think older people's willingness to participate in informal learning will increase if courses related to later life, like medicine and financial planning are provided?	No	53.6 (15)	21.4 (6)	25 (7)
		Yes	65.4 (17)	23.1 (6)	11.5 (3)
		No	64.3 (18)	17.9 (5)	17.9 (5)
22 (a)	Do you think older people's willingness to participate in informal learning will increase if older people can learn at the nearest center, regardless of which organisation it belongs to?	Yes	80.8 (21)	7.7 (2)	11.5 (3)
		No	32.1 (9)	21.4 (6)	46.4 (13)
	(b) Do you think older people's willingness to participate in informal learning will increase if they take informal courses at tertiary institutes?	Yes	69.2 (18)	11.5 (3)	19.2 (5)
		No	50.0 (14)	32.1 (9)	17.9 (5)
	(c) Do you think older people's willingness to participate in informal learning will increase if more field trips besides regular lessons are provided?	Yes	61.5 (16)	3.8 (1)	34.6 (9)
		No	32.1 (9)	17.9 (5)	50.0 (14)
23 (a)	Informal courses cost tens to hundreds of dollars. Do you think it is affordable?	Yes	100 (26)	0 (0)	0 (0)
		No	82.1 (23)	10.7 (3)	7.1 (2)
	(b) Do you think older people's willingness to participate in informal learning will increase if they are provided with grants from the government?	Yes	76.9 (20)	11.5 (3)	11.5 (3)
		No	64.3 (18)	17.9 (5)	17.9 (5)
	(c) Do you think older people's willingness to participate in informal learning will increase if they are provided with travel allowance from the government?	Yes	76.9 (20)	3.8 (1)	19.2 (5)
		No	60.7 (17)	25 (7)	14.3 (4)
	(d) Do you think older people's willingness to participate in informal learning will increase if older people are provided with scholarship?	Yes	46.2 (12)	7.7 (2)	46.2 (12)
		No	42.9 (12)	25 (7)	32.1 (9)
	24 (a) Informal courses usually last for 2 – 6 months, do you think the duration is appropriate?	Yes	73.1 (19)	0 (0)	26.9 (7)
		No	39.3 (11)	14.3 (4)	46.4 (13)
(b)	Do you think older people's willingness to participate in informal learning will increase if they are allowed to divide the courses into certain phases and finish them according to their own situation?	Yes	38.5 (10)	19.2 (5)	42.3 (11)
		No	21.4 (6)	35.7 (10)	42.9 (12)
25 (a)	Do you think older people's willingness to participate in informal learning will increase if elements such as service learning and practicum are integrated into the curriculum of informal courses?	Yes	65.4 (17)	15.4 (4)	19.2 (5)
		No	53.6 (15)	32.1 (9)	14.3 (4)

(b)	Do you think older people's willingness to participate in informal learning will increase if informal courses are provided on the internet or through broadcasting?	Yes	42.3 (11)	26.9 (7)	30.8 (8)
		No	25 (7)	17.9 (5)	57.1 (16)
26 (a)	Do you think it is most appropriate to have experienced teachers or elderly service workers as course instructors?	Yes	92.3 (24)	0 (0)	7.7 (2)
		No	78.6 (22)	3.6 (1)	17.9 (5)
	(b) Do you think it is good to have experienced elderly learners as course instructors?	Yes	92.3 (24)	0 (0)	7.7 (2)
		No	71.4 (20)	14.3 (4)	14.3 (4)
	(c) Are you interested in being a course instructor if possible?	Yes	76.9 (20)	3.8 (1)	19.2 (5)
		No	17.9 (5)	25 (7)	57.1 (16)
27 (a)	Various organizations release the information of elderly courses separately. Do you think it is easy to get the information you need?	Yes	34.6 (9)	46.2 (12)	19.2 (5)
		No	7.1 (2)	7.1 (2)	85.7 (24)
	(b) Do you think it is easier for older people to attain information of learning programme if a central data bank for older persons courses is set up?	Yes	96.2 (25)	0 (0)	3.8 (1)
		No	71.4 (20)	10.7 (3)	17.9 (5)
	(c) Do you think it is easier for older people to attain information of learning programme if newsletter of elderly learning programme is mailed to older people once they register for the mailing list?	Yes	88.5 (23)	0 (0)	11.5 (3)
		No	67.9 (19)	17.9 (5)	14.3 (4)
	(d) Do you think it is encouraging if older people are awarded with certificate whenever you finish a course?	Yes	100 (26)	0 (0)	0 (0)
		No	100 (28)	0 (0)	0 (0)
	(e) Do you think it is encouraging to have a large scale and public graduation ceremony for older persons graduates every year?	Yes	100 (26)	0 (0)	0 (0)
		No	78.6 (22)	7.1 (2)	14.3 (4)
	(f) Do you think it is encouraging for older people to have opportunities to share their learning experiences publicly?	Yes	92.3 (24)	0 (0)	7.7 (2)
		No	85.7 (24)	3.6 (1)	10.7 (3)
	(g) Do you think organizations should carry out survey to assess the needs of older people regularly?	Yes	26 (100)	0 (0)	0 (0)
		No	28 (100)	0 (0)	0 (0)
	(h) Do you think the promotion of lifelong learning among older people from the government is enough?	Yes	19.2 (5)	57.7 (15)	23.1 (6)
		No	17.9 (5)	67.9 (19)	14.3 (4)

Q.20 Organization

In both the learner and non-learner groups, most of the respondents agreed that the number of informal courses was enough. Learners also indicated that they were given enough options of informal courses to choose from. At the same time, they would like to have tertiary institutes provide informal learning programmes for them. These findings indicate that tertiary institutes have much symbolic meaning for older persons.

Q.21 Courses

Most of the non-learners thought that the varieties of informal courses provided were enough. In the learner group, the options “yes” and “neutral” carried almost the same percentage. More than 60% of the respondents in both groups agreed that older persons’ willingness to participate in informal learning will increase if the courses were related to later life.

Q.22 Location

More than 80% of the learners agreed that older persons’ willingness to participate in informal learning would increase if they could learn at the nearest centre, whereas only 32.1 % of non-learners agreed with that. This result indicates that location may not be the main reason for non-learners not learning. Half of the non-learners and almost 70% of the learners agreed that older persons’ willingness to participate in informal learning would increase if informal courses were held at tertiary institutes. More than half of the learners agreed that activities like field trips can increase older people’s willingness to learn, whereas most of the non-learners were neutral towards this suggestion. This result indicates that learners were asking for more diversity in the types of classes available.

Q.23 Fee

Most of the learners and non-learners suggested that they could afford the course fee of informal courses as they were cheap enough. At the same time, they agreed that grants, travel allowance, and scholarships from the government could attract older persons to learn.

Q.24 Duration

73.1 % of learners answered “yes” to this question, meaning that they thought the duration of informal courses was appropriate, whereas the modal answer in the non-learner group was neutral. Moreover, in both of the groups, over 40% of all the respondents were neutral towards the suggestion that courses could be divided into certain phases. It may be because most of them agreed that duration of informal courses was appropriate.

Q.25 Teaching Style

Most of the learners and non-learners agreed that older persons’ willingness to participate in informal learning would increase if elements such as service learning and practicum were integrated into the curriculum of informal courses. However, the suggestion of making informal courses available through the internet was supported by learners only, whereas most of the non-learners were neutral towards it. This may be due to the reason that non-learners in this research had lower literacy level and they were not familiar with computer application.

Q.26 Teachers

Most of the older persons interviewed agreed that it was appropriate to have experienced teachers, elderly service workers or experienced elderly learners serve as course instructors.

In question 26(c), most of the older learners said that they were willing to be course

instructors, whereas non-learners were neutral towards being course instructors. This implies that elder learners were more confident with their own teaching ability.

Q. 27 Others

In question 27(a), most of the experienced elder learners indicated that they faced difficulties in obtaining course information, whereas most of the non-learners were neutral to that statement.

Results of 27(b) and 27(c) show that most of the interviewees agreed that a central data bank and availability of newsletters could help older persons obtain information on courses.

Results of question 27(d), 27(e) and 27(f) show that most of the interviewees, regardless of whether they had learning experience or not, agreed that it would be encouraging for older learners if they could be awarded with certificates after finishing a course or be invited to join a large scale and public graduation ceremony after graduation, and they also found it encouraging if they were given opportunities to share their learning experience.

Question 27(g) shows that most of the older persons interviewed were positive towards the suggestion that “organizations should carry out survey to assess the needs of elder learners regularly”.

According to the last part of this question, question 27(h), most of the learners and non-learners thought that the government is not doing enough to promote lifelong learning.

5.2 Findings of Documentary Study

The aim of the documentary study is to investigate the various learning opportunities available to older persons in Hong Kong. This section will be divided into the formal and the informal learning parts¹. As there is no central data bank of elderly education in Hong Kong, information had to be retrieved from the websites of elderly service providers and leaflets and booklets obtained from centres run by various organizations.

5.2.1 Formal Learning Opportunities

As of now, only The Hong Kong Society for the Aged and Lingnan University jointly provide formal learning opportunities for older persons. Through cooperating with each other, they hold programmes including Project Yi Jin, foundation diploma, and associate degrees, which are highly similar to the existing formal tertiary education. These programs require applicants to be at least 50 years old and have at least completed primary school, so as to ensure basic literacy. The courses are offered in full-time mode only, and those enrolled will have to take 600 to 900 hours of classes. After finishing the courses, students will be awarded with certificates, diplomas or associate degrees respectively. Students take classes on the campus of Lingnan University and at its teaching centres. Formal learning for older persons is very expensive, with costs comparable to those of young people, varying from HK\$30,000 to HK\$ 84,000. Subsidies are available from the organizations offering the courses, though they could only subsidize up to 50% of the course fee, as funding is limited and the quota of subsidy is also limited.

¹ Findings has ve been summarized into a table and attached as Appendix 5 for reference.

5.2.2 *Informal Learning Opportunities*

As stated before, most of the learning opportunities for older persons in Hong Kong are informal, and there are quite a lot of organizations providing courses. Due to the large number, information on informal elderly education will be illustrated by examining the following topics respectively: (1) Organization, (2) Course type, (3) Duration, (4) Pre-requisite, (5) Study mode, (6) Qualification or Award, (7) Location, (8) Course Fee and (9) Financial Subsidy.

(1) Organization

The main elderly education providers in Hong Kong are The Hong Kong Society for the Aged (SAGE), Neighbourhood Advice Action Council (NAAC), Hong Kong Young Women's Christian Association (YWCA), Hong Kong Christian Service, Hong Kong Sheng Kung Hui Welfare Council, and Radio-Television HK Radio (RTHK-R5).

(2) Course Type

Older persons can enjoy a wide variety of courses, including language (such as Chinese and English), social science, health knowledge, computer literacy, music (such as Chinese opera and musical instruments), arts (such as water painting), and physical education. Furthermore, increasing number of service providers are providing “training to be teachers” courses, so that more older learners can become teachers and serve as volunteers to teach other older people.

(3) Duration

Four out of six service providers listed above have limitations on the duration for finishing courses, varying from at least 2 months per course to a maximum of 6 months. Only NAAC and YWCA have courses with flexible course duration.

(4) Pre-requisite

The only pre-requisite is age. Most of the providers require applicants to have a minimum of age of 50, while some of them require 55. If older persons want to enroll in “training to be instructors”, they should be willing to become course instructors.

(5) Study Mode

All informal classes are in part-time mode. They meet once every week and each lesson usually lasts for one and a half hours to two hours.

(6) Qualification or Award

Some of the organizations provide certificates of attendance for every course. Recently, more organizations have changed to a system of credit accumulation, so that elder learners can be awarded with certificates and diplomas depending on how many courses they have finished. However, all these awards are merely symbolic, and would not be recognized as qualifications commonly.

(7) Location

Organizations hold classes at their own centres. Yet, service organizations vary greatly in scale. Some organizations may have up to 30 centres located all around Hong Kong, but some may only have 5-6 centres located in a particular district.

(8) Course fee

Informal learning is relatively cheap in Hong Kong, so most of the older people can afford to join. Course fee starts from as low as tens of dollars, but it would usually cost two hundred dollars for joining. Only a small proportion of courses are free.

(9) Financial Subsidy

Most of the organizations do not provide financial subsidies except to CSSA recipients, who could enjoy a discount in course fee of up to 100 %. The government or governmental bodies do not provide financial subsidies, and public transportation companies only offer discounts to those aged 65 or above, as they are regarded as senior citizens in Hong Kong. Therefore, there would be some elder learners who cannot enjoy any financial subsidy.

Chapter 6

The Gaps between Older Persons' Needs and Present Lifelong Learning Model

In Chapter 5, the findings of the interview survey and the documentary study had been illustrated. It is quite obvious that there are gaps between what older persons want and what the lifelong learning model offers. Based on the results, these gaps will be pointed out one by one in this chapter, with suggestions to improve the existing model to bridge each gap.

Improving the Existing Lifelong Learning Model in Hong Kong

In this section, the gaps between older persons' needs and existing lifelong learning model's offers will be illustrated through the following 13 elements: (1) Organization, (2) Entry, (3) Venue, (4) Time, (5) Types of course, (6) Type of lesson, (7) Course Fee, (8) Instructor, (9) Duration, (10) Information, (11) Satisfaction, (12) Curriculum and (13) Reinforcement.

(1) Organization

As indicated in the findings of the questionnaire, older persons interviewed preferred to have universities and more tertiary institutions, like VTC and IVE, provide formal learning programmes. However, the only programme currently available is the joint Lingnan University and SAGE programme that includes Project Yijin, foundation diploma, and associate degree programmes. Furthermore, older persons also wanted tertiary institutes to hold informal learning courses.

Suggestion

Because official tertiary institutions may have a stronger symbolic meaning to the older people since they are recognized entities, it is suggested that other tertiary

institutions in Hong Kong should be more involved in the provision of formal learning programmes, while universities should provide more informal learning opportunities. For example, in France, Australia, the United States of America, and Finland, tertiary institutions involve actively in the provision of learning activities to older persons, whether it is formal or informal*. Furthermore, the increased number of participating organizations can increase the accessibility of elderly educational programmes.

(2) Entry

Applicants were required to have certain literacy level when applying to formal learning programmes. Yet, it was found that older persons interviewed were commonly not confident in their own literacy level and they were concerned that the prerequisite in educational level is hard for them to attain.

Suggestion

Instead of setting an educational level prerequisite, it is suggested that organizations adopt face to face interview as a measure to assess the applicants' ability.

Elderly Want Organization Formal University / More tertiary institutions such as IVE or VTC Informal Elderly Centre / NGOs / Tertiary Institutions	Satisfactory Model Organization Formal University / <i>More tertiary institutions such as IVE / VTC</i> Informal Elderly Centre / NGOs / <i>Tertiary Institutions</i>	Existing Organization Formal University Informal Elderly Centres / NGOs
Entry Formal Face to face interview instead of educational level pre-requisite	Entry Formal <i>Face to face interview only</i>	Entry Formal Face to face interview / educational level pre-requisite

Fig.6.1 Gaps between Older Persons' Wants and Present LL Model: Organization & Entry

(3) Venue

In the interview survey, most of the respondents stated that for formal courses, apart from university campuses, they would also prefer to have classes on virtual forums, such as the through internet and radio broadcasting. For informal courses, besides the elderly centres or community centres they were registered with, they would also like to take classes on university campuses. Same as for formal courses, learning through the internet and radio broadcasting was also favourable to them. In addition, it was found that being able to learn at the nearest centre, no matter which organization that centre belongs to, could help solve the problem for those who have indicated location as one of their learning barriers. Unfortunately, as of now, formal courses could only be taken on university campus, while informal courses could not be taken there. In addition, since elderly organizations do not cooperate with each other, sharing of centres among the organizations is not possible.

Suggestion

It would be good if formal learning programmes can be made available through the internet or on the radio. Moreover, older persons' willingness to participate in informal learning may increase if they can learn at tertiary institutions or the nearest centres. Thus, it is strongly recommended that organizations should encourage stronger cooperation with each other so that resources can be shared. In China and Australia, there are successful experiences of providing formal learning programmes on the internet and through radio broadcast. Also, older persons in China and the US can take informal courses at centres that are very close to their living places, and tertiary institutions help with offering classrooms for elder students^{*}.

(4) Time

Respondents in the interviews preferred having the formal and informal courses

available on the internet or broadcast through the radio so that they can take the classes according to their own schedule. However, formal classes are held during day time only.

Suggestion

It is suggested that formal learning programmes should be made available on the internet or radio. In addition, since only RTHK is providing informal courses through radio broadcast, it will be beneficial if other stations could join in the provision of informal programmes.

<p>Elderly Want</p> <p>Venue</p> <p>Formal Internet or Radio Broadcast / University Campus</p> <p>Informal Centre / Tertiary Institutions/ Internet / Radio Broadcast / Nearest Centre most preferred</p>	<p>Satisfactory Model</p> <p>Venue</p> <p>Formal University Campus / <i>Internet /</i> <i>Radio Broadcast</i></p> <p>Informal Centre / <i>Tertiary Institutions /</i> Internet / Radio Broadcast / <i>Nearest Centre most preferred</i></p>	<p>Existing</p> <p>Venue</p> <p>Formal University Campus</p> <p>Informal Centre / Internet/ Radio Broadcast</p>
<p>Time</p> <p>Formal & Informal More courses available on the internet and through broadcasting so they can take the class anytime</p>	<p>Time</p> <p>Formal Day time / <i>internet or radio</i> <i>broadcast</i></p> <p>Informal Day time / internet or radio broadcast</p>	<p>Time</p> <p>Formal Day Time</p> <p>Informal make anytime on internet or radio broadcasting / Day Time</p>

Fig.6.2 Gaps between Older Persons' Wants and Present LL Model: Venue and Time

(5) Type of course

In the study, older persons on the one hand expressed that they were satisfied with the variety of formal and informal learning programmes, but on the other hand, more

than half of the respondents agreed that it would be good for older persons if courses were related to later life, like medicine and financial planning.

Suggestion

According to the results, even though the interviewees seem to be satisfied with the current variety of courses, they also asked for new types of courses, which shows that innovative type of courses are attractive to older persons.

(6) Type of lesson

It is observed that most of the respondents were positive towards new styles of teaching. Other than taking formal lessons in classroom, they were also like to have field trips or practicum in both formal and informal courses.

Suggestion

It is suggested that there should be a greater variety of teaching styles such as practicum, field trips, and service learning. Although some informal learning opportunities have elements of service learning and fields trips integrated into them, the more these kinds of opportunities could be offered, the better they appeal to older persons. Hong Kong can learn from the experiences Australia, the US, and Finland, where service providers have been providing courses with innovative teaching styles, such as the Elderhostel in the US and “Learning through traveling” in Australia*.

Elderly Want	Satisfactory Model	Existing
Type of courses Formal Satisfied with the variety Informal Satisfy with the variety of courses / New types such as medicine and investment	Type of courses Formal AD / Project Yi Jin Informal Keep the existing / <i>New types such as medicine and investment</i>	Type of courses Formal AD / Project Yi Jin Informal Language / I.T. / Interest Class / P.E. / Cultural / Social Issues / P.R.
Type of lessons Formal More field trips, practicum and service Informal More field trips, practicum and service	Type of lessons Formal & Informal In classroom / <i>More field trips & Practicum</i>	Type of lessons Formal & Informal Most in classroom / some field trips & Practicum

Fig.6.3 Gaps between Older Persons' Wants and Present LL Model: Type of courses and lessons

(7) Course fee

Interviewed older persons indicated that course fee for formal learning was very expensive for them and they would like to receive grants from the government. However, the government does not provide grants, and even though there may be scholarships from the organizations, the quota and amount of subsidies are very limited. For informal courses, elderly interviewed thought that the fee was low enough, but they also revealed that their willingness to learn will increase if there were grants and travel allowance.

Suggestion

Formal courses for the elderly should cost less, and the government should provide subsidies in order to assist the elderly in pursuing formal and informal education. Moreover, public transportation companies should also provide discounts to elder learners aged 55 to 64, because currently, only those aged 65 or above could receive senior discounts.

(8) Instructor

Most of the respondents pointed out that they were satisfied with having university staff and elderly service workers as instructors for the formal learning programmes. Moreover, most of them were positive towards having elder learners as instructors and most of the learners interviewed were interested in being course instructors.

Suggestion

In the United Kingdom and Australia*, there are many elder learners working as instructors. In Hong Kong, more elder learners can be invited to be instructors for informal courses, since elder learners are believed to have a better understanding of the needs of their peers in classes, and elderly learners as instructors can minimize the cost of providing informal learning programmes. Thus, there should be more courses, like those provided by SAGE and YWCA, to train elderly learners to become instructors.

Elderly Want Course Fee Formal Too expensive / Grants from the gov' t Informal Cheap / Grants from the gov' t / More free courses	Satisfactory Model Course Fee Formal <i>Lower course fee / Grants from the gov' t</i> Informal Remain unchanged/ <i>Grants from the gov' t / travel allowance</i>	Existing Course Fee Formal Tens of Thousands of dollars / May have subsidy from organizing body Informal Tens or hundreds of dollars / Waiver from organizations
Instructor Formal & Informal U staff / Elderly Service Workers Informal Experienced Elderly Learners	Instructor Formal & Informal U staff / Elderly Service Workers Informal <i>More Experienced Elderly Learners</i>	Instructor Formal & Informal U staff / Elderly Service Workers Informal Some experienced learners

Fig.6.4 Gaps between Older Persons' Wants and Present LL Model: Course Fee & Instructor

(9) Duration

Generally, for formal learning, older persons interviewed would like to have greater flexibility on the time they were given to finish the course, because formal learning programmes can last for two to three years, which may be too long for them. They were positive towards the establishment of credit accumulating systems, which could provide them with greater flexibility. For informal learning programmes, most of the respondents thought the duration was appropriate.

Suggestion

Similar to the United Kingdom*, service providers in Hong Kong should let elder learners accumulate credits in formal learning programmes. This is because two to

three years may be too long for the older persons. They are worried that their health could turn bad, and they would feel more relaxed if they do not have to finish the course within a particular period.

(10) Information

Older persons who participated in the interview survey agreed that a central data bank would be helpful for them to search information on courses for elderly. In addition, they were also positive towards the receiving of newsletters on elderly courses as a means to obtain more information.

Suggestion

Unlike Australia, the UK and the US*, Hong Kong does not have a central data bank for lifelong learning programmes for the older persons. Older persons who wish to learn have to either physically go to different centres or visit different centres' websites to obtain information and thus, most of the elder learners only participate in courses provided by the centres they are associated with. Furthermore, it is good to have newsletters on elderly courses mailed to interested older persons, so that they can receive information from various centres and pick the best courses for themselves.

(11) Satisfaction

Most of the respondents indicated that service providers should carry out surveys regularly in order to assess the needs and preferences of older persons. Even though some of the organizations in Hong Kong do carry out surveys regularly, most of the surveys are course evaluations rather than needs assessments.

Suggestion

Besides carrying out course evaluations to see the strengths and weaknesses of

courses, it is important to carry out needs assessments too, so that service providers can know the preferences and needs of older persons.

Elderly Want	Satisfactory Model	Existing
Duration Formal More flexibility / Accumulation of credits Informal Satisfied	Duration Formal 2-3 years/ <i>More flexibility</i> <i>/ Accumulation of credits</i> Informal 2-6 months	Duration Formal 2-3 Years Informal 2-6 months
Information Central data bank / Newsletter / Trial lessons	Information Individual organizations' leaflet or website / <i>Central</i> <i>data bank / Newsletter</i>	Information Leaflet or website of organization providing courses
Satisfaction Regular surveys to assess the needs	Satisfaction <i>Regular surveys to</i> <i>assess the needs</i>	Satisfaction Some may have course evaluations

Fig.6.5 Gaps between Older Persons' Wants and Present LL Model: Duration, Information & Satisfaction

(12) Curriculum

In the questionnaires, it was found that regardless of formal or informal learning programmes, the elderly hoped to design the course curriculum with their teachers. They suggested that through discussion, they could learn with suitable pace and the level of difficulty could be adjusted. Furthermore, they pointed out that free basic literacy courses may help the elderly succeed in formal learning programmes. Also, it seems that the older persons prefer not to have test or examination. Nonetheless, the style of formal learning programmes in Hong Kong is the same for young people and older persons in that the entire curriculum is designed by teachers, and tests and

examinations are carried out regularly.

Suggestions

It is strongly suggested that service providers should design course curriculum along with the elder learners by discussing with them. In China, Australia and the UK*, elder learners can express their opinions to the service providers concerning topics to be covered, teaching pace, and so on. Furthermore, in order to help those who did not receive much education when they were young, foundation literacy courses should be offered. In addition, instead of written course work, tests, and examinations, oral presentations and examinations can be carried out.

Elderly Want	Satisfactory Model	Existing
Curriculum Formal Can design curriculum with teachers / Free basic literacy courses / No test or examination Informal Can design curriculum with teacher	Curriculum Formal <i>Can design curriculum with teachers/ Free basic literacy courses / No test or examination</i> Informal <i>Can design curriculum with teacher</i>	Curriculum Formal Designed by providers / Tests and examinations Informal Designed by providers

Fig.6.6 Gaps between Older Persons' Wants and Present LL Model: Curriculum

(13) Reinforcement

Reinforcements are very important for the increase of the sustainability of learning activities among older persons. Most of the learners indicated in the questionnaires that it would be good if they were awarded with a certificate whenever they complete a course. Although some of the organizations do provide certificates of attendance as awards, not many organizations are doing so.

Some of the organizations and Lingnan University cooperating with the SAGE hold private graduation ceremonies for the course participants. However, older persons interviewed would like to have a large scale and public graduation ceremonies if possible, as they thought they would be better recognized by others. Moreover, most of the respondents assented to the idea that more opportunities to share learning experience with others could reinforce the learning behaviour, as most older persons are proud to be learning again in the later age. In addition, most of the learners in the interview survey pointed out that the government was not doing enough to promote lifelong learning among older persons.

Suggestions

From the point of view of elder learners, certificates, qualifications, and public and large scale graduation ceremonies can reinforce their learning behaviour. Thus, it is strongly recommended that various organizations providing elderly education should cooperate with each other to ensure the qualifications they are offering to elder students would be recognized for further education, and that an integrated graduation ceremony can be carried out. Government officials and the mass media should also be invited to join so that the ceremony will be more widely known to the public. Moreover, the government should be more active in promoting the positive impact of lifelong learning among older persons.

Elderly Want	Satisfactory Model	Existing
Reinforcement Formal Qualification & certificate / Public and large scale ceremony / Opportunity to share learning experience Informal Certificate / Public and large scale ceremony / Opportunity to share learning experience	Reinforcement Formal Qualification & certificate / <i>Public and large scale ceremony / More opportunities to share learning experience</i> Informal <i>Certificate / Public and large scale Ceremony / More opportunities to share learning experience</i>	Reinforcement Formal Qualification & certificate / Ceremony held by University / Some opportunity to share learning experience Informal Certificate / May have private ceremonies by organization / Some opportunities to share

Fig.6.7 Gaps between Older Persons' Wants and Present LL Model: Reinforcement

* To review the lifelong learning experience of other countries, please refer to Chapter 2, section 2.5.1

Chapter 7

Discussion and Conclusion

Proposed Lifelong Learning Model in Hong Kong

In Hong Kong, various organizations provide different courses to the older people, and these providers seldom cooperate among each other. While we have quite a lot of courses targeting older persons, we do not have well-structured lifelong learning models. Based on the mapping of interview survey results with documentary study of lifelong learning programmes for older persons, a lifelong learning model in Hong Kong is proposed.

7.1 Proposed Lifelong Learning Model in Hong Kong

7.1.1 Formal learning

Organization

Right now, the joint Hong Kong Society for the Aged (SAGE) - Lingnan University programme is the only formal learning opportunity for older people. Other tertiary institutions also have similar courses that have no age restrictions, but they are primarily for working adults with the aim of retraining the working population, providing them with up-to-date skills and knowledge. Nonetheless, there is no evidence that older people demand more formal learning opportunities. It may be the case that older people find it quite difficult to study at the university level, and also, they may not be able to afford the course fee. It is important to note that opportunities for elderly formal learning may have to be increased in the future, because the population is becoming better-educated.

Courses Provided

Three types of courses, namely Project Yijin, Foundation Diploma and Associate Degree, are currently available. It is hoped that degree programmes would be made available in the future. Older people can pursue a degree by completing the required courses one by one. Project Yijin is like general studies in terms of the curriculum, and it provides older people with basic knowledge. Foundation Diploma's curriculum concerns particular fields, and Associate Degree narrows down to a particular area of study. However, it is found that older people admitted into Project Yijin encounter difficulties in understanding and expressing what they think in words. Thus, it is strongly recommended that besides Project Yijin, secondary schools, or even primary schools can help provide some courses so that older people are able to pursue the qualification step by step.

Duration and Studying Mode

In order to finish Project Yijin and Foundation Diploma, students have to finish 600 hours (5 phases) of classes. Associate Degree requires students to finish 900 hours of study within 3 years. This is quite intensive and elder students may find the burden quite heavy if they have to finish all the course work in the classroom. From the experiences of other countries, other modes of learning, like learning through service or field trips, are very efficient and favourable to older people. These types of learning modes are therefore recommended for elderly learning programmes.

Pre-requisite

The pre-requisites for taking classes include reaching the minimum age (applicants have to be above 50) and being literate (applicants should have basic literacy level). Face to face interviews will also be conducted. Although those admitted usually have

attained a certain level of literacy, it is always found to be inadequate for the courses. Thus, supplementary literacy courses should be provided for free, so that older people can manage the courses more easily, and at the same time be able to understand the content and finish the courses successfully. Furthermore, similar to other countries, literacy level should not be seen as the main selection criterion. Rather, previous working experience is worthy to be regarded as an important selection criterion, as working experience is found to be always beneficial to learning, and thus should not be ignored.

Qualification or Award

By completing the courses, older people should be able to either receive a certificate, diploma, or an associate degree.

Location

Courses are usually being held on the campus of Lingnan University or at SAGE branches. As students come from different areas of Hong Kong, the available locations may not be convenient for some of them. If the class size is not too big, survey can be conducted prior to the start of a course in order to decide on the most favourable location for lessons. The classes can be conducted at different branches of SAGE, or most ideally, at branches of the most convenient NGOs whenever cooperation among different organization exists. This measure is definitely a favourable offer to the older people.

Course fee

Course fee is the most common barrier for older people. As the teaching staff usually has higher qualification, the cost of running the programme is high, leading to high

course fees. The course fee for a foundation diploma is HK\$30,000, whereas an associate degree would cost HK\$84,000. Some scholarships or government funding should be provided, otherwise, only those who have more money to spend in their later life would be able to participate in these formal learning activities.

7.1.2 Informal Learning Opportunities

Organization

There are six major organizations in Hong Kong that provide informal learning opportunities. These include SAGE, Radio-Television HK Radio (RTHK-R5), Hong Kong Sheng Kung Hui Welfare Council, Hong Kong Christian service, Hong Kong Young Women's Christian Association, and Neighborhood Advice Action Council. Cooperation among the organizations is scarce, and information on the courses provided is dispersed, making it difficult for older people to find what they want. It is suggested that a central body can be set up in order to oversee the courses provided by different organizations. Furthermore, it will be easier for older people to find the information they want from the central data bank.

Courses Provided

There is a great variety of courses provided by the organizations, ranging from academic courses such as Chinese and English, to interest courses such as Chinese opera and calligraphy. Furthermore, physical education courses such as Tai Chi are becoming more popular. More and more organizations are providing tutor-training courses and it is found to be quite popular among the older people. This is a proof that quite a lot of older people would like to make use of the knowledge they have to educate their peers. Moreover, there are a few newly emerged courses such as

financial management and Chinese medicine. Perhaps we cannot predict what courses will be demanded by the older people in the future, but the emergence of new preferences is a good indication that it is necessary to carry out learning needs assessments regularly in order to make sure that the courses provided match the needs of the older persons.

Duration and Studying Mode

Most of the courses are provided on a part-time basis, meaning that there are usually 1.5 hours of class every week. However, except for those provided by the Neighborhood Advice Action Council, older learners are required to complete the courses provided by other organizations within a particular time, ranging from 2 to 6 months. It is suggested that in order to increase flexibility, and also due to the fact that older people may terminate learning for reasons like physically unhealthy or different engagements, it would be better if they were given the option to complete the courses within a particular period. The courses can be divided into different phases, and it is believed that this measure can increase older persons' intention to learn.

Pre-requisite

Other than the age requirement, there are usually no pre-requisites for informal learning programmes. The minimum age for attending courses ranges from 50 to above 55. Although being literate is not a pre-requisite, some older persons find difficulties in understanding the curriculum, because they did not receive much education when they were young. Thus, the learning barriers cannot be eliminated by merely not setting any pre-requisites. Basic literacy course should be provided for free so that older people can participate in the courses easily and at the same time, be

able to understand the curriculum and finish the courses successfully.

Qualification or Award

Chinese people like symbols of achievements, like certificates and ceremonial occasions, to celebrate successful completion of a task. Thus, service providers are now willing to offer certain kinds of certificates and diplomas to the learners upon completion of courses. Some organizations also award participants with a degree after completing a programme, but it is not the same as the one issued by tertiary institutes. These awards can reinforce continuous participation in learning among the older persons, and are symbolically important for them. Although many service providers already arrange their own graduation ceremonies for the older people, it is suggested that a large scale graduation ceremony for all participants in older learning programmes should be held each year. Government officials and members of the media should be invited to attend as guests. On the one hand, this can provide a sense of recognition to the older learners and reinforce their learning behaviours, and on the other hand, it can help promote the idea of lifelong learning in the society.

Location

Courses are provided by the NGOs at the various branches under their governance. However, since some NGOs serves only in a particular area, some courses may be available in that particular area only. If a central body is set up to oversee the arrangement of all the courses, various organizations would be able to cooperate and share classrooms in their branches. This can increase the accessibility of courses and enhance the learning motivation for older people.

Course fee

Course fees for informal courses provided by the NGOs are not very high. They can start from as low as HK\$20, and can go up to couple hundreds of dollars. However, some older persons may still be unable to join the programmes or be forced to quit due to financial difficulties, because they only live on limited amount of pension or CSSA from the government. Thus, it is necessary for the government to provide funding for the needy. In addition, the importance of travel allowance is always ignored by the government. On most of the public transportation, discount is only given to those who are over 65. Those aged 50 to 64 may have to face expensive transportation fee. As a result, tuition fee assistance as well as travel allowance should be provided to the needy by the government.

7.2 Two Important factors making foreign countries' experience successful

7.2.1 Culture of Volunteerism

From the synoptic literature review of foreign countries' experiences, volunteerism is a crucial factor in both kind of learning programmes. Most of the formal and informal learning programmes are provided at a pretty low cost because most of the instructors are experienced older learners and they volunteered to be course instructors. In some organizing institutions, not only the instructors, but also the administrative staff, are volunteers and thus, older persons can learn at a very low cost. In Hong Kong, the case is different. Some administrative staff has to double as instructors, because service providers are trying to lower the cost of courses. However, administrative staff already has a very heavy workload because most of the organizations are running multi-service centres, providing services such as

recreational activities and delivering meals to older persons in public estates, apart from holding elderly courses. Hence, it is hard to only rely on the administrative staff as instructors, and recruiting volunteers can be one of the solutions. The problem though, is that on the one hand, the culture of volunteerism is not very strong in Hong Kong, and on the other hand, there are only a few training courses to train elder learners as instructors. Propitiously, YWCA in Hong Kong is providing training courses actively and they have set up an elder instructor data base so that various organizations can hire the less costly but very experienced elder learners as instructors. This will be beneficial to the development of a self-contained lifelong learning model for older persons. Furthermore, the government should also put more resources into enhancing the volunteering atmosphere. This is not only good for the learning environment for older persons, but also for the well-being of the entire society.

7.2.2 *Presence of Central Organizational Body*

Hong Kong is different from other countries in that there is not a central body to organize all elderly learning programmes. In Britain, there is the National Institute of Adult Continuing Education (N.I.A.C.E.). In the States, the Committee on Education for Aging is the central organizer. The Open University acts as the central body in Finland and Australia, and the University of the Third Age (U3A) works with district U3A Committee to organize older persons learning programmes. But here, the various organizations work by and for themselves only, without any cooperation with each other. The presence of a central organizing body can provide more room for sharing of resources, delivery of course information, and arrangement of class time and venue. Service providers can also exchange ideas more frequently. Thus, it is

desirable and worthwhile for the Hong Kong government to set up a central body.

7.3 Limitation of the Research

Like all researches, there are limitations in this research that cannot be avoided nor neglected. Firstly, a user-oriented approach was adopted in the study because it is believed the most ideal model should be developed from the point of view of the end-users, that is, the older persons. It is certainly meaningless if the services provided cannot satisfy the older persons' demands. Consequently, some may find the above suggestions ridiculous or inconceivable. However, it should be stressed that these suggestions were made in the most ideal way, even though they may be hard to attain practically. Therefore, future studies should preferably contain a more comprehensive overview, and the lifelong learning model should be studied from different perspectives, such as the "service provider approach" or the "government approach".

Secondly, as mentioned, suggestions were made in the most ideal way. If practicability has to be taken into consideration, the study should go further to investigate the views of service providers (various NGOs) and the government on lifelong learning among older persons, and also their views towards the ideal suggestions made. However, the centres-in-charge of the various NGOs and government officials refused to be interviewed, stating reasons like they were occupied or the required information is obtainable from their websites, booklets, and leaflets. It is very hard to carry out interviews without proper networking, and this is even more difficult for individuals who are doing their master theses. Thus, documentary study of lifelong learning opportunities provided by the NGOs was

carried out instead.

Thirdly, this study was limited by its scale. The findings cannot be directly generalized for application on the whole of Hong Kong population aged 55 or above, because of the small sample size. In this research, only 54 older persons participated in the interview survey. Sample size was small due to 3 reasons: Firstly, human capital was limited. In the pilot study, it was found that most of the older persons were unable to finish the questionnaires by themselves, as some of them, especially the non-learners, had lower literacy level. Moreover, some of them encountered difficulties in understanding the questions. Therefore, interview surveys were carried out by the researcher one by one. Secondly, time is limited. Each interview survey lasted for 1.25 hours on average and there was only one interview for each participant in the whole research. Therefore, it took a long time to do the interview survey. Thirdly, samples were drawn from 5 different organizations. As most of the staff in those NGOs was busy with administrative work, the researcher could only stay in the centres and interview older persons at random. 6 cases had been voided because the interviewees left during the interview.

Nevertheless, this study has fulfilled the objectives of figuring out the gaps between a satisfactory lifelong learning model proposed by the older persons and the existing model in Hong Kong. Moreover, it has proposed measures to make the existing model more ideal from the point of view of older persons. This provides a sound insight for service providers and government officials on developing and enhancing lifelong learning activities among senior citizens. Hopefully, it can also provide a firm groundwork for in-depth exploration of this topic in the future.

Appendix 1 Questionnaires of “Lifelong Learning for Older Persons in Hong Kong” (English Version)

Lifelong Learning for Older Persons in Hong Kong Survey

I am a postgraduate student from the Lingnan University who is doing a research concerning Lifelong Learning among older persons in Hong Kong. This research attempts, on the one hand, to study the learning motivations and barriers of older persons, and on the other hand, to see the feasibility of any measures in enhancing older persons to learn in the Hong Kong. The information you provide will be used for research only and will be kept confidential. Thank you very much for answering the questionnaire.

Please put a 「✓」 where appropriate

Part One: Learning Experience

1. Have you participated in any learning activities in the past six months?
 1. Yes (Please go to question 3)
 2. No (Please go to question 3)

2. Have you planned to participate in any learning activities in the past six months?
 1. Yes (Please go to question 3)
 2. No (Please go to question 3)

3. What kind of courses have you participated in during the past 6 months? (can have more than 1 choice)
 - A. Informal Courses:
 1. Language: Chinese, English etc.
 2. Information Technology: Computer Application, use of software
 3. Elderly Health : Ageing Process, Physical Fitness, Tai Chi
 4. Daily Living: Bank Service, Road Safety
 5. Technical Training : Volunteer Training, Elderly Caring
 6. Interest Class: Singing, Drawing
 7. Social Cultural: Local Social Issues
 8. Interpersonal Relationship : Family Education, Communication

 - B. Formal Courses:
 1. Project Yijin 2. Foundation Diploma 3. Associate Degree

4. Where did the course take place?
1. Elderly Centre 2. Private Teaching
 3. RTHK 4. Tertiary Institution
 5. Others (Please specify: _____)
5. Generally speaking, are you satisfied with the courses?
1. Yes
 2. No (Please specify/suggest methods to improve: _____)
6. Where did you learn about the courses?
1. Elderly Centre 2. Family/ friends 3. Newspaper/Magazine
 4. Poster 5. TV
 6. Others (Please specify: _____)
7. What concerned you most when you planned to take course?
1. Applicability 2. Interest 3. Location 4. Time
 5. Organization 6. Course Fee 7. Course Difficulty
 8. Others (Please specify: _____)
8. Which organisation provided the courses you take?
1. Elderly centres 2. Tertiary Institution
 3. Other social organizations
 4. Government Departments
 5. Others (Please specify: _____)

Please go to Part Two

Part Two: Only for those who have / planned to participated in any learning activity in the past six months

9. Some of the most popular motivations for older persons to learn are listed below. Please indicate your level of agreement of each motivation and specify whether such motivation will affect your learning behavior in the future.

[illegible]

(i) improve relationship with friends and family									
(j) to remain mentally active									
(k) encouragement from the family							Did your family show support when you were taking courses? 1.Yes 2.No	If yes, would it reinforce your participation ? 1.Yes 2.No	
								If no, would it make you quit learning? ? 1.Yes 2.No	
(l) affected by friends							If your friends continue taking courses, will that encourage you to continue? 1.Yes 2.No		
							If your friends quit taking courses, will you also quit? 1.Yes 2.No		

10. The most popular learning barriers have been listed below. Please indicate your level of agreement towards each barrier and answer whether particular measures can eliminate your learning barriers

Barrier	Level of Agreement					<i>If you have ever learn and “agree” or “strongly agree” with the barriers, please continue to answer this part.</i>		
	Very Disagree	Disagree	Agree	Strongly Agree	Not Applicable	Will your willingness to learn be affected?	Particular measures aimed at solving the barriers are listed below	Can the measures help eliminate barriers for you?
(a) Low Literacy level						1. Yes 2. No	I. Government provide free basic literacy course II. No entry requirements III.No test/ examination IV. No time restriction to finish the course V. You can decide the curriculum with the course instructor.	1.Yes 2.No 1.Yes 2.No 1.Yes 2.No 1.Yes 2.No 1.Yes 2.No
(b) Too old to learn						1. Yes 2. No	Do you know about the following research findings? (1)Older persons who have learnt in the later life are healthier and have a lower chance to suffer from Parkinson’s disease (2) Older persons who have learnt in the later life communicate better with others (3) Older persons who have learnt in the later life are happier than others	1.Yes 2.No 1.Yes 2.No 1.Yes 2.No
(c) Not interested in courses provided						1. Yes 2. No	I. What type of courses are you interested in? _____	
							II Are you interested in taking part in formal learning, like Project Yijin, foundation diploma or bachelor degree programme	1.Yes 2.No
							III If the courses are related to later life, like physical fitness or medicine	1.Yes 2.No

(e) Cannot obtain information on courses							1. Yes 2. No	I. Government set up a central data bank of courses for older persons II Information on courses for older persons are mailed to you regularly III Trial lessons are provided	1.Yes 2.No 1.Yes 2.No 1.Yes 2.No
(f) Quota is limited and have to wait for long time							1. Yes 2. No	I. What do you think is the reasonable duration of the wait? _____month(s) II. Cooperation among various organisations. You can be transferred to those providing the same course if quota is full	1.Yes 2.No 1.Yes 2.No
(g) Course fee is too expensive							1. Yes 2. No	I What is a reasonable fee for a course lasting for 3 months and consisting of 10 lessons? HK\$_____ II. Government provide travel subsidy III Government provide grant for course fee. IV What percentage of the course fee should the government grant be? _____%	1.Yes 2.No 1.Yes 2.No
(h) Physically not healthy							1. Yes 2. No	I. More courses are provided on the internet, you can learn any time at home II. No time restriction to finish the courses, you can divide the courses into certain phases according to your own situation.	1.Yes 2.No 1.Yes 2.No
(i) Time is not suitable							1. Yes 2. No	I. More courses are provided on the internet and through broadcasting, you can learn anytime at home. II. No time restriction to finish the courses, you can divide the courses into certain phases III. What is the best time for you to take courses? _____	1.Yes 2.No 1.Yes 2.No

(j) Can't catch up with the courses							1. Yes 2. No	I. No time restriction to finish the courses, you can divide the courses into certain phases. II. You can decide the curriculum and teaching pace with the course instructor.	1.Yes 2.No 1.Yes 2.No
(k) Location is not good							1. Yes 2. No	I. Various organisations cooperating with each other. You can choose to take courses at the centre which is best for you, no matter which organization it belongs to. II More courses are provided on the internet and through broadcasting, you can learn anytime at home. III. What is the most favorable venue for you? _____	1.Yes 2.No 1.Yes 2.No
(l) Discouragement or objection from family or friends							1. Yes 2. No	I. What are their reasons for not supporting? _____	
								II. Do you think your family or friends will show their support to you if you are awarded with certificates or award ceremony is available?	1. Yes 2.No
								III. Do you think the promotion of lifelong learning among older persons from the government is enough?	1. Yes 2.No
(m) Don't have required facilities							1. Yes 2. No	I. What kind of facilities do you need? _____	
								II. More computers to access the internet at the public libraries? III You can use the computers in nearby schools during public holidays	1. Yes 2.No 1. Yes 2.No

Please Move to Part 4

11. The most popular learning barriers have been listed below. Please indicate your level of agreement towards each barrier and answer whether particular measures can eliminate your learning barriers

Barrier	Level of Agreement					<i>If you “agree” r strongly agree with the barriers, please continue to answer this part.</i>	
	Very Disagree	Disagree	Agree	Strongly Agree	Not Applicable	Particular measures aimed at solving the barriers are listed below	Can the measures help eliminate barriers for you?
	1	2	3	4	0		
(a) Low Literacy level						I. Government provide free basic literacy course II. No entry requirements III.No test/ examination IV. No time restriction to finish the course V. You can decide the curriculum with the course instructor.	1.Yes 2.No 1.Yes 2.No 1.Yes 2.No 1.Yes 2.No 1.Yes 2.No
(b) Too old to learn						Do you know about the following research findings?	
						(1)Older persons who have learnt in the later life are healthier and have a lower chance to suffer from Parkinson’s disease	1.Yes 2.No
						(2) Older persons who have learnt in the later life communicate better with others	1.Yes 2.No 1.Yes 2.No
(c) Not interested in courses provided						(3) Older persons who have learnt in the later life are happier than others	
						II If you don’t know about these findings before, will you be more interested to learn after knowing about them? III. If you already knew about these findings but did not learn, what is the reason? _____	1.Yes 2.No
(c) Not interested in courses provided						I. What type of courses are you interested in? _____	
						II Are you interested in taking part in formal learning, like Yijin Project, foundation diploma or bachelor degree programme	1.Yes 2.No

						III If the courses are related to later life, like physical fitness or medicine	1.Yes 2.No
(g) Cannot obtain information on courses						I. Government set up a central data bank of courses for older persons	1.Yes 2.No
						II Information on courses for older persons are mailed to you regularly	1.Yes 2.No
						III Trial lessons are provided	1.Yes 2.No
(h) Quota is limited and have to wait for long time						I.What do you think is the reasonable duration of the wait? _____ month(s)	
						II Cooperation among various organisations. You can be transferred to those providing the same course if quota is full	1.Yes 2.No
(g) Course fee is too expensive						I What is a reasonable fee for a course lasting for 3 months and consisting of 10 lessons? HK\$_____	
						II. Government provide travel subsidy	1.Yes 2.No
						III Government provide grant for course fee.	1.Yes 2.No
						IV What percentage of the course fee should the government grant be? _____ %	
(n) Physically not healthy						I. More courses are provided on the internet, you can learn any time at home	1.Yes 2.No
						II. No time restriction to finish the courses, you can divide the courses into certain phases according to your own situation.	1.Yes 2.No
(o) Time is not suitable						I. More courses are provided on the internet and through broadcasting, you can learn anytime at home.	1.Yes 2.No
						II. No time restriction to finish the courses, you can divide the courses into certain phases	1.Yes 2.No
						III. What is the best time for you to take courses? _____	
(p) Can't catch up with the courses						I. No time restriction to finish the courses, you can divide the courses into certain phases.	1.Yes 2.No
						II. You can decide the curriculum and teaching pace with the course instructor.	1.Yes 2.No

(q) Location is not good						I. Various organisations cooperating with each other. You can choose to take courses at the centre which is best for you, no matter which organization it belongs to. II More courses are provided on the internet and through broadcasting, you can learn anytime at home. III. What is the most favorable venue for you? _____	1.Yes 2.No 1.Yes 2.No
(r) Discouragement or objection from family or friends						I. What are their reasons for not supporting? _____ _____ II. Do you think your family or friends will show their support to you if you are awarded with certificates or award ceremony is available? III. Do you think the promotion of lifelong learning among older persons from the government is enough?	1.Yes 2.No 1.Yes 2.No
(s) Don't have required facilities						I. What kind of facilities do you need? _____ _____ II. More computers to access the internet at the public libraries? III You can use the computers in nearby schools during public holidays	1.Yes 2.No 1.Yes 2.No

Part Four : Some recommendations to improve the existing formal and informal older persons lifelong learning programmes are listed below. Please indicate whether you support the statements.

A Formal Learning Programme

(12) Organization

(a) Existing formal learning opportunities for the older person include the university programme provided by Lingnan University and SAGE, and also courses for adults provided by other tertiary institutes. Do you think the number is enough?	1. Yes
2. No
3. Neutral
(b) Do you think there should be more tertiary institutes, like the Institute of Vocational Education and the Vocational Training Council, to provide courses for older persons?	1. Yes
2. No
3. Neutral

(13) Courses

(c) Currently, formal learning opportunities include Project Yijin, Foundation Diploma and Associate Degree programmes. Do you think there should be more types of formal programmes, like HKCEE, HKALE etc.?	1. Yes
2. No
3. Neutral
(b) Do you think more category of courses should be provided?
For example, courses other than Applied Gerontology Associate Degree.	1. Yes
2. No
3. Neutral

(14) Location

(a) Do you think older persons' willingness to participate in formal learning will increase if they learn on the University campus?	1. Yes
2. No
3. Neutral
(b) Do you think older person's willingness to participate in formal learning will increase if they learn at the elderly centers or community centres?	1. Yes
2. No
3. Neutral
(c) Do you think older persons' willingness to participate in formal learning will increase if they are provided with more field trips besides regular lessons?	1. Yes
2. No
3. Neutral

(15) Fee

(a) Formal courses cost thousands to tens of thousands of dollars,. do you think it is affordable.	1. Yes
2. No
3. Neutral
(b) Do you think older persons' willingness to participate in formal learning will increase if they are provided with grants from the Government?	1. Yes
2. No
3. Neutral

(16)Duration

(a) Project Yijin and Foundation diploma requires students to take 600 hours of lessons, and AD takes 900 hours, do you think numbers of hours is appropriate?	1. Yes
2. No
3. No Neutral
(b) Do you think the willingness to participate in formal learning will increase if elder learners are allowed to divide the course into different phases?	1. Yes
2. No
3. Neutral
(c) Do you think the willingness to participate in formal learning will increase if elder learners are allowed to accumulate credits so that they can complete course according to their own situation?	1. Yes
2. No
3. Neutral

(17) Teaching Style

(a) Do you think older persons' willingness to participate in formal learning will increase if elements such as service learning and practicum are integrated into formal elder learning programmes?	1. Yes
2. No
3. Neutral
(b) Do you think older persons' willingness to participate in formal learning will increase if courses are provided on the internet or through radio broadcasting?	1. Yes
2. No
3. Neutral

(18)Teachers

(a) Do you think it is most appropriate to have university academic staff as course instructors?	1. Yes
2. No
3. Neutral
(b) Do you think it is most appropriate to have experienced teachers or elderly service workers as course instructors?	1. Yes
2. No
3. Neutral

(19) Entry Requirement

(a) Most of the formal learning courses require students to fulfill certain education level requirements, is it easy for you to fulfill such requirement?	1. Yes
2. No
3. Neutral
(b) Do you think using face to face interviews as one of the screening process can help older persons getting into formal learning programmes?	1. Yes
2. No
3. Neutral
(c) Do you think free basic literacy course can help older persons getting into formal learning programmes?	1. Yes
2. No
3. Neutral

B. Informal Learning Programme

(20) Organization

(a) Most of the informal courses are provided by elderly centres and other elderly service providers. Do you think the number is enough?	1. Yes
2. No
3. Neutral
(b) (For those having learning experience) Do you think you have enough choices of organizations which providing informal courses?	1. Yes
2. No
3. Neutral
(c) Do you think the willingness of the older persons to participate in informal learning will increase if tertiary institute involve in informal courses provision?	1. Yes
2. No
3. Neutral

(21) Courses

(a) Do you think there are enough types of informal courses?	1. Yes
2. No
3. Neutral
(b) Do you think older persons' willingness to participate in informal learning will increase if courses related to later life, like medicine and financial planning, are provided?	1. Yes
2. No
3. Neutral

(22) Location

(a) Do you think older persons' willingness to participate in informal learning will increase if older persons can learn at the nearest center, regardless of which organisation it belongs to?	1. Yes
2.. No
3. Neutral
(b) Do you think older persons' willingness to participate in informal learning will increase if they take informal courses at tertiary institutes?	1. Yes
2. No
3. Neutral
(c) Do you think older persons' willingness to participate in informal learning will increase if more field trips are provided besides regular lessons?	1. Yes
2. No
3. Neutral

23 Fee

(a) Informal courses cost tens to hundreds of dollars. Do you think it is affordable?	1. Yes
2. No
3. Neutral
(b) Do you think older persons' willingness to participate in informal learning will increase if they are provided with grants from the government?	1. Yes
2. No
3. Neutral
(c) Do you think older persons' willingness to participate in informal learning will increase if they are provided with traveling allowance?	1. Yes
2. No
3. Neutral

(d) Do you think older persons' willingness to participate in informal learning will increase if older persons are provided with scholarship?

- 1. Yes
- 2. No
- 3. Neutral

24Duration

(a) Informal courses usually last for 2 – 6 months, do you think the duration is appropriate?

- 1. Yes
- 2. No
- 3. Neutral

(b) Do you think older persons' willingness to participate in informal learning will increase if they are allowed to divide the courses into certain phases so that they can complete courses according to their own situation?

- 1. Yes
- 2. No
- 3. Neutral

(25)Teaching Style

(a) Do you think older persons' willingness to participate in informal learning will increase if elements such as service learning and practicum are integrated into the curriculum of informal courses?

- 1. Yes
- 2. No
- 3. Neutral

(b) Do you think older persons' willingness to participate in informal learning will increase if informal courses are provided on the internet or through broadcasting?

- 1. Yes
- 2. No
- 3. Neutral

(26)Teachers

(a) Do you think it is most appropriate to have experienced teachers or elderly service workers as course instructors?

- 1. Yes
- 2. No
- 3. Neutral

(b) Do you think it is good to have experienced elderly learners as course instructors?

- 1. Yes
- 2. No
- 3. Neutral

(c) Are you interested in being a course instructor if possible?

- 1. Yes
- 2. No
- 3. Neutral

(C) Others

27

(a) Various organisations release the information of elderly courses separately. Do you think it is easy to get the information you need?

- 1. Yes
- 2. No
- 3. Neutral

(b) Do you think central data bank can help older persons searching information of elderly learning programmes.

- 1. Yes
- 2. No
- 3. Neutral

(c) Do you think it is easier for older persons to attain information of learning programme if newsletter of elderly learning programme is mailed to interested older persons?	1. Yes
2. No
3. Neutral
(d) Do you think it is encouraging if older persons are awarded with certificate whenever they finish a course?	1. Yes
2. No
3. Neutral
(e) Do you think it is encouraging to have a large scale and public graduation ceremony for the elderly graduates every year?	1. Yes
2. No
3. Neutral
(f) Do you think it is encouraging for older persons to have opportunities to share their learning experiences publicly?	1. Yes
2. No
3. Neutral
(g) Do you think survey should be carried out by service-providers regularly in order to assess the needs and preferences of older persons?	1. Yes
2. No
3. Neutral
(h) Do you think the promotion of lifelong learning among older persons from the government is enough?	1. Yes
2. No
3. Neutral

Part Five Background Information

28. Name: _____

29. Sex: 1. Male 2 Female

30. Age : 1. 55-59 2. 60-65 3. 66-70 4. 70 or above

31. Are you retired? 1. Yes 2. No 3. Semi-Retired 4. Not Applicable

32. Highest Education Level obtained:

1. Never receive any education	2. Private Tutoring	3. Primary School
4. Secondary School	5. Tertiary Institute/ University	

33. Marital Status: 1. Single 2. Married 3. Divorced 4. Widowed

34. Housing Status:

1. with spouse	2. with sons	3. with relatives
4. with spouse and sons	5. alone	
6. others (please specify: _____)		

35. Generally Speaking, do you think you are living happily?

1	2	3	4	5	6	7
<i>very unhappy</i>	<i>unhappy</i>	<i>quite unhappy</i>	<i>neutral</i>	<i>quite happy</i>	<i>happy</i>	<i>very happy</i>

36. Generally speaking, are you satisfied with your life?

1	2	3	4	5	6	7
<i>very unsatisfied</i>	<i>unsatisfied</i>	<i>quite unsatisfied</i>	<i>neutral</i>	<i>quite satisfied</i>	<i>satisfied</i>	<i>very satisfied</i>

37. How do you rate your willingness to learn? (0-10) _____

39. Do you think learning can increase your quality of life? (0-10) _____

Appendix 2 Questionnaires of “Lifelong Learning for Older persons in Hong Kong” (Chinese Version)

「香港長者終身學習模式」 問卷調查

您好! 我是嶺南大學碩士研究生，現正進行一項有關長者終身學習的研究。是次研究是希望藉著了解長者的學習動機和阻礙，並調查各項幫助長者參與終身學習的建議的可行性，從而建構一套適用於香港長者的終身學習模式。你所提供的資料只會作學術上的研究用途，並會絕對保密。非常感謝你抽出寶貴的時間完成這份問卷。

請在適當的地方上加上「√」號

第一部份：學習經驗

1. 你於過去 6 個月有沒有參加或報讀任何學習課程?

1. 有 ☐ (請跳至第三題) 2. 沒有 ☐ (請回答第二題)

2. 你有否曾經想過要參加長者課程(即使最後都沒有參加)?

1. 有 ☐ (請跳至第二部份) 2. 沒有 ☐ (請跳至第三部份)

3. 你於過去六個月內曾參加過甚麼課程? (可選多項)

a. 非正規課程

- 1 語文:例如中文，英文、簡體字等 ☐
- 2.資訊科技: 例如電腦操作、程式應用等 ☐
- 3 老年健康: 例如老化過程、體健運動、食療、太極等 ☐
- 4 日常應用:銀行服務、交通安全、法律常識，家居安全等 ☐
- 5 技能培訓課程: 例如義工訓練、制服團體、護老者技巧 ☐
- 6.消閒興趣課程:例如唱歌、繪畫、園藝 ☐
- 7 社會文化課程: 例如詩詞賞、本地社會文化、時事等 ☐
- 8 人際關係:例如家庭生活教育、人際關係 ☐

b. 正規課程

- 1 毅進課程 ☐ 2 基礎文憑課程 ☐ 3 副學士課程 ☐

4. 你從甚麼途徑學習以上課程?(可選多項)

1. 長者中心 ☐ 2. 函授 ☐ 3. 港台空中學院 ☐
4. 專上學院 ☐ 5. 其他 ☐ : (請註明:

_____)

5. 總括而言，你是否滿意該些課程？

1. 是 ☐

2. 否 ☐ (如不滿意，請註明有哪些地方需要改善:_____)

6. 你從甚麼途徑得知長者課程的資料? (可選多項)

1. 中心 ☐ 2. 家人/朋友 ☐ 3. 報章雜誌 ☐
4. 宣傳海報 ☐ 5. 電視 ☐ 6. 其他 ☐: (請註明:

_____)

7. 你選擇及報讀課程以甚麼為優先考慮條件? (可選多項)

1. 課程實用性 ☐ 2. 興趣 ☐ 3. 地點方便 ☐ 4. 時間方便 ☐
5. 舉辦機構 ☐ 6. 課程收費 ☐ 7. 課程難度 ☐
8. 其他 ☐ (請註明: _____)

8. 你報讀的課程是由哪些機構舉辦?

1. 長者中心 ☐ 2. 專上學院/大學 ☐ 3. 其他社區組織 ☐
4. 康文署或其他政府部門 ☐
5. 其他: ☐ (請註明: _____)

第二部份:只供於第一題或第二題回答”是”的長者作答

9.有很多原因令長者學習或報讀課程，以下列出一些常見原因。請根據你過往一年的學習經驗，表達對以下各學習動機的同意程度，並回答該動機是否會影響你日後是否繼續參與任何學習活動的意欲。

動機	同意程度					如果你曾經有參與長者課程的經驗及回答‘同意’或‘非常同意’，請繼續回答此部份				
	非常不同意	不同意	同意	非常同意	不適用	你參加後能否達到你原來的目的？		如果不能夠，是因為甚麼原因呢？	如果不能夠，會否影響到你日後參加其他長者課程的意欲呢？	
	1	2	3	4	0	1.能夠	2.不能夠		1.會	2.不會
(a) 想充份利用空閒時間										
(b) 對提供的課程有興趣										
(c) 應付日常生活需要										
(d) 追隨社會步伐、與社會一同進步，不想落伍										
(e) 補償年青時缺乏學習機會										
(f) 證明自己能夠做得到										
(g) 喜歡學習新事物/知識										

(h) 擴闊生活圈子、結交新朋友										
(i) 改善自己如家人、朋友等的關係										
(j) 使自己保持腦筋靈活										
(k) 家人鼓勵						你於參加課程期間，有否繼續得到家人的鼓勵？ 1.有 ☐ 2.沒有 ☐	如果有，會否令你 更積極 參加長者課程呢？ 1.會 ☐ 2.不會 ☐			
							如果 沒有 ，會否令你 停止 參加長者課程呢？ 1.會 ☐ 2.不會 ☐			
(l) 受朋友影響						如果你的朋友 繼續 參加長者課程，會否也令你 繼續 參加長者課程呢？ 1.會 ☐ 2.不會 ☐ 3.不適用 ☐				
						如果你的朋友 停止 參加長者課程，會否也令你 停止 參加長者課程呢？ 1.會 ☐ 2.不會 ☐ 3.不適用 ☐				

請續答第十題

10.有很多原因令長者不報讀或放棄報讀課程、參與學習，以下列出一些常見的原因。請根據你過往一年的經驗，表達你對各學習障礙的同意程度。就減低個別學習障礙所提出的建議，請回答是否能夠減低你的學習障礙。

障礙	同意程度					如果你曾經有學習經驗及同意或非常同意該項是你的學習阻礙，請繼續回答此部份		
	非常不同意	不同意	同意	非常同意	不適用	有否影響日後你參加其他課程的意欲？	以下是就減低個別學習障礙所提出的建議	建議對你而言是否能夠減低你的學習障礙？
	1	2	3	4	0			
(a) 知識水平低 (例如語文能力)						1.有 ☐ 2.沒有 ☐	I. 政府或機構提供免費基礎語文課程 II. 課程不設任何入學限制 III. 課程沒有測驗/考試 IV. 不設時限去完成課程 V. 你可以與導師共同制定課程內容	1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐
(b) 年紀大，學了都沒有用						1.有 ☐ 2.沒有 ☐	I. 你知道以下的研究發現嗎？ (A) 有研究顯示長者學習能夠使身體更健康，並減低患柏金遜症的機會 (B) 有學習的長者與其他人溝通的能力較好 (C) 有學習的長者較沒有學習的長者生活得更開心	1.知道 ☐ 2.不知道 ☐ 1.知道 ☐ 2.不知道 ☐ 1.知道 ☐ 2.不知道 ☐
(c) 沒有想學的課程						1.有 ☐ 2.沒有 ☐	I. 你想要參加哪一類的課程？ II. 你是否希望參與一些正規課程，例如毅進；基礎文憑；副學士或學位課程？ III. 如果課程是與退休或晚年生活有關，例如：健體，保健和藥物知識	1.是 ☐ 2.否 ☐ 1.能夠 ☐ 2.不能夠 ☐

(d) 未能得到想學的課程的資料，例如不知哪些機構有提供；不清楚課程內容						1.有 ☐ 2.沒有 ☐	I. 政府成立長者課程的資料庫 II 定期將長者課程資料寄給你 III 提供試讀的服務	1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐
(e) 名額有限，輪候需時						1.有 ☐ 2.沒有 ☐	I. 那麼你認為輪候少個月才算合理呢？_____月 II 不同舉辦機構間有聯繫。如果名額已滿，你可以被轉到其他有提供相同課程的機構報讀該課程。	1.能夠 ☐ 2.不能夠 ☐
(f) 課程收費過高						1.有 ☐ 2.沒有 ☐	I 那麼你認為以一個為期三個月，共有十堂的課程收費應該是多少呢 HK\$_____ II. 政府提供車船津貼 III 政府提供學費的資助 IV 如果政府提供學費資助，那你認為金額應為課程收費的百分之幾呢？_____ %	1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐
(g) 身體健康狀況不佳						1.有 ☐ 2.沒有 ☐	I. 有更多的網上課程提供，你能隨時隨地於家裡學習。 II. 課程沒有時限，你可以因應自己的身體狀況，分期完成課程。	1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐
(h) 課程時間不適合						1.有 ☐ 2.沒有 ☐	I. 有更多的網上或電台課程提供，你能隨時隨地於家裡學習。 II. 課程沒有時限，你可以分期完成課程。 III. 那你認為課程應安排在甚麼時間？_____	1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐
(i) 未能追上學習進度						1.有 ☐ 2.沒有 ☐	I. 課程沒有時限，你可以分期完成課程 II. 你可以與導師共同制定課程內容及進度	1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐
(j) 上課地點不方便						1.有 ☐ 2.沒有 ☐	I. 不同舉辦機構間有聯繫，你可以選擇於就近的中心上課，不論該中心是否屬於同一機構。 II 有更多的網上或電台課程提供，你可以於家裡學習 III 那你認為地點應在那裡呢？_____	1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐

(k) 家人或朋友不鼓勵或反對							1.有 ☐ 2.沒有 ☐	I. 他們不鼓勵或反對的原因是甚麼呢? _____		
								II. 你認為舉辦機構於你完成課程後頒發獎狀，或設有頒獎禮，是否有助你的家人或朋友去支持你參加課程呢？		1.是 ☐ 2.否 ☐
								III.你認為政府鼓勵長者終生學習的宣傳是否足夠呢？		1.足夠 ☐ 2.不足夠 ☐
(l) 沒有需要的配套設施							1.有 ☐ 2.沒有 ☐	I. 你需要哪一類的配套設施呢?_____		
								II. 公共圖書館有更多上網的設備		1.能夠 ☐ 2.不能夠 ☐
								III 你可以於學校假期使用就近學校的電腦設施		1.能夠 ☐ 2.不能夠 ☐

請續答第四部份作答

第三部份:只供於第二題回答”沒有”的學習長者作答

11.有很多原因令長者不報讀或放棄報讀課程、參與學習，以下列出一些常見的原因。請根據你過往一年的經驗，表達你對各學習障礙的同意程度。就減低個別學習障礙所提出的建議，請回答是否能夠減低你的學習障礙。

障礙	同意程度					以下是就減低個別學習障礙所提出的建議 如果你”同意”或”非常同意”該項是你的學習阻礙，請繼續回答此部份	建議對你而言是否能夠減低你的學習障礙?
	非常不同意	不同意	同意	非常同意	不適用		
	1	2	3	4	0		
(a) 知識水平低 (例如語文能力)						I. 政府提供免費基礎語文課程 II. 課程不設任何入學限制 III. 課程沒有測驗/考試 IV. 不設時限去完成課程 V. 你可以與導師共同制定課程內容	1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐
(b)年紀大，學了都沒有用						I 你知道以下的研究發現嗎？ (A) 有研究顯示長者學習能夠使身體更健康，並減低患帕金森症的機會 (B) 有學習的長者與其他人溝通的能力較好 (C) 有學習的長者較沒有學習的長者生活得更開心 II. 如果你是不知道的，那麼你知道後會否驅使到你去學習呢？ III. 如果你是知道的，但最後都沒有參加，會是因為甚麼原因呢？_____	1.知道 ☐ 2.不知道 ☐ 1.知道 ☐ 2.不知道 ☐ 1.知道 ☐ 2.不知道 ☐ 1.會 ☐ 2.不會 ☐
(c) 沒有想學的課程						I 你想要參加哪一類的課程？_____	
						II 你是否希望參與一些正規課程，例如毅進；基礎文憑；副學士或學位課程？	1.是 ☐ 2. 否 ☐

						III 如果課程與退休或晚年生活有關，例如：健體，保健和藥物知識	1.能夠 ☐ 2.不能夠 ☐
(d) 未能得到想學的課程的資料，例如：不知哪些機構有提供；不清楚課程內容						I. 政府成立長者課程的資料庫 II. 定期將長者課程資料寄給你 III 提供試讀的服務	1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐ 1.能夠 ☐ 2.不能夠 ☐
(e) 名額有限，輪候需時						I 那麼你認為輪候多少個月才算合理呢？_____月 II 不同舉辦機構間有聯繫。如果名額已滿，你可以被轉到其他有提供相同課程的機構報讀該課程。	1.能夠 ☐ 2.不能夠 ☐
(f) 課程收費過高						I 那麼你認為以一個為期三個月，共有十堂的課程收費應該是多少呢？HK\$_____	
						II 政府提供車船津貼	1.能夠 ☐ 2.不能夠 ☐
						III 政府提供學費的資助	1.能夠 ☐ 2.不能夠 ☐
						VI 如果政府提供學費資助，你認為金額應是課程收費的百分之幾呢？_____ %	
(g) 身體健康狀況不佳						I. 有更多的網上課程提供，你能隨時隨地於家裡學習。	1.能夠 ☐ 2.不能夠 ☐
						II. 課程沒有時限，你可以因應自己的身體狀況，分期完成課程。	1.能夠 ☐ 2.不能夠 ☐
(h) 課程時間不適合						I. 有更多的網上或電台課程提供，你能隨時隨地於家裡學習。	1.能夠 ☐ 2.不能夠 ☐
						II. 課程沒有時限，你可以分期完成課程。	1.能夠 ☐ 2.不能夠 ☐
						III. 那你認為課程應安排在甚麼時間？_____	
(i) 未能追上學習進度						I. 課程沒有時限，你可以分期完成課程	1.能夠 ☐ 2.不能夠 ☐
						II. 你可以與導師共同制定課程內容及進度	1.能夠 ☐ 2.不能夠 ☐
(j) 上課地點不方便						I. 不同舉辦機構間有聯繫，你可以選擇於就近的中心上課，不論該中心是否屬於同一機構。	1.能夠 ☐ 2.不能夠 ☐
						II 有更多的網上或電台課程提供，你可以於家裡學習	1.能夠 ☐ 2.不能夠 ☐
						III 那你認為地點應在那裡呢？_____	
						I. 他們不鼓勵或反對的原因是甚麼呢？_____	

(k) 家人或朋友不鼓勵或反對					I. 他們不鼓勵或反對的原因是甚麼呢？_____	
					II. 你認為舉辦機構於你完成課程後頒發獎狀，或設有頒獎禮，是否有助你的家人或朋友去支持你參加課程呢？	1.是 ☐ 2.否 ☐
					III.你認為政府鼓勵長者終生學習的宣傳是否足夠呢？	1.足夠 ☐ 2.不足夠 ☐
(l)沒有需要的配套設施					I. 你需要哪一類的配套設施呢?_____	
					II. 公共圖書館有更多上網的設備	1.能夠 ☐ 2.不能夠 ☐
					III 你可以於學校假期使用就近學校的電腦設施	1.能夠 ☐ 2.不能夠 ☐

請繼續回答第四部份

第四部份:

以下是就正規長者課程及非正規長者課程所提出的問題或具體建議，請回答你對問題的意見或你是否贊同該具體建議。

A. 正規長者課程

(12)組織

- (a) 現時的正規長者課程計有由嶺南大學及耆康會合辦的“圓我大學夢”計劃及其他大專院校的成人課程，你認為數目是否足夠呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (b) 你認為是否應該有更多的大專院校，如專業教育學院及職業訓練局等，提供正規的長者課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐

(13)課程

- (a) 現時的正規長者課程計有毅進課程；基礎文憑課程及副學士課程。你認為是否應該有更多的類型，如中學會考課程、中學高考課程和學位課程等，以供選擇呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (b) 現時的正規長者課程範疇只有老年應用學，你認為是否應該增加其他範疇的課程？
- 1.是 ☐
2.否 ☐
3.中立 ☐

(14)上課地點

- (a) 你認為將正規長者課程的上課地點設在大學校園，是否能夠吸引長者參加正規長者課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (b) 你認為將正規長者課程的上課地點設在社區中心或長者中心等地方，是否能夠吸引長者參與正規長者課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (c) 你認為正規長者課程除有正規課堂以外，能夠有更多實地考察旅行等活動，是否能夠吸引長者參加正規長者課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐

(15)學費

- (a) 正規長者課程由數千完至數萬元不等，你是否能夠負擔呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (b) 你認為如果政府提供學費資助，是否有助長者參加正規課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (c) 你認為設立車船津貼是否有助長者參加正規課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐

(d) 你認為機構提供獎學金是否有助長者參加正規課程呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

(16)時期

(a) 現時毅進及基礎文憑課程要求學員完成 600 小時課堂，副學士學生則需要完成 900 小時課堂，你認為時期是否適中呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

(b) 你認為容許長者分期完成課程，是否能夠吸引長者參加正規課程呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

(c) 你認為容許長者累積學分，因應自己的情況去完成課程，是否能夠吸引長者參加正規課程呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

(17)上課模式

(a) 現時上課模式多數是課室授課為主，你認為加入義務工作和實習等完素，是能夠吸引長者參加正規課程呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

(b) 除課堂授課以外，你認為增加可隨時隨地透過互聯網或電台廣播學習的完素，是否能夠吸引長者參加正規課程呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

(18)師資

(a) 你認為正規長者課程的講師是否要由大學教職員擔任才是理想呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

(b) 你認為講師由資深的老師或長者服務工作者擔任是否理想呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

(19)入學條件

(a) 現時正規長者課程大多要求學員有一定的學歷，你認為自己是否容易符合這個要求呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

(b) 你認為正規長者課程的入學條件中加入面試的完素，是否能夠幫助長者參加正規課程呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

(c) 你認為在正規課程以外提供額外的基礎課程，如中文班、英文班或電腦班給學員，是否能夠幫助長者參加正規課程呢？

- 1.是 ☐
2.否 ☐
3.中立 ☐

B. 非正規長者課程

(20)組織

- (a) 現時的非正規長者課程多由長者中心及長者服務機構，如耆康會，鄰舍輔導會等舉辦，你認為數目是否足夠？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (b) (只供曾經有學習經驗者) 你想要參加非正規長者課程時，可供選擇的機構數目是否足夠？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (c) 你認為大專院校參與提供非正規長者，是否能夠吸引長者參與學習呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐

(21)課程

- (a) 你認為現時的非正規長者課程的類型是否足夠？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (b) 你認為增加一些與晚年生活有關的課程，如藥物知識，理財，保健知識等，是否能夠吸引長者參加非正規課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐

(22)上課地點

- (a) 你認為能夠在最近的中心(無論是否屬於所報讀的機構)上課，是否能夠吸引長者參加非正規課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (b) 你認為將非正規長者課程的上課正點設在大專院校，是否能夠吸引長者參加非正規課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (c) 你認為在課堂以外，能夠有更多實地考察旅行等不同型式的課堂，是否能夠吸引長者參加非正規課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐

23 學費

- (a) 非正規課程由數十元至數百元不等，對你而言是否容易負擔呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (b) 你認為如果政府提供學費資助，是否有助長者參加非正規課程呢？
- 1.是 ☐
2.否 ☐
3.中立 ☐
- (c) 你認為機構提供更多的免費課程，是否有助長者參加非正
- 1.是 ☐

規課程呢？	2 否 ☐
	3.中立 ☐
(d) 你認為設立車船津貼是否有助長者參加非正規課程呢？	1.是 ☐
	2.否 ☐
	3.中立 ☐
<u>24 時期</u>	
(a) 非正規課程大多持續 2 個月至半年不等，你認為時期是否適中呢？	1.是 ☐
	2.否 ☐
	3.中立 ☐
(b) 你認為容許長者分期完成課程，是否能夠吸引長者參加非正規課程呢？	1.是 ☐
	2.否 ☐
	3.中立 ☐
<u>(25) 上課模式</u>	
(a) 現時非正規長者課程的上課模式多數是課室授課為主，你認為加入義務工作和實習等完素，是否能夠吸引長者參加非正規課程呢？	1.是 ☐
	2.否 ☐
	3.中立 ☐
(b) 除課堂授課以外，你認為增加一些可隨時隨地透過互聯網或電台廣播學習的完素，是否能夠吸引長者參加非正規課程呢？	1.是 ☐
	2.否 ☐
	3.中立 ☐
<u>(26) 師資</u>	
(a) 你認為非正規長者課程的講師由資深的老師或長者服務工作者擔任，是否理想呢？	1.是 ☐
	2.否 ☐
	3.中立 ☐
(b) 你認為非正規長者課程的講師由有學習經驗的長者擔任是否理想呢？	1.是 ☐
	2.否 ☐
	3.中立 ☐
(c) 你是否有興趣參加課程以成為合資格的長者導師呢？	1.是 ☐
	2.否 ☐
	3.中立 ☐
(C) 其他	
27	
(a) 現時各機構自行發放長者課程的資料，你認為是否容易獲得想要的資訊呢？	1.是 ☐
	2.否 ☐
	3.中立 ☐
(b) 你認為成立一個中央資料庫，是否有助長者搜尋長者課程資料呢？	1.是 ☐
	2.否 ☐
	3.中立 ☐

(c) 你認為定期郵寄長者課程的資訊給有興趣學習的長者，是否有助長者獲得長者課程資訊呢？	1.是 ☐
2.否 ☐
3.中立 ☐
(d) 你認為機構於每位長者完成一個課程之後，都頒發獎狀或證書，是否能夠鼓勵長者參加課程呢？	1.是 ☐
2.否 ☐
3.中立 ☐
(e) 你認為每年都有一個大型及公開的結業禮以表揚長者學生，是否能夠鼓勵長者參加課程呢？	1.是 ☐
2.否 ☐
3.中立 ☐
(f) 你認為讓長者有機會於公開場合分享學習經驗，是否能夠鼓勵他們參加長者課程呢？	1.是 ☐
2.否 ☐
3.中立 ☐
(g) 你認為提供長者課程的機構，是否需要定期進行"學習需要及喜好"的調查以了解長者所需呢？	1.是 ☐
2.否 ☐
3.中立 ☐
(h) 你認為政府提倡長者終身學習的宣傳足夠嗎？	1.是 ☐
2.否 ☐
3.中立 ☐

第五部份:背景資料

29. 姓名: _____

30. 性別: 1.男 ☐ 2.女 ☐

31. 年齡: 1.55-59 歲 ☐ 2. 60-65 歲 ☐ 3. 66-70 歲 ☐ 4.70 歲以上 ☐

32. 你是否已經退休？ 1.是☐ 2.否 ☐ 3.半退休☐ 4.不適用☐

33 已獲取的最高學歷:

- 1.從未接受教育 ☐ 2.私塾 ☐ 3.小學 ☐ 4.中學 ☐
5.大專/大學或以上 ☐

34. 婚姻狀況: 1. 未婚 ☐ 2.已婚 ☐ 3.離婚 ☐ 4.鰥寡 ☐

35. 居住情況: 1. 與配偶同住 ☐ 2.與子女同住 ☐ 3.與親友同住 ☐
4. 與配偶及子女同住 ☐ 5.獨居 ☐ 6.其他 (請註明:_____)

36 整體來說，你覺得你現在活得快樂嗎？

1	2	3	4	5	6	7
很不快樂	不快樂	頗不快樂	一般	頗快樂	快樂	很快樂

37 整體來說，你滿意你現在的生活嗎？

1	2	3	4	5	6	7
很不滿意	不滿意	頗不滿意	一般	頗滿意	滿意	很滿意

38 你認為自己一般的學習意欲是 _____分 (0-10 分)

39 你認為學習能提升你的生活質素嗎？ _____分 (0-10 分)

問卷完

長者活動中心／長者綜合活動中心會員學習需要及喜好調查

(讀)我地之前曾透過中心寄給佢哋一份同意書你簽，我依家想收回，唔知你有冇帶呢？
 (如有，取回並在適當位置填上訪問員姓名、取回的日期及時間)
 (如沒有，給被訪者一份空白同意書填寫)

訪問員姓名：_____ 日期：_____

到訪中心名稱：_____

今天此中心第_____位被訪者 開始訪問時間：_____

第一部份：閱讀課程經驗

(讀)我地今日所問嘅課程係要報名，要上超過一堂，有唔學，唔理乜嘢地方或者機構舉辦嘅嘅。

1. 由去年九月到現在的那一段時間，你有沒有上過任何課程？(不論是不是這間老人中心所舉辦)

1. 有 2. 沒有 → (跳問題 6)

99. 拒答 (訪問員不讀出) → (跳問題 6)

2. 所讀課程資料：(照實填)

a. 是甚麼課程？	b. 由哪個機構舉辦？	c. 完成課程後有沒有正式學歷？如有：請註明
1.		
2.		
3.		
4.		
5.		

(訪問員請根據問題 2 的答案填上適當代碼)

a.	b.	c.
1.		
2.		
3.		
4.		
5.		
6.		

3. 在要上堂的日子，你通常每星期有多少日上堂？_____堂 (99=拒答)

4. 在要上堂的日子，你通常每星期要上多少小時堂？_____小時 (99=拒答)

5. 總括而言，你滿不滿意那些課程？(訪問員讀出 1-5 各項)

1. 非常滿意 2. 滿意
 3. 一般 4. 不滿意
 5. 非常不滿意 99. 拒答 (訪問員不讀出)

如「一般」、「不滿意」或「非常不滿意」，追問：

5a. 你覺得那些課程在哪一方面最需要改善？(照實填) _____ (99=拒答)

6. 你會不會在未來的一年內報讀任何課程？(不論是不是這間老人中心所舉辦)

1. 會 2. 或許會
 3. 不會 99. 拒答 (訪問員不讀出)

如問題 6 答案是「不會」或「拒答」，
 跳至 第三部份：學習障礙 - 問題 8

否則，請繼續下一題

第二部份：學習動機

7. 有很多原因令長者想報讀一些課程，我將讀出一些常見的原因，請問你在最近兩年有沒有因為這些原因而認真想過報讀一些課程？〔訪問員讀出 a-k 各項〕

	學習動機	有	沒有	〔訪問員不用讀出〕 被訪者不明白	〔訪問員不用讀出〕 拒答
a.	應付日常生活需要或所遇到的問題	1	2	98	99
b.	與社會一齊進步，不想落伍	1	2	98	99
c.	喜歡學習新事物和知識	1	2	98	99
d.	找一些精神上的寄託	1	2	98	99
e.	怕悶，要打發時間	1	2	98	99
f.	為幫助他人或服務社會作準備	1	2	98	99
g.	改善自己與他人（如家人、親友）的關係	1	2	98	99
h.	證明自己能夠做得到	1	2	98	99
i.	擴展生活圈，結交新朋友	1	2	98	99
j.	增進自己對社會的了解	1	2	98	99
k.	其他：	1	2	98	99

如問題 6 答案是「會」，

跳至 第四部份：學習喜好 — 問題 9

否則，請續問下一題

第三部份：學習障礙

8. 有很多原因令長者不報讀或不經常報讀課程，我將讀出一些常見的原因，請問你在有沒有因為這些原因而放棄報讀課程？〔訪問員讀出 a-m 各項〕

	學習障礙	有	沒有	〔訪問員不用讀出〕 被訪者不明白	〔訪問員不用讀出〕 拒答
a.	不喜歡學習	1	2	98	99
b.	沒有想學或要學的東西	1	2	98	99
c.	健康有問題、身體有殘缺或沒有精力	1	2	98	99
d.	不是讀書材料，學不來	1	2	98	99
e.	太老了，學不來	1	2	98	99
f.	要工作或做家務，沒有時間	1	2	98	99
g.	有其他消閒活動，沒有時間	1	2	98	99
h.	不知道有甚麼課程或不知道如何取得課程資料（如上課時間、地點、內容、報讀程序等）	1	2	98	99
i.	上課時間或地點通常不很方便	1	2	98	99
j.	想學的東西現時的沒有課程教	1	2	98	99
k.	家人或親友不鼓勵或反對	1	2	98	99
l.	沒有錢交學費及其他有關的雜費	1	2	98	99
m.	其他：	1	2	98	99

如問題 6 的答案是「不會」及問題 8a 或 8b 或 8c 或 8d 或 8e 其中一題的答案是「有」，

跳至 第五部份：個人資料 — 問題 17

否則，請續問下一題

第四部份：學習喜好

[如問題 6 答案是「不會」或「拒答」才讀出此句]

假設你所憂慮有關報讀課程的障礙都可以克服，．．．．．

9. 你最有興趣報讀關於甚麼的課程？

1. _____ [照實填] _____ [代碼] [99=拒答]
2. _____ [照實填] _____ [代碼] [99=拒答]
3. _____ [照實填] _____ [代碼] [99=拒答]
4. _____ [照實填] _____ [代碼] [99=拒答]
5. _____ [照實填] _____ [代碼] [99=拒答]

10. 你有沒有興趣報讀一些職業技能訓練課程？

1. 有 2. 沒有
99. 拒答 [訪問員不讀出]

如「有」，追問：

10a. 你最想報讀甚麼科目？[照實填]
_____ [99=拒答]

11. 你有沒有興趣報讀一些完成後可得正式學歷或資格的課程？

1. 有 2. 沒有
99. 拒答 [訪問員不讀出]

如「有」，追問：

11a. 你最想報讀甚麼科目？[照實填]
_____ [99=拒答]

11b. 你最終想得到甚麼的學歷或資格？[照實填]

_____ [99=拒答]

12. 就你喜歡報讀的科目而言，下列哪一種學習方法會較適合你自己？(可選多項) [訪問員讀出 1-8 各項]

1. 課堂授課及練習 2. 小組學習討論
3. 個別教授 4. 實地考察實驗
5. 透過書本或雜誌自學 6. 透過電視或電台節目自學
7. 透過電腦互聯網自學 8. 其他 _____
99. 拒答 [訪問員不讀出]

13. 你喜歡所報讀的課程是只限長者的，或是不限年齡的？

1. 只限長者 2. 不限年齡
3. 沒所謂 99. 拒答 [訪問員不讀出]

14. 你喜歡在下列哪些日子和時段上課？(可選多項) [訪問員讀出 1-10 各項]

1. 平日早上 2. 平日下午
3. 平日晚上 4. 週末早上
5. 週末下午 6. 週末晚上
7. 週日早上 8. 週日下午
9. 週日晚上 10. 沒所謂
99. 拒答 [訪問員不讀出]

15. 如下列機構有提供你有興趣的課程，你會不會考慮報讀？[訪問員讀出 a-h 各項]

	提供課程機構	不會	或者會	會	[訪問員不用讀出] 拒答
a.	長者活動中心／長者綜合服務中心	1	2	3	99
b.	社區中心	1	2	3	99
c.	康文署或其他政府部門	1	2	3	99
d.	專上學院／大學	1	2	3	99
e.	專上學院／大學校外進修部	1	2	3	99
f.	其他社區組織	1	2	3	99
g.	其他(牟利／非牟利)教育機構	1	2	3	99
h.	其他：	1	2	3	99

16. 如果你想報讀一個你有興趣的課程，以一個八個小時的課程為例，你最多願意繳交多少學費及雜費？[訪問員讀出 1-6 各項]

1. 400元以上 2. 301-400元
3. 201-300元 4. 101-200元
5. 51-100元 6. 50元或以下
99. 拒答 [訪問員不讀出]

17. 性別？〔不用問，憑觀察〕

17. 性別？〔不用問，憑觀察〕

1. 男 2. 女

18. 你今年幾多歲（以身份証為準）？〔訪問員不用讀出下列各項〕

1. 55-59
 2. 60-64
 3. 65-69
 4. 70-74
 5. 75-79
 6. 80或以上
99. 拒答

19. 你最高教育程度是甚麼？（訪問員不用讀出下列各項）

1. 沒有接受教育
3. 私塾
5. 中學／預科
7. 大專或以上
98. 不知
2. 幼稚園
4. 小學
6. 專科／學徒
8. 其他 _____
99. 拒答

20. 你現時的工作狀況是怎樣？〔訪問員讀出 1-6 各項〕

1. 全職工作 2. 部份時間工作
3. 失業 4. 家庭主婦
5. 退休 6. 其他 _____
99. 拒答〔訪問員不讀出〕

21. 你現時或退休前職業是甚麼？〔訪問員讀出1-9各項〕

1. 經理及行政級人員	2. 專業人員及輔助專業人員
3. 文員	4. 服務工作及商店銷售人員
5. 工藝及有關人員	6. 機台及機器操作員及裝配員
7. 非技術工人	8. 家庭主婦
9. 其他	99. 拒答〔訪問員不讀出〕

22. 你現在住在甚麼類型的屋？（訪問員讀出 1-6 各項）

1. 臨時房屋 2. 公屋—房委會／房協租住房屋
3. 居屋—房委會／房協補助出售單位 4. 私人永久性房屋—租住
5. 私人永久性房屋—自置 6. 其他 _____
99. 拒答〔訪問員不讀出〕

23. 請問你最主要與誰同住？（訪問員讀出 1 - 8 各項）

1. 獨居
 2. 與配偶一個人同住
 3. 與家人（包括未成年孩童）同住
 4. 與家人（全部成年）同住
 5. 與親戚（包括未成年孩童）同住
 6. 與親戚（全部成年）同住
 7. 與朋友同住
 8. 其他 _____
99. 拒答 [訪問員不讀出]

24. 你是否正在領取綜援金／公援？〔訪問員不用讀出下列各項〕

1. 是 2. 不是
99. 拒答

25. 你有沒有殘疾／長期病患？〔訪問員不用讀出下列各項〕

1. 有 2. 沒有
99. 拒答

26. 由去年九月到現在，你覺得你通常的健康狀況是怎樣？〔訪問員讀出 1-5 各項〕

1. 非常差 2. 差
3. 一般 4. 好
5. 非常好 99. 拒答〔訪問員不讀出〕

27. 你預計今年大約會有多少時間在內地或外地居住？〔訪問員不用讀出下列各項〕

1. 沒有或一個月或以下
2. 超過一個月至三個月
3. 超過三個月至半年
4. 超過半年
99. 拒答

28. 你是多少間長者活動中心／長者綜合服務中心的會員？
 _____ 間 [99 = 拒答]

29. 不計今次，由去年九月至現在，你平均有多經常到長者活動中心／長者綜合服務中心（包括所有你是會員的中心）？〔訪問員讀出1-7各項〕

1. 沒有
2. 兩個月或以上才去一次
3. 一個月去一或兩次
4. 一個月去三或四次
5. 一星期去一或兩次
6. 一星期去三或四次
7. 差不多天天去
99. 拒答〔訪問員不讀出〕

我已經問完所有的問題，非常多謝你的合作，再會。 結束訪問時間：_____

嶺南大學
亞太老年學研究中心

社會福利署
Social Welfare Department

「屯門區長者學習需要研究」

問卷調查

本問卷是由社會福利署屯門安老服務地區協調委員會和嶺南大學亞太老年學研究中心合作進行，希望透過是次調查，了解屯門區長者過去的學習狀況，學習目的及動機，學習存在的困難及障礙，以及對未來學習的期望和原因。

我們誠意邀請你協助填寫以下的問卷，其中所收集的資料只會作為調查分析之用，資料絕對保密，多謝你的合作。

訪 問 員 姓 名 : _____
問 卷 編 號 : _____
訪 問 日 期 : _____
訪 問 開 始 時 間 : _____
訪 問 結 束 時 間 : _____
訪 問 地 點 : _____
覆 查 員 : _____ 成功／不成功

請圈出適當的答案

第一部份：學習經驗

1. 你於過去六個月有沒有參加或報讀學習課程？

1. 有 (請繼續回答) 2. 沒有 (請轉答第三、四、五部份)

2a. 你於過去六個月內曾參加過什麼課程？(可選多項)

1. 手工藝 2. 音樂 3. 電腦 4. 語文
5. 烹飪 6. 太極 7. 急救，護理 8. 保健知識
9. 其他:(請註明) _____

2b. 你從什麼途徑學習以上課程？(可選多項)

1. 長者中心 2. 函授 3. 港台空中學院
4. 其他:(請註明): _____

2c. 你通常每星期用多少小時學習以上課程？ _____ 小時

2d. 此等課程屬於

1. 自學 2. 老師教授
3. 其他:(請註明): _____

2e. 你如何得知有此課程舉辦？(可選多項)

1. 中心 2. 家人/朋友 3. 報章雜誌
4. 宣傳海報 5. 其他:(請註明): _____

3. 你選擇及報讀課程以什麼為優先考慮條件？(可選多項)

1. 課程實用性 2. 興趣 3. 地點方便
4. 舉辦機構 5. 課程收費 6. 其他:(請註明) _____

4. 你報讀的課程是由那些機構舉辦? (可選多項)

1. 長者中心 2. 大學/專上學院 3. 其他社區組織
4. 康文署或其他政府部門 5. 其他:(請註明) _____

第二部份: 學習動機

5. 有很多原因令長者參與學習、報讀課程，以下列出一些常見的原因。

請問你在最近一年有沒有因為以下原因而報讀一些課程，請根據你過往一年的學習經驗，表達你對以下各學習動機的同意程度。

	非常不同意	不同意	同意	非常同意	不適用
a. 充分利用空閒時間	1	2	3	4	0
b. 爲了興趣	1	2	3	4	0
c. 應付日常生活需要	1	2	3	4	0
d. 可追隨社會步伐，與社會一齊進步	1	2	3	4	0
e. 補償年青時缺乏學習的機會	1	2	3	4	0
f. 證明自己能夠做得到	1	2	3	4	0
g. 喜歡學習新事物和知識	1	2	3	4	0
h. 家人鼓勵	1	2	3	4	0
i. 受朋友影響	1	2	3	4	0
j. 擴闊生活圈子，結交新朋友	1	2	3	4	0

第三部份: 學習障礙

6. 有很多原因令長者不報讀或放棄報讀課程、參與學習，以下列出一些常見的原因。請問你在最近一年有沒有因為以下原因而不報讀或放棄報讀一些課程，請根據你過往一年的學習經驗，表達你對以下各學習障礙的同意程度。

	非常不同意	不同意	同意	非常同意	不適用
a. 知識水平低 (例如語文能力)	1	2	3	4	0
b. 年紀大，學了都沒有用	1	2	3	4	0
c. 沒有想學的課程	1	2	3	4	0
d. 名額有限，輪候需時	1	2	3	4	0
e. 課程收費過高	1	2	3	4	0
(如選擇同意或非常同意，請回答以下 i) 問題)					
i) 那你認為爲期三個月十堂的課程應收費多少 \$ _____					
f. 身體健康狀況不佳 (如視力/行動不便的問題)	1	2	3	4	0
g. 課程時間不適合	1	2	3	4	0
(如選擇同意或非常同意，請回答以下 i) 問題)					
i) 那你認為應安排在什麼時間 _____					
h. 未能追上學習進度	1	2	3	4	0
i. 上課地點不方便	1	2	3	4	0

j. 家人或親友不鼓勵或反對 1 2 3 4 0

第四部份：學習期望

7. 長者對參與學習，報讀課程各有不同的須要及期望，以下是一些常見的學習期望。請按你自己的喜好，表達你對以下各學習期望的同意程度。

	非常不同意	不同意	同意	非常同意	不適用
a. 學以致用，再次工作	1	2	3	4	0
b. 學有所成，拿取證書	1	2	3	4	0
c. 提高自我成就感(如獲得表揚)	1	2	3	4	0
d. 能入讀院校課程	1	2	3	4	0
e. 能有更多學科選擇	1	2	3	4	0
f. 多學便好，旨在消閒	1	2	3	4	0
g. 能學亦能教，互相交流分享知識	1	2	3	4	0
h. 以學習交友	1	2	3	4	0
i. 多學知識，改善生活	1	2	3	4	0
j. 希望提供學費資助或經濟援助	1	2	3	4	0

8. 你最有興趣報讀什麼課程？

9. 你希望各機構可多舉辦什麼課程 (可選多項)

1. 手工藝	2. 音樂	3. 電腦	4. 書法
5. 健體運動	6. 語文	7. 繪畫	8. 編織
9. 烹飪	10. 義工訓練	11. 法律常識	12. 中藥認識
13. 保健知識	14. 投資理財	15. 人際溝通	16. 文、史、哲
17. 其他:(請註明) _____			

10. 就你喜歡報讀的課程而言，下列哪一種學習形式會較適合你自己？(可選多項)

1. 課堂授課及練習	2. 小組學習討論	3. 個別教授
4. 實地考察實驗	5. 透過書本或雜誌自學	6. 透過電腦互聯網自學
7. 從服務中學習	8. 和家人一起學習	

9. 其他:(請註明) _____

11. 整體來說，你是否活得快樂？

1	2	3	4	5	6	7
很不快樂	不快樂	頗不快樂	一般	頗快樂	快樂	很快樂

12. 整體來說，你是否滿意你的生活？

1	2	3	4	5	6	7
很不滿意	不滿意	頗不滿意	一般	頗滿意	滿意	很滿意

13. 你認為自己一般的學習意欲是 _____ 分 (1-10分)

14. 你認為學習能提升你的生活質素嗎？ _____ 分(1-10分)

第五部份：背景資料

15. 姓名： _____

16. 性別： 1. 男 2. 女

17. 年齡： _____

18. 學 歷： 1. 從未接受教育 2. 私塾 3. 小學
 4. 中學 5. 大專/大學或以上

19. 婚姻狀況： 1. 未婚 2. 已婚 3. 離婚
 4. 鰥寡

20. 居住情況： 1. 與配偶同住 2. 與子女同住 3. 與配偶及子女同住
 4. 與親友同住 5. 獨居 6. 其他：(請註明)

若日後有需要再次徵詢你的意見，會否願意再接受訪問：

1. 不願意

2. 願意 電話 _____

地址 _____

訪問完畢，謝謝

— 全卷完 —

Appendix 5 Summary of Formal and Nonformal Learning Programmes in Hong Kong

Formal Learning Opportunities

Organization		Course Type	Duration	Pre-requisites	Studying Mode	Qualification or Award	Location	Course fee	Financial Subsidy
The Hong Kong Society for the Aged (SAGE) & Lingnan University		1. Project Yi Jin 2. Foundation Diploma 3. Associate Degree	1. 600 hrs (5 Phases) 2. 900 hrs (3 Years)	Age above 50 Basic Literacy Level with Interview	Full- Time	1. Certificate 2. Diploma 3. Associate Degree	Lingnan University and Teaching Centre	1. HK\$30,000 2. HK\$84,000	Yes / partial subsidy/ limited in quota

Nonformal Learning Opportunities

Organization		Course Type	Duration	Pre-requisite	Studying Mode	Qualification or Award	Location	Course fee	Financial Subsidy
SAGE		Training Older People to be Instructor	6 months	Age above 50 With skills and willing to be course	Part-time, 10 lesson with 2 times of Practicum	Certificate of attendance	SAGE centres located at H.K. Island, Kowloon and New territories	Free	NIL

			instructor						
Radio- Television Hong Kong (RTHK-R5)		Series of Programme ranged from academic course such as Chinese to interest courses such as Chinese Opera	3 months per term	None	Part-time, broadcasting through radio at particular time slot	None	Remote Learning	Free	NIL
Hong Kong Sheng Kung Hui Welfare Council		3 Programmes 1. Arts 2. Physical and aesthetic education 3. Social Sciences	3 months per term	Age above 55	Part-time Varies from centre to centre, normally 1 hrs per week	Certificate: 50 credits Medium Level certificate : 150 credits High Level Certificate: 250 credits Honorable Certificate: 500 credits	30 centres located on H.K. Island, Kowloon and New territories	Depends , varies from \$20 to \$100	NO
Hong Kong Christian Service		Various courses ranging from Language, social	2 months per course	Age over 50	Part-time, normally 1.5 hrs per week	Certificate	2 centres located at Tsim Sha Tsui	Varies but less than	NO

		science and health and computer literacy					and Kwun Tong	HK\$200	
Hong Kong young Women's Christian Association (YWCA)		Online Learning , Progamme ranging from Social Science, Arts, Physical and aesthetic education and Applied Science	Flexible	Age over 50	Part-time, Course material available on internet	Certificate if particular number of credits are obtained	Remote Learning	Tens to Hundreds of dollar	NO
Hong Kong young Women's Christian Association (YWCA)		Progamme ranging from Social Science, Arts, Physical and aesthetic education and Applied Science	Not restricted	Age over 50	Part-time, Depends on self-interest	Certificate: 40 credits Diploma: 40 credits Higher Diploma : 160 credits Degree: 200 credits	6 centres under the governance of YWCA	Hundred s of dollars	NO

		Training Older People to be Instructor		Age above 50	Part-time, 6 lessons with 2hrs each	Certificate			
Neighborhood Advice Action Council (NAAC)		Various programmes ranging from Arts, Physical and aesthetic education, Social Service and Social Science, Information technology and Physical health	Not restricted	Age over 55	Part-time	Certificate : 50 credits High Level certificate: 80 credits Diploma: 140 credits Higher Diploma: 140 credits Degree: 200 credits	15 centres under the governance of NAAC	Depends , varies from Tens to Hundred s of dollars	Depends, may provide subsidy to those receiving CSSA

Bibliography

- Abeles, R.P., Gift, H.C. & Ory, M.G. (1994). Aging and quality of life. New York: Springer Pub. Co.
- Adieshiah, M.S. (1973). Lifelong education. In R.H. Dave & N.Stierling (Eds). Lifelong learning and the school. Hamburg: UNESCO Institutes for Education.
- Agern, M. (1998). Life at 85 and 92: a qualitative longitudinal study of how the oldest old experience and adjust to the increasing uncertainty of existence. *International Journal of Aging and Human Development*. Vol.47, pp.105-117
- Asia-Pacific Institute of Aging Studies. (2003) 「Yuanwo Daxue Meng」 Changzhe Chixu Jinxiu Jihua. Retrieved February 25, 2003 from the World Wide Web:
<http://www.ln.edu.hk/apias/>
- Aspin, D., & Chapman, J. (2001). Toward a philosophy of lifelong learning. In D. Aspin, J. Chapman, M.Hatton and Y.Sawano (Eds), *International Handbook of lifelong learning. Part 1*. London : Kluwer Academic Publishers.
- Battersby, D.& Blendenning, F. (1990). Educational gerontology and education for older adults: a statement of first principles. *Australian Journal of Adult and Community Education*, 30(1), 38-44.
- Babbie, E.R. (1998). The practice of social research. Belmont: Wadsworth Publishing Company.
- Balon, R.. (1999). Successful aging. The American Journal of Psychiatry Washington: May
- Bass, S.A.,Caro, F.G. & Chen, Y.P. (1993). Achieving a Productive Aging Society. Westport:Auburn House
- Berdes, C., Dawson, G.D.,& Zych, A.A.. (1992). Geragogic: European Research in Gerontological Education and Educational Gerontology. New York: The Haworth Press.

- Bird, E., (1999). Lifelines and life lines: retraining for women returning to higher level occupations—policy and practice in the UK. *International Journal of Lifelong Education*, 18(5), 203-216
- Bostrom, A.K. (2003). Lifelong Learning, Intergenerational Learning, and Social Capital. Retrieved March 15, 2004 from the Stockholm University, Stockholm, Institute of International Education Web site:
<http://www.interped.su.se/publications/bostromNO.61.pdf>
- Bray, M. (1981). Policies and progress towards universal primary education. *The Journal of Modern African Studies*, 19(4), pp.547-563
- Brockett, R.G. (1985). Relationship between self-directed learning readiness and life satisfaction among older adults. *Adult Education Quarterly*, 35 (4), pp.210-219.
- Brockett, R.G. & Hiemstra, R. (1991). "Self-Direction in adult-learning: Perspectives on theory, research, and practice. New York : Routledge
- Census and Statistics Department: <http://www.info.gov.hk/censtatd/home.html>
- Chan, A.C.M. et al. (in press). Constructing a Quality of Life Scale for Older Chinese People in Hong Kong (HKQOLOCP).
- Chan, A.C.M & Ma, H.K.C. (2004). A discussion paper for the visit to Universities of the Third Age (U3A) in Brisbane & Melbourne, Australia 29th November to 5th December 2003.
- Chiu, S. & Chiu, M. (2002). A research into the effectiveness of educational programmes for elderly people. Hong Kong : Hong Kong Society for the Aged
- Clough, B.C. 1992. Broadening Perspectives on learning activity in later life. *Educational Gerontology*, Vol.18, pp447-459.
- Coleman, J.S. (1971). Resources for social change. New York: John Wiley & Sons.
- Coleman, J.S. (1988). Social Capital in the creation of human capital. *American Journal of Sociology*, Vol.94, pp.95-120.
- Coombs, P.A., & Ahmed, M. (1974). Attacking rural poverty: How non-formal education can help. Baltimore: John Hopkins University Press.

- Cribbin, J., & Kennedy, P. (Eds.). (2002). *Lifelong Learning in Action*. Hong Kong: Hong Kong University Press.
- Cropley, A.J. (1976). Some psychological reflections on lifelong learning. In R.H. Dave (Ed.), *Foundations of lifelong education*. Oxford: Pergamon Press.
- Cropley, A.J. (1980). *Towards a system of lifelong education*. Oxford: Pergamon Press.
- Cross, W., & Florio, C. (1978). Adult education: key to longer life?. *Kiwanis Magazine, March*, pp28-45.
- Cross, K.P. (1981). *Adults as learners : increasing participation and facilitating learning*. San Francisco: Jossey-Bass
- Cusack, S.A.. (1995). Developing a lifelong learning program: Empowering seniors as leaders in lifelong learning. *Educational Gerontology, 21*(4), 305-320
- Dave, R.H. (Eds.) (1976). *Foundations of lifelong education*. Oxford: Pergamon Press.
- Drentea, P., & Ross, C.E. (1998). Consequences of retirement activities for distress and the sense of personal control. *Journal of health and Social Behavior, 39*(4), 317-334 Retrieved September 10, 2004, from JSTOR Database
- Dench, S., & Regan, J. (2000, February). *Learning in Later Life: Motivation and Impact*. Retrieved September 4, 2004, from [http:// www.dfes.gov.uk/research/data/uploadfiles/ACF31AF.doc](http://www.dfes.gov.uk/research/data/uploadfiles/ACF31AF.doc)
- Department for Education and Skills, British Government. (n.d.). *Celebrating Older Learners Seminar Report*. Retrieved September 4, 2004 from <http://www.lifelonglearning.co.uk/cols/report.pdf>
- Dewey, J. (1949). *Democracy and education: an introduction to the philosophy of education*. New York : The Free Press
- Dewey, J. (1956). *Philosophy of education : problems of men*. Ames, Iowa : Littlefield, Adams & Co.
- Desjardins, R. (2003). Determinants of Economics and Social Outcomes from a Life-wide Learning Perspective in Canada. *Education Economics, 11*(1),

- Elderly Commissions,HKSAR Government. (2002). *Elderly Commissions Library*. Retrieved June 23, 2004. from <http://www.elderlycommission.gov.hk/en/library>
- Field, J. & Leicester, M. (Eds). (2000). *Lifelong learning : education across the lifespan*. London : RoutledgeFalmer
- Fisher, G.A.,Schuessler, K.F. (1985). *Quality of Life Research and Sociology. Annual Review of Sociology, Vol.II*, 129-149. Retrieved November 11, 2004 from JSTOR Database.
- Findsen, B. (2005). *Learning Later*. Florida: Krieger Publishing Company
- Gaskell, J. & Rubenson, K. (Eds). (2004). *Educational outcomes for the Canadian workplace : new frameworks for policy and research*. Toronto: University of Toronto Press.
- Gove, W.R. (1994). *Why we do what we do: a biopsychosocial theory of human motivation*. *Social Forces*, 73(2), 363-394. Retrieved September 10 2004 from JSTOR Database.
- Hatton, M.J. (Eds). (1997). *Lifelong learning : policies, practices, and programs*. Toronto : School of Media Studies at Humber College.
- Harris, D. & Cole, W. (1980). *The sociology of aging*. Dallas:Houghton-Mifflin.
- Harrison, R. (Ed.). (2002). *Supporting lifelong learning*. London : RoutledgeFalmer.
- Hawes, H.W.R. (1975). *Lifelong Education, schools and curricula in developing countires*. Hamburg: UNESCO institutes for education.
- Herzog, A.R. & Morgan, J.N. & Kahn, R.L. (1993). *Age Differences in Productive Activities*. In Bass, S.A., Caro, F.G. & Chen, Y.P. *Achieving a Productive Aging Society*. Westport: Auburn House.
- Heyting, F.,Kruithof,B.,Mulder,E. (2002). *Education and Social Integration: On Basic Consensus and the Cohesion of Society*. *Educational Theory*, 52(4), 381-396

- Hiemstra, R. (1975). The older adult and learning. ERC Document reproduction Service, no. ED 117 371
- Hiemstra, R. (1994). Lifelong education and personal growth. In A. Monk (Ed.), *The Columbia retirement handbook*. (pp.525-547). New York : Columbia University Press
- The Hong Kong Council of Social Service (HKCSS). (August 2002). Dierjie 「Liangguo guoji Laonian Dagui」 Yantaogui Jueyao. Retrieved February 27, 2003 from the World Wide Web: <http://www.hkcss.org.hk/el/ReportWAA.htm>
- The Hong Kong Council of Social Service (HKCSS). (2002). Learning needs and preferences of members of multi-service centers for elderly and social centers for elderly. Hong Kong: Author
- Hong Kong Christian Service. (n.d.). *Continue Education for the Elderly*. Retrieved December 2, 2004 <http://www.hkcs.org/edcb/cee/cee.htm>
- Hong Kong Sheng Kung Hui (HKSKH). (2004, November). *Qiyi Jinxu Xueyuan*. Retrieved December 12, 2004 from <http://www.skhw.org.hk/~ice/>
- Hong Kong Special Administration Region Government. (1998). Chief Executive's Policy Address 1998. Retrieved February 27, 2003 from the World Wide Web: <http://www.policyaddress.gov.hk/pa98/english/index.htm>
- Hong Kong Special Administration Region Government. (1997). Chief Executive's Policy Address 1997. Retrieved February 27, 2003 from the World Wide Web: <http://www.policyaddress.gov.hk/pa97/english/paindex.htm>
- The Hong Kong Society for the Aged. (n.d.). 'Yuanwo Daxue Meng' *Changzhe Chixu Jinxu Jihua*. Retrieved November 23, 2004. from http://www.sage.org.hk/tst/content/ctxt_main.html
- Hurlbut, N. (1998). The influence of vicarious experience on self-efficacy and learning of senior adults. *Canadian Home Economics Journal*, 38(4), pp.137-141
- Javis, P. (1985). The sociology of adult & continuing education. London : Helm.

- Javis, P. (2001). *The Age of learning : education and the knowledge society*. London : Kogan Page
- Kaplan, G.A. & Strawbridge, W.J.. (1994). Behavioral and Social Factor in Healthy Aging. In Abeles, R.P., Gift, H.C., & Ory, M.G. *Aging and Quality of Life*. New York: Springer Pub. Co.
- Kelly, P. (1989). Research into older students: a progress report from the older research group. *Research in distance education*, 1(3), pp2-3.
- Kingston, A.J., and M.W. Drotter. (1983). A comparison of elderly college students in two geographically different areas. *Educational Gerontology*, Vol.9, pp.399-403.
- Lui, Y.H., Leung, A., Jegede O.J.. (2002). Research Report on Overseas Experience in Providing Continuing Education for Older Persons. Hong Kong: Hong Kong Open University.
- Lamdin, L. S. (1997). *Elder learning : new frontier in an aging society*. Phoenix, AZ : Oryx Press.
- Lassey, W. R. & Lassey, M.L.. (2001). *Quality of life for older people : an international perspective*. Upper Saddle River, NJ : Prentice Hall
- Lin, N. (2001) *Social capital : a theory of social structure and action*. New York : Cambridge University Press
- Maehi, W.H. (2000). *Lifelong Learning at its best*. San Francisco: Jossey-Bass Publishers.
- Maddox, G.L. (ed). (1995). *The Encyclopedia of Aging*. New York: Springer.
- Maslow, A.H. (1968). *Toward a psychology of being*. New York : Van Nostrand Reinhold
- Marshall, I. (2002). *Peak experiences : walking meditations on literature, nature, and need*. Charlottesville : University of Virginia Press
- Monk A. (Ed). (1994). *The Columbia Retirement Handbook*. New York: Columbia University Press.

- Moody, H.R. (1986). Education as a lifelong process. In A.Pifer and L.Bronte,eds., *Our Aging Society: paradox and promise*. New York: W.W. Norton.
- McDermott , J.J. (Ed). (1973). *The philosophy of John Dewey* . New York : Putnam Sons
- Midwinte, E. C. (1982). *Age is opportunity : education and older people*. London : Centre for Policy on Ageing
- Miller, P.A. (1964). New Missions for Old programs: a university-wide approach to continuing education. *The Journal of Higher Education*, 35(8), 450-458. Retrieved June 8,2004 from JSTOR Database.
- Oliver, P. (Ed). (1999). *Lifelong and continuing education : what is a learning society?*. Aldershot ; Brookfield, Vt. : Ashgate Pub.
- Organisation for Economic Co-operation and Development. (2002). *Lifelong learning in Norway*. Paris: Author
- Organisation for Economic Co-operation and Development. (1996). *Lifelong learning for all: meeting of the education committee at ministerial level*. Paris: OECD
- Pang, H.H. (1999). What to Do After Overcoming the Shortcomings of the Academic Record Society. *Chinese Education & Society*, 32(4). 60-64. Retrieved January 16,2004 from EBSCOhost Database
- Pavlov, I.P. (1927). *Conditioned reflexs*. In Wolpe, J. (1990). *The practice of behavior therapy*. USA: Pergamon Press.
- Peterson, D.A. (1983). *Facilitating education for older learners*. San Francisco: Jossey-Bass.
- Phillips, D.R.& Yeh, G.O. (1999). *Environment and aging: environmental policy, planning and design for elderly people in Hong Kong*. Hong Kong: Centre of Urban Planning and Environmental Management, University of Hong Kong.
- Phillips, D.R.. (2000) *Aging in Asia-Pacific region:issues, policies and future trends*. London:Routledge

- Picton, C., Yuen, C. (1998). Educational interested and motivations of older adult learners: a comparative study between Australia and china. *Ageing International*, Vol. 23, pp.24-45
- Queeney, Q.S. (1995). *Assessing needs in continuing education : an essential tool for quality improvement*. San Francisco : Jossey-Bass
- Radio Television Hong Kong. (n.d.). *Changzhe Kongzhong Jinxiu Xueyuan*. Retrieved November 25, 2004 from <http://www.rthk.org.hk/channel/radio5/>
- Raggatt.P , Edwards, R., & Small. N. (Eds). (1996). *The Learning society : challenges and trends*. London ; New York : Routledge
- Ralston, P.A. (1981). Education needs and activities of older adults: their relationship to senior centre programs. *Educational Gerontology*, Vol.7, pp.231-244.
- Rao, V.K.R.V. (1970). The universality of lifelong education. Inaugural address delivered to the expert's meeting on lifelong education, 18 August 1970. New Delhi: Asian Institues of Educatonal Planning and Administration, pp.3-11
- Ross, C.E., & Willigen, M.V. (1997, September). Education and the Subjective Quality of Life. *Journal of Health and Social Behavio*. 38(3), 275-297. Retrieved September 14, 2004 from JSTOR Database
- Rogers, A. (2003). What's the difference?. *Adults learning*. 15(2), 15-17. Retrieved January 14,2004 from EBSCOhost Database
- Ross, C.E., Wu C.L. (1995). The Links Between Education and Health. *American Sociological Review*. 60(5). Retrieved September 14, 2004 from JSTOR Database
- Rowe, J.W. & Kahn, R.L. (1987). Human Aging: Usual and Successful. *Science*. 237. 143-149
- Schuller, T.; Bynner, J.; Green, A.; Blackwell, L.; Hammond, C.; Preston, J. (2000, March). *Modelling and measuring the wider benefits of learning: An Initial Synthesis*. Retrieved September 4, 2004 from http://www.learningbenefits.net/docs/report1.htm#_ftnref1
- Seed, P. & Lloyd, G. (1997). *Quality of life*. London : Jessica Kingsley Publisher

- Selehon, G, Cox, H. & Rathee, R. (1983). Education and the elderly in America. *Indiana academy of social science proceedings, Vol.18*, pp.429-447
- Shen, S.M., Sodustra, J. (2002). Globalization, Localization and Individualization of Continuing Education In Hong Kong. Hong Kong: HKU, School of Professional and Continuing Education.
- Siegel, H. (2002,) Philosophy of Education and the Deweyan Legacy. *Educational Theory*, 52(3), 273-280. Retrieved January 31, 2004 from EBSCOhost Database
- Smith, J.F. (1999). Lifelong learning : riding the tiger. London : Cassell
- Stetar, J.M. (1974). Community Colleges and the educational needs for older adults. *The Journal of Higher Education*, 45(9), 717-721. Retrieved June 30, 2004 from JSTOR Database
- Weindell, R. (n.d.). Report on some adult education opportunities for older Australins. Queensland: Griffith University.
- Whitbourne, S.K., & Weinstock, C.S. (1979). Adult Development: the differentiation of experience. New York: Holt, Rinehart and Winston.
- Tuijnman, A. & Bostrom, A. (2002). Changing Notions of Lifelong Education and Lifelong Learning. *International Review of Education*. Vol.48, pp.93-110
- Tuijnman, A. & Schuller, A. (Eds). (1999). Lifelong learning policy and research : proceedings of an international symposium. London : Portland Press,
- Uhlenberg, P. (1992). Population aging and social policy. *Annual Reviews Sociology*. Vol. 18, pp449-474
- UNESCO, International Comission on Education for the 21st Century (1996). Learning: The treasure within. Paris: Auhor.
- Walker, J. (Ed). (1996). Changing concepts of retirement : educational implications. England : Arena
- Walker, S.N. (1997). Promoting Healthy aging. In Ferraro, K.F. *Gerontology: Perspectives and Issues*. New York: Springer.

Wang F.S. (1987). Zhongsheng Xiaoxi De Shiyi. Retrieved February 25, 2003 from the World Wide Web:
<http://www.contest.edu.tw/87/endshow/5/wellbeing/articles/paper1.htm>

Woo, J. (1999). Strategies to Promote Successful Aging of Populations. Asia-Pacific regional conference for the international year of older person, April 26-29, 1999, Hong Kong: conference proceedings. Hong Kong Council of Social Service: Social Welfare Dept., Hong Kong.

World Health Organization. (n.d.). WHO Statistical Information System (WHOSIS). Retrieved August 19, 2004, from
<http://www3.who.int/whosis/menu.cfm>

Young Women Christian Association (YWCA). (n.d.). Zhangzhe Tiankong Hudong Jiaoshi. Retrieved December 7, 2004 from
<http://estudy.ywca.org.hk/member/frontindex.aspx>

林寶山譯. (1989). 民主主義與教育. 臺北：五南圖書

車文博. (2001). 人本主義心理學. 台北：臺灣東華書局.

許金聲, 劉鋒等譯. (1987). 自我實現的人. 北京：生活.讀書.新知三聯

香港社會服務聯會. (2002). 安老服務機構提供長者教育現況 問卷調查結果報告. 香港: 作者

嶺南大學亞太老年學研究中心. (2003). 屯門區長者學習需要研究. 香港: 作者