

**THE LIFELONG LEARNING EDUCATION REFORM
IN HONG KONG - a review from the perception of frontline
teachers**

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CERTIFICATE OF AUTHORSHIP

I certify that the work in this thesis has not previously been submitted for a degree nor has it been submitted as part of requirements for a degree except as fully acknowledged within the text.

I also certify that the thesis has been written by me. Any help that I have received in my research work and the preparation of the thesis itself has been acknowledged. In addition, I certify that all information sources and literature used are indicated in the thesis.

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Glossary

ACER	Australia Council for Educational Research
ACTEQ	Advisory Committee in Teacher Education and Qualification
CDC	Curriculum Development Council
CMI	Chinese Medium Instruction
CPD	Continuous Professional Development
EC	Education Commission
ED	Education Department (Education Department was renamed Hong Kong Education and Manpower Bureau in 1997)
EDB	Education Bureau (Hong Kong Education and Manpower Bureau was renamed Education Bureau in 2007)
EMI	English Medium Instruction
ESR	External School Review
HKCEE	Hong Kong Certificate Education Examinations
HKDSE	Hong Kong Diploma of Secondary Education
HKEMB	Hong Kong Education & Manpower Bureau (the government department dealing with education and manpower planning between 1997 and 2006)
HKPTU	Hong Kong Professional Teachers' Union
HKSAR	Hong Kong Special Administrative Region
IVE	Institute of Vocational Education

KLA	Key Learning Area
LPAT	Language Proficiency Attainment Test
MOI	Medium of Instruction
NSS	New Senior Secondary
OECD	Organization for Economic Cooperation Development
QAD	Quality Assurance Division (a section of the HKEMB / EDB under quality assurance for schools)
QAI	Quality Assurance Inspection (the school inspection unit of Quality Assurance Division)
SBA	School Based Assessment
SMI	School Management Initiative
SSPA	Secondary School Places Allocation
<i>Jiao Gai</i>	Education Reform [教改]
<i>Zhong Shen Xue Xi</i>	Lifelong Learning [終身學習]

ABSTRACT

This study focuses on the secondary school teachers' perceptions as they are directly related to the implementation of the New Senior Secondary (NSS) curriculum which signifies the completion of the first reform cycle in the reform proposal (HKEMB 2000). This research employs an 'interpretive' approach to study the frontline teachers' perceptions on the HKEMB Education Reform so as to solicit their understandings, feelings and emotions towards the reform measures. Through the semi-structured interviews conducted, frontline teachers' understandings, feelings, emotions and their comments on the benefits and positive measures as well as the disadvantages and hindering measures of the Education Reform are recorded.

Phenomenology was chosen as the methodology of inquiry because it is believed to be the best the way to generate authentic discourses in the interpretive paradigm for studying feelings and emotions as well as understandings and perceptions. The discourse analyzed reveal the frontline teachers' understandings, feelings and emotions during the implementation of the HKEMB lifelong learning Education Reform, drawing on the Heideggerian concepts of '*Being*' and '*horizons*'.

Research findings of the present study reveal that, due to different orientations and limited understanding of *lifelong learning*, frontline teachers are experiencing uncertainties and stress during the HKEMB lifelong learning Education Reform. I argue that meaning sharing and trust building between the policy makers and the frontline practitioners is the key issue to be addressed. It is important for policy makers to connect frontline teachers' work and life to the implementation of reform measures in the later stages of the Education Reform.

Findings of the research have implications on further studies about the relationship between curriculum innovations and the conceptions of learning, teachers' identity, use of Information Technology and learning to learn.

THE LIFELONG LEARNING EDUCATION REFORM IN HONG KONG - a review from the perception of frontline teachers

CHAPTER ONE: CONTEXT AND ORIENTATION OF THE RESEARCH

Chapter One outlines the context and orientation of the research. It justifies the study and aligns the research focus with the discourse of *lifelong learning*, experience of frontline teachers and progress of the reform.

1.1 Introduction of the Education Reform in Hong Kong

Lifelong learning is the theme of the Hong Kong Education and Manpower Bureau (HKEMB) Education Reform. In 1999, the Curriculum Development Council (CDC) of HKEMB proposed comprehensive lifelong learning curriculum reforms to the school curriculum in the territory.

In the policy document (CDC 1999), a holistic review of the Hong Kong school curriculum is reported and reforms are proposed to change the school curriculum from early childhood education, nine years basic and, post-basic education to tertiary education. Concepts of the proposed curriculum are based on a lifelong learning approach to training learners in acquiring the targeted knowledge, skills and attitudes through Key Learning Areas and other learning experiences in the school systems.

and the admission systems for different stages of education. This is the first full-scale government-initiated education reform in Hong Kong. The policy document (HKEMB 2000) highlights the importance of changing the system, modes, content and pedagogies of the schools for the 21st century.

Our future lies in today's education. The system, modes, content and teaching methods of our education system must keep up with the environment and needs of society in the 21st Century (HKEMB 2000, p. ii)

Lifelong learning and training lifelong learners remain the focus of the education reform. Although the term 'lifelong learning' is not defined in the proposal document (HKEMB 2000), it occurs frequently in the reform policy documents to explain why Hong Kong needs education reform.

Learning is the key to one's future and Education is the gateway to our society's tomorrow...."Students" are the focal point of the entire reform, "life-long learning" and "all-round development" the spirit.... Students, according to their different aptitudes and abilities, will then be able to select their own path of learning, and we can witness the emergence of a society for life-long learning (HKEMB 2000, p. i).

The Reform Proposal (HKEMB 2000) points out that the frontline teachers are an important agent in the success of the HKEMB Education Reform.

Lifelong learning and all-round education are not achievable without the active and enthusiastic engagement of frontline educators (HKEMB 2000, p. ii).

From the beginning, frontline educators' engagement and support has been cited as an important factor in the success of the HKEMB Education Reform.

The *Reform of the Education System in Hong Kong – Summary* (HKEMB 2001a) was released one year after the *Learning for Life Learning through Life Reform Proposals for the Education System in Hong Kong* (HKEMB 2000). This 19-page report explains the ambitious Education Reform to the public in a simple but comprehensive manner. In the report (HKEMB 2001a), globalisation training learners to meet the needs of the globalised economy is mentioned as the purpose of the reform.

The world is undergoing fundamental changes, and Hong Kong is no exception. Globalisation and development of the knowledge based society have brought many opportunities as well as challenges to Hong Kong. In the social environment of the new era, adaptability, creativity, power of analysis, judgment and abilities for self learning, communication, organization and cooperation are prerequisites for one to meet the requirements in life and at the workplace. To cope with these social changes, corresponding reform must be made to the education system to enable students to develop their potentials and to lead a rich life in the new century (HKEMB 2001a, p.1)

Unlike most government policy document, the *Reform of the Education System in Hong Kong – Summary* (HKEMB 2001a) was released in the form of a pamphlet. The main policies are explained in bullet points accompanied by colourful graphics and illustrations. It takes only three pages to summarise the direction, scope and focus of the HKEMB Education Reform. Other proposed changes in the admissions and assessments systems in Hong Kong for the following two decades are summarised in

only 16 pages.

The *Reform Summary* (HKEMB 2001a) presents a clear picture of the HKEMB Education Reform. The language used (in both the Chinese and English version) is very simple. Main issues are highlighted and presented in attractive drawings. It points to the direction of 'building an education system focusing on all-round development and lifelong learning' (HKEMB 2001a p.1).

Page 2 of the *Reform Summary* (HKEMB 2001a) states that the Education Reform will change the curricula, academic structure and assessment mechanisms of the territory. The triangle of curriculum-academic structure-assessment is connected in the implementation of the system reform. With the introduction of the curricular reforms, academic subjects in schools and assessment mechanisms can transform the school culture. However, the triangle of 'curriculum-academic structure-assessment' implies that the momentum of change in the paradigm hinges on the reforms in different tiers of school admission system. HKEMB has a leading role in the Education Reform because the government bureaucracy monitors and regulates the school admission mechanisms from elementary to tertiary education.

The *Reform Summary* (HKEMB 2001a) predicts that with the success of the Education Reform, all students in Hong Kong can benefit from the *Learning for Life Learning through Life Reform Proposal* (HKEMB 2000).

Page 3 of the *Reform Summary - Focuses of the Reform* (HKEMB 2001a) paints a beautiful picture of the success in Education Reform (Figure 2).

The key factors in the success of the Education Reform are described on page 3 of the *Report Summary* (HKEMB 2001a). These elements in the ‘rainbow garden’ are the ‘sun’, the ‘sprinkle’ and the ‘helping hand’. If things go as planned, the ‘beautiful plant’ (i.e. lifelong learners) can grow.

HKEMB is the ‘sun’. It creates resources for the Education Reform to improve teaching and learning. The ‘helping hand’ is the increased learning opportunities for schoolchildren through the reform measures. The key factor in the success of the Education Reform (i.e. water) is the ‘sprinkle’ – the frontline teachers. In other words, frontline teachers are expected to be very well prepared for and enthusiastic about the HKEMB Education Reform. If not, water cannot reach the plant and the ‘flower’ of training lifelong learners for Hong Kong cannot blossom.

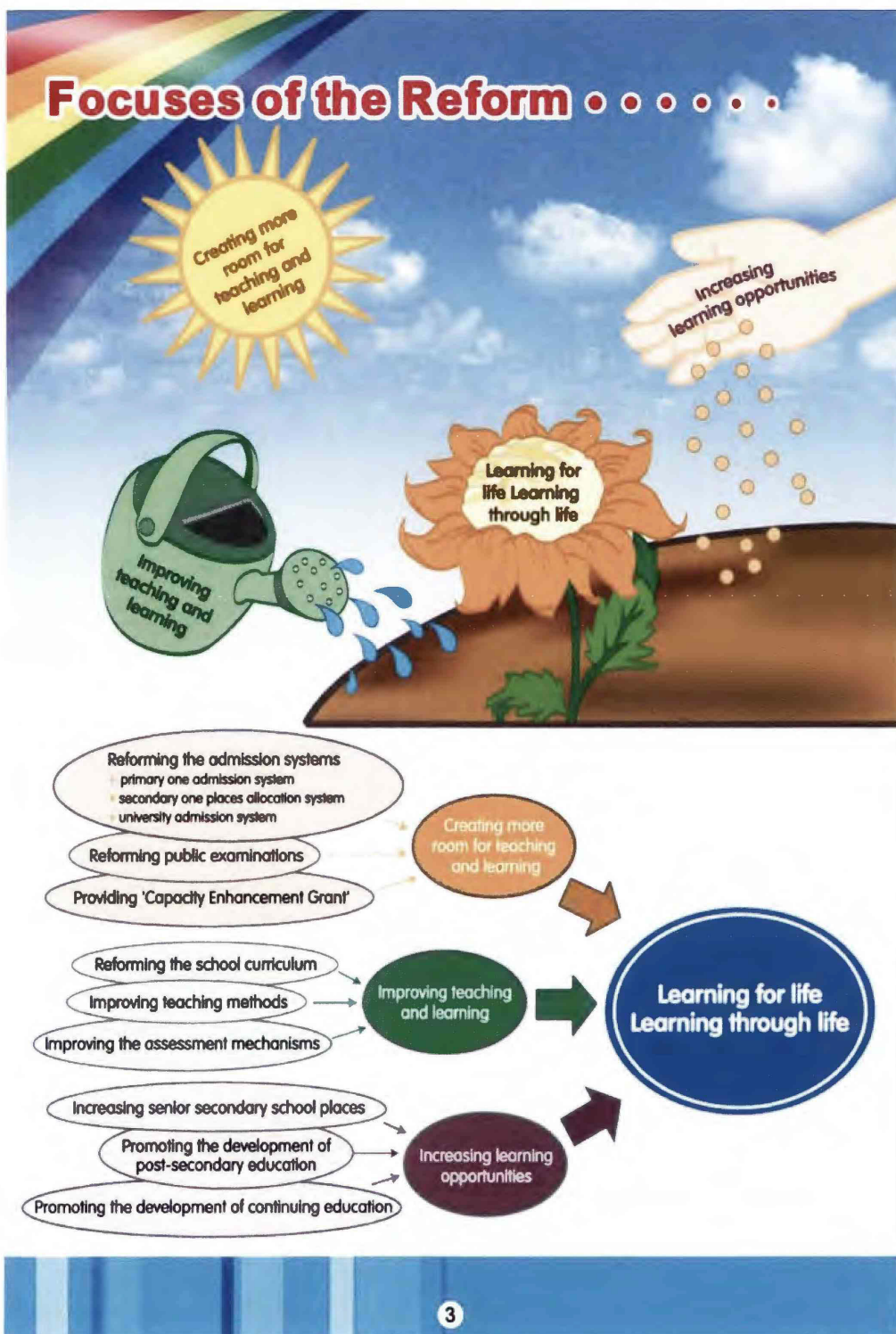


Figure 2. *Focuses of HKEMB Education Reform*

(HKEMB 2001a, *Reform of the Education System in Hong Kong – Summary*, Hong Kong: Government Printer, p.3.)

According to HKEMB (HKEMB 2000), implementation of the reform measures was scheduled for 2001. The first phase of the Education Reform would be completed when measures affecting the structure of the senior secondary school system were implemented and the public examination system bridging the secondary schools and university entrance had been completed. Although the *Reform Summary* (HKEMB 2001a) does not set a deadline for the completion of the reform measures, it is estimated that the first phase of the Education Reform will be completed in about ten years. This timeframe shall lead to the change from early childhood education, nine year basic education, senior secondary education, higher education to continuing education. Such a thorough change has never taken place in the history of Hong Kong education.

1.2 Why do this study?

The purpose of doing this study is to let the stakeholders of the Education Reform (government, policy makers, school leaders, frontline teachers, parents and students) in Hong Kong understand more about frontline teachers' perception of the reform implementation. It is believed that a better understanding how frontline teachers respond to the implementation of the reform measures will enhance the sustainability and effectiveness of the Education Reform in the territory.

During the implementation of the reform, stakeholders presented very different perceptions of the reform progress and on the success and failure of the reform measures. In the first few years (2001-2003), the relation among the key stakeholders deteriorated (Cheng, Mok & Tsui 2002). Although literature of the HKEMB reveals an optimistic picture (HKEMB 2002a, HKEMB 2003b, HKEMB 2004a), frontline

teachers were resistant to the changes (HKPTU 2003b, HKPTU 2005a, HKPTU 2005b). Although the Education Reform documents (HKEMB 2000, HKEMB 2001a) predict a very promising future of training lifelong learners, parents and employers express worries and frustrations (*South China Morning Post*, 30 June 2004).

The researcher believes that frontline teachers' emotions and perceptions of the HKEMB Education Reform have had a great impact on the effectiveness of the reform implementation. The present study was initiated in 2003 and the fieldwork data were collected in 2006 and 2007. The findings of the research can improve the understanding of the frontline teachers' perceptions of the HKEMB lifelong learning Education Reform during its implementation. It is also hoped that this research can initiate a more professional discussion and research on the lifelong learning Education Reform in Hong Kong.

Before 1997, the Education Commission made recommendations for the improvements of the education system in Hong Kong. The Education Commission had been set up in 1984 as a non-statutory body to advise the Government on the development of education in the light of the community's needs. Between 1984 and 1997, the Education Commission issued seven reports (EC Report 1 1984, EC Report 2 1986, EC Report 3 1988, EC Report 4 1990, EC Report 5 1992, EC Report 6 1996 and EC Report 7 1997) before Hong Kong returned to China's sovereignty.

The title of ECR No.7 (Education Commission 1997) is *Quality School Education*. It argues that Hong Kong's school system needs a quality assurance system. From the late 1990s, a series of reform initiatives was carried out to tighten schools' accountability and monitor their performance. The lifelong learning Education

Reform documents were released by the Education Commission after ECR No.7. Although the lifelong learning Education Reform proposal (HKEMB 2000) has a completely different focus, many of its initiatives are extensions of the quality assurance agenda of ECR No.7 (Education Commission 1997).

Learning for Life Learning through Life Reform Proposals for the Education System in Hong Kong (HKEMB 2000) explains the vision and mission of changing the admission system in Hong Kong schools and building a new education system.

The reform proposal criticizes the hurdles set at various stages of education like Primary One and Secondary One admissions, public examinations as well as university admission. It proposes that admission to Primary One should be based on the principal of vicinity and that the admission test of Secondary One should be abolished.

Most frontline teachers did not realise the drastic change involved in the HKEMB Education Reform until the reform measures were 'enforced' strictly in 2003. When the qualifications and the employability of the frontline teachers were hit by reform measures like Language Proficiency Attainment Test (LPAT) and Continuous Profession Development (CPD), teachers began to voice their grievances and complaints (HKPTU 2003a, HKPTU 2003b, HKPTU 2003c, HKPTU 2003d). Local academics also point out the problems in the implementation of the HKEMB Education Reform (Chong 2006; Clem 2006; Connolly 2006; Lam 2006; Yung 2006).

Frontline teachers' understanding of the lifelong learning Education Reform will affect its pace and effectiveness. However, many of practitioners have very limited understanding of either the orientation or the goal of the lifelong learning Education

Reform (HKPTU 2003b, HKPTU 2003c). HKEMB's Education Reform documents fail to clarify the orientation of training lifelong learners in the OECD context. There is also no explanation on how and why the Chinese term 終身學習 [*Zhong Shen Xue Xi*] is translated into *lifelong learning*. Many frontline teachers are confused about the orientation and vision of the HKEMB lifelong learning Education Reform. They see no connection between the improvements suggested by the Education Commission and the HKEMB (HKPTU 2005a).

If lifelong learning attitude and skills are to be taught in schools, teachers should be the first change agent. This research can contribute to the knowledge of how teachers understand and perceive the HKEMB lifelong learning Education Reform.

The Chinese term 教改 [*Jiao Gai*] which means Education Reform, is used among to include all the changes in the school system after 1997. (In Chinese, the literal meaning of '*jiao*' is 'education' and '*gai*' is 'change'). Although not all the reform measures carried out by HKEMB are intended to train lifelong learners, most frontline teachers link all changes in the school system to '*Jiao Gai*'. From the analysis of the discourse related to Education Reform (Chong 2006; Clem 2006; Connolly 2006; Lam 2006; *South China Morning Post* 2004; *South China Morning Post* 2006; Yung 2006), many frontline teachers are complaining about 'school downsizing', 'retrenchment of redundant teachers' and not about the lifelong learning Education Reform. The concepts of '*Jiao Gai*' and '*Zhong Shen Xue Xi* (lifelong learning) appear to be very confusing in the discussions.

It has now been over seven years since the lifelong learning Education Reform was launched in Hong Kong. The frontline teachers, parents, students, policy makers of

the HKSAR Education Reform (the SAR government) and administrators of the lifelong learning school reforms (the HKEMB) are very concerned about the effectiveness of the reform and the impact of the lifelong learning education reform measures.

HKEMB has issued a series of Progress Reports (HKEMB 2002a, HKEMB 2003b, HKEMB 2004a, HKEMB 2006a) to support its argument that the lifelong learning Education Reform has been carried out and that schools and students have been benefiting. However, reports about the drawbacks of the Education Reform continue to appear in the press (Clem 2006; Connolly 2006; *South China Morning Post* 2004; *South China Morning Post* 2006; Yung 2006) and in the literature of academics and the teachers' union (Cheng 2006a; Cheng 2006b; Choi 2005; HKPTU 2003c; HKPTU 2005a; ; HKPTU 2004; Kennedy 2004; Kennedy & Sweeting 2003; Lam 2006; Lau 2002; Leung & Lee 2006). The issues raised in the discussions include:

- ✧ Is the government's money on Education Reform worth spending?
- ✧ Have Hong Kong's human resources become more competitive since the implementation of the Education Reform?
- ✧ How has the life of frontline teachers been affected by HKEMB lifelong learning Education Reform?
- ✧ Is the Education Reform the cause of stress and burnout among frontline teachers?
- ✧ Is the Education Reform moving in the right direction?

Public discussions revealed that the community had been questioning the cost-effectiveness of the lifelong learning Education Reform.

The debate on the effectiveness of the Education Reform became heated when reports of school downsizing, teachers' retrenchment and teachers' suicide cases appeared in the newspaper between 2003 and 2006. Discussions of '*Jiao Gai*' and '*Zhong Shen Xue Xi* (lifelong learning) demonstrate very different interpretations and perceptions of the HKEMB Education Reform among policy makers, frontline practitioners, parents and employers. It also aroused public concerns about the effectiveness of the Education Reform.

This study placed frontline teachers' perceptions of the HKEMB Education Reform into an interpretative paradigm. Data collected from the frontline teachers' experience will be presented in rich textural discourses. The study presents the HKEMB lifelong learning Education Reform through the frontline teachers' emotions and perceptions.

1.3 Focuses of this Study

1.3.1 Lifelong Learning

The year 1997 was a watershed in the history of Hong Kong. In that year, Hong Kong was turned over to the People's Republic of China. In the following years, Hong Kong has undergone many political and social reforms.

Politically, reunification with China and democratization have changed the ways Hong Kong people think and live. Our social structure is fast evolving and there is an urgent need to alleviate the disparity of wealth. The society is adapting its culture and mindframe to these changes. The rapid development of information technology has opened up new domains in all aspects of our lives and creating new challenges (HKEMB 2000 p.3).

The background to the HKEMB Education Reform (HKEMB 2000) shows the need for the education system to meet changing social, political and economic conditions. The ‘change’ (*gai*) made to ‘education’ (*jiao*) is interpreted as ‘lifelong learning’ (*Zhong Shen Xue Xi*).

In the tide of changes, everyone has to meet new challenges...“Lifelong Learning and All-round Development” is our expectation of everyone in this era. Education is infinitely important for everyone (HKEMB 2000, p.3).

After 1997, Lifelong Learning (*Zhong Shen Xue Xi*) became the centrepiece of Education Reform (*Jiao Gai*).

The new school curriculum is required to train lifelong learners. From 1999, ‘Lifelong Learning’ and *Zhong Shen Xue Xi* [終身學習] (the Chinese translation used in the HKEMB documents for the English term ‘Lifelong Learning’) has been widely used in the HKEMB Education Reform documents. However, HKEMB has failed to define what it means by ‘lifelong learning’ and the Chinese translation used for ‘Lifelong Learning’ (*Zhong Shen Xue Xi*).

In western developed countries, the current version of lifelong learning has an OECD origin and the UNESCO definition (Faure 1972) is widely accepted. Faure (1972) points out that lifelong learning should be realised by ‘providing a framework for all levels and types of education in all parts of the world’. He adds that ‘lifelong education’ should become the master concept for educational policies in the years to

come for both developed and developing countries (p.182).

Candy et al. (1994) explore the ideal education system for training lifelong learners.

According to Candy et al., an ideal system of education should:

- last throughout an individual's lifetime
- lead to the systemic acquisition, renewal, upgrading and completion of knowledge, skills, and attitudes made necessary by the constantly changing conditions in which people now live
- have as its goal the promotion of self-fulfillment
- depend of people's increasing ability and motivation to engage in self-directed learning activities
- acknowledge the contribution of all available formal, nonformal and informal educational influences

(p.xi)

Unlike most of the literature (Bryce 2002; Candy et al. 1994; Chapman & Aspin 2001; Day 2001; Field 2002; Longworth 2000; Longworth & Davis 1996a; Longworth & Davis 1996b; Riley 1993; Wright 1992) the *Learning for Life Learning through Life: Reform Proposal for the Education System in Hong Kong* (HKEMB 2000) does not include any report on the orientation of lifelong learning.

To replace the orientation studies, the OECD "economic" interpretation of lifelong learning was adopted in the summary report of the Education Reform proposal (HKEMB 2000). The reform proposal argues that education reform is the only way for Hong Kong to meet the challenges of the 21st century economy.

The world is undergoing unprecedented changes, and Hong Kong is no exception. We are seeing substantial changes in the economic structure and the knowledge-based economy is here to stay. Hong Kong is also facing tremendous challenges posed by a globalised economy (HKEMB 2000 p.3).

In *Learning for Life Learning through Life: Reform Proposal for the Education System in Hong Kong* (HKEMB 2000), the 'change' to *Zhong Shen Xue Xi* was highlighted as the goal of the HKEMB Education Reform.

The Chinese term '*Zhong Shen Xue Xi*' has a Confucian origin and it can be traced to the Confucian classics *The Analects*. *Zhong Shen Xue Xi* was accepted as a virtue long before 1997. In the Chinese version of *Learning for Life Learning through Life: Reform Proposal for the Education System in Hong Kong* (HKEMB 2000), there is no explanation of the orientation or application of *Zhong Shen Xue Xi*. However, the value of traditional Chinese education is mentioned in the reform proposal.

Education in Hong Kong is endowed with some very fine traditions. Our education system is infused with the essence of eastern and western cultures, preserving the basic elements of traditional Chinese education while absorbing the most advanced concepts, theories and experiences from modern western education (HKEMB 2000, p.4).

The Chinese translation of lifelong learning into *Zhong Shen Xue Xi* may cause confusion about the purpose of the HKEMB Education Reform. This thesis is based on the premise that in order to build a society of lifelong learners, there should be a clearer understanding of lifelong learning and its Chinese translation of *Zhong Shen*

Xue Xi used in the HKEMB Reform documents.

A deeper examination of the meaning of ‘lifelong learning’ as used in the HKEMB Education Reform documents is necessary as *Zhong Shen Xue Xi* is used to direct the design and implementation of the reforms. Without a clear understanding of the vision of the HKEMB Education Reform, policy makers cannot explain it to the Chinese frontline teachers.

1.3.2 Frontline Teachers

The second focus of the study is the frontline teachers. The education reform in Hong Kong is government initiated and implemented through the education bureau. Frontline teachers were excluded from the policy formation. However, they are expected to show ‘active and enthusiastic engagement’ (HKEMB 2000, p. ii) in the reform.

In the early years of the reform, most literature about education reform in Hong Kong was written by academics in the tertiary institutions or government officials. Frontline teachers’ opinions seldom appeared in academic studies. It was not until the HKEMB reform measures reached the classrooms after 2003 that more frontline teachers began to write about them in the trade journals and newspapers.

After 2003, when the reform measures on school admission and teachers’ training began to be enforced, frontline teachers’ worries were expressed in short articles and anecdotes in the Hong Kong Professional Teachers’ Union News (HKPTU 2003a, HKPTU 2003b, HKPTU2003c, HKPTU 2003d, HKPTU 2004, HKPTU 2005a,

HKPTU 2005b, HKPTU 2006, HKPTU 2007a, HKPTU 2007b). In addition, literature pertaining to the discussion of the education reform in Hong Kong can also be found in articles written by teachers in *Education Convergence* (Education Convergence 2006) and *Xiyao Culture and Education* (Xiyao Culture 2006). Frontline teachers' complaints about workload, stress and burnout and even suicide were discussed in the media between 2004 and 2006 (Chong 2006; Clem 2006; Connolly 2006; *Hong Kong Economic Times* 6 December 2004 p.5; Lam 2006; *Sing Tao* 2006 February 8 p.11, February 15 p.9, June 14 p.13, December 21 p.14; *South China Morning Post* 2004; *South China Morning Post* 2006; Yung 2006).

This study investigates teachers' experience with the implementation of the HKEMB lifelong learning Education Reform in Hong Kong. It is believed that frontline teachers' attitudes about the reform will affect its progress and effectiveness. The data gathered on frontline teachers' 'perceived benefits' and 'positive measures' will facilitate the implementation of the lifelong learning reform measures in the later stages of the Education Reform. Data gathered on frontline teachers' 'perceived disadvantages' and 'hindrances' can also help the policy makers to refine and align it with the direction for the reform implementation.

The writer is a secondary school teacher in Hong Kong. The writer hopes to observe the Education Reform from a variety of perspectives. A better understanding of the reform agenda and its implementation will help the writer to bring the knowledge, skills and attitudes of lifelong learning to the classroom. Such experience can also be shared among the frontline teachers in Hong Kong.

The HKEMB Education Reform affects all frontline teachers from kindergarten to

senior secondary schools. This study focuses on secondary school teachers' perceptions of the New Senior Secondary (NSS) curriculum which signifies the completion of the first reform cycle in the reform proposal (HKEMB 2000). The senior secondary sector is also directly connected to the admission of the tertiary institutions. Since the writer is a frontline secondary school teacher, the research may present opportunities for a better recruitment network for research candidates.

The following six questions will investigate frontline teachers' perception of the implementation of the Education Reform in Hong Kong:

1. How do secondary teachers understand the HKEMB lifelong learning Education Reform?
2. How do secondary teachers feel about the implementation of the HKEMB lifelong learning Education Reform measures?
3. What do secondary teachers perceive as the benefits of the HKEMB lifelong learning Education Reform?
4. What do secondary teachers perceive as the disadvantages of the HKEMB lifelong learning Education Reform?
5. What do secondary teachers think helps the implementation of the HKEMB lifelong learning Education Reform?
6. What do secondary teachers think hinders the implementation of the HKEMB lifelong learning Education Reform?

It is necessary to see the implementation of the Education Reform from the perspectives of the frontline teachers. With reference to the reform document (HKEMB 2001a, p.3), even though the sun continues to shine (HKEMB continues to

carry out reform measures) and the seeds being added (learning opportunities), the plants (schoolchildren) cannot grow without water (frontline teachers) to the soil (classrooms). As for the implementation of the reforms, the ‘door’ to lifelong learning cannot be opened without the ‘pillars’ - frontline teachers’ engagement in the curriculum changes of the Key Learning Areas (CDC 1999, Appendix 1).

1.3.3 Progress of the Education Reform

The Education Reform in Hong Kong was launched with the release of the *Learning for Life Learning through Life: Reform Proposal for the Education System in Hong Kong* in 2000. The Hong Kong Education and Manpower Bureau implement the reform and the *Reform of the Education System in Hong Kong – Summary* (HKEMB 2001a) marks the beginning of the implementation of reform measures in Hong Kong school system.

In order to reach the goal of ‘building an education system conducive to lifelong learning and all-round development’ (HKEMB 2000), HKEMB adopted the following measures in 2000:

1. Abolition of *Attainment Tests* in primary schools (2000)
2. Enforcement of *Benchmark Policy* on English and Putonghua and *Language Proficiency Tests* for language teachers of English and Putonghua – LPAT (2000)
3. Release of *School Enhancement Grant* (2000)
4. Implementation of *School-Based Management* – SBM (2000)
5. Implementation of *Project Yi Jing* for continuous learning

6. Promotion of *Through Train schools* – bridging the primary and secondary schools (2000)
7. Implementation of *New Direct Subsidized School Plan* (2001)
8. Release of the *Reform of the Education System in Hong Kong – Summary* (2001)
9. Change in the *Secondary School Place Allocation* (SSPA) from 5 Bands to 3 Bands (2001)
10. Release of the new *Elementary Education Curriculum Guide* (2002)
11. Establishment of the *Performance Indicators* to improve school accountability (2002)
12. Establishment of the policy on *Professional Development for School Principals* (2002)
13. Consultation on policy of *Continuous Professional Development* – CPD for school teachers (2003)
14. Enforcement of the *Language Benchmark Policy* on language teachers (2003)
15. Implementation of the *School Accountability Scheme: School Self Evaluation-SSE* (2003)
16. Induction of *New Senior Secondary Schools curriculum* (2003)
17. Implementation of *External School Review- ESR* (2004)
18. Legislation on *School-based Management* (2004)
19. Review of *Medium of Instruction in secondary schools* and *Secondary School Place Allocation* system report (2005)
20. Implementation of the new *Territory System Assessment* for Secondary Three students –TSA (2006)
21. Implementation of the *New Senior Secondary Reform* –the 334 structure (2006)

Most of these measures are intended to change the school culture by altering the assessment mechanisms and admission systems. The new admission system directs school practices in setting up their curriculum, applying new pedagogies and meeting new forms of assessments. However, the changes in the admission system, which determine the progress of the Education Reform triangle (curriculum-academic structure-assessment), are separated from the curriculum reform document (HKEMB 2001b). Frontline teachers do not see the connections between the new assessments and the new curriculum. They also question the effectiveness of the innovative pedagogies suggested in the curriculum reforms (HKEMB 2003a).

In the wake of teachers' protests and complaints, more reform measures related to school performance, appraisal and public assessment were implemented after 2003. More voices and grievance from the frontline teachers were also recorded. Discourse on Hong Kong's Education Reform turned to teachers' workload, stress, and the effectiveness of the reform.

From 2000 to 2006, the social, economic and political evolution in Hong Kong affected frontline teachers' perceptions of the HKEMB Education Reform. The drastic decline in the school-age population required schools to downsize and even close for the first time in Hong Kong's history.

ACTEQ (2003) was the first HKEMB section to monitor teachers' professional development. ACTEQ's proposal for Continuous Professional Development (CPD) is the first in Hong Kong's history to require lifelong learning of frontline teachers. In the policy document, ACTEQ (2003) sets the target of 150 CPD hours for school teachers to attain in three years. Many frontline teachers regarded the professional

development and training as pressure put on them. Newspaper articles (Chong 2006; Clem 2006; Connolly 2006; *Hong Kong Economic Times* 6 December 2004 p.5; Lam 2006; *Sing Tao* 2006 February 8 p.11; February 15 p.9; June 14 p.13; December 21 p.14; *South China Morning Post* 2004; *South China Morning Post* 2006; Yung 2006) reveal that frontline teachers' perceptions of the Education Reform can be affected by implementation of new measures in teachers' development. In order to understand the HKEMB Education Reform, it is necessary to investigate the relation between the reform measures being applied to schools and the attitudes of the frontline teachers.

1.4 Chapters Overview

This first chapter introduces the background of the HKEMB lifelong learning Education Reform. It gives the rationale and the themes of the research.

In Chapter 2, the genesis of the lifelong learning literature is examined and the application of lifelong learning policy in several countries is discussed. The effects of lifelong learning are shown to be different for adolescents, university undergraduates, and adults.

Lifelong learning and *Zhong Shen Xue Xi* are then discussed in the context of Hong Kong Chinese and the HKEMB lifelong learning Education Reform. The interpretation of training lifelong learners in secondary school is investigated.

Quotations from *The Analects* are used to illustrate how *Zhong Shen Xue Xi* has influenced the Chinese understandings of lifelong learning and how it affects the perceptions of the frontline teachers towards training lifelong learners and the HKEMB lifelong Education Reform.

Chapter 3 gives a chronology of the Education Reform in Hong Kong. It distinguishes the means of enhancing school accountability and school performance from the reform measures geared to lifelong learning. However, many of the reforms have improved the lifelong learning Education Reform by enhancing teachers' effectiveness and schools' accountability. The goal of training lifelong learners (HKEMB 2000) is tied up with improving the quality of schools (Education Commission 1997). From 2001, the term *Jiao Gai* has been used to cover all the HKEMB initiated reform measures.

The key policy documents of Continuous Professional Development (CPD), Teachers' Language Proficiency Attainment Test (LPAT), Medium of Instruction (MOI), Secondary Schools Places Allocation System (SSPA) and the requirements in the New Senior Secondary curriculum (NSS) are discussed in Chapter 3. Teacher stress is also discussed.

Chapter 4 positions the study in education research and social inquiry. This research adopts the interpretive approach to study the frontline teachers' perceptions of the HKEMB Education Reform so as to solicit their understandings, feelings and emotions towards the reform measures. Through the semi-structured interviews conducted, frontline teachers' understandings, feelings, emotions and their comments on the benefits and positive measures as well as the disadvantages and hindrances of the Education Reform are recorded (Appendix 1 to Appendix 7).

Phenomenology is chosen as the methodology of inquiry because it is the best the way to generate authentic discourses in interpretive paradigm for studying feelings, emotions, understandings, and perceptions.

The discourse analysis should be able to reveal the frontline teachers' attitudes to the HKEMB lifelong learning Education Reform. The application of Heideggerian phenomenology is investigated and the concepts of '*Being*' and '*horizons*' are discussed in order to link the study to the frontline teachers' perceptions and interpretations of the Education Reform. The relevance of the research design and the process of data collection are also described in this chapter.

The small sample used in the present study (only 20 frontline secondary school teachers) is explained in the research design. The research does not generalise the results of the study to all frontline teachers. Issues of validity and reliability are addressed in the fieldwork. Research participants are recruited under the rationale of social circle heuristic and the themes of the discourse are generated by phenomenological reduction. The research standards related to ethical considerations, validity and reliability, scope and limitations are also discussed in Chapter 4.

Chapter 5 consists of data analysis. This chapter begins with the analysis of the adapted ACER survey on 'How far are the secondary schools in Hong Kong moving towards the final goal of training lifelong learners?' The six research questions are then revisited and the concepts related to each of the research question (understandings, feelings, emotions, benefits, disadvantages, positive measures and hindrances) are discussed. By applying the phenomenological analysis process, major themes related to the research questions are generated. The themes are listed and supported with textual analysis of the participants' interview responses.

Based on the themes generated in Chapter 5, the possibilities for future research on the lifelong learning Education Reform in Hong Kong are presented.

Chapter 6 concludes the dissertation by explaining the research findings and their implications for policy and research. It discusses the roles of frontline teachers in later phases of the lifelong learning Education Reform. Through a better understanding of how the frontline teachers experienced the first years of the education reforms, policy makers and stakeholders of the lifelong learning Education Reform will be able to adjust the pace and focus of the reform.

I argue that during the implementation of the Education Reform, frontline teachers' work and life should be considered by the policy makers in a holistic manner. Policy makers could adjust the pace of reform implementation to cater for the social, political and economic development of the society so as to accommodate the frontline practitioners' resilience to change.

The HKEMB lifelong learning Education Reform is a very ambitious change to Hong Kong's school system. There are few academic studies on this topic. As the Education Reform continues, it is essential to have more studies on its implementation. Besides investigations carried out from the policy makers' perspective, future studies can be oriented from the perceptions of the other stakeholders (school administrators, frontline teachers, parents and students).

At the end of 2007, the Hong Kong Education and Manpower Bureau (HKEMB) was renamed Hong Kong Education Bureau (HKEDB). The Permanent Secretary of HKEMB from 2001-2007 was also replaced. In 2008, the lifelong learning Education Reform in Hong Kong entered another phase. In 2008, the new admission systems have been tested and the New Senior Secondary curriculum has been launched. The

New Senior Curriculum will be applied in the senior secondary schools in September 2009.

Frontline teachers will see the changes brought by the reforms. If training lifelong learners remains the goal, there will be more investigations of how frontline teachers perceive the implementation of the reform measures.

The oldest Chinese text 易經 [*I Chin*] states that success on earth depends on the manipulation of the Right Nature, the Right Location and the Right People (天時[*tian shi*], 地利 [*di li*], 人和 [*ren he*]). HKEMB (2001a) launched the Education Reform with the promise of providing the Right Nature (the Sun), and the Right Location (the Soil). However, the success of the lifelong learning Education Reform still depends on the Right People.

CHAPTER TWO: LIFELONG LEARNING AND LIFELONG LEARNING EDUCATION REFORMS

2.1 The lifelong learning Discourse

Lifelong learning has become a popular term in adult education and corporate training. The literature on school education and government policies has been increasing. In order to understand the historical and policy context of lifelong learning and lifelong learning education, it is necessary to investigate the genesis of the term 'lifelong learning'.

2.1.1 The genesis of lifelong learning and lifelong learning education

'Lifelong Learning' is interpreted very differently, depending on the culture and the context. Learning encompasses almost all human activities. However, in the literature, the concept of lifelong learning is 'the form of deliberated self-directed learning which is consciously planned, self-managed and self-motivated' (Candy 1994 et al., p.15). Individual learners can make use of lifelong learning education providers such as governments, corporations, unions, and community groups.

In the past, most educational opportunities in developed countries focused on initial education. However, the advancement of information technology has changed the rate of economic, technical and social transformation. In developed countries, few people hold the same job for a lifetime. Research shows that people are not only capable of, but also actually engage in, continuing learning (Tuijnman & Kamp, 1992). There is for a need the provision of educational opportunities throughout working life.

As early as 1972, UNESCO recognized this change in the workplace and set up an International Commission on the Development of Education in 1972, with Edgar Faure as the chairperson. The International Commission published *Learning To Be: The World of Education Today and Tomorrow* (Faure, 1972). This visionary document outlined a framework for education around the world. Its thematic recommendation was that *lifelong education* should become the ‘master concept for educational policies in the years to come for both developed and developing countries’ (Faure 1972, p.182).

Since then, the idea of *lifelong learning* has been promoted and disseminated by the UNESCO Institute of Education in Hamburg. Throughout the 1970s, a body of literature on *lifelong education* emerged (Cropley 1977, 1979, 1980; Cropley & Dave 1978; Dave, 1973, 1976; Ingram, 1979; Parkyn, 1973; Skager & Dave, 1977). Lifelong education would lead to the systematic acquisition, renewal, upgrading and completion of knowledge, skills and attitudes made necessary by the constantly changing conditions in which people live. Lifelong learning education depends on people’s ability and motivation to engage in self-directed learning. It should also acknowledge the contribution of all available formal, non-formal and informal educational influences (Cropley, 1979, p.3).

Responding to this agenda from the 1970s, governments in industrialized countries have developed educational, economic and political policies and strategies. For example since October 1976, there has been a *Lifelong Learning Act* which guided the training policy of the American workforce. In 1989, the state governors passed the *Goals 2000: Educate America Act*. Goal No.5, states that ‘learning is an ongoing process and a lifelong activity’ (Riley 1993, p.19).

In the UK, the Enterprise in Higher Education scheme, which began in 1987, grew out of a ‘tide of opinion’ among higher education policy makers that, in order to expand and to respond to demands from the employment market, educational courses would have to be ‘broader, more flexible and give deliberate prominence to transferable, personal and intellectual skills’ (Wright 1992, p. 204).

In Australia, the federal Minister for Education Dawkins initiated reforms that shaped the development of lifelong learning education. In the 1988 White Paper, Dawkins claimed that:

The principle of lifelong education is now accepted as fundamental to achieving social, cultural, technological and structural change, and to our future economic development (Dawkins 1988, p.68).

By the 1980s, there was already an abundance of discourses on lifelong learning reforms in post-compulsory education settings around the world.

2.1.2 Training lifelong learners in secondary schools

During the 1990s, the lifelong learning education reforms discourse extended from the tertiary levels to the school systems.

In 1990, the Canadian Corporate Higher Education Forum issued an advisory document under the heading ‘Education for the Future’, which recommends:

Lifelong Learning – Enhance the continuity of educational experience by linking educators at different levels: pre-school, elementary, secondary, community colleges, universities, business, adult education centres....All educators must be concerned with promoting lifelong learning in their clients, and all can benefit from understanding how their efforts fit into the larger picture. The time has come for a broader and more integrated view of the teaching profession (Canadian Corporate-Higher Education Forum 1990, p.17).

The CHEF (1990) document highlights that ‘all educators’, not only those working in the post-secondary levels, should promote lifelong learning.

Similarly, Longworth and Davis (1996a) argue that ‘schools’ are the cradle of lifelong learning. They describe lifelong learning schools and call for visionary new teachers who see schools as learning organizations.

Schools are key organizations in the development of a lifelong learning culture. They are responsible for the bulk of an individual’s education throughout the most impressionable period of life. Values, attitudes and enthusiasms picked up here are often carried through to life’s end (Longworth & Davis 1996a, p.7).

Since 2000, literature discussing the role of schools in realizing lifelong learning in the community has grown (Bryce 2002; Chapman & Aspin 2001; Day 2001; Field 2002; Hazlewood 2001; Longworth 2000).

In the World Bank's executive summary (2003), the distinction between 'traditional learning' and 'lifelong learning' is marked. It promotes lifelong learning as the ideal way of training human resources to fit the requirement of the global economies. According to the World Bank, lifelong learning has a series of 'new' implications on the roles of teachers and learners.

Table 1 *Comparison of Traditional and Lifelong Learning*

(Adapted from World Bank 2003, *Lifelong learning in the global knowledge economy: challenges for developing countries*. Washington DC, p. xx.)

Traditional learning	Lifelong learning
The teacher is the source of knowledge	Educators are guides to sources of knowledge
Learners receive knowledge from the teacher	People learn by doing
Learners work by themselves	People learn in groups and from one another
Tests are given to prevent progress until students have completely mastered a set of skills and to ration access to further learning	Assessment is used to guide learning strategies and identify pathways for future learning
All learners do the same thing	Educators develop individualized learning plans
Teachers receive initial training plus ad hoc in-service training	Educators are lifelong learners. Initial training and ongoing professional development are linked
'Good' learners are identified and permitted to continue their education	People have access to learning opportunities over a lifetime

The summary table marks the paradigm shift upon both the learners and the teachers. The World Bank (2003) encourages countries to look beyond traditional approaches to education and training and to engage in a policy dialogue on the pedagogical and economic consequences of lifelong learning. The World Bank (2003) also explores the challenges to education and training systems that the knowledge economy presents. It outlines policy options for responding to these challenges and developing viable systems of lifelong learning in developing countries and countries with transition economies.

The Hong Kong Education Reform, which was launched by the Hong Kong Education Commission under the Hong Kong Education and Manpower Bureau, was born in the late 1990s, when the idea of lifelong learning and lifelong learning education was flourishing in international education.

The HKSAR Education Reform borrowed its glossary from the international lifelong learning discourse. However, the western origins of lifelong learning and related reforms were not discussed in Hong Kong. As a result, many frontline teachers were confused by the terms used in the Education Reform. Ever since the reform took effect, arguments between policy makers and teachers about implementing the Education Reform according to the HKEMB directed scale and pace have continued.

In Chinese, 'lifelong learning' is translated as '終身學習' - *Zhong Shen Xue Xi*. In Confucian communities, the term '*Zhong Shen Xue Xi*' has been used among school teachers to promote traditional Chinese virtues. The ideal and measures of training lifelong learners are very different in the Confucian Chinese studies and in OECD. However, the HKEMB Education Reform documents did not differentiate western ideal

in lifelong learning education and the Confucian implications of lifelong learning.

2.2 Lifelong Learning in the HKSAR Chinese Context

Hong Kong is a Chinese community. Although Hong Kong had been a British colony for over a century before it was put under Chinese sovereignty in 1997, traditional Confucianism still influenced the minds of the educated population. According to the 2001 Hong Kong Government Population Census, over 94.9% of the population is ethnic Chinese. Among the Hong Kong Chinese, *Zhong Shen Xue Xi* (lifelong learning) was used in education long before the HKEMB Education Reform.

In Hong Kong, the term *Zhong Shen Xue Xi* is very popular in numerous paradigms of learning. Chinese Confucian study has its own philosophical interpretations of ‘why’ and ‘how’ an intellectual should approach ‘lifelong learning’. *Zhong Shen Xue Xi* is a recurring theme in the teachings of Confucius.

In *The Analects*, chapter 1, verse 1, Confucius said, ‘To learn and to practice what is learned time and again is pleasure, is it not?’ In *University*, Confucius argues that learning should never end until it reaches the stage of final perfection. The eight stages of self perfection are ‘understanding nature, acquiring knowledge, being true, having a right attitude, being able to self monitor, being a role model in the family, being a good leader and being a good ruler’. A gentleman’s learning path should never stop (Ma & Leung 2002, p.25).

The HKEMB Education Reform documents (2000, 2001a, 2001b, 2002a, 2002b, 2003a,

2003b) insisted that '*Zhong Shen Sue Xi*' is the goal of the Education Reform.

However, the Chinese term *Zhong Shen Sue Xi* and the World Bank (2003) definition of 'lifelong learning' refer to two separate issues. Without understanding the differences between the orientations and goals of the western and Confucian interpretations of *Zhong Shen Sue Xi*, many Chinese readers, including the frontline teachers, may find the implications of the lifelong learning Education Reform in Hong Kong very confusing.

Most of Confucius's philosophy of learning and teaching is collected in *The Analects*. During the Spring and Autumn period in China (about 400 BCE), education was restricted to males and therefore, so was the masters' literature related to training leaders and 'gentlemen'. Therefore this chapter uses the traditional term 'gentlemen' in reference to educated adult males, although in contemporary Hong Kong context, lifelong learning also applies to females.

According to *The Analects*, the purpose of education is to create educated gentlemen. *The Analects* states that a gentleman should be able to choose his friends carefully and be careful about what he says. He should treasure virtuous deeds more than material gains (Lau 1979). An educated gentleman should be 'polite, trustworthy, honest, self-disciplined and modest' (Lau 1979 p.32). Long before the HKEMB Education Reform, educators had regarded *Zhong Shen Sue Xi* as an educational ideal. The theme of Confucius's *Zhong Shen Sue Xi* is described in 論語 [*Lun Yu - The Analects of Confucius*].

2.3 *The Analects and lifelong learning (Zhong Shen Xue Xi)*

The Analects is the classic of Confucianism. For centuries, *The Analects* and the other Confucian classics were the contents of China's imperial examinations. Established in the Sui Dynasty (AD 581 – AD 618), the imperial examination system was for a long period of time the way for dynasties to train and select recruits officials for the imperial governments. Although the Chinese imperial examination system was abolished in 1905, *The Analects* still influence Chinese communities.

Fok (2007) argues that *The Analects* still has significant influence on the Chinese communities in South East Asia. Yip (2006) adds that a person who studies *The Analects* should pursue the ideal to 'establish' one's sincerity, purify one's heart, cultivate one's personal life, and raise a harmonious family' (Yip 2006, p.23). The teaching of Confucius can 'open the door to a perfect person' (Yip 2006, p.24). Instead of training lifelong learners for the globalised economy, *Zhong Shen Xue Xi* helps the individuals to self-reflect and to continue to learn to reach the state of perfection. The ultimate concern of Confucianism, in short, is to be 'inwardly a sage and outwardly a king' (Yip 2006, p. xiii).

Fok (2007) citing Xiong (1949) argues that in contemporary Neo-Confucianism, the 'pursuit of knowledge', 'discipline of the heart' and 'the consolidation of sincerity' are the essences of being 'inwardly a sage'. A gentleman should be 'inwardly a sage' before he can be 'outwardly a king'. In short, being 'inwardly a sage' is about personal conduct and being 'outwardly a king' is about influencing world affairs.

Zhang (1982) argues that while traditional Chinese interpretations have been criticised

against the yardstick of modernisation, contemporary Chinese should also evaluate the effects of modernisation against the yardstick in traditional Confucian teachings. The present research will investigate how frontline teachers perceive the Confucian approach to lifelong learning and how their perception has influenced their interpretation of the HKEMB lifelong learning Education Reform. Yip (2006) argues that people who critically read *The Analects*, believing that it had become outdated and out of touch with practical life and work, would miss a great deal of its valuable advice (p. vii). In *The Analects – A Modern Translation and Contemporary Interpretation* (Yip 2006), learning to learn and lifelong learning are the two of the recurring themes.

The Master says, ‘Is it not a joy to be able to practice while learning? Is it not a pleasure to have friends visiting from afar? Even though no one knows about me, I will not feel unhappy. Is not that the act of a gentleman? (*The Analects*, 1:1 in Yip 2006, p.3).

Yip (2006) argues that what Confucius wants to teach is that if a person treasures the opportunity to practice what he learns, he will become proficient at and enjoy it. Later, as people hear about him, they will pay him a visit to exchange their knowledge. It also implies that everyone learns at a different pace and may have reached different levels of learning. Well-read people who continue to study, always have a chance to become successful.

According to Yip (2006), *The Analects* Chapter 2:12 states that a gentleman’s knowledge should be far-reaching. Early specialization is discouraged. A gentleman should be able to continue to learn.

Confucius regarded himself as a teacher and a keen learner. According to Yip (2006), Confucius stresses that teachers should continue to learn.

The Master says, ‘These three things do not present any difficulty to me: To remember religiously what I have learnt, to study tirelessly and teach without growing weary.’ (*The Book*, 7:2, in Yip 2006, p.23).

To many readers, the ideas of *Learning in Life and Learning through Life* (HKEMB 2000) and *Zhong Shen Xue Xi* (lifelong learning) are already embedded in traditional Chinese education. Confucian teachings emphasise that not only is a learner encouraged to continue to learn, but the teacher is also encouraged to model lifelong learning.

In Chapter 7 of *The Book*, Confucius states that if the teacher wants to give students a drop of water, he needs to have a barrel of water himself. If the teacher wants to help the students to obtain a barrel of water, he will need to know where the source of the water is. Therefore, ‘to study tirelessly’ is a prerequisite of ‘to teach without growing weary’ (Yip 2006). *The Analects* states that in order to attain the virtues in life, studying is the key. In *The Analects* Chapter 17:8, Confucius summarises the purpose of virtues.

To desire benevolence without studying will lead to foolishness.
 To desire wisdom without studying will lead to aberration.
 To desire trust without studying will lead to vulnerability
 To desire openness without studying will lead to impulsiveness.
 To desire bravery without studying will lead to confusion.
 To desire assertiveness without studying will lead to arrogance

(*The Analects* 17:8 in Yip 2006, p.39)

According to Confucius, all members of the community are encouraged to continue to learn. As teachers are the ‘source of knowledge and the knowledge giver’, they should continue to learn so as to enrich the learners. They are also role models. By learning from great teachers like Confucius, a teacher can become a respected member of the society and a *gentleman*.

In Confucius’ teaching, an educated man is a ‘gentleman’ while an uneducated man is an ‘ignoble’ man. A person who only aims at economic gains is not a gentleman. The following verses in *The Analects* highlight the gentleman’s lack of interest in material gains.

A gentleman finds peace and is not conceited. An ignoble person is conceited but does not find peace (*Analects* Chapter 13:26, in Yip 2006 p.69).

A gentleman knows about righteousness. An ignoble person knows about self interest. (*Analects* Chapter 4:16, in Yip 2006 p.127)

There is no competition among gentlemen. If there is, it will only be in form of archery. (*Analects* Chapter 3:7, in Yip 2006 p.179)

In his dealing with the world, a gentleman is not invariably for or against anything. He is on the side of righteousness. (*Analects* Chapter 4:10, in Yip 2006 p.181)

While gentlemen cherish virtue, ignoble people cherish daily necessities. (*Analects* Chapter 4:11, in Yip 2006 p.183)

A gentleman is at peace with himself. An ignoble person is full of anxiety. (*Analects* Chapter 7:36, in Yip 2006 p.191)

Although Confucius also trains leaders, the concept of training for the economic advancement of a country is not his ideal of education.

Achieving economic gains through *Zhong Shen Xue Xi* is viewed with contempt. The Master says, 'A gentleman is not a utensil' (*Analects*, Chapter 2:12). In Confucius's teaching, education should not only train human resources to contribute to economic development of society. The Confucian ideal in education is not the delivery of the required 'knowledge and skills' for economic success (utensil), but to change the individual's perception of oneself and the world. It is believed that training in skills and knowledge would promote competition and the pursuit of material gains, neither of which is suitable for a gentleman.

The Chinese translation of the term 'lifelong learning' (*Zhong Shen Xue Xi*) can confuse some Chinese readers when they are reading the HKEMB Education Reform documents. While HKEMB emphasises the importance of training lifelong learners, traditional Confucian teachings view the acquisition of pure economic gains in contempt.

Fok (2006) argues that modern societies should adopt the wisdom of Confucius in education to overcome the material desires.

The freedom of modern man exists only in his fantasies, like his pursuit of satisfaction in the artificial world of cyberspace. His thought has already been emasculated and his life has been emptied. The things he pursues are all very practical, and his world only contains himself. Yet no one realises that this is a tragedy, and no one understands the future, only yearning to escape from the unbounded pressures of the practical world. Modern man's escaping has already brought him to the brink of catastrophe, and if he continues to fall, it can only be into nothingness. (Fok 2006 p. ii)

Fok (2006) argues that professional and continuing education should not only focus on the delivery of knowledge and skills. He states that in the developed countries like Hong Kong, the material affluence and economic development does not enhance spiritual health. Fok (2006) criticises the Hong Kong government for sending a message to the parents that schools should offer a more practical and skill-based curriculum. He argues that the focus on accountability, value-addedness and cost effectiveness in the reforms of Hong Kong's education system had put much pressure on the frontline teachers (p.23).

Besides the *Zhong Shen Xue Xi* headline used in the HKEMB Education Reform documents, there are similar notions like 'catering for learners' diversity' and 'continuous and professional training for teachers' that both traditional Confucian teachings and the HKEMB Education Reform shared. However, HKEMB (2000, 2001a, 2001b, 2002a, 2002b, 2003a) has never stated the origins and interpretations of *Zhong Shen Xue Xi* in different contexts.

Without a thorough explanation of the orientation and necessity of adopting the western concept of lifelong learning in the Education Reform, it is very difficult for the policy makers to convince the frontline teachers to support the reform measures.

2.4 Implications of Lifelong Learning and Lifelong Learning Education Reforms in Hong Kong

In 1997, the first Chief Executive of Hong Kong Special Administrative Region of the People's Republic of China, Tung Chee-hwa, expressed his strong commitment to education reform, placing it alongside housing and elderly on his list of priorities (Tung 1997b).

In the years to follow, several issues in the school system in Hong Kong were implemented top down by the HKEMB. Between 1997 and 2000, frontline teachers were very confused about why the government was carrying out education reform. The fragmented reform measures carried out between 1997 and 2000 did not show any clear direction. After 2000, the ideal of improving the quality of education in Hong Kong soon became a competition for school survival in districts where school enrollments were in decline. Many frontline teachers also opposed the measures to promote school accountability.

The release of the *Learning for Life Learning through Life reform Proposals for Education System in Hong Kong* document in September 2000 marked the 'Blueprint for the 21st Century Education' in HKSAR.

This 15-page document (HKEMB 2000) reviewed the education system in HKSAR and stated the aims of the ‘Education for the 21st century’. In this document, reform proposals for early childhood education, 9-year basic education, senior education, higher education and continuing education, the curriculum, school admission mechanisms and public examinations are set. Together with the reform proposals, the implementation strategy, budgeting and resource plan and are attached with a proposed timeline for completion.

The theme of training lifelong learners for HKSAR is made explicit for the first time in the *Learning for Life Learning through Life reform Proposals for Education System in Hong Kong* document (HKEMB 2000). In Chapter 5, the vision of the Hong Kong Education Reform is stated as ‘To build a lifelong learning society’.

Hong Kong will develop into a society that values lifelong learning. Everyone will have the attitude and ability for lifelong learning and a willingness to advance further beyond the existing knowledge level, and to continuously consolidate and upgrade their knowledge and ability. In addition, there should be diversified learning channels and opportunities to meet their learning needs. (HKEMB 2000, p.34)

This summary has applied principles of 21st century lifelong learning (Aspin 2001; Bryce 2002; Chapman & Day 2001; Field 2002; Hazlewood 2001; Longworth 2000). It (HKEMB, 2000) calls for the establishment of a lifelong learning system.

In a diverse education system, students can find the appropriate learning opportunity at various stages in life according to their personal development needs or job requirement, and their efforts should be duly recognized. Such a system would induce all to pursue lifelong learning and promote the emergence of a learning society. (HKEMB 2000, p.37)

The document also states that students develop their life-long learning abilities and attitudes in school. The concept, attitude and skills of lifelong learning are to be included in the Education Reform.

Industries that employed a large number of low-skilled workers used to be an important part of Hong Kong's economic activities and provided a lot of employment opportunities for S3 leavers and secondary school graduates. Faced with rapid economic restructuring, traditional industries in Hong Kong have moved northwards and been replaced by high value-added and more technology intensive industries. As we head for a knowledge-based society, we need to acquire more complex and fast-changing knowledge and skills. There is a need to increase opportunities at the secondary level and post-secondary level to help more people to cope with the needs of a knowledge-based society (HKEMB 2000, p.46-47).

The Education Reform document (HKEMB, 2000), applies what Longworth and Davis (1996b) state: that 'schools' should be the cradle of lifelong learning. The document argues that as Hong Kong becomes a knowledge-based society, its education system should prepare school leavers with the skills and attitude for 'lifelong learning'.

When the Education Reform policy document was released in 2000, schools and

frontline teachers reacted quite positively in the consultation documents to the ideal of training lifelong learners (Cheng 2006b). However, during the implementation of the reform measures, teachers' groups began to complain about the reform measures.

School teachers began to question the significance of the reform and the orientation of lifelong learning and teachers' training.

The Learning for Life Learning through Life reform Proposals for Education System in Hong Kong (2000) document is used as the 'Education Blueprint' for setting the Education Reforms for the 21st century HKSAR. In this policy document, the lifelong learning Education Reform is connected to the 'economic restructure' in Hong Kong and the employment of the junior and senior secondary school leavers. Apparently, the HKEMB Education Reform adopted western orientation of training lifelong learners for the 21st century. Although the translation of *Zhong Shen Xue Xi* was used throughout the reform documents in Chinese, the Confucian origin was not mentioned.

Both the UNESCO and the Confucian literature mentioned 'continue to study' as a key to success. However, the UNESCO and the Confucian interpretations of success had very different contexts and targets. For most of the Chinese readers in Hong Kong, *Zhong Shen Xue Xi* is the same as 'lifelong learning'. When the HKEMB Education Reform was launched, *Zhong Shen Xue Xi* was the slogan used in the reform documents written in Chinese. Without an investigation into the similarities and differences of the western and Confucian interpretation of the term *Zhong Shen Xue Xi*, the message of training lifelong learners in the school system cannot reach the frontline teachers effectively. The dialogue between the HKEMB officials and the frontline teachers also becomes confusing.

To many Hong Kong Chinese, the idea of ‘lifelong learning’ is already embedded in traditional Chinese teaching. The goal of lifelong learning is a ‘virtue’ to be possessed by a gentleman. The ideal of ‘lifelong learning’ has nothing to do with technology or economy. If Confucius’ teaching has already been introduced into the school system, there is no need for reform in schools.

In 2006, in response to a series of suicides among frontline teachers, Fok (2006) argues that teachers have no time and space to share with students the non-syllabus bounded Chinese virtues when cost effectiveness and competitiveness are the priorities of education reforms. He states that the traditional Confucian virtues have been neglected in Hong Kong. Learning and teaching have become an economic transaction and many teachers are confused about their role in the education reform (Fok 2006).

The difference between the Chinese and OECD interpretation on lifelong learning was never brought up during the implementation of the Education Reform. It was assumed that Hong Kong would follow the trend of globalisation. According to HKEMB, the education system should increase the competitiveness of human resource. Other implications of the English term ‘lifelong learning’ and the Chinese translation of term lifelong learning - ‘*Zhong Shen Xue Xi*’ are not discussed either in the policy documents or in the implementation guidelines.

Without making any clarification on *Zhong Shen Xue Xi* or having dialogue with the frontline teachers, the HKEMB Education Reform was launched. Since 2000, HKEMB has been committed to the Education Reform. There was no discussion of the original goal of *Zhong Shen Xue Xi* (lifelong learning). Discourse on Education Reform in Hong Kong began to focus on the ‘implementation and the administrative

procedure. The core of lifelong learning and the cultural context of the education reform have not been revisited. Without more dialogue on the investigation of the origin and ideal of lifelong learning and without clarifying the goal of the education reform, the policy makers and the frontline teachers were just working to meet the deadlines of the proposed reform measures in the *Learning in Life Learning through Life* (2000) document.

Frontline practitioners' understanding and perception of lifelong learning and its relation to HKEMB Education Reform would certainly affect the effectiveness of the reform. This thesis investigates the underlying causes of the misunderstanding and conflicts of the policy makers and the frontline teachers during the implementation of the education reform.

The Chinese term Lifelong learning (*Zhong Shen Xue Xi*) carries a very different orientation and implication on teaching, learning and education from the OECD definition. If the HKEMB Education Reform is to achieve the goal of training lifelong learners, the policy maker should make the orientation of 'lifelong learning' very clear to all the stakeholders of the Education Reform.

The Education Reform is ambitious. When the goal of training lifelong learners is set, related reform measures are to be realised through the change in the school curriculum, the shift in teachers' paradigm, the innovation in pedagogy and the transformation of the territory's school-based and public examinations assessment systems. One of the purposes of this research study is to clarify frontline teachers' understanding and interpretations of 'lifelong learning' and of the Education Reform. Frontline teachers face the changes that Education Reform brought to their working life. Training

lifelong learners in the school system is not confined to the changes in teaching and learning. It also affects the livelihood of the frontline practitioners. Therefore, more investigation should be carried out from the perspective of the frontline teachers. Besides, in such a big reform, students, parents, and community leaders are also involved. These stakeholders' perceptions should also be better understood by the policy makers.

The following chapter will trace the implementation of the HKEMB lifelong learning Education Reform measures. Besides reforms measures suggested in the lifelong learning reform documents (HKEMB 2000, HKEMB2001a, HKEMB 2001b), the issue of school accountability and its relation to the implementation of the lifelong learning Education Reform will be discussed. Finally, the issue of teachers' stress and its relation to the present study will be examined.

CHAPTER THREE: IMPLEMENTATION OF THE LIFELONG LEARNING EDUCATION REFORM IN HONG KONG

3.1 Introduction

Since 2000, the *Learning for Life, Learning through Life* (2000) has been the blueprint for education reform in Hong Kong. With reference to the policy document (HKEMB 2000), HKEMB took the lead in a series of school reforms. These measures have affected the entire education system.

This chapter examines these measures that affect frontline secondary school teachers. During the reform implementation (2000-2006), HKEMB published four official Progress Reports (HKEMB 2002a, HKEMB 2003b, HKEMB 2004a, HKEMB 2006a). Progress Report 4 (2006a), notes that ‘the Education Reform is progressing in the right direction’ (HKEMB 2006a, p.4).

However, some local academics (Choi 2005, Cheng 2006a) see the implementation of the Education Reform as a ‘failure’. They criticise the government bureaucracy for ‘making frontline teachers focus more on paperwork than teaching’, ‘putting more stress on frontline teachers’ and ‘lowering the morale of the teaching profession’ (Choi 2005, p.2; Cheng 2006a, p.7).

Frontline teachers also complain about the implementation of education reform measures through their unions’ newsletters (HKPTU News, Education Convergence, and Xiyao Culture). They complain that the new teacher training requirements and curriculum reform measures have placed a burden on the frontline teachers, causing

‘burnout’ and ‘stress’ (HKPTU 2005a).

According to the policy document (HKEMB 2000) changes initiated in the school system are to meet the goals of lifelong learning Education Reform:

1. Reforming the curricula in the school systems
2. Enhancing the professionalism of teachers
3. Reforming the admission systems and public examinations systems
4. Enhancing the quality assurance mechanism

Based on the guiding principles of improvements (HKEMB 2000, p.34), HKEMB carried out a series of administrative measures to change the practices and culture of the school system.

‘Reforming the curricula’ (HKEMB 2000, p.45), ‘enhancing the professionalism of teachers’ (HKEMB 2000, p.48) and ‘reforming the public admission and examinations systems’ (HKEMB 2000, p.44) are ‘focuses of the Education Reform’ in the HKEMB lifelong learning Education Reform document (HKEMB 2000, p.6). However, ‘enhancing the quality assurance mechanism’ is not stated in the Reform Proposal summary. Quality Assurance appears only as a subheading under ‘reforming the monitoring system’ in early childhood education (p.14). Although the focus of quality assurance is not highlighted, the impact of the quality assurance measures and school accountability are closely related to the lifelong learning Education Reform in Hong Kong because quality assurance allows for review the effectiveness of the changes in schools during the years of implementation.

Although how the quality assurance rationale is linked to the lifelong learning Education Reform is not mentioned in the QAD document (QAD 2002), the External School Review of the Quality Assurance Department echoes many of the key criteria mentioned in the lifelong learning literature (Longworth & Davis 1996a, Bryce & Withers 2003, World Bank 2003). HKEMB links the need for quality assurance in Hong Kong schools to the educational reforms in the UK, USA, Europe and Australia. In 2004, besides implementing the reform measures of the key focuses mentioned, ‘quality assurance’ measures were launched on all the government-run and -aided kindergarten, primary and secondary schools in Hong Kong.

The curricula reforms, teachers’ development and reforms in the school system are officially assessed through the Performance Indicators appraisal in the Quality Assurance Inspections and External School Reviews carried out by HKEMB. During the implementation of the Education Reform, frontline teachers’ work was not only tied up to the reform measures; it was also affected by the political, social and economic changes.

The lifelong learning Education Reform measures and their relationship to the literature on lifelong learning will be examined in the following sections. Responses from the academics, teachers’ unions and the media will be included to contrast with the scenario presented by the HKEMB Education Reform Progress Reports (HKEMB 2002a, HKEMB 2003b, HKEMB 2004a, HKEMB 2006a). Finally, teacher stress will be investigated.

3.2 Reforming the Curricula in the School System

The curriculum is the first area of reform that affects school administration. There is an attempt to change the classroom-bounded curricula in Hong Kong to a more 'experience based' school environment conducive to lifelong learning (HKEMB 2000 p.45).

To help students develop all-round abilities and positive attitudes in preparation for lifelong learning, we must provide them with comprehensive and balanced learning experiences. We propose to provide important learning experiences, job-related experiences, community service as well as physical and aesthetic development through reforming the curricula (HKEMB 2000, p.45).

Based on this policy document, the Curriculum Development Council released a series of curriculum guides between 2001 and 2006 (CDC 2001, CDC 2002, CDC 2004, CDC 2006). CDC (2001) proposes that the senior secondary school curriculum framework in Hong Kong is to change from the traditional streaming of Science and Arts subjects to the eight newly framed Key Learning Areas (KLAs):

1. Chinese Language Education
2. English Language Education
3. Mathematics Education
4. Personal Social and Humanities Education
5. Science Education
6. Technology Education
7. Arts Education
8. Physical Education

The proposed curricula change implies that some key subjects in the traditional secondary school framework (e.g. Physics, Chemistry, Chinese History, Geography, Chinese Literature etc.) will be merged under the new Key Learning Area structure.

Besides the change required in the school curriculum, the curricula reform measures also bring an enormous change to school structure and administration in secondary schools.

Traditionally, students in Hong Kong are entitled to nine years (six years primary education and three years junior secondary) compulsory and free education provided by the government. Admissions to Primary One and Secondary One are regarded as the keys to stream the academically better performed students to the parents' more favoured schools.

In the old system, most secondary schools offer 3 years junior secondary education to the students. Students have to join a central allocation scheme to continue their senior secondary studies in Secondary Four and Secondary Five. After Secondary Four and Secondary Five, students have to join the Hong Kong Certificate of Education Examinations to compete for the school places in Secondary Six and Secondary Seven. When students have finished their Secondary Six and Secondary Seven studies, they have to enter the Advanced Level Examinations to compete for a place in the universities.

In order to meet the curricula reform, the traditional seven years secondary schooling will change into a new 6 years system (3+3: three years junior secondary and three

years senior secondary). In the new system, students can move from junior secondary to senior secondary in the same school without having to enter the central allocation scheme in the old system. Secondary school graduates will then join a new public examination (Hong Kong Diploma of Secondary Education) to compete for places in the 4-year university education. The new 3-year junior secondary, 3-year senior secondary and 4-year university education is named 334.

Reforms of school curriculum and the new public examinations have a huge impact on the administration of the secondary schools because all graduate teachers in secondary schools were subject-trained before 1997. The administration hierarchy in the secondary schools was also structured with the leadership of the subject head teachers before the Education Reform. The change required in the CDC document (2001) does not only imply the change required in learning and teaching, it also implies a restructure in subject (Key Learning Area) leadership in all the secondary schools. The curriculum change which is tied up to university admission also affects the retraining and employability of many senior secondary school teachers.

It is hoped that with the curriculum reforms, students in Hong Kong can develop the nine skills (critical thinking, self-management, problem solving, numeracy, collaboration, communication, creativity, study skills, IT skills) required in the 21st century (CDC 2002). The following points are listed as the short term targets for the Curriculum Reform from 2003 to 2006:

1. To complete the four key tasks: 'Reading to Learn', 'Project Learning', 'IT for Interactive Learning' and 'Moral and Civic Education'
2. To induce critical thinking, creativity and communication in the eight Key

Learning Areas (KLA)

3. To connect the ‘central curriculum’ in the eight KLA Guides with school-based curriculum development at different levels

The curriculum change proposed in the CDC documents (CDC 2001, CDC 2002, CDC 2004) reiterates the lifelong learning literature in secondary schools’ curriculum reform (Smith & Spurling 1999). The CDC policy documents also cite the significance of teachers’ training in meeting the new requirements in learning and teaching the new curriculum.

HKEMB’s expectations for curricula reform in 2006 (CDC 2002) sound very optimistic. However, carrying out such reform is not a simple task and the road to training lifelong learners is not straight. Smith and Spurling (1999) describes the curriculum reform in UK schools as ‘*Riding the Tiger*’ and they point out that ‘conditions in educational institutions of all kinds and levels tend to be hostile to the principles of training lifelong learners’ (p.139). They also point out the practical constraints of implementing the lifelong learning curriculum in the secondary school settings.

In the secondary schools too, it largely explains why so many young people turn away from further learning. Teaching mechanically for predominantly instrumental reasons is certainly not going to reverse that trend – though it may be a way to survive the experience of teaching overcrowded classes of reluctant learners, day in day out (Smith & Spurling 1999, p.139).

The issues of ‘overcrowded classes’ and ‘reluctant learners’ which Smith and Spurling (1999) mentioned have interfered with the lifelong learning curriculum in many Hong

Kong secondary schools.

The success of lifelong learning in schools hinges on teachers' development

(Longworth & Davis 1996a, Chapman and Aspin 2001, Bryce 2002, Cheng 2003).

Tennant and Yates (2005) also argue that it is 'teachers rather than the students who are thrust more forcibly into adopting new learner-worker identities consonant with the attributes of lifelong learners and the demand of the contemporary workplace' (Tennant & Yates, p.213). During the implementation of Education Reform in Hong Kong, frontline teachers were forced to complete Continuous Professional Development (CPD) before they could deliver knowledge, skills and attitude of lifelong learning to the students.

At the beginning of the policy implementation, in 2001, teachers did not react strongly to the HKEMB's rationale of 'improving the school curriculum'. The Hong Kong Professional Teachers' Union supported the recommendation of 'Improving Teaching and Learning' made by the Education Commission (HKPTU 2003a). However, when the administrative procedures related to curriculum reforms were released after 2002, teachers began to worry. Their concerns about workload and stress were expressed in the media and their trade unions (HKPTU 2003b, HKPTU 2003c).

When the new Curriculum Guide was released by CDC in 2002, frontline teachers, especially in the secondary schools, began to question the cost-effectiveness of such a huge transformation. The division of school subjects into the Key Learning Areas (KLA) affects appraisal and promotion in most secondary schools. Frontline teachers also wonder about the validity and reliability of the new assessments in 'generic skills', 'values' and 'attitudes'. They argue that these elements could not be quantified and it

would be very difficult for the school to explain students' performance (HKPTU 2005b). The accountability of School-Based Assessments (SBA) placed much pressure on frontline teachers, especially in the secondary schools, because the 'school-based assessment marks' will be linked to the high-stakes public examinations. SBA marks given by frontline teachers in secondary schools will affect secondary students' chances of being admitted to the universities.

In order to train lifelong learners, HKEMB set up measures to 'provide the environment to facilitate the implementation of the curricula reforms' (HKEMB 2000) after introducing the changes to be made in the public assessment system. The following administrative guidelines were introduced in 2002 (CDC 2002).

- Development of School-based curriculum
- Establishing the culture of 'Collaborative Lesson Preparation'
- Transforming the 'School-timetable'
- Promotion of 'Assessment for Learning'
- Catering for 'Learner Differences'
- Setting up new modes of 'Homework'
- Providing 'Life-wide' learning opportunities in schools

In 2002, most of these terms were new to frontline teachers. HKEMB claims that support measures and resources are to be distributed to schools and frontline teachers should support the reforms (CDC 2002 p.99). However, frontline teachers were frustrated when the reform measures were launched in 2003. They argued that neither the teachers nor the learners were prepared for the new mode of learning, teaching and assessment. It would not be fair to link students' school-based assessments (SBA) to

the public examinations system by 2012 (HKPTU 2004, p.3). The change is described as ‘too enormous, too hasty and too broad’ for its stakeholders (teachers, students and parents) to adapt to (HKPTU 2004 p.4).

In October 2004, the CDC released the paper ‘Reforming the Academic Structure for Senior Secondary Education and Higher Education’ and proposed ‘Core and Elective Subject Framework for the New Senior Secondary Curriculum’. Frontline teachers argued that there should be a delink between the timetable for the academic reform and curriculum restructuring (HKPTU 2004, p.2). They stated that they had no objection to the ideal of developing whole-person education and the introduction of the new core subject of Liberal Studies in the 2012 public examinations system (Hong Kong Diploma of Education –HKDSE). However, this timeline did not allow schools to gain resources and experiences in the process of implementation. HKPTU criticised HKEMB for the rigid timetabling in carrying out most curriculum reform measures (HKPTU 2004, p.3).

Frontline teachers complain that they have no autonomy in curriculum planning and many schools report being pressured during the implementation of the new examination syllabus (*South China Morning Post* 2004, June 30 p.7). Many frontline teachers argue that although several learning paths are featured in the new curricula, students’ achievement was still decided by the pen-and-paper examination at the end of the new 3+3 (6 years) secondary schooling. The introduction of the new core subject, Liberal Studies, in the Hong Kong Diploma of Secondary Education (HKDSE) in 2012 also creates debate among frontline teachers.

We recommend that curriculum restructuring need not be accomplished with the same pace as the academic reform in 2008. At least for the controversial subject, i.e. Liberal Education. The government should have priority in curriculum restructuring and let the 'immature' subject develop slowly. If EMB does not have careful planning, it will cause chaos in the education sector, particularly secondary schools.

(HKPTU 2004, p.4)

Starting from 2001, curricula reforms have been endless. Frontline teachers complain that the ever-changing requirements in the curriculum and the public examination syllabus is doing the students more harm than good. The curriculum change is tied to the new public examination syllabus (HKDSE) and the universities' admission requirements are linked to the students' performance in HKDSE. The change is very high stakes. Frontline teachers feel pressured in preparing the students for a completely new syllabus in the public examinations and the parents and students do not feel comfortable with the new examination system (*Hong Kong Economic Times* 6 Dec. 2004, p.5)

The proposed study investigates how well the frontline teachers understand the implications of the lifelong learning curriculum reform and how they react emotionally to the HKEMB curricula reform. From the data collected, it is hoped that a better understanding of the effective measures in curricula reforms can be reached. It is also hoped that the frontline teachers' perception on the disadvantages and measures hindering the lifelong learning curricula reform can be documented for the direction of further investigation into lifelong learning Education Reform in Hong Kong.

3.3 Enhancing the professionalism of teachers

Enhancing the professionalism of teachers is the second area of school reform.

Enhancing the professionalism of teachers is emphasized in the HKEMB Education Reform policy document (HKEMB 2001a) and the task of teacher development in the territory is recommended to be delegated to a special committee for Teacher Education and Qualification after 2001 under the Education Commission.

3.3.1 Continuous Professional Development (CPD) and Teachers Competencies Framework (TCF)

The Advisory Committee on Teacher Education and Qualification (ACTEQ) works on ways to improve the quality of teachers (ACTEQ 2003, p. i). ACTEQ published 'Towards a Learning Profession: The Teacher Competencies Framework and the Continuing Professional Development of Teachers' in November 2003. This policy document makes recommendations on a framework for teachers' continuing professional development.

The willingness and capacity for lifelong learning, which we expect from our students, should also be reflected in our teachers. Every teacher should be a continuous learner in order to advance the quality of our education system and the quality of students' learning (ACTEQ 2003 p.1)

ACTEQ (2003) proposes the Continuous Professional Development (CPD) and a Teachers Competencies Frame (TCF) to encourage teachers to undertake CPD activities.

ACTEQ (2003) highlights the significance of training teachers as lifelong learners and recommends that 'all teachers, irrespective of their rank and capacity, should engage in Continuous Professional Development (CPD) activities of not less than 150 hours in a three-year cycle' (p.13). A three-year try-out period is recommended before the full implementation of the CPD and TCF. In March 2004, a steering committee on teachers' CPD was set up under ACTEQ to keep track of CPD developments and advise the government.

The implementation of CPD and TCF policies in school has led to a series of discussions among the teaching professionals. In March 2005, the Hong Kong Primary Education Research Association and Education Convergence published a survey 'Teachers' perception on Continuous Professional Development'. The report mentioned the readiness of schools and teachers for HKEMB implementation of CPD.

About 100 secondary schools participated in the questionnaire (Education Convergence 2006) and the response rate was about 50%. Four hundred and ninety-two questionnaires from secondary frontline teachers were analysed. The survey shows that fewer than 35% of the participants understood the requirements of CPD. Over 60% of the participants responded that they did not understand the rationale of CPD. However, over 50% of the participants had started the CPD studies as required by their schools. The survey report also revealed that secondary school teachers under the age of 25 and over the age of 50 responded positively to the implementation of CPD.

In conclusion, the report points out that most teachers are not ready to map their own development plan to meet the lifelong learning requirement of ACTEQ. Some frontline teachers stated that the HKEMB's 150 hours 'quantity requirement' had an

adverse effect on their own development plan.

The Professional Teachers Union also criticises the mandatory CPD requirement as a major source of teacher burnout. The editor of HKPTU argues that teachers should be granted full-pay sabbatical leave if they participate in regular and frequent professional development courses (HKPTU 2005a, p.2).

Between 2004 and 2005, the media reported the suicides of several teachers. The issue of burnout and the requirements on CPD became a popular topic of discussion in the news. In 2006, HKEMB established the Committee on Teachers' Work and the issues of teachers' workload and development requirements were brought under official government scrutiny.

3.3.2 Language Benchmarking Tests for Teachers

Language benchmarking is not an innovation in the lifelong learning Education Reform. The development of the English language benchmarks in Hong Kong was first recommended in Education Commission Report No.6 (1996). Following the recommendations of the Coniam and Falvey report (2002), HKEMB took the lead in the Language Benchmark Policy. The language benchmark requirements for English teachers were released in a series of HKEMB circular documents to secondary schools between 2001 and 2005. It is expected that pre-service teachers would, from September 2001, have to be benchmarked before they join the profession. In-service English language teachers also had to meet the English Benchmark requirement by 2005 if they were to continue teaching English.

Starting from 2005, the Language Proficiency Requirement (LPR) became a HKEMB school policy which is applicable to all English and Putonghua teachers holding a permanent post in a public-sector school or an aided school offering a full curriculum (except those employed under the Native-speaking English Teachers Scheme and those in international schools). Teachers of English and Putonghua are not allowed to teach these subjects if they cannot meet the Language Proficiency Requirements.

According to ACTEQ (2003), the purpose of setting language proficiency levels is to promote effective teaching and to enhance the quality of education. The policy document states that language proficiency levels provide an objective reference against which teachers' proficiency can be gauged to help them pursue continuous professional development. Although the lifelong learning goal is not tagged to LPR, enforcement of the language requirement tests has been regarded by the frontline teachers as one of the most controversial administrative measures in *Jiao Gai*.

Frontline teachers resisted the implementation of the LPR, especially the requirement in the English benchmarking examinations. HKPTA (2003b, 2003c) harshly criticises the frontline teachers' benchmark requirement in English. HKEMB is blamed for the rigid administrative measures used in schools. Such measures are said to affect the redundant teachers, especially the teachers being put under the Centralised Redeployment Scheme (CRS).

What is infuriating is that schools recruiting teachers of Chinese language also asked for English- benchmarked teachers!

All of a sudden, the attainment of English Benchmark is indicative of high teaching ability and benchmarked teachers with haloes become objects that schools are dying to fish into their nets at all costs.

The absurdity of the scene is intensified by the naivety of some school managers whose eyes are blinded by the Benchmark requirements and completely disregard all the other qualities of good teachers.

The playwright of the Benchmark Farce has created this outrageous scene and the 'award', of course, goes to EMB. (HKPTU 2003b p.2)

In 2003, when the benchmark policy of professional development was merged with the employment criteria, many frontline teachers, especially the English Language subject teachers, felt forced to take the Language Proficiency Attainment Test (LPAT). Frontline teachers complained that the language benchmark had become an indication of 'teacher effectiveness'. Amid the waves of school downsizing, teachers entering the Centralised Redeployment Scheme (CRS) were under great pressure. Even teachers of Physical Education and Art were asked if they had reached English benchmark requirements in the CRS interviews (HKPTU 2003c). The criteria set for teachers continuous professional development was characterized as the 'knife' used to slaughter redundant frontline teachers (HKPTU 2003c).

The education policy related to Medium of Instruction (MOI) has always been controversial in Hong Kong. To enhance students' 'biliterate (to read and write in

Chinese and English) and trilingual (to speak Putonghua, Cantonese and English) competence is the main objective of Hong Kong education. Although improving teachers' language proficiency is not directly related to the lifelong learning discourse and the lifelong learning Education Reform, HKEMB puts much emphasis on improving language proficiency of the English teachers in the territory. Teachers' English language proficiency was expected to affect students' second language acquisition and that teachers who failed to reach the benchmark level were not qualified to teach English. LRP is also linked to the discourse of Medium of Instruction (MOI) and Secondary School Places Allocation (SSPA) in 2005 (Education Commission, 2005) in the Education Reform.

The Education Commission policy reports on MOI and SSPA are included under the theme of 'highlights of Education Reform' on HKEMB's website. However, HKEMB does not explain how teachers' development and the Language Proficiency Requirements are related to the agenda of the lifelong learning Education Reform.

The present study will investigate the secondary school teachers' attitudes towards Education Reform measures (LPR, MOI and also SSPA). Looking at these issues from the perception of frontline teachers may help the policy makers to clarify the misunderstandings between the reform administrators and frontline practitioners.

3.4 Reforming the admission and public examinations system

3.4.1 Secondary School Places Allocation (SSPA) and Medium of Instruction (MOI)

SSPA has been regarded as the key mechanism for the favoured secondary schools to screen the academically better students in the Secondary One admission exercise.

However, HKEMB (2001a) criticises the traditional SSPA and other admission systems for interfering with learning.

There are at present too many hurdles at various stages of education like Primary One (P1) and Secondary One (S1) admissions, public examinations as well as university admission, which impose a lot of restriction on learning...As a result, school education tends to put too much stress on the intellectual development of students rather than the development of their ethical, physical, social and aesthetics faculties (HKEMB 2001a, p.44).

Based on this argument, the Education Commission proposed to abolish the Academic Aptitude Test (AAT) under the Secondary School Places Allocation (SSPA) system in 2001. In 2005, the Education Commission released the MOI and SSPA review report. It claims that the MOI and SSPA mechanism should be changed to enhance the Education Reform.

The Education Reform, which is student-focused, aims to develop each student in all-round manner so that he/she is capable of lifelong learning, critical and exploratory thinking, of being innovative and adaptable to changes. This goal has guided each and every aspect of the Education Reform, including the medium of instruction (MOI) arrangements for secondary schools and Secondary School Places Allocation (SSPA) mechanism (Education Commission 2005 p. i)

In the review report (Education Commission 2005), Education Commission confirms that ‘mother-tongue’ teaching should be applied to the majority of secondary schools in Hong Kong. Teachers (except the subject teachers of the English Language) in the Chinese Medium Instruction (CMI) schools are not required to prove their English proficiency. However, all subject teachers in the English Medium Instruction (EMI) secondary schools are required to pass the English benchmark requirements.

The new SSPA arrangement also gives parents a wider choice to select different MOI (CMI or EMI) secondary schools for their children. EMI schools have traditionally been regarded as elite schools for high achievers. EMI secondary school places are limited to less than 25% in each school district. In the new SSPA, primary school graduates in a school district can be allocated across different school nets in the same district. In 2006, a total of 19 school districts were linked to 36 school nets in the territory according to the student population of the district. Most parents from the traditionally favoured school nets were opposed to the new measures because it implied that students in these favoured school nets would have to face more intense competitions from students of other school nets in the district for admission to an EMI school.

In Hong Kong, the school admission system was used to match the parents' choices and the school places in different stages of public schooling. In the community, students' academic performance in the public examinations is the key factor in parents' choice in various tiers (primary, secondary and university) of the admission system. Most parents were keen to put their children in the EMI secondary schools because these schools used to attract the top 25% Primary Six academic achievers. Graduates of the EMI secondary schools also had much better chance for admission to a university.

HKEMB's policy in transforming the admission and examination systems has been accused of helping 'strong' schools and 'killing' weak ones. In the system of SSPA, academic results of the Primary Six students were divided into three bands with the top 33% in 'band 1', next 33% in 'band 2' and bottom 33% in 'band 3'. From 2000 onwards, the steady decline in the number of schoolchildren placed more pressure on the frontline teachers. Many 'low banding' secondary schools found that the change in the admission system had undermined their recruitment of Secondary One students. Frontline teachers also point out that the new SSPA measures intensify the competition for Secondary One students' admission to the school districts where the population of students is shrinking (HKPTU 2003d).

Schools are closed in cases of under-enrolment....
More schools of direct-subsidy scheme are yet to be built. These schools have the advantage of adopting English as the medium of instruction without further justification of their students' language competency, thus recruiting more students from low-banding subsidized schools. ...The adverse state of competing to attract students among schools is, in reality, the direct aftermath of EMB's mismanagement (HKPTU 2003d).

The MOI and SSPA review report (Education Commission 2005) is said to be making the EMI schools even more popular and forcing the CMI schools to struggle in the years of school downsizing.

3.4.2 New Senior Secondary (NSS) syllabus and Hong Kong Diploma of Secondary Education (HKDSE)

In order to bridge junior secondary and the New Senior Secondary school curriculum change, the Education Commission (HKEMB 2000) proposes that the modes, content and assessment methods of the secondary schools public examinations be reviewed. In order to promote students' independent thinking and creativity, 'more flexible modes of examination' are introduced (p.44). In order to realise the goal of lifelong learning, the Education Commission suggests a certain degree of teachers' assessment in secondary schools being added to evaluate students' abilities in organization, communication and cooperation with others. Teachers of the senior secondary forms were required to carry out School Based Assessments (SBA) to evaluate students' performance. These assessments records might affect students' performance in the public examinations.

Based on these recommendations, CDC (2004) proposed introducing the New Senior Secondary (NSS) curriculum to the secondary schools by September 2009 and a new public examination system, the Hong Kong Diploma of Secondary Education (HKDSE), to be applied to secondary school leavers by 2012. In order to train lifelong learners, by 2012, all the subjects in HKDSE should include School-based Assessments (SBA) in the public examinations' construct.

The introduction of School-based Assessment (SBA) is designed to recognize students' achievement in areas which are not easily reflected on paper-and-pencil tests. For the first time in Hong Kong, frontline teachers are required to document students' daily performance as part of the assessment in the public examinations.

From 2004, HKEMB held numerous seminars and training sessions for the introduction and the preparation for the implementation of SBA in secondary schools. The subject of English Language was the first subject required to include the SBA element in the 2007 Hong Kong Certificate of Education Examinations.

The requirement of SBA has led to a series of public debates in the HKPTU's editorial news. Frontline teachers express their concerns on 'uniformity', 'validity' and 'reliability' of the SBA scores. They also complain about the 'significantly added workload' on the frontline teachers (HKPTU 2005b). Frontline teachers present various facts to complain about the implementation of SBA.

- Fact 1 is that nobody is certain of the method of uniformly assessed students with SBA in such a high-stakes examination.
- Fact 2 is that the number of students in each class is so large that it is impossible for teachers to assess them for the proposed SBA.
- Fact 3 is that there is no provision of supporting materials for students' learning and teachers' teaching.
- Fact 4 is that teachers' workload has already been so immense that with their burnout rate so high manifested in most recent survey findings it is murderous to yet implement another innovative project as large as SBA (HKPTU 2005b, p.2).

The new MOI policy, SSPA system and the introduction of SBA are innovations to change the nature the school curricula and public examinations from the traditional induction mode to a more lifelong learning and training directed mode. However, frontline teachers do not seem to perceive the positive effects of these measures.

The present study investigates frontline teachers' understanding of the new admission and public examinations system. Their feelings will be recorded to reflect their perception of the effectiveness of the measures hindering the new assessments.

3.5 Enhancing the quality assurance mechanism

The Quality Assurance Division (QAD) of the Education Department (ED) published the *Performance Indicators for Hong Kong Schools: Evidence of Performance* in 2002. Under the direction of HKEMB and ED, the Quality Assurance Division carried out Quality Assurance Inspections to review the strengths and weaknesses of the schools (QAD 2002, p. i). In the QAD inspection reports, performance of schools is rated in four levels: 'excellent', 'good', 'acceptable' and 'unsatisfactory'. Inspection reports on schools are released to the parents, students and communities through the schools' websites and the annual reports to their subsidizing bodies.

In the Learning and Teaching Domain of the Performance Indicators guide (QAD 2002) on secondary schools, the lifelong learning elements are emphasised. In order to attain an 'excellent' performance, the secondary school should be able to apply the lifelong learning education goals proposed in the CDC 2001 lifelong learning curriculum document.

Excellent criteria on curriculum goals and policies:
Based on the principle of lifelong learning and whole person development, the school has formulated curriculum goals, appropriate policies (e.g. policy on medium of instruction) and a strategic curriculum plan that are in line with the aims of education in Hong Kong and its goals (QAD 2002 p.23).

From 2003 onwards, QAD carries out regular Quality Assurance Inspections (QAI) on schools. The performance indicators in the Teaching and Learning Domain are applied to the classroom observations in the External School Reviews. Students' learning is also assessed in a lifelong learning agenda.

Excellent criteria on student learning:

- Students are able to learn actively and independently (QAD 2002, p.30).
- Students master and manipulate various generic skills. They also demonstrate good and independent learning abilities, which lay the foundation of lifelong learning (QAD 2002, p.31).

Many academics (Cheng 2006a; Choi 2005; Chong 2006) point out that the implementation of QAI's School External Review has put frontline teachers under much stress. Choi (2005) argues that the practice of School External Review has put schools under surveillance and aggravated teachers' stress.

External assessments of schools, introduced by EMB in 2003, which required schools to upload the school external assessment reports in the website, have aggravated teachers' stress due to the fierce struggle for survival among schools under the policy of closures. Moreover, EMB puts schools under surveillance by disclosing their data to the public (Choi 2005, p.242)

HKPTU (2005a, 2005b, 2006) put the HKEMB's quality assurance exercises under the umbrella of '*Jiao Gai*' and criticises the External School Reviews for having 'adverse effects' on the quality of education (HKPTU 2006, p.2).

The Quality Assurance Inspection (QAI) is a public examination on the school's performance. As the public evaluation on the 'success' (excellent performance) or 'failure' (unsatisfactory performance) of the school depends on the External School Review, it is reasonable for frontline teachers to relate their workload and stress to the these '*Jiao Gai*' measures.

3.6 The issue of teachers' stress and the implementation of Education Reform

Between 2001 and 2006, the Chinese medium discourse on frontline teachers' stress was related to '*Jiao Gai*'. As 'lifelong learning' is used to steer the '*Jiao Gai*' measures implemented after 2001, discourse on the Education Reform in Hong Kong is also very often tied to curriculum reform, language education, teachers' professional development and the admission and assessment systems under the same umbrella of '*Jiao Gai*'. HKEMB Progress Reports (HKEMB 2002a, HKEMB 2003b, HKEMB 2004a, HKEMB 2006a) also mention these '*Jiao Gai*' measures as pointers for the

success of the reform implementation. To most frontline teachers, *Jiao Gai* was regarded as an umbrella and a grab bag of reforms introduced by HKEMB. As mentioned in the context and orientation of the research, most local teachers were confused about the orientation and implementation of the lifelong learning Education Reform and *Jiao Gai* is used to describe all the changes made in the education system.

According to a survey done by the Hong Kong Professional Teachers' Union in December 2006 (HKPTU 2006), a total of 46 new measures on '*Jiao Gai*' has been implemented top down by the HKEMB since 2001. The literature review on the discourse of HKEMB Education Reform also reveals that, to many academics, all changes in the school system led by the HKEMB after 1997 should be summarised in the context of '*Jiao Gai*'.

3.6.1 The issue of teachers' stress

Responding to the public discussion on teacher stress after the Education Reform, HKEMB released a series of measures, 'Relieving Frontline Teachers' Pressure' in 2005 and 2006. In 2006, the Committee on Teachers' Work (CTW), the Hong Kong Professional Teachers Union, Education Convergence, the Hong Kong Primary Education Research Association, and Xiyao Culture and Education released their findings on 'Teacher Stress'.

3.6.1 a. Committee on Teachers' Work

The HKSAR government created the independent 7-member Committee on Teachers' Work (CTW) in February 2006 to look into teachers' work. Its final report was

released ten months later. According to CTW (2006), communication problems, the pace of change and the burden of carrying out education reforms were the key sources of teachers' stress.

3.6.1 b Hong Kong Professional Teachers' Union

The Hong Kong Professional Teachers' Union published a series of surveys in 2007 on teacher stress (HKPTU 2007b). It argues that frontline teachers' stress has reached 'burn out' level.

In 2007, over 90% of frontline Hong Kong teachers from kindergartens to secondary schools belonged to the HKPTU. HKPTU calls itself a 'professional body aiming at protecting teachers' rights and providing the frontline teachers with various welfare services' (HKPTU 2007a). HKPTU strives for education quality through teachers' professionalism. The highest authority of HKPTU is the Annual General Meeting, which is attended by representatives, who are elected by teachers in every school in Hong Kong. There is 1 representative for every 15 members. When the Annual General Meeting is not in session, a 39-member Executive Committee runs the union. HKPTU (2007a) criticised the CTW final report (CTW 2006) for 'failing to pinpoint the major sources of stress among teachers' (HKPTU 2007a, p.1).

3.6.1 c Education Convergence and Hong Kong Primary Education Research Association

Education Convergence was founded in 1993. The Hong Kong Primary Education Research Association is annexed to the publications of the Education Convergence. Its mission statements emphasize improving the quality of education in Hong Kong

through professional studies in the primary and secondary schools. Education Convergence released its 62-page research study, ‘Hong Kong Teachers’ Stress: Preliminary Analysis’ in December 2006. The study points out that primary and secondary school teachers have different perceptions of the stress induced by the Education Reform. The survey research adds that secondary school teachers from different banding schools, who were teaching different subjects and with different years of teaching experience, rank the source of teachers’ stress in a different way.

3.6.1 d Xiyao Culture

Xiyao Culture was founded in Singapore in 1998 by a group of Chinese scholars and Confucian studies experts. The institution aims at reviving Confucian studies in school in Asian Chinese communities. Xiyao Culture promotes the development of ‘intrinsic virtuous quality’ (性情 [*Xingqing*]) in education and it claims to have committee members who are experts in comparative Eastern and Western philosophies. In 2004, 喜耀文化 [Xiyao Culture] began to sponsor regular professional exchange activities and started publishing its educational research periodicals 喜耀性情 [*Xiyao Xingqing*] in Hong Kong.

In June 2006, Xiyao Culture published a special issue on ‘Teachers’ Stress’ a collection of ten articles written by frontline teachers. The study summarises frontline teachers’ feelings about the HKEMB Education Reform and teachers’ stress. The editor argues that frontline teachers in Hong Kong are experiencing ‘the most serious stress problem’ in the history of education (Xiyao Culture, 2006).

3.6.2 Causes of teachers' stress

The CTW (2006) report finds that teachers perceive their workload as stressful when the environment or work demands have exceeded their personal resources and disrupts their teaching routines (p.24). Sources of stress are reported to originate from the following five clusters:

1. Changes and innovation (e.g. External School Review and curriculum reform)
2. External stakeholders (e.g. community expectations and demand of EMB and parents)
3. Students' assessments (e.g. Territory-wide System Assessment and related Language Proficiency Requirement)
4. School management (e.g. communication channels, team work and cooperation in school)
5. Students (e.g. students' learning attitude, motivation, and diverse abilities)

The CTW (2006) report also points out that changes and innovations have a greater impact on teachers' stress than the long hours of work. Teachers have to use 15.8% of their teaching time on administrative duties, which they consider the least important, to meet the requirement of the education reform. The report also cites declining student enrollments and rising community expectations as additional sources of pressure.

In contrast, the Hong Kong Professional Teachers' Union (HKPTU 2007b) argues that the CTW report (2006) only presents the bureaucratic view of teachers' stress. It claims that 98.6% of their respondents believe that the Education Reform is directly responsible for the tremendous increase in teachers' administrative and non-teaching workload (HKPTU 2007b, p.2). In addition to workload, 'the arrogant manner' of the EMB officials is also criticised (HKPTU 2007b).

3.6.3 Level of stress

The official report of Teachers' Work gives an objective survey on the duties and work hours on the frontline teachers (CTW 2006). It does not directly address teachers' stress.

Similar to schools in other countries, the school days in Hong Kong were intense. On average, teachers worked about 10 hours a day on a school day, including the time spent working at home. For non-school days other than long holidays like Christmas and the summer vacation, teachers usually worked 4.6 hours a day. It is also shown that frontline teachers devote a higher proportion of time to teaching-related duties and a lower proportion to administrative duties, continuing professional development and communications with external stakeholders (CTW 2006, p.16).

After listing the work hours of the frontline teachers, the document states that 'teachers need to be motivated to sustain a high level of job satisfaction and proper attention should be paid to address the issues that impact their work and well being' (CTW 2006, p.31).

By the end of 2005, HKPTU had published several articles claiming that teachers were burning out. Based on a survey report conducted by HKPTU in September 2005, the union news claims that 'teachers' health has been devastated by their heavy workload' (HKPTU 2005a, p.1).

Teachers always have more than 5 burnout symptoms and the most frequent symptoms assaulting teachers are: tiredness, nervousness, musculoskeletal pain, sadness/ depression, sleep problems and headache... From the survey we found that the phenomenon of teachers' burnout is very obvious (HKPTU 2005a,p.2)

HKPTU (2007a) argues that the level of teacher stress has reached an alarming level.

For many years teachers have been tortured by education reforms initiated by EMB, including many administrative measures putting school and teachers under surveillance, accelerating the closures of schools, introducing external and internal evaluations, and worst of all, refusing to implement small-class teaching in schools (HKPTU 2007a, p.2).

HKPTU (2007a) also puts the blame for teachers' stress to on the Education Reform and the insensitivity of the government officials.

Education reforms have turned schools into education-killing –fields where teachers have to struggle for their survival amid the fierce destructive competitions, feeling stifled and exhausted. CTW simply turn a blind eye to the above facts and come to an immature conclusion by attributing teachers' stress to the ill-management or improper administration of schools (HKPTU 2007a, p.2).

HKPTU (2007a) points out that no mutual trust can be sustained between the policy makers and the frontline practitioners unless immediate action is taken to change the implementation protocols of the Education Reform.

In the Education Convergence's study, literature on teachers' stress (Black 2004; Lau 2002; Leung & Lee 2006; Tang et al. 2001) is cited and conclusions are made to summarise the causes of teachers' stress in. Education Convergence (2006) notes the complexity of teacher stress. Its study ranks the stress-related elements perceived by the secondary schools frontline teachers as follows: (The median score is 3):

1. Time management and workload (3.5073)
2. Student misbehavior (3.1055)
3. Expectations of teachers' professional standard (3.0397)
4. Career development (2.8961)
5. School administration and management (2.7131)
6. Teachers' self-efficacy in student support (2.7009)

3.6.4 Consequences of teachers' stress

HKPTU (2005a) argues that if teacher stress cannot be reduced, burnout will be aggravated and teachers' physical and mental health will be harmed. The problem of teacher stress will have an adverse effect on the Education Reform.

The survey section of the report shows that over 80% of the teachers attribute their stress not to the increasing work hours but to the 'deteriorating quality of the students' (Xiyao Culture 2006 p.7). The study includes the interview transcripts of ten frontline teachers. It claims that teachers' stress has had a negative effect on the education system in Hong Kong.

Mr. Fung, a secondary frontline teacher of Design and Technology in Tuen Mun, responded:

In recent years, I continuously cannot go to sleep at night (insomnia). I could only sleep well for 2 to 3 nights a week. I worried about students' behavior and their results in the public examinations. The school management is very concerned about the value-addedness report given by EMB. Students are becoming more and more difficult to teach. I am teaching in a Band Three school. Our effort cannot be shown on students' academic achievement. I found no reward in teaching. (Xiyao Culture 2006 p.6)

Ms Ng, an English secondary teacher in Hong Kong Island stated:

I have become constipated. I think it is caused by stress. Under the curriculum reform and the New Senior Secondary curriculum reform, I think many teachers will be retrenched. It seems that teaching has become a dead end profession. I found myself helpless. (Xiyao Culture 2006 p. 13)

Mr. Ching, a Chinese secondary teaching in Kowloon said:

The implementation of School-Based Assessment (SBA) created tension between teachers and students. Our relation deteriorated because students always argued with me on the school-based assessment grades I gave them. The Education Reform related measures had increased my workload by 40%. (Xiyao Culture 2006 p. 21)

In the summary report of the Xiyao Culture (2006) study, the stress-related issues of school closure, teachers' language benchmarking requirement and teachers' family life

are discussed. The authors of Xiyao Culture (2006) conclude that the implementation of HKEMB Education Reform had been carried out without revisiting the Chinese teachers' concept of self efficacy. More qualitative study of the frontline Chinese teachers' perception on Education Reform is urged.

Between 2003 and 2006, the print media often raised teachers' stress when attempted suicides were reported. (*South China Morning Post* 2003 Nov.3, *South China Morning Post* 2004 June 12, *South China Morning Post* 2004 June 30, *South China Morning Post* 2004 November 20, *Hong Kong Economic Times* 2004 Dec. 6, *Sing Tao* 2006 February 8 p.11, *Sing Tao* 2006 February 15 p.9, *Sing Tao* 2006 June 14 p.13, *Sing Tao* 2006 December 21 p.14).

3.6.5 Possible solutions to deal with teachers' stress

CTW (2006) argues that change is inevitable and that teachers' stress is common (p.37).

The Committee recommends the following measures to release teachers' stress:

- i. To strengthen mutual trust and communication within the education sector
- ii. To minimise uncertainties in the planning and implementation of education initiatives
- iii. To allow teachers to redirect time to core business of teaching and learning
- iv. To enhance the capacity of school teachers
- v. To leverage community support and respect for the profession

(CTW 2006 p.38)

CTW (2006) concludes that public resources are not unlimited and must be used wisely.

It states that 'the onus' is on the 'development of a healthy and resilient teaching force' (p.38).

However, the teachers' unions did not agree with the CTW's recommendation. HKPTU (2006) criticises the CTW for not being represented by trade union members or frontline teachers. HKPTU calls CTW a 'ridiculous arrangement' and the recommendations of CTW 'amateurish'.

The committee is not represented by frontline teachers, not to mention members of the trade unions. This is definitely the most ridiculous arrangement, one that no thinking person would ever come up with. How could a bunch of people with no direct experience of teaching in primary and secondary schools really understand what is going on in the field? Asking amateurs to judge professionals' work, one is bound to come up with amateurish conclusions (HKPTU 2006 p.1).

HKPTU (2007a) urges HKEMB to listen more to the frontline practitioners. In order to reduce teacher stress, the Union urges the government to slow down the speed of the Education Reform and to put more resources to reassure the teachers about school downsizing and redundancy.

It is high time that EMB stopped paying lip-service to resolving teachers' stress problems, stopped putting forward reform programmes unilaterally and started addressing the issue with compassion and honesty (HKPTU 2007a, p.3).

Education Convergence (2006) recommends that HKEMB consider implementing 'small class' teaching to relieve the problem of school downsizings. It emphasises that teachers should be given paid-leave in their Continuous Professional Development

(CPD) studies. Besides, school leadership training should be enhanced and frontline teachers' needs should be met immediately. It is also recommended that the communication channels among the policy makers, administrators, supervisors and the frontline practitioners be strengthened (p.58).

Xiyao Culture (2006) approaches teachers' stress from a cultural perspective. It criticises the qualitative assessment approach of the External School Review and the western concept of school accountability. It promotes a revival of the eastern perception of 'passion and love' (p.35). Xiyao Culture (2006) quotes the Chinese classics of 老子[Lao Tsz's] 道德經 [*Tao Te Ching*] (Chapter 60: On ruling a big country) to suggest 'a way out' 道 [the *Tao*] for the Education Reform.

‘To rule a big country is just like to cook a small dish’. There should not be any big move in ruling a big country. The cook's very small action will have huge impact on the final taste of the dish. The ruler should not manipulate the changes involved in the process of change. Danger and pitfalls are everywhere when change is implemented (Xiyao Culture 2006 p.50).

It is implied that the government should leave more room for the frontline teachers to adopt and adapt to the 'big' change initiated in the HKEMB lifelong learning Education Reform (p.51). Too much intervention may destroy the original goal of the reform.

3.7 Further enquiry

After the release of the *Learning for Life and Learning through Life* (HKEMB 2000) policy document, training lifelong learners for Hong Kong has been the guiding principle for the education reforms. Besides the lifelong learning Education Reform

measures, HKEMB carried out other administrative measures to deal with the changing social and economic environment. In Chinese medium discourse, all the changes in the school education system led by the HKEMB after 1997 are termed '*Jiao Gai*'. There is no study to distinguish the Chinese translation of '*Jiao Gai*' and the lifelong learning Education Reform implied by HKEMB.

Between 2002 and 2010, there will be a 20% decrease in the number of students in Hong Kong. In order to deal with the shrinking student population, HKEMB released a series of policies on redundant teachers and school closure between 2003 and 2005. These administrative measures are not directly related to the lifelong learning Education Reform. However, they were carried out with the school reform measures. The reforms to the admission system (SSPA), language policy (MOI) and External School Review (ESR) are always merged with the discussions on teachers' redundancy and teachers' stress in relation to '*Jiao Gai*'. Under the Education Reform, many school administrators and frontline teachers attribute the school closure and teacher redundancy policy to the unsatisfactory performance of schools rated by the '*Jiao Gai*' requirements in Quality Assurance Division (QAD) in the External School Review (ESR).

The rated performance ('excellent', 'good', 'acceptable' and 'unsatisfactory') in the Quality Assurance Inspection Reports (QAD 2004, QAD 2005, QAD 2006) have great impact on the schools' popularity. Schools which are rated weak in "Academic Performance" are less popular and the pressure for school closure and teacher redundancy is greater (QAD 2004).

In “Academic Performance”, over half of the schools were rated as unsatisfactory. In the past 3 years, most students in secondary schools scored a lower percentage for passing 5 subjects or above in the Hong Kong Certificate of Education Examinations as compared with Hong Kong overall day-school candidates’ scores (QAD 2004 p.14).

HKPTU (2003b) argues that the EMB policies of ‘Special Substitute Teaching Posts’ (SSTP) and ‘Drifting Teachers Scheme’ (DTS) cannot solve the problem of teacher redundancy. The issues of ‘small-class teaching’, ‘no-pay long leave’ and ‘early retirement’ are raised to respond to the problem of teacher redundancy (HKPTU 2003c).

This is prime time and golden opportunity for EMB to gradually implement small-class teaching to ensure quality education... No-pay long leave and early retirement are also suggestions for further considerations to ease the shortage of teaching vacancies (HKPTU 2003c, p.3).

The ideology of *Zhong Shen Xue Xi* and the Confucian teaching in *The Analects* (Xiong 1949, Zhang 1982, Fok 2006, Yip 2006) also appear in the arguments of the ‘school system restructure’ between the government and the teachers’ unions (HKPTU 2004).

The focal point of argument is between “abiding to the basic principle of matching demand-and-supply to avoid imbalance of education provision” and “promoting diversified development at the expense of overprovision and wastage”...If “competitiveness”, “choices” and “diversity” are only to be determined and monitored on the basis of the strength or weakness of class structure, education provisions would then be treated as commodities, market-driven services and consumable activities rather than for the public good with the essence of humanity in education (HKPTU 2004, p.1)

The market-driven origin was blamed for losing the humanity of education (HKPTU 2004). In a contemporary explanation on *The Analects*, ‘humanity’ means benevolence (Yip 2006). According to the Confucian explanations on providing education on ‘humanity’, the ruler should decide what is right and wrong (Yip 2006, p.79).

The Master says, “A person with little humanity cannot face adversity in the long term. He cannot find peace in life. Only those who are wise and benevolent can seek humanity”. (*The Analects* Chapter 4:2, in Yip 2006, p.79)

The eastern studies of Confucius and the western discourse of globalisation and economic appreciation have very diverse interpretations of the origins and goals of lifelong learning and training lifelong learners. The frontline Chinese teachers in Hong Kong also have very different interpretations of the introduction of the administrative measures that arose from the Education Reform after 2001.

By the end of 2007, it was very hard to trace the origins of the HKEMB reforms.

HKEMB was restructured and renamed Hong Kong Education Bureau (HKEDB) in

2007. The new mission of HKEDB is to ‘provide quality education for the students’. However, the lifelong learning Education Reform is slated to continue through the introduction of the New Senior Secondary curriculum in September 2009 and the implementation of the new Hong Kong Diploma of Secondary Education in 2012.

This research can help policy makers to understand frontline teachers’ perception of the Education Reform and to extend the channel of communications among the stakeholders. The following chapter will discuss the theoretical framework of the present study, and explore the research design and research standard.

CHAPTER FOUR: EDUCATIONAL RESEARCH AND SOCIAL INQUIRY

4.1 Method and methodology

There is no one way to do social research. In fact, much of the power and potential of social research lies in the many valid approaches it comprises.

Babbie 2004, p. 21

Babbie (2004) points out that social research technology and practices are continually changing. The dominant languages and logics of educational research in the 20th century can be summarised under the disciplines of the logical empiricism (positivism); critical theory (neo-Marxism); and interpretive theories (analytic, phenomenological, and hermeneutic). Researchers have to find their best theoretical framework and work out the process of social inquiry (Soltis 1984).

4.1.1 Establishing a suitable theoretical framework

Before setting the framework of inquiry into the lifelong learning Educational Reform in Hong Kong, different social inquiry practices are examined.

The development of natural science has affected the inquiry of social and behavioral sciences in the 20th century. The language and logic of positivist empirical research has also influenced contemporary educational theories and practices. The central doctrine of positivism is that all knowledge is based on sense experience and can only be advanced by means of observation and experiment. However, in the study on the implementation of educational reforms where the immense complexity of human nature

and the elusive and intangible quality of social phenomena are involved, empirical positivism has its limitations. Frontline teachers' behavior and perceptions are related to contexts, values and individual needs in the community. Their perceptions cannot be revealed through the quantitative analysis. Therefore, empirical positivism is not the best framework for this study.

Critical theorists like Habermas (1973) and neo-Marxists like Willis (1990) see positivism as an ideology focusing on the technical, on reason at the expense of emotion, and on instrumental rationality. As a result it has a tendency to preserve the status quo and the power of the dominant class. Critical theorists reject the idea of value-free research into human, social, political and educational phenomena. They stress the need for inquiry that takes into account the historical and ideological moment we live in and the influence it has on us. Critical theory uncovers the interests at work in particular situations and interrogates the legitimacy of those interests. Its intention is to transform the society and individuals to social democracy. Critical theorists do not only wish to understand situations as phenomena but to change them. They hope to emancipate the disempowered, to redress inequality and to promote individual freedoms (Cohen et al. 2004).

Critical theory does not fit into the research construct of the present study as this research is only an attempt to seek more understanding of the phenomenon of Education Reform in Hong Kong as perceived by the frontline teachers. There is no value judgment on how well the Education Reform is doing for its stakeholders.

In the present study, the interpretive inquiry approach is most appropriate. As the frontline teachers' understandings and emotions cannot be mapped out in the controlled

empirical-positivist paradigm, and since the present study focuses on understanding rather than transformation, the interpretive investigation is best suited to answer the research questions.

Interpretive researchers argue that quantitative empirical research leaves out too much of what is human in educational research. In the interpretive paradigm, research is viewed as a social practice that operates within and through discourse. This leads to the assumption that all research is historically, socially and culturally located and therefore should be regarded as a situated and contingent practice. Unlike the positivists, interpretive researchers see research outcomes as partial, limited and open to multiple readings.

4.1.2 An interpretive inquiry into the Hong Kong Education Reform

The lifelong learning Education Reform entailed a paradigm shift in the culture of the schools in Hong Kong. The change in the admission system, the pedagogy in the classrooms and public assessments are to be shifted from a traditional examination oriented mode to a westernised lifelong learning mode. The change and ripple effects involved in the reform are complex. Stakeholders in the education reform are expected to perceive the reforms from very different perspectives. The investigation of such change is complex and subtle. Research on the education reform process should be sensitive to the pulse of the community and to the feelings of its stakeholders.

The present study investigates the understandings and emotions of frontline teachers under the education reform. It is hoped that an interpretative approach will lead to

in-depth understanding of how frontline teachers perceive the reform. In turn, this can help the policy makers to inform the frontline practitioners about the reforms.

The interpretive paradigm satisfies the rationale of the investigation of frontline teachers' perception of the education reform.

The central endeavour in the context of the interpretive paradigm is to understand the subjective world of human experience. To retain the integrity of the phenomena being investigated, efforts are made to get inside the person and to understand from within.

Cohen, Manion and Morrison (2004, p.22)

Interpretive researchers begin with the individuals and set out to understand their interpretations of their world. Cohen, Manion and Morrison (2004) explain that the naturalistic inquiry of social science interprets the social world only from the standpoint of the individuals who were part of the action being investigated. It is from the interpretive paradigm that the present research on the frontline teachers is developed. This entails a qualitative methodology.

Creswell (1998) argues that qualitative research is based on methodological traditions that explore a social or human problem. 'The researcher builds a complex, holistic picture, analyses words, reports detailed views of informants, and conducts the study in a natural setting' (p.15). Creswell (1998) states that, in conducting qualitative research the researcher is an instrument of data collection. The research focuses on the meaning of participants and describes the process in expressive and persuasive language.

A qualitative approach is selected for the present study because the research questions require a qualitative investigation design. Besides, the research topic has to be investigated so as to collect more details and data about the phenomenon. Finally, the researcher intends to report the findings from the participants' view rather than from the perspective of an expert who passes judgment on the participants.

Patton (1990) states that qualitative methods permit the researcher to study the research issue in more depth. The researcher can enter the field without being constrained by predetermined categories of analysis. The data collected could then contribute to the depth, openness and detail of the issue. Patton (1990) gives the example of the 1970s 'Kalamazoo schools' case to demonstrate how qualitative data in the study of the frontline teachers' perception on the education reform helps to change the tenor of the implementation of the school accountability education reform. As Patton (1990) argues, the qualitative information in the evaluation report reveals the 'scope and nature of teachers' feelings about what it was like to work in the atmosphere created by the accountability system'. The depth of those feelings as expressed in the teachers' own words become part of the impetus for change in Kalamazoo (Patton 1990, p.19-23).

The Kalamazoo example demonstrates how the 'rich' and 'comprehensive descriptions' of frontline teachers' experience may inform the government's evaluation of the reform. Patton (1990) reports that, one year after the release of the study on frontline teachers' feelings, in 1977-78, the teacher association reported a new environment of teacher-administration cooperation in developing a 'mutually acceptable' accountability system (Patton 1990 p.23).

It is hoped that data help policy makers to understand what it is like to work in the atmosphere created by the HKEMB Education Reform. The more comprehensive descriptions of the frontline teachers' experience may shed light on the implementation of the lifelong learning Education Reform in Hong Kong. If HKEMB can better understand frontline teachers' perceptions and experiences of the Education Reform, it may help to facilitate later implementations of reform.

4.1.3 A phenomenological methodology for researching the Hong Kong Education Reform

Among the qualitative models of social research, phenomenology seems to offer the best choice for the collection of the required rich and complex data in order to reveal frontline teachers' feelings. Phenomenology is a way of studying 'phenomena that are typically difficult to observe or measure' (Wilding & Whiteford 2005, p.99).

Phenomenology offers a way to investigate the complexity, ambiguity and dynamism in a phenomenon.

The HKEMB lifelong learning Education Reform is complex, ambiguous and dynamic. A phenomenological approach can place the frontline teachers in the position of 'experiencers' and the researcher in the position of learner. Phenomenological study reminds the researcher to understand people who are caught in the situation, and to pay attention to their feelings (Rudestam & Newton 2001).

The understanding of social reality is always related to understanding of people. In order to understand the lifelong learning Education Reforms' in Hong Kong, it is necessary to investigate the perceptions and understandings of the frontline teachers,

who were the stakeholders and main executors of the reforms.

The present study aims to find out how the HKEMB Education Reform is interpreted by frontline secondary teachers. By interviewing and listening to people's subjective experiences, the researcher will be able to portray the phenomenon of the HKEMB lifelong learning Education Reform. Phenomenology allows the researcher to explore the frontline teachers' world and report their interpretations and their experiences in their own language.

Transcriptions of interviews can capture the experience of the frontline teachers. The data would be analysed in the process of phenomenological reduction. It is hoped that the findings could find the 'first opening' to the understanding of the frontline teachers' experience during the implementation of the Education Reform in Hong Kong.

Through the interviews and the transcription work, data collected from the frontline teachers' experience during the implementation of the lifelong learning Education Reform can be made visible and true to stakeholders. In the data analysis, ideas of the participants and the researcher will come to an interpretation of meaning.

The phenomenological approach offers an opportunity for different aspects of the phenomenon related to the implementation of the lifelong learning Education Reform in Hong Kong to be reviewed in terms of the frontline teachers.

If the success of the HKEMB Education Reforms relies on the whole-hearted participation of the frontline teachers, their attitudes and experiences should be revealed in a way that relies upon their own interpretations. The next section provides insight

into the aspects of phenomenology that informed the research.

4.2 Phenomenology

According to Kockelmans (1967), the term ‘phenomenology’ was used as early as 1765 . Phenomenology was first defined by Hegel as ‘a knowledge domain that appears to consciousness’, ‘the science of describing what one perceives, senses, and knows in one’s immediate awareness and experience’ (Moustakas 1994 p.26). The process leads to an unfolding of phenomenal consciousness through science and philosophy ‘towards the absolute knowledge of the *‘Absolute’* (Kockelmans 1967 p.24). Recent discussions of phenomenological research focused on the conceptual and philosophical foundations of Husserl and Heidegger (Wilding and Whiteford 2005).

The German philosopher Edmund H. Husserl (1859-1938) was the first to apply phenomenology to the study of social phenomena. The concept of *Epoche* and in phenomenological research was refined in Husserl’s writings. Husserl argues that any phenomenon constitutes a suitable starting point for an investigation. What is given in our perception of a thing is its appearance, yet this is not an empty illusion. It is the essential beginning of a science that seeks valid determinations that anyone can verify (Husserl 1931, p.129 in Moustakas 1994, p.50).

Husserl is concerned with the discovery of meanings and essences in knowledge. He believes that a sharp contrast exists between facts and essences, between the real and non-real. The challenge facing the human science researcher is to describe things in themselves, to permit what is before one to enter consciousness and be understood in its meanings and essences in the light of intuition and self-reflection. The process blends

what is really present with what is imagined as present. According to Husserl, human science research is a unity of the real and the ideal (Husserl 1931, p.45 in Moustakas 1994).

The transformation of individual or empirical experience into essential insights occurs through a special process that Husserl calls 'ideation'. The object that appears in consciousness mingles with the object in nature so that a meaning is created, and knowledge is extended. (Kockelmans, 1967, p.80). Husserl emphasises that researchers are to search for the essential, invariant structure (essence) of the experience. Intentionality of consciousness involves experiences that contains both the outward appearance and inward consciousness based on memory, image and meaning. Researchers are also required to set aside all prejudgments and to bracket their experience so as to return to intuition and imagination to obtain a picture of the experience.

Husserl's approach is criticised by Heidegger for overlooking the basic structural features of both the subject and object of experience (being). Heidegger expands Husserl's enquiry to encompass the understanding and experience of 'being' itself. Heidegger's phenomenology took a hermeneutical turn. He denies the possibility of a naïve 'direct grasp' of the phenomena themselves. In hermeneutical phenomenological research, the researchers are to look at their own preconceptions and be as explicit about these preconceptions as they can.

Husserl developed different disciplines and approaches to phenomenological studies. The interdisciplinary studies are attached to different philosophical camps such as transcendental phenomenology, existential phenomenology, hermeneutic phenomenology, and social phenomenology.

Social phenomenology emphasizes the social and inter-subjective nature of our experience of others. In the study of social phenomenology, understanding is presented as shared meanings, social contexts and social interaction among participants in the research. It is believed that shared understandings achieved through social interaction will vary based upon the social distance between the actors involved. The closer the relationship, the more particular, rich and full understanding of the meaning of other's actions can be perceived. Moustakas (1994) argues that the core facets of human science research focuses on a "portrayal of phenomenon that is vital, rich and layered in its textures and meanings" (Moustakas 1994, p.59).

Despite emphasis on types of phenomenology, there are some discernible themes. Phenomenology calls for a return to the Greek conception of philosophy before the dominance of empirical science. It also calls for a suspension of prejudgment in doing research. The idea that consciousness is always directed towards an object and reality cannot be divided into subjects and objects is prevailing in phenomenological studies. Finally, phenomenology focuses on perceived meaning of the individual's experience (Creswell 1998 p.53)

The present research applies the practice of social and transcendental phenomenology with reference to the following constraints:

- The researcher requires a solid grounding in the philosophical precepts of phenomenology.
- The participants in the study need to be carefully chosen individuals who have experienced the phenomenon.
- The social distance between the researcher and the participants may affect the researcher's understanding of the phenomenon.
- Bracketing personal experiences by the researcher may be difficult.
- The researcher needs to decide how and in what way his or her personal experiences will be introduced into the study.

(Creswell 1998, p. 55)

In order to investigate the understandings of the frontline teachers, the psychological approach in phenomenology (Creswell 1998, p.53) which focuses on the meaning of experiences is applied. The present study will also employ the psychological phenomenological data analysis of horizontalisation to explore frontline teachers' experience of the HKEMB lifelong learning Education Reform. From the research findings, it is hoped that a better understanding on frontline teachers' perception on the benefits, disadvantages, positive and negative measures related to the implementation of the HKEMB Education Reform can be reached.

4.2.1 The role of the researcher's understanding

Classic phenomenology refers to the concept of *epoche* to explain that researchers should set aside their preconceived ideas about the phenomenon. *Epoche* is a Greek word meaning to refrain from judgment, to abstain from or stay away from the everyday, ordinary way of perceiving things. Husserl (1970) points out that *Epoche* requires the elimination of suppositions. For Husserl, 'essence' precedes empirical

knowledge. He recognizes the crucial value of returning to the self to discover the nature and meaning of things as they appear and in their essence. Husserl (1970) asserts that ultimately, all genuine scientific knowledge rests on inner evidence. He emphasises the importance of the study of how people describe things and experience them through their senses. In summary, Husserl argues that we could only know what we experience by attending to perceptions and meaning that awaken our conscious awareness (Husserl 1970, p.576).

During the Epoche phase of phenomenological research, it is essential for the researchers to be aware of how to reduce their preconceptions (Wilding and Whiteford, 2005, p.100). In the analytical process, the researcher 'brackets out the world and presupposition to identify the data in pure form, uncontaminated by extraneous intrusions' (Patton 1990, p.408). To 'bracket' is to set aside our biases and previous understandings, theories, beliefs etc. in trying to understand the phenomenon as it is.

The possibility for researchers to bracket their understandings has been critiqued since the early days of phenomenology. Instead, much contemporary phenomenological research suggests that researchers should gain clarity about their preconceived ideas and make them explicit at the outset.

Heuristics is a form of phenomenological inquiry that brings to the personal experience and insights of the researcher. The word 'heuristic' is Greek for 'discover'. Patton (1990) defines heuristic inquiry as 'what is my experience of this phenomenon and the essential experience of others who also experience this phenomenon' (p.71).

Patton (1990) argues that within the larger framework of phenomenology, the

researcher must have personal experience with and intense interest in the phenomenon under study. Patton also states that what was important about heuristics was that heuristic research epitomizes the phenomenological emphasis on ‘meanings and knowing’ through personal experience. It makes the researcher the primary instrument in qualitative inquiry. It also challenges the traditional scientific concerns about the researcher’s objectivity and detachment (Patton 1990, p.73).

Wilding and Whiteford (2005) argue that Heidegger’s phenomenology took a hermeneutical turn in phenomenological studies. In a sense, Heidegger denies the possibility of a naïve ‘direct grasp’ of the phenomena themselves. He argues that we interpret everything in terms of our language and experience.

And so, in trying to understand another person, I need to look at my own preconceptions and be as explicit about them as I can. I may move back and forth between someone’s description of her experience and my own, and refer to literature and what others have written about similar experiences. This dialectical interplay of sets experiences is what is called ‘hermeneutical’ (Wilding and Whiteford, p.101).

Moustakas (1994) argues that understanding requires ‘a return to the self’ and ‘employment of a self-reflective process’ that enables the researcher increasingly to know himself / herself within the experience being investigated (p.47). Similarly, Kneller (1984) argues that in hermeneutic enquiry, one must know about the researcher as well as the researched in context. Saito (1991) argues that one can only interpret the meaning of something from some perspective, a certain standpoint- a *praxis* (p.17). In using this approach, it is difficult to avoid having prejudgments. To overcome this difficulty, the researcher should try to make assumptions explicit.

Hermeneutic phenomenology can help to investigate the complexity of the Education Reform through the eyes of the researcher. In the present study, the researcher's standpoint needs to be acknowledged, although the focus is on the standpoints of the research participants (the frontline teachers). In the present hermeneutical phenomenological research, the researcher, who is also a frontline teacher in Hong Kong, will be aware of the possible bias and preconceptions about the implementation of the Education Reform.

The researcher had been teaching in a Band Two secondary school in New Territories West for over 20 years. She was an English teacher who also had administrative duties. During the HKEMB Education Reform, she experienced the introduction of the major reform measures related to *Jiao Gai* including the NSS, MOI, SSPA, LPAT, ESR and SBA. She supported the rationale of training lifelong learners for Hong Kong but found that the umbrella of 'Lifelong Learning' was misleading as the guiding principle of the Education Reform. The discourse of 'lifelong learning' and 'lifelong learning education' motivated the present study.

Although it is impossible for the researcher to remain objective, the awareness of possible bias and the explicit statement in the researcher's role as a frontline teacher can help to present the data collected in a more authentic way. The researcher is aware that her preconceptions about the Education Reform may affect her interpretation of the data. She will always be reminded to reveal the participants' own 'words' and 'feelings' as they are. It is hoped that this explicit statement of the researcher's standpoint (*praxis*) can achieve the purpose of the present phenomenological inquiry. The idea of standpoint is connected to the key aspect of horizons in phenomenology, which is also used in this research.

4.2.2 Horizons

Evidence from phenomenological research is derived from first-person reports of life experiences. In accordance with phenomenological principles, investigation is valid when the knowledge sought is arrived at through descriptions that make possible an understanding of the meanings of an experience.

Husserl (1970) employs the word *act* to refer to experiences of meaning, emphasizing that the meaning of a phenomenon is the 'act experience' and not the object. He points out that the mere presence of something in consciousness constitutes an *act*. Objects are perceived but not experienced while sensations are experienced but not perceived, seen, or heard; they are not themselves *acts* (Husserl 1970, p.567 in Moustakas 1994, p.57).

The act itself 'contains its own evidence and its own guarantee of 'givenness'. Through a continuing perceiving of and reflecting on acts, we come to know their meaning in our experience and their relationship to ourselves. In each act of consciousness there are aspects of the object that are not directly intended but which are recognized either by recall and anticipation, as belonging to the object intended. These constitute its *horizons*. (Husserl 1965, p.150 in Moustakas 1994 p.52).

The perceptions that emerge from different angles are what Husserl called *horizons*. In the *horizontalisation* of perceptions, every perception counts. Every perception adds something important to the experience. Intentionality arises first and foremost as a synonym for consciousness itself. We are always intentionally conscious of something; our consciousness points to a direction and has a meaning. As we search

into experience, we focus our seeing, our listening, touching and our thinking on what that experience is in its essences.

Knowledge of appearances and reasoned inquiry are not the end of knowing. No scientific discovery is ever complete. No experience is ever finished or exhausted. New and fresh meanings are forever in the world and in us. When the connection is made and the striving comes alive again, the process begins once more. There is no limit to our understanding or sense of fulfillment, no limit to our knowledge or experience of any idea, thing, or person. We need only to come to life again regarding some puzzlement and everything crystallizes and through within ourselves, being within others, and correlating these outer and inner experiences and meanings is infinite, endless, eternal. This is the beauty of knowledge and discovery.

(Moustakas 1994, p.65)

In addition, the researcher should accept that there may be many possible perspectives on a phenomenon (Cohen, Manion & Morrison 2004). It is like turning a prism; one part becomes hidden and another part opens. The horizons found in the data can present different perceptions of the participants.

In order to investigate the experience of the frontline teachers in Education Reform, the researcher needs to take into consideration their different backgrounds and contexts.

Phenomenology assists investigation into the complicated and controversial social research agenda on the educational reform in Hong Kong as it helps to open up different *horizons* of perception. The present research may broaden the understanding of the education reform by drawing on horizons of perception provided by the frontline teachers

In order to gather different horizons of perception, participants of both genders, different amounts of teaching experience, administrative duties, Key Learning Areas taught, school districts and school banding will be created.

4.2.3 Emotional Aspects

Phenomenology is a good method to elicit feelings. Phenomenology reveals a picture of the experience, and provides an understanding of how particular perceptions, feelings, thoughts, and sensual awareness are evoked in consciousness with reference to experiences such as frustration, depression, anger or joy (Creswell 1998). In Creswell's study (1998), examples in nursing literature are used to illustrate how phenomenology elicits the participant's emotional experience (p.271-295). For example, the significance of applying phenomenology in studying the feelings of 'care' and 'caring' (p.272-273) is put forward to demonstrate how phenomenology can be applied in the study of the nurse-client interaction. Creswell (1998) argues that when the empirical approach fails to elicit data related to emotional experience, a psychological phenomenological approach can serve as the methodology.

Research on education reform (Choi 2005; Kennedy 2004; Leung & Lee 2006) shows that emotions often appeared among the frontline practitioners under the HKEMB Education Reform. These perceptions, feelings, thoughts and sensual reactions can be presented in a phenomenological investigation. Heuristic inquiry can help the researcher to discover the Education Reform in terms of the frontline teachers' understandings, perceptions and emotions.

4.3 Research Design

4.3.1 Research Questions

The research questions are set in the context of phenomenological inquiry. In order to present the phenomenon of lifelong learning Education Reform's implementation in Hong Kong through the eyes and experiences of the frontline teachers, the following questions are asked:

1. What are the understandings of secondary teachers in relation to the HKEMB lifelong learning Education Reform?
2. What are the feelings of secondary teachers in relation to the implementation of the HKEMB lifelong learning Education Reform measures?
3. What do secondary teachers perceive as benefits of the HKEMB lifelong learning Education Reform?
4. What do secondary teachers perceive as disadvantages of the HKEMB lifelong learning Education Reform?
5. What do secondary teachers perceive as positive measures helping the implementation of the HKEMB lifelong learning Education Reform?
6. What do secondary teachers perceive as measures hindering the implementation of the HKEMB lifelong learning Education Reform?

It is hoped that frontline teachers' experience of the education reform can be captured in the participants' responses and the researcher's descriptions. The questions elicit frontline teachers' perceptions of the education reform implementation rather than how the reform is preconceived by HKEMB or the teachers' unions. The phenomenological approach sets the inquiry of what is distinctive and common in the experience of the 20 frontline teachers.

4.3.2 Participants

Frontline secondary school teachers were invited to participate in an individual interview of about 60 minutes.

Only 20 participants are involved in the present study. Pachur, Rieskamp and Hertwig (2004) support the significance of a small sample size in social research by stating that reliance on information from one's proximal social environment for generalizing about the population is often valuable and it can be exploited for making accurate inferences (p.1077). Pachur, Rieskamp and Hertwig (2004) argue that the information obtained from a social circle heuristic is often 'vivid', 'reliable', 'accessible and 'valid'.

Participants are recruited from the researcher's proximal social circle. With the researcher as the centre of the 'heuristic circle', e-mails and invitation letters were sent to secondary schools in the territory. Following the positive responses, telephone follow-up invitations were made. Out of the 132 positive responses collected from the preliminary survey forms, only 39 frontline teachers agreed to in-depth interviews.

By applying Pachur, Rieskamp and Hertwig's (2004) 'stopping rule' (p.1079), 20 frontline teachers were invited to participate in the study. The 'stopping rule' (Pachur, Rieskamp and Hertwig's, 2004) was applied to the following criteria:

1. Gender
2. Years of teaching experience
3. Administrative duties taken
4. Key Learning Areas taught
5. School Districts and School Regions
6. School Banding
7. School types

Besides the seven main criteria, age and management rank can affect the frontline teachers' perception of the reform's implementation. However, as age and job rank are regarded as very personal in the Hong Kong, such issues will be dealt with during the interviews when participants are invited to describe themselves and their schools.

It is hoped that the participants can provide the intended demographic variety of the research. During the recruitment of participants, the researcher kept a record of the demographics of all the potential interviewees. Each time a new participant was approached, the details of his or her background were recorded. Among the 20 interviewees, 14 were personally known to the researcher before the research. The remaining six were recruited through the 'social circle heuristic' approach. The social circle heuristic is a judgment mechanism in which the content and structure of people's social networks are used for making inferences about frequencies in the population in a paired comparison task (Pachur, Rieskamp & Hertwig, 2004). Pachur et al. argue that the social heuristic circle can compete with a more thorough strategy and bigger sampling size (p.1077).

Gender issue

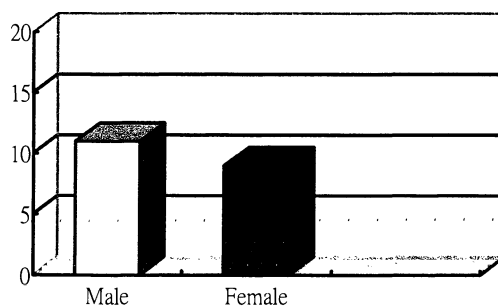


Figure 3 *Gender of participants*

In 2007, there were about 30,000 secondary school teachers in Hong Kong. Both genders have almost an equal share in the teaching posts (HKEMB 2007a).

A total of 20 participants were interviewed, 11 male and 9 female. It is hoped that the participants can represent both genders' perception on the HKEMB lifelong learning Education Reform.

Years of teaching experience

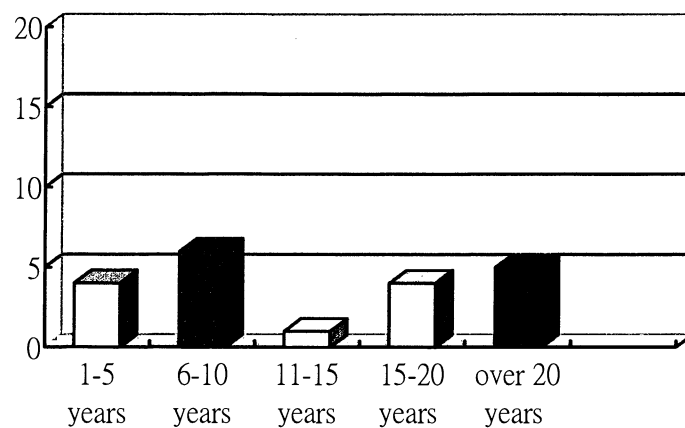


Figure 4 *Teaching experience of participants*

Research on education reforms (Cheng; Mok & Tsui 2002; Chiu 2002; CTW 2006; Day 2001; Day & Leitch 2007) reveals that teachers with different amounts of frontline teaching experience might have very different perceptions of the reform. The 'stopping rule' (Pachur, Rieskamp and Hertwig's, 2004) also applies to recruiting teachers of different amounts of classroom experience.

Among the 20 participants, four come from the one-to-five years teaching experience group; six come from the six-to-ten years group; only one come from the eleven-to-fifteen years group; four come from the fifteen-to-twenty years group and five come from the over twenty years of teaching experience group.

Teachers' administrative duties

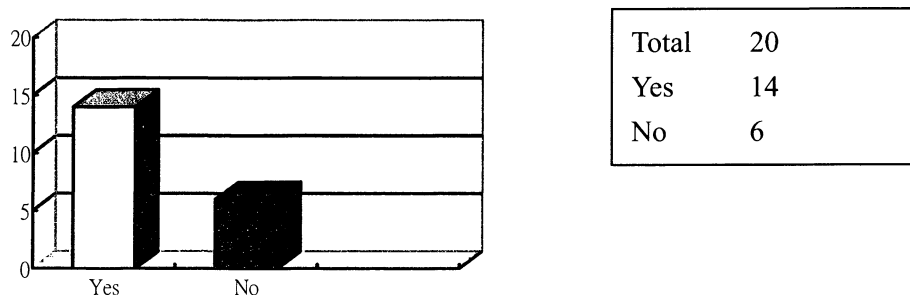


Figure 5 *Administrative duties of participants*

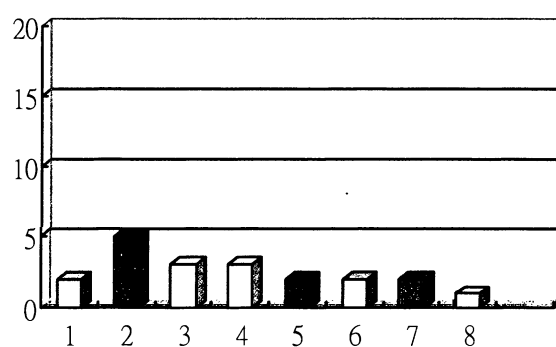
During the implementation of the HKEMB Education Reforms and the lifelong learning curriculum reform initiatives, much workload is added to the school administration. In the secondary school system, most administrative duties are shared out among senior teachers. These duties included school timetabling, curriculum design, subject panels' administration, students' discipline, students' counseling, staff development, and school promotion.

Research literature (CTW 2006; Education Convergence 2006) reveals that teachers with or without administrative duties in secondary schools have very different experiences of the reform.

This phenomenological research includes participants who have administrative duties and those who do not, so as to reflect different perspectives. Among the 20

participants, 14 report that they have administrative duties to take up and six report that they do not.

Teachers from different Key Learning Areas (KLA)



KLAs	No.
1. Chi	2
2. Eng	5
3. Math	3
4. PSHE	3
5. Science	2
6. Tech.	2
7. Arts	2
8. PE	1

Figure 6 Key Learning Areas taught by participants

The HKEMB curriculum reforms affect teachers of different subject areas. Under the New Senior Secondary (NSS) curriculum reform, the traditional subject-based curriculum is transformed into different Key Learning Areas (KLA) in 2005. The secondary school system in Hong Kong will undergo a transformation in curriculum, pedagogical approach and assessment requirements.

By 2012, the territory's secondary school education public assessment, Hong Kong Diploma of Secondary Education (HKDSE), will replace the Hong Kong Certificate Education Examination (HKCEE), which has been steering the public assessment system in Hong Kong for over 50 years.

Secondary school teachers are required to carry out KLA-based reform initiatives and

prepare students for the New Senior Secondary (NSS) public assessments. As the reform initiatives of different KLAs have different impacts on the teachers, it is hoped that teachers from different KLAs can be recruited for the research.

There are eight Key Learning Areas in the curriculum reform (Chinese, English, Mathematics, Personal Social & Humanities Education, Science, Technology, Arts and Physical Education). The research has recruited two Chinese teachers, five English teachers, three mathematics teachers, three social & humanities education teachers, two science teachers, two technology teachers, two arts teachers and one physical education teacher.

It is hoped that the participants from different KLAs can reflect their experiences and perceptions of the lifelong learning Education Reforms.

Teachers from different school regions and school districts

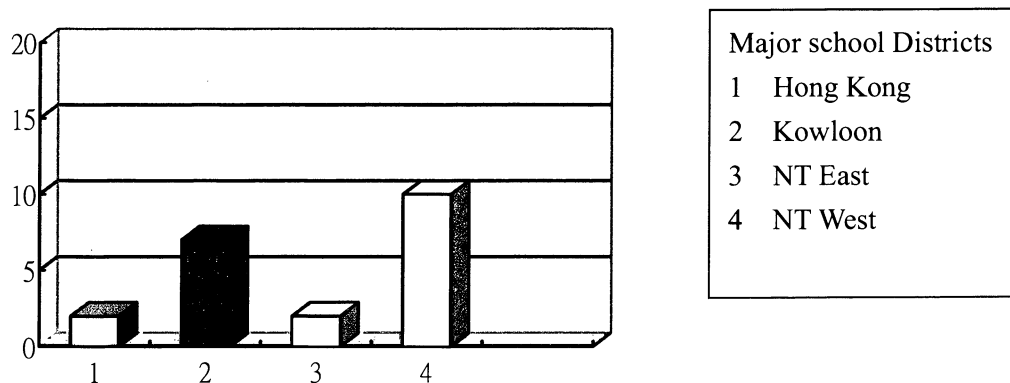


Figure 7 School districts and school regions of participants

Research (Lau 2002, QAD 2004, QAD 2005, QAD 2006, Xiyao Culture 2006) shows that different school regions and districts in Hong Kong have students and parents of a

variety of socioeconomic backgrounds.

In 2007, there were a four School Regions and 18 School Districts in Hong Kong. The research recruited frontline teachers from all the four regions. Among the 20 participants, nine come from New Territories West (the school region with the largest population), six teachers come from Kowloon; three from New Territories East and two from Hong Kong.

Teachers from different school bandings

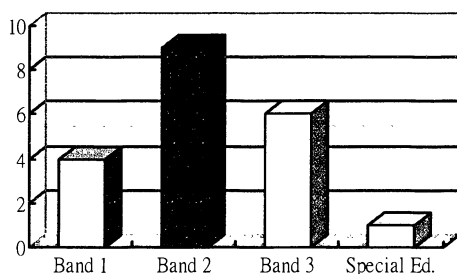


Figure 8 *School bandings of participants*

Besides the physical location, the ‘Banding’ and intake (Secondary One students’ academic performance) of a secondary school affects the teachers’ experiences of the education reform measures. Research literature in Hong Kong (Education Convergence 2006, Xiyao Culture 2006) reveals that teaching experiences vary among banding schools. In Hong Kong’s public schools, students have to join a centralised Secondary School Places Allocation (SSPA) exercise for a place in a secondary school. The SSPA operates within each School District and School Region (school Nets). Students’ academic performance is standardized and scaled in order of merit, with the top 33 percent in Band 1, next 33 percent in Band 2 and the last 33 percent in Band 3. The Special Education Schools serve less than 1 percent of all secondary students.

Band One secondary schools attract the highest-performing primary students in the School Net. In contrast, the Band Three schools have the students with the poorest academic performance. The research recruits frontline teachers from all banding schools. Among the 20 participants, four teach in Band One schools; nine teach in Band Two schools; six teach in Band Three schools and one teaches in a Special Education school.

Teachers from different school types

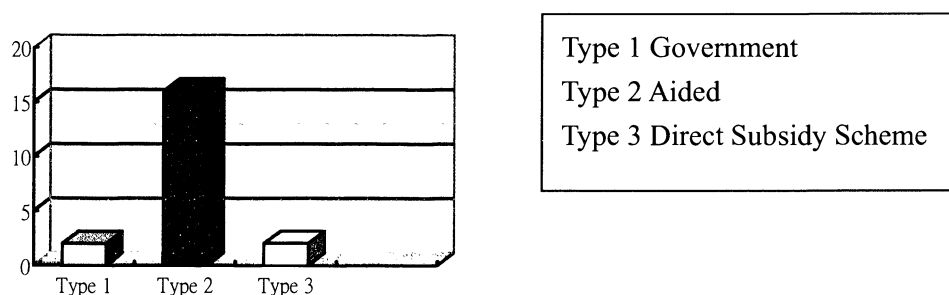


Figure 9 *School types of participants*

In Hong Kong, each type of secondary school has its own funding relationship with HKEMB. It is supposed that the more reliant a school is on the government funding, the more control HKEMB has over the school's policy. As the education reform initiatives in the territory originate with the HKEMB, frontline teachers in each school type may have their own experience of the education reforms.

Teachers in the Government schools are civil servants and the Government schools are directly under HKEMB's policy. Aided schools in Hong Kong are run by sponsoring bodies but the schools' expenditure and teachers are paid under HKEMB's pay-scale in the Code-of-Aid. Schools in the Direct Subsidy Scheme can only receive an annual

block grant from the government as a subsidy but they are free in their curriculum design and Secondary One admission exercise. In 2006, over 85% of secondary schools in the territory were operating in the Aided Secondary School mode.

Among the 20 frontline teachers interviewed, 16 are working in the Aided schools, two are working in the Government Secondary Schools and two are working in the Direct Subsidy Scheme schools.

4.3.3 Instruments

Before the site interviews, the participants were contacted by telephone to arrange the date, time and venue of the interviews. The conduct of research ethics was explained in detail. Before the interview, the participants were given with the UTS Research Information Letter and asked to sign the UTS Research Consent Form (Appendix 1).

Most of the participants preferred to have the interviews done during their free teaching periods and on school premises. Because of conflicts with the researcher's own teaching schedule, it took nine months (from July 2006 to March 2007) for the 20 interviews to be completed.

The following instruments were used during the interviews to elicit the participants' response to the six research questions:

1. Screening survey form (Appendix 2)
2. APASO (HKEMB) Instruments (Appendix 3a, 3b, 3c)
3. Bryce and Withers (ACER 2003) study on lifelong learning secondary schools (Appendix 4a, 4b, 4c, 4d)
4. Interview protocol (Appendix 5)

Screening Survey Form

The screening survey (Appendix 2) is designed to select participants of different genders, teaching and administrative experience, curriculum involvement, and school districts and types. It is administered to the potential participants after the initial email and telephone contacts. It is also used to shortlist the final 20 participants chosen for the personal interviews based on the demographic background.

Hong Kong Education and Manpower Bureau (HKEMB) APASO Instruments:

- 3a APASO Form A: Secondary Teachers
- 3b APASO Form B: Secondary Students
- 3c APASO Form C: Learning Strategies

HKEMB designed the HKEMB External School Reviews and the APASO instruments (Appendix 3) as a school self-evaluation exercise. Under the terms of the Education Reforms, frontline teachers are required to complete the survey questionnaires and provide feedback to HKEMB on the progress of the Education Reform. The APASO instruments are presented to the frontline teachers during the interviews to help them recall the feedback they had given to HKEMB on the questionnaire and to elicit more information about their experience of the Education Reform.

Instruments adapted from Bryce and Withers (ACER 2003) *Engaging Secondary School Students in Lifelong Learning*

- 4a ACER Form A: To what extent are school policies and practices oriented to lifelong learning?
- 4b ACER Form B: How far are teachers in the school lifelong learners?
- 4c ACER Form C: What is it like to be a student in a lifelong learning secondary school?
- 4d ACER Form D: How far is the school in the journey to lifelong learning?

The ACER forms (Appendix 4) are adapted from the instruments that Bryce and Withers (2003) use in 'Engaging Secondary School Students in Lifelong Learning'. This set of instruments is used to elicit the school-based experience of the frontline teachers and their perceptions of how the school policies, teachers and students have been affected by the lifelong learning Education Reform.

The ACER forms provide more horizons for data collection. They can also reduce the researcher's bias and preconceptions. The ACER forms can elicit more opinions from the frontline teachers as the participants can be prompted to talk about the school policies, teachers and students in their own schools. As Bryce and Withers (2003) have already used these instruments to investigate how far seven Australian secondary schools are moving to lifelong learning, their experience can assist clarify the researcher's preconceptions and to avoid bias as possible during the data analysis.

Before the interview ended, participants were asked to comment on how they perceived the implementation of lifelong learning policies in their school with reference to the ACER forms (Appendix 4a, 4b, 4c and 4d). Data collected from the ACER forms is used to triangulate and supplement the discourse on Research Questions 1 to 6. It is hoped that by examining the frontline teachers' experience from multiple perspectives, different dimensions of the lifelong learning Education Reform can be presented and bias from the researcher's own experiences and ideas can be minimised.

Interview Protocol

The interview protocol (Appendix 5) is used to guide the researcher in conducting the

semi-structured interviews. The participants were invited to talk freely about the questions in the interview protocol. During the 60-90 minute interview, the researcher follows the interview protocol which guides the participant through the following stages:

- Warming up and self introduction
- HKEMB APASO survey recall
- Perceptions of lifelong learning
- Perceptions of transformed teaching
- Perceptions of transformed learning
- Perceptions of school change
- Perceptions of advantages and disadvantages of education reform
- Perceptions of improvements to be made

A phenomenological study focuses on knowing what things begin with themselves. Although some guided main points are intended to motivate the participants to answer the research questions, there is no intention to restrict the participant's description of his/her experience of the Education Reform. The interview is scheduled to last 60 minutes. However, the participants are encouraged to continue the dialogue for as long as they wish. The actual recording time of each interview is summarised in Appendix 6.

4.4 Data Analysis

4.4.1 Introduction

Data collected from the interviews are analysed in the process of phenomenological reduction. Creswell (1998) argues that the researcher should begin phenomenological analysis by describing his or her own experience of the phenomenon and then find comparable statements in the interviews. The significant statements should then be

listed and '*horizontalised*'. Each statement should be considered valid. The researcher should then develop a list of 'non-repetitive', 'non-overlapping' statements from the interviews. After constructing the '*textural description*', the researcher can reflect his or her description by using '*structural description*', seeking possible meanings, perspectives and a frame of reference about the phenomenon. Finally, the researcher can construct the '*essence*': the description of the meaning of the phenomenon. The report shall finally appear 'in rich textural language just as what the researcher sees and interprets the phenomenon' (Creswell 1998, p.147).

When undertaking a phenomenological study, it is important to consider the experience of the research participants in a fresh light. In analysing the phenomenological data, the researcher looks inside to become aware of personal bias and to minimise personal involvement with the subject material. It is essential for the researcher to gain clarity about their preconceptions (Wilding & Whiteford, 2005, p.100).

Another dimension of phenomenological reduction is the process of '*horizontalisation*' described by Husserl (1970). In a phenomenological analysis, horizons are unlimited. It is believed that we can never exhaust our experiences, no matter how many times we reconsider or review them. In this sense, phenomenological reduction is not only a way of seeing but also a way of listening and investigating with a conscious and deliberate intention of opening ourselves to different horizons of phenomena. The researcher hears another person's reality and focuses on the central, dominant, or recurring themes which represent the essential qualities or meanings of that person's experience.

Although there are no fixed methods in analysing the data collected from a

phenomenological study, Moustakas (1994) tries to modify Stevick's (1971), Colaizzi's (1973), and Keen's (1975) methodologies and comes up with the following phases of a phenomenological investigation:

1. Using the phenomenological approach, obtain a full description of the researcher's own experience of the phenomenon.
2. Create the verbatim transcript.
3. Consider each statement with respect to significance for description of the experience.
4. Record all relevant statements.
5. List non-repetitive, non-overlapping statements.
6. Relate and cluster the invariant meaning units into themes.
7. Synthesize the invariant meaning units and themes into a description of the textures of the experience.
8. Reflect on the textural description. Through imaginative variation, construct a description of the structures.
9. Construct a textural-structural description of the meanings and essences.

(Moustakas 1994, p.120)

The present research will go through the stages of phenomenological analysis listed in Moustakas's (1994) study. In the initial stage, a full description of the researcher's experience of the phenomenon is recorded. As the interviews were carried out in Cantonese, discourse of the participants was first transcribed in Cantonese.

In the data analysis, each statement was considered with respect to its significance to the research questions. The non-repetitive and non-overlapping statements were listed. Major themes were generated from the recurring descriptions of experience of the frontline teachers. The English translation was used in the final rewriting stage.

Data collected from the present study are analysed in a phenomenological approach.

The researcher is always aware of the importance of distancing herself from her past experience, prejudice, and bias about the HKEMB Education Reform. Before the data are analysed, the demographic information of the interviewees is summarised (Appendix 7), to ensure that the data collected can represent all horizons of the HKEMB Education Reform. Significant statements referring to the research questions (understandings, feelings and emotions, perceived benefits, perceived disadvantages, perceived positive measures, perceived hindrances) are horizontalised with reference to the recoding time. When the transcription is completed, the researcher reflects her interpretation and description of each participant in a brief summary (Appendix 8). It is hoped that through the phenomenological analysis, the essence and horizons of the frontline teachers' experience during the Education Reform can be presented.

Wilding and Whiteford (2005) remind researchers to be aware of the criticism of the 'new phenomenologist' who celebrates their descriptions of participants' subjective experiences as 'adding something new and valuable to the understanding of the phenomenon'. In order to achieve a deeper understanding of the phenomenon, the researcher must consider what exactly the phenomenon was; how it was experienced and what made that phenomenon unique in the context of study (p.101). In order to inquire into and critically appraise what makes a phenomenon unique in context, the researcher should engage in hermeneutic practice.

The researcher will bear in mind that the purpose of the present study is NOT to celebrate how it can add something new to the Education Reform. Its value is to present the change scenario and the context of the Education Reform as it is through the experience of the frontline teachers and thus helps the policy makers to understand the phenomenon of Education Reform from a different perspective. With reference to the

phenomenological rationale and research design, the research questions are posed; participants are chosen, instruments are developed, and the data are analysed. The ethical issue, validity and reliability of the research are also explained within the framework of this phenomenological study.

4.4.2 How far is the school in the journey of lifelong learning?

At the end of the interview, the participants are asked to fill in a survey sheet to reveal their perceptions of ‘How far has the school progressed in the journey to lifelong learning?’ (Appendix 4d).

The survey items are adapted from the lifelong learning education literature. OECD (1998) highlights three key features in lifelong learning education:

- ✧ The centrality of the learner and learner needs, reflected in an orientation towards the demand side of education and training
- ✧ 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 long-term view that encompasses the life cycle.

Merging the OECD (1998) features with Longworth’s (1999) suggestions on the criteria in shaping the framework for the teaching of lifelong learning skills, Bryce and Withers (2003) developed an instrument for the Australian secondary schools to assess their progress towards lifelong learning. In Bryce and Withers (2003), the development of lifelong learning education in secondary schools can be divided into five phases under six items.

Table 2 *Journey of a lifelong learning school – Phase 1 to Phase 5*

Item	Phase 1(Beginning)	Phase 5 (Final goal)
1	Ownership of the need to learn and its content is with the teacher.	As far as possible, ownership of the need to learn and its content is given to individuals.
2	Education is compartmentalized according to age and subject.	Learning is a lifelong concept. There are links vertically and horizontally between age groups.
3	Learning is about what to think.	Learning is about how to think.
4	Teachers are dispensers of knowledge.	Teachers are mentors and models of lifelong learning.
5	Failures are separated from success.	Emphasis is on progress and encouragement of further learning.
6	Learning is a difficult chore and is about received wisdom.	Learning is fun, participative and involving.

(Bryce and Withers 2003, *Engaging secondary school students in lifelong learning*, ACER report, Victoria, Australia, p.94.)

Participants in the research were invited to rate the lifelong learning education program in their schools according to the items listed and stated the progression of the lifelong learning Education Reform. Phase 1 is where the reform starts and Phase 5 is the ideal goal of training lifelong learners. As this rating survey on the implementation of lifelong learning is based on the design of OECD (1998), Longworth (1999) and Bryce and Withers (2003), its lifelong learning implication can only reflect the western orientation. The Confucian orientation is excluded.

4.5 Research standards

4.5.1 Ethical considerations

It is of paramount importance that risk and harm to the participants in the research be kept to a minimum.

In the screening survey exercises, it was made very clear to the participants that if they did not want to discuss the Education Reform of their own school, they would not be invited to an interview. The participants were informed that if they felt uncomfortable during the interview, they could stop it at any stage.

Data collected from the participants were guarded with extreme care. Participants and the real names mentioned in the interviews were kept confidential. Pseudonyms are used in the data transcription and analysis. Participants were given access to preview the research findings. They also had the right to withdraw their data prior the final publication of the thesis.

The researcher is a frontline teacher. She is aware that her perceptions, emotions and feelings can be affected by the participants' responses. Such emotional involvement might affect her own psychological well-being. For this reason, the researcher tried to maintain a professional distance in the conduct of the interviews. In addition to making field notes, the digital recording and transcriptions help to maintain the 'distanced' approach required in phenomenological research.

Privacy and confidentiality are protected. UTS privacy principles for the use of data are applied in the thesis. The data collected were de-identified and kept confidential.

Contact records of the participants were kept separately from the data. The researcher is the only person with access to the data.

All of the participants were briefed about the ethical issues and the use of the interview protocol (Appendix 5). They were also invited to read the *UTS Information Letter* and sign the *UTS Letter of Consent* (Appendix 1) before the interviews. The 20 interviews were carried out without any participant demanding to delete any information. The only ethical issue was that in two of the interviews, the participants became so emotional that recordings were paused while the participants took time to regain their composure. In those two cases, the participants were reminded that if they were uncomfortable, the interviews could be cancelled and the data would be deleted. However, the participants chose to continue the interview once they found that they could continue the conversation.

4.5.2 Validity and reliability

Maxwell (1992) suggests that ‘understanding’ is a more suitable term than ‘validity’ in qualitative research. The issues of validity and reliability in this research are addressed in the following four paragraphs.

Data collected from the in-depth interviews with the participants will be transcribed in Cantonese (the speakers’ native language) before being translated into English. The aim of the study is to use the data in the study to reveal a new perception on how frontline teachers perceive the Education Reform.

Maxwell (1992) argues that qualitative researchers need to avoid working within the agenda of the positivists in arguing for the need for research to demonstrate concurrent,

predictive, convergent, criterion related, internal and external validity. Providing understanding to the phenomenon is the key to interpretive research. In qualitative research, 'validity' is understood in descriptive, interpretive, theoretical and evaluative terms. Schofield (1993) also states the importance of providing a clear and detailed description in qualitative research for the readers and users of research to determine the generalisability and transferability of the study (p.200).

The present research is an attempt to capture the frontline teachers' experiences of the Education Reform during the implementation of the reform measures. The data collected and the analysis are presented in descriptive statements. There is no attempt to test the internal or external validity of the research construct in a positivist sense. Validity of the present study is explained in Maxwell's (1992) descriptive and interpretive validity. The readers of the study should use their discretion in applying its findings on the implementation of the lifelong learning Education Reform in Hong Kong with the more in-depth understanding they gain from the study.

Agar (1993) claims that in qualitative data collection, the intensive personal involvement and in-depth responses of individuals secure a sufficient level of validity and reliability. This phenomenological study, like other interpretive research, might not eliminate all threats to validity and reliability. However, the researcher is aware of what Oppenheim (1992) suggests in the prevention of bias in setting interviews (p.96-97). The issues of sampling, rapport between interviewer and interviewee, technique in prompting and probing, management of support materials, sequencing of questions, consistent coding of responses, comprehensiveness in recording and transcriptions of data are incorporated into the research design in order to safeguard the validity and reliability of the research.

4.5.3 Scope and limitations

This research was carried out in 2007 when the HKEMB lifelong learning Education Reform was halfway through its first phase (the new public examination, Hong Kong Diploma of Secondary Education, was being linked to the New Senior Secondary curriculum). As the Education Reform was still being implemented, the perceptions of the frontline teachers are expected to change. The findings of the research are limited to the timeframe in which the data were collected.

The data collected are limited to the experiences and understandings of the 20 participants. No matter how carefully the data are treated and presented, the descriptions presented are restricted to the participants who have experienced the implementation of the Education Reform in their own context. The researcher has tried to choose participants to represent a variety of backgrounds so as to present the varied horizons of the Education Reform in Hong Kong.

The present study will use the HKEMB official progress reports on Education Report and the teachers unions' reports to triangulate the data collected in the interviews. However, the scope of understanding to the scenario of Education Reform in Hong Kong is still limited to the physical and human resources invested in the present study.

It is hoped that this investigation will create a 'first opening' on the authentic experience of frontline teachers during the implementation of the Education Reform in Hong Kong.

The findings of the present study will contribute to the knowledge of managing 'change' in educational organizations and the implementation of education policy. It is hoped that the study can improve the understanding of the HKEMB Education Reform among policy makers, frontline teachers and the stakeholders.

CHAPTER FIVE: FRONTLINE TEACHERS' PERCEPTION ON THE HKEMB LIFELONG LEARNING EDUCATION REFORM – THE INTERVIEWS

5.1 Introduction

This chapter gives an overview of the data generated from the research study. The interviews of the 20 frontline teachers were conducted over a period of nine months. After the data analysis, major themes generated by the research questions are discussed.

Each research question is presented and followed by a section of thematic discussion of the data collected to reveal the frontline teachers' perceptions of the implementation of the lifelong learning Education Reform in Hong Kong. Direct quotations of the participants are extracted to support the major themes.

The literature research has provided a rich background about the government's and teachers unions' perception on the implementation of the HKEMB lifelong learning Education Reform. Data generated from the interviews support some preconceptions of the government, the teachers unions, and the researcher. However, the participants also presented new understandings, and suggested the advantages and disadvantages of the reform. The value of the phenomenological research is confirmed through the experiences of the frontline teachers.

To most of the frontline teachers, all education reforms in the school system after 1997 are under the umbrella of *Jiao Gai*. From the quality school education initiatives recommended by Education Commission in 1997 to the introduction of the New Senior Secondary curriculum in 2012 by Curriculum Development Council (CDC HKEMB

2004), the changes to the admission system, pedagogy and assessment mechanisms in schools are called *Jiao Gai*. As Lifelong Learning is used in the HKEMB policy document (HKEMB 2000) to steer the Education Reform, *Jiao Gai* encompasses all initiatives related to the lifelong learning Education Reform led by the Hong Kong government after 1997.

The frontline teachers' perceptions of the reform initiatives are relevant to the study of general reforms in the education system and for the study of the lifelong learning measures under the HKEMB Education Reform because the frontline teachers express their understanding, feelings and emotions with regard to *Jiao Gai*.

In order to uphold the ethical considerations, participants of the present study are assigned pseudonyms. The context and background of the interviewees are summarised in Appendix 7. The significant statements referring to the research questions (understanding, feelings and emotions, perceived benefits, perceived disadvantages, perceived positive measures, perceived hindrances) are horizontalised through the analysis and summary of the recordings (Appendix 8).

The following data of the participants are recorded in the summary of field notes in Appendix 8:

1. Gender
2. Teaching experience
3. Administrative roles
4. Key Learning Area or subject taught
5. School districts
6. School types
7. School banding

The summary of field notes (Appendix 8) uses pseudonyms to highlight participants' most significant background information and to record the researcher's reflection of the interviews. The awareness of the researchers' preconception and the horizontalisation of the data can best present the different horizons of the frontline teachers during the implementation of the lifelong learning Education Reform in Hong Kong.

How far are the schools in Hong Kong in the journey of lifelong learning? – Frontline teachers' perception

Before the interviews ended, participants were invited to complete a 5-point survey form on 'How far is the school in the journey of lifelong learning?' (Appendix 4d).

The result reveals that most participants agree that the HKEMB lifelong learning Education Reform has started with most items moving away from Phase 1. Although most of the goals have not been reached, most participants find that the lifelong learning Education Reform is moving in the right direction as secondary students in the territory beginning to meet the criteria of becoming lifelong learners.

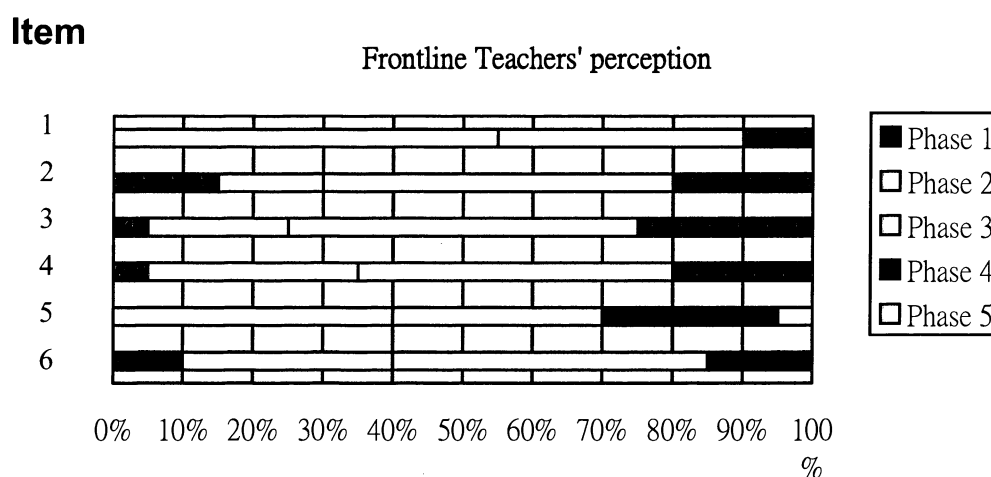


Figure 10 *How far is the school in the journey of lifelong learning? – frontline teachers' perception*

- Item 1 Ownership of learning from teacher to student
- Item 2 Organization of learning from compartmentalization of knowledge to a holistic lifelong learning approach
- Item 3 Learning from about ‘what to think’ to about ‘how to think’
- Item 4 The role of teachers from ‘knowledge dispensers’ to ‘mentors’ of lifelong learners
- Item 5 Perception of ‘failures and successes’ from separation to continuation
- Item 6 Perception of learning from ‘difficult chore’ to ‘learning is fun’

Most of the participants see that the lifelong learning Education Reform is in progress (with most items being ranked in Phase 3). All the participants agree that frontline teachers are aware of the paradigm shift in the ownership of learning from the teacher to the learner (Item 1). They are also aware that learners need ongoing feedback and encouragement for further learning (Item 5). However, on the issues of ‘How learning is organized’ (Item 2), ‘What learning is about’ (Item 3), ‘Teachers’ role in learning’ (Item 4) and ‘Whether learning is fun’ (Item 6), participants disagree on the progress of the reform.

How far are the schools in Hong Kong in the journey of lifelong learning? – The researcher’s perception

The researcher’s preconception on ‘How far the schools are in the journey of lifelong learning’ may affect the data analysis in the study. It is necessary to state the researcher’s *praxis* before investigating the other research questions.

Item 1 - Ownership of learning

Item	1	2	3	4	5	Item
Ownership of the need to learn and its content is with the teacher.		√				As far as possible ownership of the need to learn and its content is given to individuals.

To the researcher, although the lifelong learning Education Reform documents recommend giving learners ownership of what and how to learn, the examination-oriented senior secondary curriculum is still directed by the public examination syllabus. The researcher thinks that learners' ownership of the need to learn and what to learn is very limited (Phase 2).

Item 2 - How is learning organized?

Item	1	2	3	4	5	Item
Education is compartmentalized according to age and subject.			√			Learning is lifelong in concept and content, there are links vertically and horizontally between age groups.

To the researcher, the school-based curriculum reforms have begun to change the tradition of compartmentalising secondary school students according to age and subject. With the introduction of NSS, students may be given more choices in connecting what they can learn. However, such choices are still limited to the context of the school. The researcher sees much difficulty for this item to go beyond Phase 3.

Item 3 - What is learning about?

Item	1	2	3	4	5	Item
Learning is about what to think.			√			Learning is about how to think.

To the researcher, more students and teachers are aware of the importance of learning how to think under the new HKDSE syllabus. However, it seems that the change is stalled in Phase 3.

Item 4 - The role of teachers

Item	1	2	3	4	5	Item
Teachers are dispensers of knowledge.			√			Teachers are mentors and models of lifelong learning.

The researcher agrees that most teachers are aware of the need to shift their paradigm from being dispensers of knowledge to being mentors and models of lifelong learner during *Jiao Gai* (Phase 3). However, they might have very different interpretations of what ‘mentors’ and ‘lifelong learners’ are.

Item 5 - Failure and success in learning

Item	1	2	3	4	5	Item
Failures are separated from successes.		√				Emphasis is on progress and encouragement of further learning.

Although the School-Based Assessment in the HKDSE is supposed to place emphasis on the ‘learning process’ rather than ‘learning outcome’ by changing the practice of the one-off high-stakes public examination, the researcher thinks that progress in this area is slow (Phase 2).

Item 6 - Is learning fun?

Item	1	2	3	4	5	Item
Learning is a difficult chore and is about received wisdom.	√					Learning is fun, participative and involving.

'Learning is Fun' has been used to promote the Education Reform since the late 1990s. However, the researcher thinks that most learners still do not enjoy learning in school (Phase 1). In conclusion, the researcher's perception of 'How far secondary schools in Hong Kong are moving towards lifelong learning?' is in line with that of the majority of the participants. Implications of the participants' perceptions will be discussed in Chapter 6.3.

5.2 The understanding of secondary teachers in relation to HKEMB Education Reform

Research findings for Question 1

What are the understandings of secondary teachers in relation to the HKEMB lifelong learning Education Reform?
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Understanding refers to the participants' ability to discuss the background and the major initiatives of the HKEMB lifelong learning Education Reform (HKEMB 2006a).

In order to gain findings that reflect the horizons of understandings of the secondary teachers, analysis of the interviews was focused on the participants' spoken texts in relation to:

1. Background of the lifelong learning Education Reform (HKEMB 2006a, p.3)
2. The lifelong learning needs in Hong Kong (HKEMB 2006a, p.4)
3. Major initiatives mentioned in the *Learning for Life Learning through Life* policy document (HKEMB 2000)
4. Relation among the admission system, curricula, academic structure and assessment mechanism (HKEMB 2001a)
5. Major initiatives related to lifelong learning in the HKEMB Education Reform from 2000 (HKEMB 2006a, p5-6)

Before discussing the understandings of the teachers, it must be noted that certain conceptions were absent from the teachers' explanations. The HKEMB lifelong learning education reform originates from the HKEMB (2000) *Learning for Life Learning through Life* policy document. However, in the data collected and analysed, the researcher finds that the frontline teachers' understandings of the Education Reform presents a very different picture from the scenario portrayed by the HKEMB.

None of the participants mentioned the relation between the original policy document and the implementation measures of the Education Reform. Nor could the participants describe connections among the changes implemented in the past seven years of reforms. In addition, most of the participants failed to recognise the relationship among assessment, pedagogy and the curriculum. Most of the participants see the reform measures as discrete innovations added to the school system. As a result, the changes are perceived as 'never ending' and 'disturbing' to the everyday school routine.

Most frontline school teachers are mainly concerned about the syllabus change in the

public examinations. Most of the participants are aware of the curriculum change that affects their classroom practices. However, none of the participants could point out the relation between the goal of lifelong learning and the change in the school system.

These deficiencies in understanding are important because they lead to the 'misunderstanding' and 'lack of trust' between the policy makers and the frontline teachers (Wardlaw 2006, p. 102).

5.2.1 Understanding the relationship between the HKEMB reforms and the lifelong learning Education Reform

Most frontline teachers describe their experience in the lifelong learning Education Reform by referring to the subject-based curriculum reforms in their schools. In the interviews, most of the teachers concentrated on the details of the curriculum reform. Most participants understand the curriculum changes required in the new public examination syllabus. They took their time explaining the details of the assessments required in the new public examinations.

However, when talking about the goal of training lifelong learners, most teachers do not or cannot describe the characteristics of the lifelong learning curriculum design lay-out in the HKEMB documents. In their interpretation, lifelong learning is only a slogan in the government literature. Although some participants cite globalisation and its relation to training lifelong learners, they do not see the implications of training lifelong learners in the school system.

Of course we have to use CMI after 1997. Education reform is necessary after the Chinese take-over and of course EMI is not possible. But what happened to those who couldn't pass the benchmark test? They lost their jobs. Yes, I understand that EMB doesn't like old teachers like us. We can't pass the tests and we go. Even the parents think so. (Yucho)

'Yucho' regards 'lifelong learning' as a blanket term for all the HKEMB reforms after 1997. He attributes teacher redundancy to the government's language policy (CMI and EMI) after 1997 and links the problem with the HKEMB Education Reform.

Few participants can describe the relationship between the HKEMB reforms and the lifelong learning Education Reform. They tend to wrap up all the reform measures under *Jiao Gai*. The participants are most concerned about the measures that have direct influences on their career and livelihood (employment).

In addition to the language policy, the new benchmark requirement put on the territory's language teachers after 1997 is often criticised as a bad measure being implemented under *Jiao Gai*. The requirement for teachers' continuous professional development (CPD) is also mentioned as an administrative measure for schools to shed unwanted teachers rather than encourage teachers to become lifelong learners.

They keep an eye on the teachers' development record. I know the school has filed our professional development hours. Everybody rushed to the nearby courses available. You know, traveling takes time. The nearer, the better. EMB holds schools accountable and the school holds us (teachers) accountable. (Kaming)

‘Kaming’ sees both the CPD policy and the school accountability measures as lifelong learning reform measures and he attributes the education reforms to the government’s intention to hold the schools accountable for their performance.

The data reveal that many frontline teachers can name most of the education reform initiatives carried out by HKEMB after 1997. However, they do not or cannot explain how these reform measures are training lifelong learners. Nor can they explain the difference between the HKEMB school reforms and the lifelong learning Education Reform. Interviewees mentioned the following reform initiatives in the interviews.

1. Language Benchmarking for English and Putonghua teachers (LPAT)
2. Policy on Medium of Instruction (MOI)
3. Quality Education Fund (QEF - application and implementation)
4. Development of collaborative learning and teaching culture in secondary schools (e.g. peer lesson-observation, collaborative lesson preparation)
5. Teachers’ Professional Development requirement (CPD - 50 hours per year)
6. Schools’ Self Evaluation (SSE annual report)
7. External School Review (ESR)
8. Policy of immersion (catering for learners’ diversity and immersion of special needs students)
9. Implementation of TSA (Territory-wide System Assessment on Chinese, English and Mathematics KLAs)
10. Whole School Approach in student guidance
11. Decentralised policy of school funding
12. Development of professional exchange and sharing culture
13. Teachers’ Development Days requirement (minimum 3 days per year)
14. Development of students’ Learning Portfolios (Assessment for Learning)
15. Implementation of School-Based Assessment (SBA)
16. New Secondary School Places Allocation system (SSPA)
17. School Management Initiatives and the formation of School Management Committee (SMI & SMC)
18. New Senior Secondary School (NSS) curriculum

Every participant can mention some reform initiatives but no participant can describe the policy perspectives of lifelong learning and the relationship between the lifelong learning Education Reform and curriculum reforms. None of the teachers interviewed had read the *Learning for life Learning through life: Reform Proposal* (HKEMB 2000). Most participants are only concerned about how the reform measures affect learning and teaching in their schools. Some participants are worried that the new professional requirements and appraisal measures will affect their career.

The change required in the learning and teaching mode in secondary schools is realised by most of the participants. However, they do not see the connection between the structural change in curriculum and the change in classroom practices. To many of the frontline teachers, the curriculum reform and the Education Reform are two separate reform initiatives and lifelong learning is only an empty slogan. Some teachers regard the HKEMB Education Reform after 1997 as a purely political move. Some teachers see it as a government tool to enforce accountability in schools. Most other teachers just admit that they do not understand or do not want to understand the Education Reform. Their main concern is how the change brought about in the Education Reform is related to their teaching effectiveness and their students' performance on the public assessments.

Because helping students to earn high scores on public examinations is still regarded as the key task of most frontline secondary school teachers, the New Senior Secondary school curriculum (introduced in 2007 and scheduled for implementation in 2009) and the new public examination and assessment requirements for secondary school students in 2012 are regarded as the most important changes. Most participants reply that they are just too busy to read any other documents than the new requirements in the

examination syllabus. The research data reveal that most participants have only a superficial understanding of the measures being implemented and the new terms (e.g. assessment for learning) used during the Education Reform. There is a lack of in-depth understanding of the goal of training lifelong learners.

5.2.2 Lifelong learning is only a slogan

Out of the 20 interviewees, 17 used the term ‘slogan’ when they talked about their understanding of the lifelong learning education reforms.

Clabaugh and Rozycki (1990) argue that practitioners and policy makers have different interpretations of the use of the term ‘slogan’ in education reforms. Clabaugh and Rozycki (1990) remind the readers that slogans used in education reforms can be interpreted as a kind of systematic ambiguity that promotes shallow agreement and superficial consent. In many cases, slogans are so vague as to be meaningless. Many slogans used in education reforms are only used to initiate action. However, without a specific guide to actions, the change that a slogan promotes can never come to fruition.

Clabaugh and Rozycki (1990) refer to this as the Humpty Dumpty Principle: *When I use the word Humpty Dumpty, it means just what I choose it to mean.* The impression that the term ‘lifelong learning’ is used by policy makers in such a manner may generate frustration and resentment among frontline teachers.

5.2.2a Ambiguity of ‘lifelong learning’ as a slogan

‘Yucho’ is the Mathematics KLA panel chairperson in a Band 3 Aided secondary school in Kowloon City, Kowloon. He has more than 20 years of teaching experience. To

him, ‘lifelong learning’ is only a slogan in the HKEMB leaflets. He finds the term ‘lifelong learning’ ambiguous.

Lifelong learning has nothing to do with TSA. Why TSA?
 And HKEMB said that we don’t need to drill the students.
 Ridiculous! Don’t you know that there’re always a lot of
 absentees in the school? Do they know what is happening
 in schools? Of course, you need a slogan for the leaflets.
 (Yucho)

‘Yucho’ argues that many of the reform measures have nothing to do with training lifelong learners and that HKEMB does not seem to understand everyday practice in secondary schools. He argues that although HKEMB states that TSA results would only be used to improve assessment for learning, schools would still put much emphasis on drilling students on the TSA model examination. The slogan of lifelong learning is unclear to most frontline teachers.

5.2.2b A superficial consensus

‘Kitlee’ is the English KLA assistant panel chairperson in a Band 2 Aided secondary school in Yuen Long, New Territories West. She has eight years of teaching experience. She mentions that she sees the term ‘lifelong learning’ as a superficial consensus. She can only relate the goal of training lifelong learners to the measure of CPD in the Education Reform.

Oh I know it’s related to CPD. Lifelong learning is to ask
 teachers to continue to develop themselves 50 hours per year.
 I know this slogan. (Kitlee)

As ‘Kitlee’ points out, lifelong learning is only a slogan that HKEMB uses to cover up its demand for frontline teachers to have professional developments.

‘Waiyip’ is a Mathematics teacher in a Band 2 Aided secondary school in Wong Tai Sin, Kowloon. He has three years of teaching experience. He regards lifelong learning as a slogan that the government and the school use to select the teachers they like.

I read these articles. It is important for teachers to know lifelong learning if we want to find a job. Teachers should be lifelong learners and be role models of their students. So we have to continue to take the CPDs. I know these slogans. (Waiyip)

‘Waiyip’ implies that if teachers do not mention lifelong learning, they will be regarded as ‘disobedient’ and will be labeled as unwanted (and may not be able to find a job).

‘Kaming’ is an Arts KLA teacher in a Direct Subsidy Scheme secondary school in Yau Tsim and Mong Kok, Kowloon. He has three years of teaching experience. He states that lifelong learning is widely promoted in the media. However, only a superficial consensus can be reached.

It’s just a slogan. Everybody talks about that. You saw that on TV, EMB promotions, internet etc. Arthur Lee, Fanny Law, even parents are always using this slogan. (Kaming)

‘Kaming’ argues that although the term ‘lifelong learning’ always appears in the media, frontline teachers’ understanding of its translation to learning and teaching remains limited.

5.2.2c Vagueness of the lifelong learning slogan

‘Ngayee’ teaches in a Government Special Education secondary school in Tai Po, New Territories East. She has 16 years of teaching experience. She argues that she has been applying principles of lifelong learning teaching strategies in the special school for a long time. She states that without concrete measures to be carried out in the lifelong learning Education Reform, ‘lifelong learning’ will only be regarded as a meaningless slogan.

This slogan is nothing new to the special education schools. We always emphasis on helping the students to establish a lifelong learning attitude. We have to do that. Anyway, most of the kids will not enter the public examinations and what they have to do is just to continue to learn. (Ngayee)

‘Ngayee’ argues that HKEMB should demonstrate the learning and teaching of lifelong learning skills by showing more feasible good practices to the frontline teachers.

‘Wingkng’ teaches Computer Studies in a Band One Aided secondary school in Tuen Mun, New Territories West. He has four years of teaching experience. He states that the term ‘lifelong learning’ is so general that there is no need to investigate its meaning.

The slogans sound great. I know lifelong learning is the purpose of the Education Reform. But this is only a ‘term’. Even when there is no Education Reform, we know the importance of *Zhong Shen Xue Xi*. (Wingkng)

‘Wingkng’ has his own preconception of lifelong learning. Although he claims to know what *Zhong Shen Xue Xi* is, his interpretation on lifelong learning is unclear.

5.2.2d Lack of specific guide to realise the goal of training lifelong learners

‘Isachun’ teaches English in a Band 3 Government school in the Islands District, Hong Kong. She has more than 20 years of teaching experience. She complains that the slogan of ‘lifelong learning’ is too broad and that the Education Reform in Hong Kong is not meeting the needs of the students.

There are too many terms and lifelong learning is just one of those; a slogan only. Globalisation is the trend but there’s no taste of it in Hong Kong; no culture in our specific context. Change can be for the worse. (Isachun)

‘Isachun’ argues that without guidelines for the implementation of the ideal of lifelong learning, Education Reform brings can cause changes for the worse, not for the better.

5.2.2e The Humpty Dumpty Principle leading to frustration and resentment

‘Chunkin’ is the Chinese KLA panel chairperson in a Band 3 Aided secondary school in Central and West Hong Kong. He has 15 years of teaching experience. He complains that HKEMB has dominated Education Reform and that lifelong learning is only a slogan used by policy makers to enforce the top-down Education Reform.

‘Be brave, be positive, globalisation, lifelong learning’. These slogans are too high sounding, too demanding. The ideal is too high but the implementation team is too lousy. I think it is only a commercial way of shifting the accountability of education from the government to the schools. Teachers have no say. (Chunkin)

‘Chunkin’ expresses frustration and resentment in the interview as he claims that the government is only using the lifelong learning reform slogan to enforce the policy it wants. Frontline teachers do not have ownership of the change.

‘Rochlee’ teaches English in a Government school in Sham Shui Po, Kowloon. She has seven years of teaching experience. She sees ‘lifelong learning’ as a government slogan to test teachers’ submissiveness. She relates the retrenchment policy and teachers’ job security to the government’s lifelong learning slogan.

I don’t care about these reforms and these slogans. The English subject syllabus always changes. I’m not afraid of change. These big slogans must not be wrong; but what is it to do with teaching English. You tell me. These slogans just beautify the hard measures taken. Lifelong learning can be realised in many extra-curricular activities. We have been doing all these. But why setting all these benchmark tests for teachers? Why changing the admission system? Why making so many frontline teachers lose their jobs.
(Rochlee)

Rochlee’s understanding of lifelong learning is related to her experience in the curriculum and assessment changes required in the subject she taught. She does not see these changes as benefiting her students and she finds that the government is only using the slogan to direct frontline teachers’ practices.

To most of the participants, lifelong learning is only a slogan that HKEMB uses to promote changes in the school system. They do not see the relationship between the structural change led by HKEMB and the pedagogical changes in their schools.

Although participants have very different experiences and levels of understanding of the Education Reform, almost all of them separate the lifelong learning goal from the implementation measures being imposed by HKEMB. Lifelong learning is only regarded as a slogan. The ‘Humpty Dumpty’ interpretation of the lifelong learning slogan has led to frustration and resentment among some of the frontline teachers.

5.2.3 Lifelong learning and *Zhong Shen Xue Xi*

Some participants exhibit confusion about the western concept of lifelong learning in the context of globalisation and the interpretation of the Confucian’s teaching of *Zhong Shen Xue Xi*. As the Education Reform document (HKEMB 2000) in Chinese does not address translation matters in *Zhong Shen Xue Xi*, some participants just apply their own preconception of the Chinese term ‘*Zhong Shen Xue Xi*’. The Confucian concept of training lifelong learners is mixed with the ideal of training lifelong learners to meet the globalised 21st century economy.

‘Isachun’, a teacher in the Island District, views her interpretation of *Zhong Shen Xue Xi* in the interview as readdressing the core values of the Chinese culture.

It is too remote to talk about lifelong learning to my students. You know, they are islanders. Some of them had not been to the Hong Kong island before they came to my school. They are not concerned about the world affairs. I think we should teach them more about the traditional Chinese value of lifelong learning rather than making all these changes in the syllabus. (Isachun)

Although 'Isachun' does not explain her interpretation of lifelong learning, she points out that 'the traditional Chinese value of lifelong learning' should be taught. She argues that the teaching of traditional Chinese value (Confucian teaching of *Zhong Shen Xue Xi*) is more important than the change in the new syllabus.

Although not many participants mention the importance of Chinese traditional values as explicitly as 'Isachun' does, they seem to confuse the western interpretation of lifelong learning with the Chinese translation of *Zhong Shen Xue Xi*. Most of the participants mention 'globalisation' in connection with the goal of the Education Reform. However, many of them add that this term has been used by the Chinese for a long time. It means that they are confused by the translation of *Zhong Shen Xue Xi*.

Before 1997, English was the official language of the Hong Kong Government. However, since the shift of sovereignty to the China, Chinese has become the official language in the policy documents. The present study does not intend to investigate the language issue raised by the translation of *Zhong Shen Xue Xi* and lifelong learning. However, Chinese translation can be an area for further investigation.

5.3 The feelings and emotions of secondary teachers in relation to the implementation of the HKEMB lifelong learning Education Reform measures

Research findings for Question 2

What are the feelings and emotions of secondary teachers in relation to the implementation of the HKEMB lifelong learning Education Reform measures?

Emotions are the mental and physiological state that is associated with a wide variety of feelings, thoughts and behaviour. Izard (1991) states that emotions directly

influence what we see, hear, perceive and remember. The participants' feelings and emotions are interpreted by the researcher through recoding and analysing the responses in the interviews. Besides the 'words' spoken, the researcher paid attention to the tone, gestures and facial expressions of the participants when she completed her interview field notes. The feelings and emotions discussed are not only the meaning of the words as defined in the dictionary but the researcher's own understanding and interpretation of what the participants wanted to say.

The lifelong learning Education Reform requires teachers to change from 'knowledge givers', to 'facilitators' (HKEMB 2001b). It takes time to prepare teachers for such a paradigm shift. The reform measures are introduced according to a strict timetable. The introduction of curriculum reforms in secondary schools has created a sense of insecurity in the traditional classrooms where most teachers are accustomed to more discipline and control. The feelings of 'not being in control', 'not confident', 'lack of security', 'frustration', 'stress' and 'not fair to the students' are recurring themes in the interviews.

The literature on emotional intelligence (Mayer & Salovey 1993; Mayer et al., 2001) states that a feelings and emotions can be expressed in different states. Although frustration, identity loss, stress, burn out and depression may look similar, the participants in the research have a range of emotions.

5.3.1 Feeling frustrated

Section 5.2.2e mentioned that frontline teachers' difficulty interpreting the lifelong learning slogan used by HKEMB caused frustration. In that regard, frustration is

related to a lack of understanding. In this section, this frustration will be investigated in relation to the sense of stress.

Most teachers regard the changes required by EMB as positive when they find that students benefit. However, when the teachers describe their experience as 'not under control' and that students' performance is below their expectation, they relate the change to a 'negative' impact. When the frontline teachers talked about a change that was not under their control, they mentioned 'frustration'. Frustration was also associated with stress in connection with the HKEMB Education Reform. Lowenfeld (1975) argues that the confusion of values seems 'to deprive many people of satisfactions derived from their ego-ideal demands and contributes to a sense of narcissistic frustration' (p.129).

'Kinglin' has been an English teacher for over 15 years. She is teaching in a Band 3 Aided school in Kowloon. She describes herself as 'not ambitious' and as someone who only wants to be a 'good English teacher'. She attributes her frustration to the recent education reform measures in the English subject.

I know what is mentioned in the Education Reform. I read the HKEAA (Hong Kong Examination & Assessment Authority) reform documents and those promotional pamphlets. But I'm not the panel-chairperson and I'm not involved with any administrative work. I don't care about those SMI (School Management Initiative) things. What I want to know is how the change will affect my teaching practices in the classroom.

Actually, those lifelong learning elements are nothing new to us English teachers. Those 'generic skills' are always taught through RWLS (Reading, Writing, Listening and Speaking). The SBA (School-based Assessment) requirement is really ridiculous. Why suddenly requires the English subject to change the assessment mode within 2 years' time? It's not fair.

When I attended the EMB seminars and asked about the details of the implementation, they couldn't give a clear answer. It seems that the HKEAA and EMB are working separately. How can a high-stake public examination be alienated from the curriculum design?

If everything is to be school-based, then what is the EMB for? It's just the blind leading the blind! How can we lead the students?

SBA requires students to self-access and self learn. But I think teachers' input is essential, especially the kind of Band 3 students I have. I have to give very clear instructions to them and drill them for the examinations. Without a clear picture of the final assessment mode, I can't feel safe in planning my lessons. And if I don't feel confident, how can I lead the students? I feel that I'm not in control and the students don't feel safe. It's not fair.

Look at these rashes I got. The doctor told me that I'm under too much stress. Actually my principal is very good to me and he never puts much pressure on me. But how can I not worry. (Kinglin)

'Kinglin' associated her frustration with the curriculum reforms in the English subject. The new measures in School-Based Assessment and the public examinations have put much stress on subject teachers. She mentions her role as an experienced English teacher. However, the change in the English subject has induced a sense of insecurity

and a lack of confidence in her teaching. The frustration has led to stress symptoms and her health has been affected.

Like 'Kinglin', other participants refer to their own frustration or to their perception of their colleagues' frustration. Stress is always associated with frustration.

5.3.2 Identity loss

According to Levita (1965), identity is used to describe the intrinsic value of a person. In psychoanalysis, identity refers to the 'cluster of roles one is enacting' (p.209). Lord et al. (2002) argue that our sense of organizational identity is connected to how we feel. Emotions can affect organizational behavior in the workplace. Tiredness, frustration, stress and depression can lead to identity loss in the organization.

The implementation of the lifelong learning Education Reform has brought about much change in schools. When the frontline teachers find that they cannot cope with the change required, they begin to question their identity as effective teachers.

The longer school hours and extra paperwork have been exhausting for many frontline teachers. When the teachers' emotional problems cannot be solved, they begin to lose job satisfaction.

'Wingyan' is a teacher of Mathematics and Physical Education. She has been teaching in a Band 2 Aided secondary school in the New Territories for ten years. She sounds proud of having been elected one of the best teachers by the students of her school for six consecutive years. She also won the Award of Teaching Excellence from HKEMB in 2005.

I'm too busy. The changes like curriculum, assessment and CPD have never stopped. I am very experienced already, but I still feel the pressure. Those EMB so-called creating space for frontline teachers' measures could not benefit me. Or that, I just can't find the time to get the benefit.

It is not the new tasks that I can't handle. It is the time spent on those documents that has eaten up my time to be spent on my students. Those new requirements have taken up the time I used to spend on helping the individual students and I feel regret. Is it good for the students? Sometimes, I just don't know how to tell the students to go away because I have to complete the school's evaluation documents.

My pedagogical techniques got improved through the professional development training and I think students can benefit; but..., I don't know. Sometimes, I wonder if I am still a good teacher.

I spent almost all my free time on the students in school. After school, I work on their assignments. That's OK. But then the documents and the course work of CPD are still there to be completed in the school holidays. I have no time for my family. I feel bad. I don't know why. I have no time to relax, no time to rest, and I can't balance it. CPD requirement is a pressure and I feel that the pressure is ever increasing. I know the school has pressure too. It has to do a lot of promotion activities to attract the new Secondary One students. If not, the school has to go downsizing and teachers lose their jobs. But I don't see how it is related to benefit students' learning. Do you think that these measures can really help? I don't know.

(Wingyan)

‘Wingyan’ is a typical example of identity loss. Her interpretation of being a ‘good teacher’ is spending more time on students and helping them with their assignments. However, the education reform measures like CPD and School Self Evaluation have taken time away from her students. In order to fulfill these requirements, she has to sacrifice time for rest, family and entertainment. As she does not see the benefits of the new reform measures on the students, she begins to question the effectiveness of the Education Reform. She also loses her identity as being a good teacher. Besides the HKEMB requirements, WINGYAN worries about the school downsizing and possible closure. The implementation of the HKEMB Education Reform seems to have put her in a dilemma.

The loss of their identity as teachers is also mentioned by six other participants. They think that the Education Reform measures have made them feel less important as teachers and less respected by their students.

5.3.3 Feeling stressed

The word ‘stress’ features in all descriptions of the participants’ feelings. Each participant mentions a different level of stress. Some participants respond that although they can manage their own stress, they can still see how their colleagues are suffering from stress.

Stress is the body’s response to situations that impose demands, constraints or opportunities. Goldstein and Kopin (2007) argue that the evolution of stress is a scientific idea. They point out that stress is related to a variety of acute and chronic disorders. The accumulation of stress can lead to burnout.

Most participants describe their stress as job-related. When the job requirement is linked to job security, the stress is compounded. 'Yuenkwan' was the teacher who was more explicit about her stress and anxiety.

'Yuenkwan' majored in music education. However, when she started teaching, she was assigned to teach English. In 2005, HKEMB required all English and Putonghua teachers in Hong Kong to pass a benchmark test in language teaching. Teachers who cannot meet the benchmark are not allowed to teach the subjects. 'Yuenkwan' described her stress when she was required to take the English benchmark test. She was worried about losing her teaching post.

It was horrible. The principal told me that I might be laid-off if I could not attain the English benchmark. There are not enough music lessons for me. I must teach English.

This is my fourth attempt already. Out of the five different papers in the tests, I had never passed more than four. The problem is that my tests' result fluctuates. Don't you know that we have to pass ALL five papers in order to attain the benchmark qualification? I gave up. I rang up EMB and cried.

They then told me to get the attainment through 'retraining'.

So I took the retraining course. I went to BU (Baptist University) three days a week after school and took the retraining course from 6:30 to 9:30p.m. Imagine what time I got home? After 11:00p.m. School starts at 8:00 in the morning and I could never have enough sleep. My weight fell from 112 to only 98 pounds. I postponed my wedding and ... (stopped and tried to calm down).

I really want to quit. But my parents have just retired. I know that this is my personal problem but what can I do? I know that I lose my temper very often. I had a stomach ulcer (stopped for a few seconds). I still love teaching and I know I'm a good music teacher. (Yuenkwan)

'Yuenkwan' shows how difficult it can be for a frontline teacher to comply with the educational reform measures. The stress was caused by the external change requirement and exacerbated through the teacher's self concept and personal context.

Many participants reported different levels of stress when they encountered the change required by the education reforms. In addition to job security, stress was related to 'unclear identity', 'workload', 'students' discipline', 'school policy' and 'parents' demand'.

During the implementation of the lifelong learning education reform, secondary teachers are expected to shift from being the knowledge givers to being knowledge facilitators. The teachers who cannot weather this paradigm shift may experience stress related to 'unclear identity'.

The ideal of Lifelong Learning has been steering the curriculum reforms in secondary schools from 2000. The requirement of the New Senior Secondary curriculum and the new public examination (HKDSE) are perceived by the frontline teachers as adding to their workload.

Curriculum change required in the lifelong learning Education Reform demands a more interactive classroom arrangement and pedagogy. However, most secondary frontline

teachers are not accustomed to the new form of teacher-student interactions. When trying these new activities, many frontline teachers complained of 'uncontrolled noise in class', 'disobedience' and 'failure to hand in homework'. These problems are always referred to as discipline problems.

In many schools, appraisal of teachers is related to their ability to enforce discipline. When teachers are seen conducting lessons in noisy classrooms, with students not meeting the homework requirement or being unruly, the teacher may be viewed as ineffective.

Some participants reported that most parents still regarded assigning written homework as the main duty of secondary school teachers. The group work and projects introduced in the lifelong learning Education Reform have not been well received. If fewer written assignments are given, parents may complain to the school administration. Most participants responded that parents' complaints and lack of support from school administration have created stress among the secondary school teachers.

Yuenkwan's case exemplifies the most intense type of stress among the participants. Although the language benchmark policy is not meant to be applied to teachers who had not majored in a language, many non-language teachers in secondary schools are also required to reach the language benchmark requirements. When job security is added to the participant's individual difficulties, the stress only increases.

5.3.4 Feeling burnt out

Constant stress in work and life can lead to burnout. Burnout is often associated with the lack of motivation or incentive. When someone's devotion to a cause fails to produce the desired results, the disappointment can lead to the burnout.

Raiger (2005) states that burnout is a unique type of stress that affects the workplace. Maslach and Leiter (1997) state that "burnout is the index of the dislocation between what people are and what they have to do".

It represents an erosion in values, dignity, spirit, and will--an erosion of the human soul. It is a malady that spreads gradually and continuously over time, putting people into a downward spiral from which it's hard to recover ... What might happen if you begin to burn out? Actually three things happen: you become chronically exhausted; you become cynical and detached from your work; and you feel increasingly ineffective on the job (Maslach & Leiter 1997, p.17).

All the participants in the research have used the terms 'too fast', 'too quick-pace' and 'ever changing' to describe the way in which lifelong learning Education Reform measures were imposed. To most frontline teachers, the changes initiated by the Education Reform have not stopped since 1997. The changes in the curriculum, assessment, school evaluation, teachers' benchmarking test and the requirement for teachers' continuous professional development have affected the teachers' emotions. Most participants state that their attempts to adapt to the changes in the classroom are causing burnout.

Many participants state that the change required by EMB is much easier said than done. The teachers who are assuming administrative duties find it even harder to satisfy the EMB requirement. The reform measures are described as ‘too hasty’ and ‘too many things’ to get done to meet the ‘deadlines’. Frontline teachers complained that they just did not have any time to think about the reform implementation. They had their hands full just meeting the deadlines. Many teachers stated that they had no choice but to comply. They admitted feeling ‘exhausted’ in keeping up with the changes. The ‘never-stopping’ changes caused teacher burnout.

‘Waihung’ is the vice principal of a Band One Aided secondary school in New Territories West. He has been teaching for more than 20 years. He described the implementation of lifelong learning Education as ever-changing.

There are so many policies, so many changes in recent years. Schools cannot say ‘No’ but to follow. These measures had forced the schools and the teachers to change. Some changes are good but most are paperwork. You see, when so many changes are cramped together, only superficial gains can be achieved. Students cannot benefit.

Of course we’re burnt out. Changes happened in the whole system, school management, curriculum, assessment and almost everything. It changes every year and we just don’t have time to learn from the change.

Teachers have to change and to learn to change. Unfortunately, those who can’t survive will have to quit the profession. (Waihung)

‘Waihung’ relates the teachers’ burnout with the ceaseless changes initiated by HKEMB. Although he admits that there have been some ‘good changes’, he argues that most of the changes are superficial and cannot benefit the students. Being the middle manager and chief administrator of the school, ‘Waihung’ blames teachers’ burnout on the extra work pressure and the ever-changing top-down requirements. Unfortunately, he says, the teachers who have proven ‘unfit for survival’ have to leave the profession.

‘Kwokshin’ has more than 15 years teaching experience in a Band 2 Aided secondary school in New Territories West. He is also a middle manager in charge of staff development in his school.

I think there is nothing wrong to continue to learn. But it takes time to realise the change required. You can’t imagine teachers to suddenly become ‘facilitators’. Even students take time to adapt to the change. Some teachers find it easier to adapt to the change while some others find it harder. Some cannot realise why we have to change. Again, it takes time.

Our students are not particularly bright. So the teachers in the school have to spend a lot of time on remedial teaching. That means we have to give them extra lessons after school. It is more than just tiring. I understand their difficulty. (Kwoksin)

‘Kwokshin’ points out the difficulty of managing change in the frontline. Even if some teachers can manage the change process, the whole school still takes much more time to adapt to the required top-down change.

The lack of time to adapt to the change is cited as the chief barrier to the education reform. The mismatch in priorities between the official requirement and students' immediate needs is also blamed for burnout. Middle managers like 'Waihung' and 'Kwoksin' see the difficulties that frontline teachers have in finding the time to adapt to change and to meet the HKEMB requirement as the cause of burnout.

5.3.5 Feeling depressed

The National Institutes of Mental Health (2007) define major depression as "a serious and often disabling condition that can significantly affect a person's work, family and school life, sleeping and eating habits, general health and ability to enjoy life" (p. 23). Hamilton (1960) states that in comparison to frustration and stress, depression is a mental illness. He argues that the 'depressive triad': depressive mood, guilt and suicidal tendencies are closely related. He also forms the rating scale of depression based on the traits of depression mood, suicide, work and loss of interest, retardation, agitation, gastro-intestinal symptoms, general somatic symptoms, hypochondriasis, and weight loss.

'Wingkng' describes his teaching life as much happier before the Education Reform.

Things were fine when I started teaching. But I see that many teachers in the school are rather depressed now. It seems that everything is out of control. The new jobs are never ending.

Of course I feel the stress. I have to take care of my family (my baby boy is only 3 months old); I have to take care of my students; I have heaps and piles of markings to do after school; and there are so many requirements to satisfy. How can I find the time for the required CPD? How can I squeeze the time to deal with my personal affairs? Who cares? After all, the students still learn the same way. Why changes?

The principal would only pay attention to the students' results in the public examinations. Who is to bear the responsibility if the public examination results drop? The teacher. The subject teacher. I think I'm depressed, sometimes. (Wingkng)

'Wingkng' blames his depression on the ineffectiveness of the reforms. He sees that the extra workload cannot actually benefit students and that the school administration does not understand the difficulties of the frontline teachers. Their helplessness produces unhappiness and depression.

Different participants describe their unhappiness and depression. Generally, most participants relate their unhappiness to the endless changes under the lifelong learning Education Reform.

5.4 Benefits perceived by the secondary teachers

Research Findings for Question 3

What do secondary teachers perceive as benefits of the HKEMB lifelong learning Education Reform?

Participants were invited to talk about how the HKEMB lifelong learning Education Reform affected their teaching and their students' learning in Interview Questions 3, 4 and 5 (Appendix 4). Participants were expected to talk about the advantages to teaching and learning under the curriculum reform or the lifelong learning reform policies.

The word 'benefit' is not used in the interview protocol (Appendix 5). However, when the researcher could elicit information about the perceived benefits under the lifelong learning Education Reform, the phrase 'Are there any benefits that the lifelong learning Education has brought about?' would be used.

Most of the participants did not voluntarily mention the benefits of the curriculum reform. However, following the prompt about 'benefits', most of the participants recalled some perceived benefits brought about by the HKEMB lifelong learning Education Reform.

The perceived benefits that were mentioned are analysed in relation to the participants' comments on the positive impacts on secondary school teachers and students.

5.4.1 Improvement in the use of Information Technology

The introduction and application of information literacy skills is one of the important assessment criteria of the lifelong learning schools (Bryce & Withers, 2003). The most obvious benefit noted by the secondary school frontline teachers is the use of Information Technology. Many participants agree that HKEMB's funding for secondary schools' Information Technology after 1997 has improved the IT hardware and software in the secondary schools.

'Yucho' mentions that the most significant improvement that the HKEMB Education Reform has brought about in secondary schools is the promotion of Information Technology.

The huge pool of money given to secondary schools after 1997 helps the implementation of IT. With the 300 thousand dollars per year funding and extra funding provided by QEF in IT, most secondary schools can now set up their own IT platforms in learning and teaching. Students can't do without IT now.

Although many arts subject teachers were resistant to the change at the beginning, they can now manage the basic IT skills like power-point presentation and web search. The EMB training courses like BIT (Basic Information Technology) can help.

Of course, students' IT skills are much better than their teachers' when they are applying it on entertainment. (Yucho).

'Ngayee' adds that the use of IT has significantly improved self-access learning among her with special needs.

Computers have helped them a lot. With the new funding, we can buy a lot of software to cater for students' individual needs. I see the improvement that IT brings and I hope that the funding on IT can continue. (Ngayee)

'Feitang' describes how the lifelong learning Education Reform has changed students' learning habits by bringing Information Technology into the secondary school curriculum.

The establishment of the Hong Kong Education City (an online educational web site developed and funded by the HKEMB after 2000) could not come true without HKEMB's support. I think this is a good reform measure because many students can find more about various subjects' information they need on-line. They can apply their IT skills in learning in a more practical way. (Feitang)

The use of Information Technology in teaching and learning is perceived as the most significant benefit related to the HKEMB Education Reform. Most participants describe the benefits of IT in relation to better learning among students and greater efficacy among teachers. The establishment of Hong Kong Education City (a HKEMB and schools' IT sharing platform) is frequently mentioned as a means of improving the delivery of IT education during the Education Reform.

5.4.2 Improved pedagogy

Banilow et al. (2006) claim that pedagogy is the way that teachers manage their classroom instruction in ways that help students to learn the subject matter. Examples

of pedagogical approaches include how a teacher presents material, asks questions, corrects misconceptions, or encourages students to communicate through writing or discussion.

‘Ngayee’ has been teaching in a special education school for over ten years. She says that the new requirements of the lifelong learning Education Reform have actually helped some teachers to become better in their jobs.

Although many teachers complain about their workload, students actually benefit from the training their teachers get. We have never tried to compete for academic excellence with the other grammar schools. So we have more liberty in trying out the pedagogical innovations mentioned in the curriculum reforms.

Don’t think that we can be excluded from the Education Reform. We do everything that the mainstream schools do. We have to prepare students for the New Senior Secondary curriculum and we are governed by all the accountability measures like Internal School Review and External School Review and we also have to compete for the Secondary One student intake.

We pay much attention to the development of students’ attitude and I think we have more ‘time’ to do it. We have much liberty in the delivery of the curriculum and we don’t have much complaint from the parents about the amount of academic input we have to deliver.

The new assessment modes enhance students’

learning in various ways. Collaboration with the community organizations is already a tradition in special education schools because we can't do without the community's resources. Our goal is to help the students to survive in their local communities.

Resources added from the reform funding help the school to promote reading and improve the application of Information Technology. It helps students' learning a lot.

Many of the old teachers, though reluctant, are forced to take the professional development courses. With the training they get, they can use the school facilities better and it really helps the students.

The required action research in professional development also helps to improve the teaching culture of the school and I see that students enjoy their learning more. (Ngayee)

Ngayee's description of the special education school brings up improvements in pedagogy as teachers undergo continuous training. She gives the examples of improved learning and teaching when teachers are given the freedom, time, and space to try out the innovations. However, comments on the advantages of professional development are rare. Even when the advantage of CPD is mentioned, it is always tempered by the complaints about extra workload related to the development courses. Many participants mention that if the school's environment cannot foster the change required, individual development courses cannot help the students to learn better.

5.4.3 Teachers become lifelong learners

During the interviews, participants were invited to respond to the question ‘How far are teachers in the school lifelong learners?’ with reference to the ACER instruments (Appendix 4b). Data collected from the ACER survey reveals that most frontline secondary teachers find it difficult to change their role as ‘knowledge dispensers’. However, they also mention their awareness of the changing paradigm to become mentors and facilitators to their students. In the ACER survey, most participants spent most of their time talking about ‘engaging teachers in professional development’.

Some frontline teachers state that the Education Reform does not help make students into lifelong learners. However, they think that teachers are forced to become lifelong learners in order to fulfill the CPD requirement of the Education Reform.

Some participants mention that teachers who are role models for continuous professional development have a positive impact on their students. When students see their teachers learning, they are more convinced of the necessity of lifelong learning. Some participants say that HKEMB intends to force teachers to become lifelong learners by introducing the mandatory Continuous Professional Development (CPD) hours. They say that it is easier for HKEMB to change the teachers because teachers have to comply with the lifelong learning requirement in CPD in order to keep their jobs.

‘Waihung’ mentions that the lifelong learning Education Reform has been more successful in helping teachers to become lifelong learners than in teaching the students the attitudes and skills for lifelong learning.

In recent years, many teachers know that what they learnt in the past is not sufficient to teach the students. They have to continue to learn about the syllabus change and continue to improve their teaching skills so as to fit the HKEMB requirements and the interests of the students. I'm not sure how much the students have actually benefited but I'm sure that teachers have become good models of lifelong learning. (Waihung)

'Winghan' also describes how the principal of his school helps to implement the HKEMB Education Reform to help teachers continue their learning.

The principal always encourages teachers to learn more about 'project learning', 'formative assessments' and 'reading to learn'. She encourages teachers to continue to learn by giving us 'day release' as well as 'financial support'. Now that a lot of the degree holders in the school continue their Master degree study and some even go for the Doctorate degree. I think we can surely meet the 150 hours CPD requirement. I think this is what EMB said about lifelong learning. (Winghan)

Many participants mention the CPD requirement as a means to improve teachers' professional qualifications. Lifelong learning is realised through teachers' continuous professional development.

5.4.4 Students become more confident learners

From the data collected in the ACER survey (Appendix 4c), most frontline teachers accept the change brought about by the New Senior Secondary curriculum in the lifelong learning Education Reform as benefiting the students to become more

independent and confident learners.

The criteria of learners being able to ‘set their own learning goals’ and ‘build up confidence in learning’ are mentioned in the literature of lifelong learning (Bryce & Withers 2003; World Bank 2003). The Confucian teaching of *Zhong Shen Xue Xi* also mentions the importance of empowering the learners by building their confidence (Yip 2006).

‘Kwoksin’ says that the curriculum reforms and the change of the assessment modes (SBA) have given some of his students greater confidence in learning.

The SBA (School-based assessment) requirements in the public examinations have changed the assessment mode of the school. I think the more constant and more immediate feedback have motivated the students to become more active learners as they can see the very ‘small’ improvements being recognized by the teacher.

I think the lower forms students can benefit from the new form of assessment and they can have more confidence in their learning. However, when the public examinations come near, it is another story. (Kwoksin)

‘Kitlee’ also describes how the curriculum change has improved students’ confidence in learning English.

The group work and discussion work requirements in the new syllabus and SBA have motivated the weaker students to participate more often in the classroom. Some shy students can be encouraged to take more active roles in the group discussions. I think it can help them to become more confident in using English to communicate. Although I don’t think SBA is necessary, it may be helpful to some students. (Kitlee)

Although the introduction of the curriculum reform is perceived as having negative impact on secondary schools by creating unnecessary paperwork, most participants admit that students can benefit from the new mode of assessments. Many participants state that with more variety given to students in the assessment modes, more students are encouraged to learn more confidently.

5.4.5 Limited benefits

When asked about the perceived benefits of the lifelong learning Education Reform, participants appreciate HKEMB's promotion of IT. However, when CPD and new assessment modes are raised, the participants disagree.

Some participants argue that the curriculum reform measures are only useful to junior secondary school students. When teachers have to prepare students for the high stakes pen-and-paper public examinations, they tend to return to the traditional mode of drilling and practicing.

Some participants also state that the improvements made in pedagogy and learners' confidence have only very limited benefits for students' academic performance. Many frontline teachers think that students' performance on the public examinations is still the most significant indicator of the quality of the school and its teachers. They claim that if the culture of academic performance cannot be altered, students can profit little from the lifelong learning Education Reform. Under the curriculum reforms, junior secondary students may encounter a greater variety of pedagogical or assessment modes. However, learning and teaching in the senior secondary school years will still

be following the lead of the public examinations. Some participants also claim that Education Reform has more drawbacks than benefits.

5.5 Disadvantages perceived by secondary teachers

Research findings for Question 4

What do secondary teachers perceive as disadvantages of the HKEMB lifelong learning Education Reform?

Perceived disadvantages are analysed from data collected in questions asked in Questions 3, 4 and 5 in the interview protocol (Appendix 5). Disadvantages are noted by the frontline secondary teachers pertain to the effects of the HKEMB lifelong learning Education Reform on teaching and learning in the secondary schools.

Teachers describe the disadvantages of the HKEMB lifelong learning Education Reform in very different ways. Few of the participants have any faith in the effects of change. They assume that most of the reforms are not sustainable because the requirements of HKEMB keep changing. They think that the lifelong learning Education Reform will not help students in the long run.

Participants from better 'Banding' schools mention that reform measures cannot take root in their schools because most of the measures are directed to junior forms students. In order to secure the good grades that most students earn on the public examinations, teachers in the high banding schools do not dare to experiment with changing the school's routine or test any innovative pedagogy, especially in the senior forms.

Some participants from the lower 'Banding' schools complain that the requirements of

the Education Reform have put them in an even worse situation as they have to spend time and resources on extra paperwork. Many participants in the lower banding schools mention that throughout the reform years, teachers have reported low morale, high teacher turn over and professional ill-health. They also mention that under EMB's MOI policy, the CMI schools are labeled and they can never compete with the EMI schools. They complain that the Education Reform has put them into an even worse competition for survival.

Most of the frontline teachers did not need any prompt to recall the disadvantages they experienced of the HKEMB lifelong learning Education Reform.

Most frontline teachers relate the implementation of the education reforms and curriculum changes to the loss of effectiveness among secondary frontline teachers.

5.5.1 To change for the worse, not the better

Most participants complain that the enormous resources and effort spent on the lifelong learning Education Reform should have produced an obvious improvement in the quality of teaching and learning. However, many participants admit being disappointed. Some even state that the change has been for the worse, not for the better.

'Isachun' is an English teacher of a Band 3 government school in the Island District with over 20 years of teaching experience. She emphasises that there are too many measures and too many changes to be made on the agenda of the Education Reform. Most frontline teachers cannot align the measures towards the goal of lifelong learning. She states that the disconnected measures do not help students to become lifelong

learners. She argues that if teachers just follow the reform measures blindly, the change might be for the worse.

Both teachers and students are confused. Even parents don't know what to do. We teachers got no time to digest the change required and students don't know why they have to change.

The teachers complain about the extra workload and students complained about the change in the examination syllabus. It is all in chaos. It cannot help students to learn better this way. (Isachun)

Some participants in the lower banding schools point out that if the stakeholders of the Education Reform do not have shared vision of the required change in the Education Reform, the reform measures cannot make meaning by themselves. In reality, most schools in the territory are still competing for the 'better' students. Most parents are still competing to send their children to the higher banding schools. The EMI schools are still regarded as the best and the Education Reform cannot benefit students in low-banding schools. It only makes the teachers' lives more difficult.

5.5.2 Discipline problem related to the implementation of new curriculum

Many participants mention that the implementation of the new assessment, curriculum and pedagogy through the lifelong learning Education Reform has caused many unexpected teaching and learning problems. Discipline is one of the most obvious problems.

Measures like project learning and the implementation of SBA's group work and discussion require a very different classroom setting. However, the classroom setting in the school remains the same; the timetable arrangement remains the same. How could we manage?

You couldn't imagine how noisy the kids are when they're allowed to talk in lessons. And the principal doesn't like it. There's so much conflict. Besides, we still have to mark the written assessments after school. How could we manage? (Yuenkwan)

'Yuenkwan' points out the problem of implementing a lifelong learning reform measures in secondary school settings. The new requirements in pedagogy may cause serious discipline problems in traditional settings.

5.5.3 Less time spent on students' guidance and remedial work

Many participants mention that they see themselves playing an important role in giving support and guidance to students outside the classroom. They complain that the time spent on the new syllabus, new curriculum and the new appraisal have deprived them of the time they once spent with their students after class. Less time spent with students is a disadvantage of the lifelong learning Education Reform.

'Kamhong' is a new mathematics teacher. He talks about having to spend more time on the new requirement in curriculum planning. He thinks that it is unfair to students when teachers have to spend more time on the collaborative teaching plan and less time on remedial tutorials.

Too much time is spent on the teachers' conferences. They call it developing teachers' professional dialogue but I don't think it really helps.

I used to spend the time after school on giving extra lessons and tutorials for the less able students. However, now I have to tell the students to go away because I have to attend the collaborative teaching meetings every Monday and Friday. Some professional dialogue might be useful, but there are just too many meetings to go to in the school now. Talking doesn't help. Teachers take time to try-out and see if the new ideas can really work.

Nobody dared to tell the principal that most of such meetings are actually time wasting. I think I can help the students much better if I could be released from those meetings. (Kamhong)

Some of the participants mention that they are accustomed to giving after-school lessons to students. The time taken away from students' remedial work is perceived as a drawback. Most participants say that they now have to spend less time on students' remedial and guidance work. These have no immediate benefit to the Education Reform. However, with less time for students after lessons, the decline in students' academic performance was revealed immediately.

Time is always mentioned as a problem with the new measures. Most participants claim that the time with students is better spent than the time spent on meeting the new EMB requirements.

5.5.4 Weakening students' knowledge domain

'Hoiman', a new teacher in Chinese KLA, points out that the new syllabus in the Chinese language has changed the traditional teaching and learning of Chinese as a language and as a culture. She asserts that the lifelong learning Education Reform focuses on competency and skills training. She argues that such pedagogy might be effective in teaching a second language but not the teaching of the Chinese language in Hong Kong.

There are just too many activities to be organized in the lesson. Students are not required to recite any more classics in Chinese literature. I don't think literature and culture can be replaced by such 'competency training'. It may be all right in learning English (a foreign language), but not Chinese (the students' mother tongue). Students cannot learn the core values of the Chinese culture through the literature. It's sad.

Besides, the training of what they called 'attitude' and 'skills' are very difficult to evaluate. It seems that many other subjects are also doing the same thing and students have very weak background knowledge of the subject content taught. When content is not emphasized, students actually learn less. (Hoiman)

'Winghan', the vice principal who is teaching History and Biblical Knowledge, also criticises the curriculum reform as weakening students' knowledge of history. He argues that the data-based questions may be help students to read more extensively, but students in the low banding schools still depend on their teachers to give them the model argument and the model answers for the public examinations. As a result, students only become even more confused.

I don't think that the change in the History syllabus is helping the students to improve their critical thinking. Students need to remember a certain facts in order to build up their argument. Now that with all the data given, students may think that they do not have to study at all. Or even if they study hard, they cannot guarantee that they can pass. Some of them just give up.

Actually, many teachers just pay lip service to the curriculum reform. We still prepare model answers for students to study in the examinations.

So in the end, everybody (including the teachers and the students) is talking about lifelong learning but nobody knows what it is exactly. (Winghan)

Many of the participants also perceive the introduction of more competency-based assessments in the senior forms curriculum as a disadvantage of the lifelong learning Education Reform. They admit that they have no experience in conducting and designing the new form of assessments. They understand that the new mode of assessment focuses more on students' competencies in knowledge application. However, they are confused because they cannot evaluate students' performance as accurately as before.

5.5.5 The problem of measuring skills and attitudes in the high-stakes public examinations

Most participants spend a long time explaining how the new public examination requirements related to the curriculum reform has complicated the writing of assessment reports. The School-Based Assessment and the skill-based issues in the

public examinations are also criticised as bringing more uncertainty to the secondary frontline teachers.

‘Chunkin’ raises the validity of testing students’ skills and attitudes rather than knowledge in the Chinese language on the high-stakes public examinations.

Zhong Shen Xue Xi should be an attitude induced on the young people through teachers’ modeling in everyday teaching, like what the Confucius said.

However, the public examinations now require the students to apply their ‘skills’ and even ‘attitude’ in a pen and paper examination. It is ridiculous!

The Chinese HKCEE syllabus has to change completely within only 2 years. I wonder how much the teachers could change their teaching style within 2 years and how much students can change their attitude in the 2 years of their senior education. The *Analects* said ‘attitude’ should be lived, not written.

When assessment is related to such a high-stakes examination like HKCEE, I think things will only go back to examinations drills. (Chunkin)

Many of the participants also talk about their worries about the changes in the assessment mode in the public examinations. Although the new curriculum emphasises teaching the skills and attitude through the subjects, the public examinations are still taken with pen and paper. Most participants see a discrepancy between teaching and assessment. They argue that when the teachers do not feel confident in managing the assessments, they will not feel confident in their instruction.

5.5.6 Misinterpretation of 'Learning is Fun'

Most participants believe that the promotion of 'Learning is Fun' is harmful to secondary school students. Some participants contrast the Confucian virtues of stamina and perseverance in learning for a lifetime (Yip 2006, p.25) to 'Learning is Fun' (HKEMB 2000).

'Learning is Fun' is one of the slogans used by HKEMB early in the Education Reform. It is used to promote active and lifelong learning. According to the HKEMB Education Reform, life-wide learning is upheld in the lifelong learning Education Reform as 'Learning must transcend the constraints of academic subjects and examinations' and 'students should be able to take part in a comprehensive range of learning activities both inside and outside the classroom' (HKEMB 2000, p.36). However, many participants contend that students see 'Learning is Fun' as having fun. Many participants show that they still believe that students need to work hard to succeed. If students acquire a casual attitude in the classroom, they will not study hard. As a result, their academic performance will deteriorate.

'Waiyip' suggests that the lifelong learning 'teaching pedagogy' might be more easily carried out in the better 'Banding' schools. However, students in the lower banding schools may learn nothing in their secondary school years.

What they called 'Learning is Fun' has been misinterpreted by a lot of the lazy students. They expect the teachers to play 'magic' and make them 'happy' in the classrooms. Lesson time is expected to be show time and to have fun.

Students know the EMB slogans like ‘Edutainment’, ‘Learning to Learn’ and ‘Learning is Fun’ etc. even better than me. Teaching and learning time becomes ‘show time’. How can I stress the importance of hard work and perseverance? (Waiyip)

Many participants show that they, like parents, expect students to work hard and to do well in school. Some participants add that the ‘Learning is Fun’ slogan has been used as an excuse by lazy students. It is extremely difficult for the senior secondary school teachers to actualize the ideal of ‘Learning is Fun’ when teachers, students and parents are under the pressure of the public examinations.

5.6 Positive measures perceived by secondary teachers

Research Findings for Question 5

What do secondary teachers perceive as positive measures helping the implementation of the HKEMB lifelong learning Education Reform?

Positive measures are interpreted by the frontline teachers as good practices. These measures are separated from the data analysed as benefits because the positive measures are related to the implementation of the reforms while the benefits are the outcomes.

Most participants mention that their workload can be lightened by the school-based support funding provided by EMB. They give examples on how the support funding is used to carry out school-based programs to help students and teachers to adapt to the change induced by the curriculum and the New Senior Secondary syllabus requirement.

They add that the money spent on hiring clerical assistance can relieve the teachers of their heavy administrative duties.

5.6.1 School-based tailor-made measures

Some secondary teachers explain that their school principals help to implement the lifelong learning Education Reform by changing the school practices and cutting the administrative red tape.

‘Yucho’ describes how the principal of his school tries to adjust the external EMB requirement to fit the teachers’ needs. He argues that effective school leadership can facilitate the implementation of the reforms and ease the frontline teachers’ worries and workload.

My principal has a very effective management style. He always knows the priorities. For the 150 hours CPD requirement, he gives us much flexibility. The school timetable was also adjusted to fit our study and our needs. We feel supported.

He uses the school-based funding to employ supply teachers to give us day-release to attend the CPD courses. He also uses the funding to run in-house training for us.

For some of the really ‘old’ teachers, the principal does not really put the pressure on them. I see that they are allowed to delay their CPD, maybe till their retirement.

(Yucho)

‘Chunkin’ describes how the school-based deployment of human resources has helped to implement the School-Based Assessment (SBA) in his school.

The new Block Grant given to us is helpful. The principal allows us to make use of the money to get extra clerical assistance.

Without the added clerical support, it was impossible to implement the required SBA in the subject (Chinese Language) in just 2 years' time. I think the principal is sensible in deploying the CEG to help to work out SBA. (Chunkin)

'Waihung' explains how the special timetable in his schools helps the implementation of 'Project Learning'.

The new timetabling arrangements helped the junior forms teachers to carry out project learning in a more feasible way. Students can be released from the classroom settings and teachers can be released from their 'subject-base' paradigm in designing project work.

EMB did not give any guidance. It was a school-based measure. (Waihung)

'Cheong' mentions successful examples of cross-curricular activities through rearrangement of the timetable.

I'm glad because the special timetable arrangement helps.

We have a special timetable arrangement for project learning lessons. It helps the subjects like Computer Studies and Design & Technology to cooperate in the school's cross-curricular project 'Water Rocket'.

Last year, a group of our Secondary Two students even entered the Hong Kong final for the 'Water Rocket' project

competition. I know that not many schools have special timetabling arrangements and their teachers have to do that after school with the students. It would be very tiring.
(Cheong)

‘Wingyan’ describes how the new subject of Liberal Studies was introduced in her school through the special administrative arrangements made in the junior forms.

Liberal Studies will be introduced in the 2012 HKDSE. Most teachers are frustrated because they are afraid that they may be assigned to teach a completely new subject.

My school encourages teachers (especially those who may be redundant) to try teaching Integrated Humanities in the junior forms so as to give them a chance to try-out teaching the new subject in a junior level without the pressure of the public examinations.

Our response is quite good. At least we think that the principal is concerned about our problems. (Wingyan)

The participants show how the school leaders have used financial, physical and human resource to assist teachers with their new duties. With the introduction of effective school-based measures, frontline teachers’ worries about the curriculum reform are somewhat alleviated. School leaders have a central role in introducing the school-based measures of the lifelong learning Education Reform.

5.6.2 Supporting Policy Initiatives

Frontline teachers who have administrative responsibilities often describe the special grants and funding released by EMB as ‘positive measures’ (HKEMB 2006c, HKEMB 2007b, HKEMB 2007c). Starting with the 2000-2001 school year, Capacity

Enhancement Grants (CEG) have been provided to aided, government and schools under Direct Subsidy Scheme to 'relieve teachers' workload' (HKEMB 2006c).

Schools can use CEG to hire outside services and/or temporary personnel. To relieve teachers' workload, an additional time-limited funding of CEG is provided to schools from 2005-2006 to 2007-2008 by raising the rates for secondary schools by 150%.

Examples of how these relief grants help the frontline teachers are analysed in the data.

In addition to funding and grants, other kinds of school support have been provided by HKEMB. In order to provide professional support to schools and to facilitate the implementation of the lifelong learning Education Reform, a grant of HK\$550 million was released to HKEMB by the Hong Kong Legislative Council to set up the Education Development Fund (EDF) in July 2004 (HKEMB 2004d). Some participants in the research mention that these programs help them to prioritise the reform measures and link up the curriculum reforms.

'Kwoksing' explains how HKEMB's financial assistance has helped bring in a series of new school reforms.

It was the EMB Special Capacity Grant (CEG) that allows the school to employ two clerical support staff and one teaching assistant to help to deal with the paperwork related to the External School Review.

The panel chairpersons would have no time to get all those things prepared without such assistance. With the extra paperwork required, clerical support is essential. I hope that the funding can continue.(Kwoksing)

In each academic year, EMB would recruit frontline teachers to take up temporary

administrative duties in the bureau. This staff interflow practice was known as ‘secondment’. ‘Seconded’ teachers would work in the bureau for one to two academic years and then be transferred back to their own school.

‘Feitang’ is a seconded teacher working for HKEMB in 2007. He comments on how the EMB’s School Support Section has helped school teachers to implement the curriculum reform.

The seminars organized by EMB and HKEAA are very popular. Many teachers find such seminars quite helpful to the implementation of the new examinations syllabus. EMB’s School Support Section also gives very useful input in helping teachers to make use of the EMB guided exemplars in the new NSS subjects to develop school-based teaching materials. (Feitang)

Many participants agree that the EMB school-based support programs can facilitate the implementation of the curriculum reform. However, the participants also express mixed feelings of the EMB support measures because their good effects are always compromised by the flawed Education Reform which is delivered by EMB to schools at the same time as the supporting policy initiatives.

5.7 Measures hindering the reform implementation

Research Findings for Question 6

What do secondary teachers perceive as measures hindering the implementation of the HKEMB lifelong learning Education Reform?

‘Hindrance’ is interpreted as the reform measures that impedes the implementation of

the lifelong learning Education Reform. Hindrances are not the same as ‘disadvantages’, which are the negative results of the Education Reform.

The participants in the research do not name any specific hindrance to the implementation of the Education Reform. However, they cite the lack of time and lack of communication between the policy makers and the schools. Most of the participants cannot make meaning from the lifelong learning Education Reform as they do not see the connections between the reform policy and the reform measures.

5.7.1 Lack of time to refine the reform measures

All the participants in this study remarked on the ‘too quick pace’ of the Education Reform. Some of them said that it would take much longer for them to change their paradigm and their pedagogy even though they agree with the goal of training lifelong learners. Schools also need a long time to change their culture. With the very strict reform implementation deadlines, frontline teachers cannot find the time to comprehend the reform measures in the schools.

‘Meiling’, the English KLA panel chairperson, criticises the hasty change in the English syllabus of HKCEE. She argues that too many measures are being introduced at the same time and teachers are not given enough time to evaluate what they have done.

I agree with the rationale of introducing School-Based Assessments in the examinations. However, there should be enough time given for the preparation, implementation and evaluation of these innovations in learning and teaching.

I just don't understand why they have to change the syllabus so often. We're having the NSS in 2012 and we should be heading for it. But all of a sudden, SBA was required in English in 2007. We frontline teachers just can't sit back and think about the priorities. We can just work hard to meet the requirement. There are a total of 13 English teachers in my school. We can never have the time to get together and frankly talk about the difficulties we have in getting all the new measures implemented. We are just blindly working to meet the deadlines. (Meiling)

'Changing too quickly' is a recurring theme among the participants when asked about the drawbacks of the lifelong learning Education Reform. Between 2004 and 2007, some of the curriculum reform measures were being fine tuned. However, instead of perceiving the fine-tuning as improvements, most frontline teachers saw them as additional requirements of HKEMB.

Many of the participants agree that the new curriculum may help students to learn better in the long run. However, the 'too often' and 'too quick' changes have stopped teachers from learning how to improve their pedagogy by implementing the reform measures. As a result, the shortcomings of the Education Reform have become more obvious than its advantages.

5.7.2 Lack of communication among the stakeholders

Besides the time constraint, many participants mention that although they try hard to carry out the new form of assessments promoted by HKEMB, parents may not see the significance of life-wide learning.

The participants think that what concerns parents most are the school's public examinations results and its university entrance rate.

Many participants regard the HKEMB reform measures as top-down procedures. They say that there has not been enough consultation with by HKEMB. Some participants refer to the EMB policy of 'school closure' and 'school downsizing' as the government's ploy to layoff 'unwanted old teachers'. There seems to be some misunderstanding among policy makers, frontline practitioners, school administrators, and parents.

In the interviews, many teachers expressed their grievances towards HKEMB. It was described as an institution that only cared about enforcing government policies. Many participants say that the EMB officials have no intention of listening to the problems of the frontline teachers.

'Waihung' attributes the origin of teachers' stress to EMB's refusal to carry out 'small class' teaching. In order to keep the teaching posts in the school districts where Secondary One population was shrinking, 'small class' teaching might be introduced.

However, EMB insisted on keeping the teacher-student ratio in schools and refused to carry out 'small class' teaching. As a result, some teachers in these school districts became 'redundant' teachers.

I don't know why EMB refuses to carry out small class teaching. Is it a political decision or an economic move?
I don't really understand. We actually have the money.
Even Shanghai can do that.

I think EMB should help the schools to survive rather than enforcing the 'kill school policy'. Who dares to say No when his job is not secured? (Waihung)

Some participants assert that many frontline teachers do not express their opinions because they are afraid that their criticism may make a bad impression on the school administrator and affect their performance evaluations.

The 150 hours of Continuous Professional Development (CPD), often interpreted as an EMB requirement, is described by the frontline teachers as a double-edged sword. Most frontline teachers agree that they can benefit from the seminars, workshops and qualification improvements. However, the timeline and time constraints of such requirements also exert much pressure on the frontline teachers who are already 'too busy'.

'Kaming' describes how the CPD requirement has affected his colleagues.

For those teachers who have less heavy duty loading (for example when their Form 5 and Form 7 students have gone after the public examinations), taking refresher courses and joining workshops could be helpful.

However, the mandatory evening CPD classes are horrible. Imagine that you have to spend two hours traveling to the institution and taking the evening courses twice a week from 6:30 to 9:30 p.m., and, another two hours back home; and to get up at 6 a.m. the following morning. What kind of quality teaching can you give the students? You could only fall asleep whenever possible. Many of us are exhausted but we dare not say 'No' to the requirement. We're puzzled.
(Kaming)

Many participants claim that they would like to have more communication with their school principals and the EMB officials. However, most of the participants say that teachers are not encouraged to initiate discussions. Most frontline teachers just keep quiet until they can no longer stand the pressure.

The measures that are the frontline teachers and adopted by the school administration are always regarded as more effective. In the schools where communication runs from the top down, most frontline teachers do not or cannot tell the school administration what they really need. Kaming sees that many frontline teachers simply dare not refuse even an unreasonable requirement.

Many participants also complain about the lack of time to communicate. They point out that it is almost impossible for the junior frontline teachers to initiate and schedule meetings to discuss issues which are not on the school administration's agenda. Most of the participants assume that they have no channel of direct communication with the makers of Education Reform policy.

This phenomenological study presents a much richer and more complex scenario than does the quantitative Education Reform report literature presented by HKEMB (HKEMB 2002a, HKEMB 2003b, HKEMB 2004a, HKEMB 2006a). It confirms some of the arguments of the academics (Cheng 2006a ; Choi 2005) and gives a finer understanding of the issues raised by teachers' associations (HKPTU News, Education Convergence, and Xiyao Culture).

5.8 Summarising the research findings

Much complexity is revealed in checking the frontline secondary teachers' understandings of the lifelong learning Education Reform. In one way, the frontline teachers are very familiar with the measures being carried out in the curriculum reforms after 2005. However, most participants are not concerned with lifelong learning policy (HKEMB 2000). Many participants did not treat the lifelong learning Education Reform as anything more than a slogan until the reform measures required by HKEMB began to affect the public examination syllabus, the school curriculum, and classroom instruction.

Contradictory teacher discourses are found when the participants were talking about the disadvantages and positive measures perceived. These contradictions reflect the confusion they were experiencing during the implementation of the lifelong learning Education Reform when the policy makers, school administrators, parents and students were having different expectations. The substantial cultural shift that the curriculum reforms require also added to the feeling of confusion.

As most of the participants are only concerned with the reform measures that affect their own KLA and their own school, they lack a holistic understanding of the rationale for training lifelong learners. Due to this limited and shallow understanding, most frontline teachers have all they can do with the new curriculum measures and meeting the administrative requirements of the schools and HKEMB. Limited understanding of the rationale of training lifelong learners has affected the teachers' autonomy in designing school-based initiatives to help students to become lifelong learners. The Chinese translation of *Zhong Shen Xue Xi* also prevents some frontline teachers from

understanding the HKEMB goal in the lifelong learning Education Reform.

The feelings of secondary teachers in relation to the implementation of the HKEMB lifelong learning Education Reform is affected by their perceptions of its requirements. Most participants think that they have no autonomy in prioritising the reform measures to be carried out. Many frontline teachers only perceive the non-stop reform measures from 2001 as ever-increasing workload. At the same time, the economic depression, continuous shrinking schoolchildren population and HKEMB's bold leadership style between 2001 and 2006 has created frustration, identity loss, stress, burn-out and most seriously, depression among frontline secondary teachers.

From analysing the adapted ACER survey results (Appendixes 4a, b, c and d), it is discovered that other than the criticisms revealed by the teachers associations and academics (Choi 2005, Cheng 2006a, Cheng 2006b, HKPTU 2003d, HKPTU 2005a, HKPTU 2005b, HKPTU 2006), the lifelong learning Education Reform has started to change the learning and teaching culture in secondary schools. Most participants in the research agree that the criteria of training lifelong learners (Bryce & Withers 2003) can be found in Hong Kong's secondary schools. What takes more time to change are the diversified school-based administration model (Appendix 4d, item 2) and students' attitude towards learning (Appendix 4d, item 6).

Information literacy is the area mentioned as the most significant improvement made by the lifelong learning Education Reform. Most frontline teachers agree that HKEMB's new requirement in IT training has improved both the teachers' and students' knowledge of information literacy. Some teachers remark that the curriculum reforms have accelerated the change in pedagogy in most secondary KLA

subjects.

With HKEMB's new CPD requirement, the frontline teachers claim that they are being required to become lifelong learners. Some frontline teachers also see that the lifelong learning elements in the NSS curriculum have helped some junior forms students to learn more confidently. However, most participants do not think the reforms can really improve teaching and learning. Perceived benefits are regarded as very limited.

The participants are more eager to discuss the disadvantages of the lifelong learning Education Reform. Most participants complain about the number, pace, and suddenness of the changes brought by the Education Reforms and they argue that the reforms are not worth the resources and effort. Many frontline teachers cite the difficulties in implementing lifelong learning curriculum reforms in schools. They argue that the disadvantages of the Education Reform brought to the classrooms are more obvious than their benefits.

Effective school leadership is viewed as a significant factor in facilitating the lifelong learning curriculum reforms. Some frontline teachers state that their school leaders set priorities in the reform measures and help teachers to adapt to the curriculum change. Some frontline teachers say that the HKEMB funding and human resources support (HKEMB 2006c, HKEMB 2007b, HKEMB 2007c) helped them through the most difficult times before NSS.

However, the lack of time and communication are mentioned as key impediments to the lifelong learning reform measures. Most participants agree that the lifelong learning

Education Reform looks good on paper. However, they argue that it would take much longer time than the Hong Kong government has expected for the frontline teachers to shift their paradigm, to comprehend the new curriculum, to learn the new pedagogy and to prepare themselves to continue to learn.

Lifelong learning is a new concept. It is different from the Confucian concept of *Zhong Shen Xue Xi*. Some frontline teachers argue that the idea of training lifelong learners may sound fine in the workplace but it has limitations in the classrooms. In order to engage secondary school students in lifelong learning, the words of the secondary school frontline teachers should be treasured.

5.9 Building trust and better communication in the future

Most frontline teachers equated the *Learning for Life Learning through Life* Education Reform with the curriculum reforms in the public school system. However, when they heard the term ‘Education Reform’, many participants talked about the Chinese translation of *Zhong Shen Xue Xi* and the issues of ‘school accountability’ and ‘system effectiveness’. The meaning of Lifelong Learning and *Zhong Shen Xue Xi* needs more clarification.

The background of the HKEMB lifelong learning Education Reforms is complicated. Between 2000 and 2007, the social, political and economic situation in Hong Kong changed. When many of the guidelines were turned into policies, the original target of training lifelong learners was not revisited. As most the curriculum reforms under the HKEMB Education Reform had deadlines to meet, the bureau and the frontline teachers were kept extremely busy in working out the reform measures in schools.

Little time and space were left for communication.

Most participants did not have a clear concept of lifelong learning and its relation to the HKEMB lifelong learning Education Reform. To most participants, all the post-1997 top-down reform measures initiated by HKEMB were under the umbrella of *Jiao Gai*. Some of the participants referred to the Confucian origin of *Zhong Shen Xue Xi* in the interviews while others brought up globalisation in relation to training lifelong learners. The definition and Chinese translation of the term 'lifelong learning' need clarification.

During the seven-year-implementation of the HKEMB Education Reform, the lifelong learning reform measures were presented piecemeal. None of the participants could see the connections among the reform measures and they did not see the historical links of the policy initiatives. When a new policy initiative was released, numerous reform measures were imposed at the same time. Most frontline teachers had no time to align the priorities in their work and in their own learning.

Many frontline teachers' perceptions, feelings and emotions could not be reflected in the school's Self Evaluation and External School Review as these survey exercises were carried out by HKEMB. Some participants also cited the power politics on the Education Reform agenda. They said that the voices of the teachers in the Government and Aided sectors were seldom heard. It is argued that as the Government Schools are government-funded and the Aided Schools rely on government funding on staff payroll, their leaders would not dare reject the government's policy induction. Much room is left for better communication between the frontline teachers and the policy makers.

In the next 10 to 15 years, changes and reforms in the school systems are expected to continue. It is important for the policy makers to know how frontline practitioners interpret the reform and how they can facilitate its progress.

It is also important for the school administration and school leaders to understand how teachers react to and perceive the progress of the Education Reform in order to actualize the New Senior Secondary (NSS) curriculum reforms in the classroom. Besides, frontline teachers' understanding and perception of the reform progress can affect the students and parents' perceptions of the Education Reform.

The government may try to make the links and the connections of the lifelong learning reform measures more explicit to the frontline teachers in the next phase of the Education Reform. Wardlaw (2006) argues that school leaders should be able to differentiate the major and minor policy imperatives of the Education Reforms.

There are probably only a handful of documents which are policy imperatives and which articulate our directions....These are significant documents which map out the next 10-15 years. All other documents are connected to major ones: they have different target groups; different time lines; different levels of details; different expectations. As education leaders we must make 'sense' and demonstrate the 'coherence' of our measures (Wardlaw 2006, p.99).

Wardlaw (2006) points out that the lifelong learning Education Reform has a major policy focus and a variety of related reform measures. However, most participants in the research could neither differentiate the 'major' and 'minor' issues in the Education

Reforms nor set priorities in actualising the ideal of training lifelong learners in schools. Wardlaw (2006) argues that the 'changed work' in the Education Reform was interpreted as 'excessive workload' and that 'higher levels of accountability' was misinterpreted as a 'source of pressure' by frontline teachers.

Wardlaw (2006) attributes the present EMB and frontline teachers' conflict to the lack of trust among the stakeholders in the Education Reform and he suggests that this problem should be resolved through the cultivation of mutual trust (p.102). If mutual trust is to be established between policy makers and frontline practitioners, the present research can reveal the different horizons leading to a better understanding between the two. The researcher's own heuristic experience can be used for further studies on the implementation of education reforms in Hong Kong. Mutual understanding is the first step to mutual trust.

The final chapter of this thesis will discuss the future research agenda on the implementation of lifelong learning Education Reform in Hong Kong.

CHAPTER SIX: CONCLUDING COMMENTS

6.1 Revisiting the research context

The study has investigated lifelong learning in the secondary schools. As stated in the research proposal, the findings could help the stakeholders to understand the implementation of lifelong learning Education Reform. It is also hoped that the findings of the study can contribute to the knowledge of managing change in education organizations and implementing curriculum reforms.

The study investigates lifelong learning in the secondary school. It reviews the key features of Education Reform in Hong Kong. Frontline teachers are central to the study. The lifelong learning discourse is discussed under the western OECD genesis and the eastern Confucian interpretation of *Zhong Shen Xue Xi*.

Research findings reveal that change brought about during the lifelong learning Education Reform in Hong Kong has been creating uncertainty and stress among frontline teachers. As King (2006) points out, 'educational change does have an emotional dimension that must be acknowledged in the process of reform' (p.21); the emotional impact of uncertainty and stress found in this research might affect the implementation of the lifelong learning Education Reform in Hong Kong.

Phenomenology is used in the study to reveal the scenario of HKEMB Education Reform from the perspective of the frontline teachers. The phenomenological approach reveals the frontline teachers' experience during the first decade of the lifelong learning Education Reform in Hong Kong. Literature in school change (Day

& Leitch 2007; Evans 2001; Fullan 2001; Fullan 2003; Hargreaves et al. 1998; Stuart et al. 1998) highlights the gap between the policy makers' requirement and the frontline teachers' receptiveness to change. The findings in this study also reveal that the HKEMB Education Reform has been facing similar problems.

Conclusions will be discussed in sections 6.2, 6.3 and 6.4 and the implications of the findings will be discussed in sections 6.5, 6.6 and 6.7.

6.2. Discussion on the role of frontline secondary teachers in the implementation of HKEMB lifelong learning Education Reform

Disregarding the individual differences, some recurring themes are found to be dominant in the discourse of the participants.

The frontline teachers do not show much interest in the policy perspectives of the HKEMB Education Reform. None of the participants respond that they have gone through the policy document of *Learning for Life and Learning through Life* (HKEMB 2000). To the frontline teachers, the policy perspective and change in the education system are just slogans of the HKSAR government. Their main concern is the change that the Education Reform brings to the school and the classrooms. In other words, they are more concerned about the curriculum reforms attached to the agenda of the broad Education Reform.

Many frontline teachers interpret 'lifelong learning' as merely a slogan for HKEMB to wrap up the Education Reform initiatives. The Chinese translation of '*Zhong Shen Xue Xi*' and the Confucian interpretation of lifelong learning also cause confusion to the understanding of the origin and goal of the HKEMB Education Reform. Frontline

teachers who were interviewed responded that they were more concerned about the ‘what’ and ‘how’ of the Education Reform implementation than with ‘why’ the lifelong learning Education Reform was launched.

However, without a holistic understanding of the origin and goal of training lifelong learners, most frontline teachers did not see the interconnectedness of the reform measures. Many participants found that the Education Reform had brought non-stop changes to school practices. They insisted that they had no time to adapt to these sudden and constant changes.

Although the implementation of Education Reform had been going on in the territory for a decade, parents’ traditional expectation on students’ academic performance and teachers’ monitoring role to play in the school system did not change. Most parents in the territory still expected teachers to deliver abundant written assignments, tutorials and tests to help students get through the public examinations. Such parents’ demand also added stress to the frontline teachers.

Deputy Secretary for HKEMB Wardlaw, (2006) argues that the misunderstanding between the policy maker and the frontline teachers during the implementation of the Education Reform is partly due to the policy makers’ insufficient emphasis on the interconnectedness of the changes brought through the reform initiatives. As frontline teachers have not reached consensus on the rationale for training lifelong learners and the improvements to be made in the school system through changes brought in ‘curriculum’, ‘pedagogy’ and ‘assessment’, complaints like ‘excessive workload’, ‘too many challenges at the one time’, ‘chaotic implementation’, ‘insufficient resources’, ‘conflicting policies’, and ‘excessive accountability’ arise. In order to sustain the

lifelong learning Education Reform and to see the benefits of the reform on students, Wardlaw (2006) points out that trust should be developed between the policy makers and the frontline teachers.

Together, we need to take time on building trust.
Time is a relative concept. Too fast a pace to us could
be appropriate or too slow in the eyes of others.
(Wardlaw 2006, p.103)

Wardlaw (2006) argues that interpretation of the pace of the Education Reform's implementation depends on how much the frontline practitioners can understand the interconnectedness of the reform initiatives.

From the beginning of the reform implementation, frontline teachers have played a very passive role in the lifelong learning Education Reform. They were excluded from the policy making process, the development of the new curriculum and the new public examination system. Frontline school teachers complain that they are always the last party to be informed before the reform initiatives are launched.

Most of the curriculum reform measures are delivered to the frontline teachers through government policy documents, promotional leaflets and administrative protocols in secondary schools. Many frontline teachers in the research respond that the culture discourages frontline teachers from taking the initiative to read policy documents. It is assumed that only school principals are expected to understand the change required by HKEMB. Frontline teachers are supposed to carry out the measures. As most frontline teachers do not see the link among curriculum reform measures, they do not see the potential improvements that the reform measures can bring into the classrooms.

Fullan (2001) points out that the key to successful change in schools is the improvement in relationships among all involved and not simply the imposition of reform from above. He argues that the new emphasis in educational change is based on creating the conditions to develop the capacity of both the schools and the frontline teachers to learn. He points out that the focus of change should move away from structural change and towards transforming the culture of schools and classrooms. The emphasis should be on relationship and values.

Participants in the present research show that they do not perceive any shared meaning in the lifelong learning Education Reform between the policy makers and the frontline teachers. Not many schools can create the conditions for frontline teachers to initiate school-based measures to try out the lifelong learning reform measures. There is still a lack of relationship and value building in the implementation of the Education Reform.

Frontline teachers can neither control the pace nor the space for the reform implementation. Teachers' autonomy for professional improvement is lacking in the implementation of the lifelong learning teaching initiatives. From the beginning of the Education Reform, a deadline was set to direct the schedule of implementation in various reform measures. The final goal has been set for 2012 when all the senior secondary students in the public and aided secondary schools in Hong Kong are to sit for a new secondary school graduate examination under a new senior secondary curriculum being implemented from September 2009.

As the requirement for public examinations has been used as the baton for directing the

learning and teaching practices in schools, frontline teachers perceive that they cannot alter the pace of the curriculum reform. They complain that neither they nor the students can keep up with the rapid changes required in the curriculum reform. Bryce (2004) agrees that the acquisition of lifelong learning skills and values in secondary schools may be impeded by the strong influence of competitive end-of-school assessments.

As the impact of frontline teachers' emotional dimension has not been put on the Hong Kong government's research agenda, misunderstanding and mistrust are possible. The present study reveals a lack of trust and a worsening relationship between the policy makers and the frontline practitioners during from 2001 to 2007. It is interpreted that frontline teachers have no bargaining power in altering the government policy except by passively venting their grievances in the teachers' unions and the media. Feelings of identity loss, burnout, stress, frustration and depression are the manifestations of the teachers' perceived loss of control.

Teachers refer to the HKEMB lifelong learning Education Reform as too 'quick pace' and 'ever changing'. Many teachers see the reform measures as unrealistic and as unfair to the low academic achievers and the students coming from the less advantaged social economic backgrounds (the lower 'Banding' school). Without being able to distinguish the lifelong learning Education Reform measures from the other school accountability reforms between 2000 and 2007, many teachers comment that 'the reform measures' have seriously undermined the collegiality of the frontline teachers in secondary schools. The lack of prescriptive guidance on how to implement the curriculum reforms and how to reach the goals of lifelong learning has caused high anxiety and low morale among secondary school frontline teachers.

Without a sense of security and autonomy in the implementation of the reform measures, frontline teachers do not believe that they have the respect of policy makers. This situation is not conducive to the establishment of trust.

6.3 The journey to lifelong learning

The discourse of lifelong learning marks the differences between the traditional teaching and learning mode and the lifelong learning teaching and learning mode (Bryce et al. 2000; Candy et al. 1994; Longworth & Davis 1996b; Longworth 1999; Longworth 2002; Nixon et al. 1996). Bryce and Withers (2003) summarise the stakeholders' perception of the following criteria in his study of lifelong learning skills and attitudes in the Australian secondary schools:

- Perception of ownership in learning (institutional versus individual needs)
- Perception of education and learning (compartmentalisation of knowledge according to subject and age versus vertical and horizontal links between subjects and learners' age groups)
- Perception of what learning is about (learning is about what to think versus learning is about how to think)
- Perception of teachers' identity (teachers as dispenser of knowledge versus teachers as models of lifelong learning)
- Perception of success and failure (separated success from failure versus emphasis on progress)
- Perception of learning (learning is difficult chore versus learning is fun)

With reference to the criteria of a lifelong learning secondary school (Bryce & Withers 2003), the findings of the present research show that although the frontline teachers mention limitations and drawbacks of the HKEMB Education Reform, the mode of lifelong learning education has gained ground in the secondary schools (Figure 10). Each criterion is discussed below.

6.3.1 Ownership of learning

Literature on lifelong learning education mentions the perception on the ownership of the need to learn and the curriculum design as a unique goal in training lifelong learners (Bryce et al. 2000; Candy et al. 1994; Longworth 1999; Longworth & Davis 1996a). The ownership of the need to learn and its content in schools has traditionally rested with the teacher. The goal of a lifelong learning institution is to allow students to decide their need to learn and the content of the curriculum.

Most frontline teachers in the interviews agree that the HKEMB lifelong learning education reform has changed the stakeholders' perception on ownership of learning (Figure 10, item 1). Under the reforms, students are given more choices to choose the subjects they prefer to study in the senior secondary curriculum. The restructured secondary school curriculum also creates more room for interdisciplinary project learning.

However, respondents with different backgrounds and experiences showed that they have very different perceptions of the progress of the restructured ownership in learning and teaching. Most of the teachers who were interviewed stated that the ownership of learning in their schools is still centred in the school administration. Learners' choice

is limited by their competencies in the core subjects required in the New Senior Secondary curriculum (Chinese, English, Mathematics and Liberal Studies). In many cases, ownership of learning is still decided by the students' general learning abilities and the syllabus of the public examinations. Although students are now given more options to choose the subjects they prefer to study, the Hong Kong Diploma of Secondary Education Examinations still influences and directs the secondary schools in their school-based curriculum design. Students' ownership of their learning is still very limited. Although there students have more options on the public examination syllabus, most students are still being assigned to the form and the class according to their academic performance in the core subjects. Students' choices are extremely narrow.

6.3.2 Structure of school curriculum

The structure of the school curriculum appears in the lifelong learning literature as another criterion by which to divide traditional from lifelong learning (Bryce et al. 2000; Bryce & Withers 2003; Longworth 1999; Longworth & Davis 1996). In the traditional learning mode, education is compartmentalised according to the learners' age and by subject. When lifelong learning education is realised, learning shall become a lifelong concept. There will be vertical and horizontal links between the subject and the age groups in a school.

The HKEMB curriculum reforms and the New Senior Secondary curriculum are supposed to offer more electives for students to set their own learning pace and design their own learning portfolio. The curriculum restructure in secondary school also creates more rooms for interdisciplinary project learning. However, many teachers

comment that the HKEMB curriculum reform cannot benefit the students (Figure 10, item 2), because most schools are still working on the traditional timetabling and block structure of forms and classes.

Most of the participants in the interview state that the HKEMB Education Reform has improved the use of Information Technology in secondary schools and given students access to more diverse curriculum design. The government-funded IT platform, Hong Kong Education City has won the appreciation of frontline teachers.

However, most frontline teachers in the research respond that the development of learning as a lifelong concept is still at a very initial stage. The ideal of building vertical and horizontal links among age groups is not feasible under the present space and administrative constraints. The demand for human and physical resource, will have to be increased dramatically if these links are to be forged. In order to cultivate learning as a lifelong concept, the government should reconsider raising funding levels and grants to Hong Kong's secondary schools.

6.3.3 Understanding of lifelong learning

Learning has traditionally been about teaching learners *what* to think. However, the literature on lifelong learning argues that the objective of lifelong learning education should be realised through teaching the learners *how* to think (Bryce et al. 2000; Bryce & Withers 2003; Candy et al. 1994; Longworth 1999; Longworth & Davis 1996a).

Most frontline teachers in the research have stated that it was extremely difficult to change their own and the students' belief about the nature of learning. Most teachers

claim that the HKEMB Education Reform requires teachers to fit their pedagogy to the demands of the *Learning for Life Learning through Life* (HKEMB 2000) curriculum. The new curriculum requires competency-based pedagogy instead of content-based delivery. However, the concept of what learning is about has not yet been transformed from *what* to *how* (Figure 10, item 3).

Many frontline teachers complain that they find the idea of competency too abstract to explain in the classroom. Without the guidance of the past examination papers, many teachers are wary of guiding students through the senior secondary school years and the secondary graduation examinations (HKCEE / HKDSE). Teachers need time to experiment with the new pedagogy before they can confidently prepare the students for their public examinations. The participants mention that learning how to think is not the assessment criterion in the public examination system and most teachers find teaching it extremely difficult.

In addition, parents' understanding of Lifelong Learning and the lifelong learning Education Reform also impede its implementation. When teaching and learning are related to public assessment, teachers argue that most parents are more concerned about their children's academic performance in the public examinations than with how they learn. Many frontline teachers in the research comment that even when they can handle the new pedagogy and assessment modes, parents may not accept them. According to the interviewees, some parents complain about the variety of the new modes of assessment. The parents argue that the new modes of assessments are not fair because in many cases, marks allocations are not directly based on right and wrong answers. Students cannot raise their grades by consulting examinations that had been given in previous years.

It takes time for frontline teachers, parents and students to comprehend and internalise the new concept of learning. Even more time will be needed to engage stakeholders in the lifelong learning Education Reform to create mutual understanding and trust.

6.3.4 Teachers' identity

The literature on lifelong learning defines teachers as facilitators of knowledge (Bryce et al. 2000; Bryce & Withers 2003; Candy et al. 1994; Longworth 1999; Longworth & Davis 1996a).

The present research findings show that frontline teachers' had varied perceptions of their role (Figure 10, item 4). Some frontline teachers in the research still insist that they should be a resource in their own subject. Although most of them agree that they should not regard themselves as dispensers of knowledge, they still want to be in control of teaching and learning. The idea of *Learning in Life Learning through Life* (2000) is still classroom-bounded. As frontline teachers are held responsible for students' discipline and their performance on the public examinations, they believe that they should have autonomy in delivering over the learning activities in their classrooms. Under traditional timetabling and the traditional class structure, however, it may be too idealistic to demand teachers to relinquish this control.

Most frontline teachers in the research state that the HKEMB lifelong learning Education Reform has forced many frontline teachers in Hong Kong to become lifelong learners by implementing the Language Benchmarking requirement and the Continuous Professional Development (CPD) requirements. When teachers are required to fulfill

the benchmark requirement and to meet the 150 hours professional development needs, they have to engage in structured continuous learning.

Many of the frontline teachers who were interviewed say that although they are not sure about how far the students are moving towards the goal of lifelong learning, they agree that the HKEMB Education Reform has forced the teachers to be lifelong learners in the Continuous Professional Development framework. It is debatable whether such coercion matches lifelong learning ideals. Most teachers claim to realise that the human resource market values lifelong learning in both their students and in themselves.

6.3.5 Perception of success and failure

The new perception of success and failure is an important criterion in the literature on training lifelong learners (Bryce & Withers 2003; Candy et al. 1994, Longworth & Davis 1996b). Lifelong learning institutions are to change learners' concepts of success and failure in learning. In the traditional learning scenario, failures are separated from success. However, in the lifelong learning scenario, emphasis is placed on progress and encouragement of further learning.

The HKEMB Education Reform emphasises Assessment for Learning in the secondary curriculum (Education Bureau HKSAR 2008). HKEMB reform documents point out that the traditional one-off assessment which originates from should be transformed into assessments designed to help learners change their perceptions of success and failure. In order to realise the ideal, the public examination system has been changed to include the 2007 School-Based Assessment (SBA). In 2012, most subjects in

HKDSE are required to include a proportion of SBA in the examinations.

Most frontline teachers in the research accept the rationale of the Assessment for Learning. However, they argue that when the assessments are used to determine students' academic achievement on high-stakes examinations, many schools will just turn the continuous assessments into tests and quizzes. The real purpose of constant feedback--to improve learning through assessments--is lost.

Many frontline teachers argue that the idea of lifelong learning and School-Based Assessment have more disadvantages than advantages in helping students to enjoy learning. In some schools, continuous assessments have taken the form of regular dictations, quizzes and tests. Instead of using the assessment data to improve the learning and teaching, frontline teachers complain that they are only assigning and grading student work. In most secondary schools, students' perceptions of success and failure are still determined by whether they pass or fail their courses.

Although the HKEMB reform documents point out the importance of changing learners' perception on success and failure in learning, frontline teachers indicate that the reform measures have not yet fulfilled their purpose (Figure 10, item 5).

6.3.6 Perception of 'Learning is Fun'

Learning is perceived as a chore and about receiving wisdom in the traditional learning scenario. However, in the lifelong learning scenario, learning should be interactive and enjoyable (Bryce et al. 2000; Bryce & Withers 2003; Longworth 1999; Longworth 2002; Nixon et al. 1996).

HKEMB encourages schools to 'eliminate excessive dictations and drills, tests and examinations and give students more time to participate in the enriched learning activities' (2001a p.16). Students are expected to enjoy what and how they learn.

However, most frontline teachers regard 'Learning is Fun' as a slogan to promote Education Reform. To them, the change in the NSS curriculum has only enriched the extended syllabus of the public examinations. The way that students learn in their classrooms is still very traditional. (Figure 10, item 6). Constant drills, repetition and hard work are still regarded as the keys to good academic performance, especially in senior secondary school.

The participants in the research argue that HKEMB lifelong learning Education Reform can be more successful in the primary schools whose curricula are less tied to preparation for public examinations. In the senior secondary section where over 98% of students in Hong Kong are to sit for the public examinations (HKCEE) and to compete for the places of university entrance, learning is not 'fun'.

Most teachers in the research argue that the public examinations and the streaming effect of the Hong Kong Certificate of Education (HKCEE) and the new Hong Kong Diploma of Secondary Education (HKDSE) will continue to stress drills and exercises. Under such conditions it is hard for either students or the teachers to enjoy learning.

6.4 Effectiveness of the lifelong learning Education Reform

6.4.1 Information Technology

In the discussion of perceived advantages, most frontline teachers in the research agree that the HKEMB Education Reform is moving in the right direction. The huge investment in secondary schools' use of Information Technology has noticeably improved students' learning.

Some teachers in the research mention that the IT benchmark teacher training required by EMB will improve the application of IT in secondary schools. They agree that although the training requirement was time consuming, the IT knowledge that the teachers acquired can facilitate lesson design and assessments in both junior and senior secondary learning and teaching. Most frontline teachers see the improved application of IT in teaching and learning as a key success in the Education Reform. They cite the work of Hong Kong Education City as a good example of helping the teaching professionals to enter the era of Information Technology.

Hong Kong Education City (www.hkedcity.net) is an educational portal sponsored by HKEMB. It was established in 2000 'to build a utopia of lifelong learning' (HKEdCity.net 2004). Hong Kong Education City has become a platform of learning through collaboration with schools, communities, and parents. This IT platform has won awards in the Global Junior Challenge (2004) in Rome and Computerworld Honors (2004) in the United States.

Frontline teachers in the research praised the partnership scheme run by the Hong Kong Education City. The IT platform shares teaching resources, professional teaching

practices and assessment designs among the teaching professionals in the territory. It also helps to create an atmosphere of professional exchange and development.

Information Technology is regarded the most valued element of the HKEMB lifelong learning Education Reform.

6.4.2 Learning to learn and teachers' continuous professional development

CPD is tied to the debate on teacher stress. HKPTU has been fighting for fully-paid sabbatical study leave for frontline teachers (HKPTU 2003c). Most frontline teachers in the research claim that requiring them to teach from 7 a.m. and then take evening courses after school from 6 to 9 p.m. is inhumane. Some teachers state that the term 'lifelong learning' is used to criticise the EMB's 'torturing' of frontline teachers.

Recent research (Fullan 2007) points out that school practices cannot be changed by requiring teachers to participate in ongoing professional activities. With the HKEMB advocated CPD initiatives, many teachers are encouraged (or required) to keep upgrading their professional credentials. However, the CPD requirement has both positive and negative impacts effects on the lifelong learning Education Reform.

The special release measures and grants for subjects like English and Liberal Studies can assist teachers to have study leave for professional development. However, not all secondary school subject teachers are eligible for these funds. Special relief grants and study leave for teachers are applied only to the subjects like Liberal Studies that are affected by the new senior secondary school curriculum reform. Teachers of traditional subjects have to engage in continuous learning in their free time. Many of

the participants in the research perceive such CPD demand as pressure, not as a means to enhance the effectiveness of their teaching.

The participants in the study confirm Fullan's (2007) argument that professional development activities 'divert their energy into thinking they are doing something valuable', and 'drains energy that should be directed at the hard work of changing school cultures' (p. 35). The findings show that frontline teachers perceive that the mandatory CPD requirement has distracted them from helping students to improve their learning.

Frontline teachers' opinions of CPD, like their opinions on other aspects of the Education Reform, vary. When the Advisory Committee in Teacher Education and Qualification (ACTEQ) established the HKEMB policy of professional development in 2003, the 150-hour requirement was only a proposal. It recommended a three-year try-out period. However, many school heads interpret the EMB requirement on CPD as another mandatory measure like the Language Proficiency Benchmarks of English and Putonghua. Many schools strictly enforce the CPD requirement. Some teachers in the interview believe that some school heads use CPD to pressure older or unwanted teachers who have not taken formal professional development courses for a long time, out of the profession. There is a great deal of resentment against CPD, especially when some school heads make it 'mandatory'.

Although most participants in the research agree that HKEMB has helped to change the learning tradition in the secondary schools, they contend that the benefit to students has been very limited. In contrast to the enormous investment of human and physical resources in changing Hong Kong's school system, most secondary school are moving

very slowly in the direction of lifelong learning. It is obvious that the public examinations and means of assessment have changed. However, in many cases, the teachers, pedagogy and assessments in the secondary schools classrooms are still operating in the traditional style. Not much 'change' is found in students' learning. Some teachers point out that the only obvious change might be the teachers' role in operation of the School-Based Assessments.

Although many participants reported that CPD put stress on their workload and existing commitments, there is also evidence showing professional development can make a difference to teachers' receptiveness to reform proposals. Further investigation into the effectiveness of different modes of professional development activities for frontline teachers is deemed necessary.

6.4.3 The New Senior Secondary Curriculum

Some of the frontline teachers in the research argue that the new curriculum initiatives would have been more beneficial to the students had they not been directly linked with the assessments in the public examinations.

The research participants note that when the information on students' assessments is converted into examination scores, parents and school administration dare not give up the traditional 'drills and practices' mode of preparing students for the public examinations. As the university admission system is directly linked to students' academic attainment in HKCEE or the future HKDSE, frontline teachers encounter much resistance to changes in the traditional classroom practice. As a result, NSS becomes only a new syllabus delivered in the old way of classroom practice.

Many frontline teachers are not convinced that the new HKDSE can test the skills and attitude taught in NSS. They argue that lifelong learning is an attitude to be instilled, and that this attitude is not subject-based. The curriculum reforms in senior secondary schools assumes that HKDSE and the new assessment mode can train students to become lifelong learners. However, frontline teachers argue that the pen-and-paper examinations will only encourage the continued use of drills and practice. As a result, students will not become lifelong learners. Most students and parents will still require the school teachers to concentrate on preparation for public examinations. The teachers admit that they dare not sacrifice lesson time for more extensive learning activities.

The frontline teachers in the research argue that HKEMB has put them in an untenable situation, because in addition to having to make the time to understand and implement the reform initiatives, they must face the parents. They state that HKEMB should not impose such high-stakes reforms and public examinations without a consensus from the parents.

The New Senior Secondary curriculum changes the traditional streaming practices and class allocation in almost all the secondary schools in Hong Kong. Instead of taking three core subjects (Chinese, English and Mathematics) and between two and eight subjects in either the sciences or arts, students are required to take only four core subjects (Chinese, English, Mathematics and Liberal Studies) and a minimum of one other subject elective in the 2012 HKDSE examinations. HKEMB's purpose for this dramatic change is to offer more learning opportunities to cater for learners' diversity' and to 'create more time and space' for teachers to implement life-wide learning

activities to ‘make learning more meaningful and more fun to learners’ (HKEMB 2003a).

However, many teachers of the traditional HKCEE electives may lose their jobs under the NSS scenario. Students in NSS need to take fewer electives to enter HKDSE. For example, it was common for Science stream students to take physics, chemistry and biology as their core electives in S4 and S5 to sit for HKCEE. However, the HKDSE candidates are required to take only one pure science subject in their senior secondary school years (S4 to S6). Many of the pure science and pure arts subject secondary school teachers may become redundant. The implementation of the NSS curriculum has altered the ecology of the secondary schools--from recruitment, appraisal, promotion to class structure--and the lives of many frontline teachers.

Traditionally, secondary school teachers enter the profession on the basis of their ‘subject expertise’. The demand for course offerings determines hiring decisions. Before the Education Reform, most frontline teachers had been promoted to senior ranks as subject panel heads. Based on the subject expertise available, schools can decide what subjects to offer in their senior secondary curriculum.

The new requirement in NSS alters the school-based human resource demand and supply of teaching expertise. The ripple effects of the new NSS structure and requirement range from mandatory professional development to retrenchment of the surplus teachers. In the worst cases, teachers of the redundant subjects in the senior secondary sector have to be laid off.

During the implementation of the Education Reform, the policy makers are only

addressing the changes required in the education system. The HKEMB Progress Reports (2002a, 2003b, 2004a, 2006a) mention the success of the curriculum reforms at the system level. However, issues related to frontline teachers' feelings, emotions and worries are not touched. When frontline teachers become dissatisfied, complaints begin to appear in media and the teachers' unions.

6.4.4 Language proficiency benchmarking requirement on teachers

The Language Proficiency Attainment Tests (LPAT) in English and Putonghua has put much pressure on the subject teachers of English and Chinese. Frontline teachers complain that many school principals use the new Language Benchmark to promote their own schools. Older teachers who cannot pass the new LPAT may be labeled as 'unwanted'. On top of the shrinking population of schoolchildren and central policy of school downsizing and school closure, frontline language teachers are under a great deal of pressure.

LPAT is also used as a selection criterion for many schools in the HKEMB's Centralised Redeployment Scheme (implemented in 2003). HKPTU criticises the 'Benchmark Farce' for creating an 'outrageous' scene among the frontline teachers (HKPTU 2003b). The benchmark requirement of the English subject is denounced for making unrealistic demands on frontline teachers.

Although some academics supported LPAT for 'selecting models of English and setting standards for teachers of English in Hong Kong' (Falvey & Coniam 2002, p.14), the frontline teachers oppose the benchmark policy. The non-English subject teachers in the research report that they 'feel the pressure' of the benchmark requirement from their

English subject colleagues. Some frontline teachers in the research mention ‘diminishing enthusiasm’ and ‘lack of professional autonomy’ arising from the HKEMB Language Benchmark requirement.

6.4.5 External School Review

Besides the change required in NSS and LPAT, the HKEMB External School Review practice is also mentioned as a source of teachers’ resentment. Many frontline teachers in the interviews reported that ESR exerted much pressure on the teaching profession.

The implementation of the HKEMB External School Review (ESR) is one of the controversies arising from the HKEMB Education Reform. The ESR curriculum inspection and lesson observation exercise stresses elements in the lifelong learning reform such as ‘ownership of learning’, ‘curriculum design’, ‘teachers’ role in the classroom’ and ‘students’ participation’. Some literature argues that ESR should not be put under the lifelong learning Education Reform agenda as it is only an exercise in school accountability (Choi, 2005; HKPTU 2006). The HKEMB External School Review is criticised for encouraging ‘destructive competition’ among schools, ‘overloading frontline teachers’ and ‘putting schools and teachers under surveillance’ (Choi, 2005). However, the *Learning for Life Learning through Life* (HKEMB 2000) document states that ESR is meant to support schools and frontline teachers by helping them to improve their management and teaching methods.

The frontline teachers in the research believe that ESR has had mixed results positive and negative impacts on the schools. Some teachers agree that EMB’s inspection

guideline helps them to understand the purpose of the lifelong learning teaching pedagogy and to design and teach their lessons better. They claim that ESR is a valuable means of professional exchange in learning and teaching.

However, frontline teachers with administrative duties note that ESR takes up a huge amount of their workday. The senior teachers or teachers with administrative duties are responsible for the documents to be submitted before and after the ESR, arrange the rehearsals on lesson demonstrations, and liaise with the stakeholders of the school, including parents and alumni. They complain that these extra administrative duties have interfered with their normal teaching routine. These middle managers of the schools point out that they are still responsible for carrying out their teaching duties during the ESR period. With the extra paperwork and the administrative duties required by ESR, the quality of their teaching is compromised. Some of the senior teachers in this research admit having considered stepping down. Others have mentioned thinking about of early retirement or even leaving the teaching profession.

Instead of raising the professional standard of frontline teachers, ESR is pressuring the school administration and the experienced teachers. This issue should be investigated in relation to the retention rate of experienced teachers and the sustainability of teachers' development.

After the concluding remarks on the effects of the lifelong learning Education Reform, the implications of the research findings will be discussed.

6.5 Connecting frontline teachers' work and life to the implementation of the lifelong learning Education Reform

The implementation of the HKEMB Education Reform is a centralised top-down transformation. The diversity of frontline teachers' backgrounds, careers, and lives is not taken into account. Recent research (Day and Leitch 2007) found that effectiveness of many teacher development programs were related to the considerations given to different groups of teachers' perception of their work. Day and Leitch (2007) suggest that teachers' development programs should consider teachers' experience in a variety of scenarios.

The present research finds that the following groups of teachers tend to have different perceptions of the HKEMB Education Reform:

- Junior secondary teachers versus senior secondary teachers
- Less experienced teachers versus more experienced teachers
- Teachers in schools of high socio-economic backgrounds versus teachers in schools of low socio-economic background
- Teachers in the early teaching life phase versus teachers in their late teaching life phase
- Teachers who are experiencing strong school leadership versus teachers who are experiencing weak school leadership

Future reforms may take into account more teachers' needs as individuals. In the next phase (2009-2012) of the lifelong learning Education Reform, Hong Kong requires a team of dedicated frontline teachers who understand and support the rationale of the curriculum change. As Day and Leith (2007) point out that frontline teachers' well-being and job satisfaction is a key factor in their effectiveness, policy makers in Hong Kong should connect frontline teachers' work and life to the lifelong learning Education Reform.

6.6 Refocusing the reform implementation

6.6.1 Refocusing the Education Reform on district, school and frontline practitioners

The findings of the present study reiterate the discourse of change management in education reforms. The research participants responded that the extrinsic rewards that HKEMB offers in the Language Benchmarking and CPD requirements could not assuage the frontline teachers' feelings of being unwanted. They cited the lack of time, resources and space to transform and try out the curriculum changes in their schools and pedagogical innovations with their students.

Literature on school change also points out that it is essential for policy makers to pay more attention to the district and school cultures when implementing large-scale school reforms (Fullan 2003; Fullan 2006; Fullan & Cutters 2005).

Hargreaves (1997) states that 'there is nothing inevitably good or inherently bad about restructuring, but much depends on who controls it, who is involved in it and the purposes to which it is to be put' (p.349). He adds that the bureaucratic impetus to guide implementation from the centre always makes the voices of the opposition unheard. HKEMB may take the lesson and readjust the focus of the reform to pay more attention to eliciting more qualitative feedback from the frontline teachers in different schools and districts.

6.6.2 Sharing meaning and building ‘trust’ between the policy makers and the frontline practitioners

HKEMB Education Reform was born from the Chief Executive’s personal ‘vision’ and has been implemented through the HKEMB’s ‘mission’. Frontline teachers did not respond to the policy initiative until the reform measures reach the schools. The participants in the research think that they have no ownership of the reform because they are involved neither in the framing of the lifelong learning Education Reform policy nor in the crafting of the curriculum reforms. Wardlaw (2006) also sees a lack of trust among the stakeholders in the HKEMB Education Reform.

A new direction of the reform can experiment with placing more emphasis on of the cultivation of intimacy, warmth and trust in order to forge rewarding and productive collaborative work relationships. The teachers’ voices must be heard if the problems arising from the Education Reform are to be solved (Hargreaves1997).

Frontline teachers in Hong Kong remain unconvinced of the importance of professional development language proficiency benchmarks. It may explain why they do not whole-heartedly support the reform measures and that why their professional development may not benefit their students. Sergiovanni (1998) argues that top-down educational change seldom succeeds because as soon as the external pressure or incentives for change have been removed, teachers revert to their old practice.

If the goal of training lifelong learners for 21st century’s HKSAR is to be achieved and sustained, policy makers should communicate and share this ideal with the frontline practitioners. Frontline teachers should also be consulted and included in the

implementation of the curriculum reforms.

Fullan (2001) has stated that the key to change in education institutions is the improvement in relationships among all stakeholders, and not the imposition of reforms from above. He argues that change is accompanied by anxiety and struggle and it cannot be assimilated unless its meaning is comprehended and shared. The present study has revealed that frontline teachers and policy makers lack a shared vision and mission of lifelong learning Education Reform. It has also found that the centralised, top-down reforms that were implemented between 2000 and 2007 ignored the culture of individual schools and of frontline teachers. Fullan (2001) argues that educational change should develop the capacity for both organizations and individuals to learn.

Future education reforms in Hong Kong should move away from the emphasis on structural change and towards changing the culture of classrooms and schools. Policy makers of the Education Reform can emphasize more on improving relationship and establishing shared values among the stakeholders.

6.6.3 Incorporating frontline teachers' voice in the changing education system

In the early stage of the reform implementation, Kennedy (2004) denounced the HKEMB Education Reform as 'a sorry catalogue of ill-conceived initiatives that have had very limited outcome' (p.595). He condemned the reform measures as 'expensive mistakes' made by the policy makers and concluded that 'education policy cannot be rushed through or imposed by the government' (p.614).

Further studies can explore the loopholes in communications between the policy makers and the practitioners during the reform implementation. Darling-Hammond (1998) suggests a new framework for the successful implementation of 'change' in schools. She points out that there are always huge differences between the policy makers and the interpretation by the teachers and schools when changes are introduced to schools. She therefore suggests that policy makers to refrain from directing and controlling the system to enabling the frontline workers to participate in education reform. She argues that change introduced to the education system should focus on learning (for both students and teachers) instead of on compliance.

The present research findings reveal that frontline teachers have misinterpreted the focus and rationale of the curriculum reforms attached to the lifelong learning Education Reform. The proposed changes to classroom practices have been interpreted by the teachers in this research as the new benchmarks for meeting the requirements of the 2012 examination syllabus in the new Hong Kong Diploma of Education. Darling-Hammond (1998) argues that if frontline teachers are enlisted in policy making, there will be fewer miscommunications in the implementation stage. While both Kennedy's research (2004) and this research identify problems encountered so far, it may be possible to improve the next phase of implementation of the lifelong learning reforms by inviting greater input in policy making.

Frontline teachers in the research complain that the Education Reform measures confuse and puzzle them as each discrete measure seemed to be completely new. They did not see the coherence of the reforms. Darling-Hammond (1998) has compared the reforms to 'a carriage pulled by horses dashing off in different directions'. Wardlaw (2006) also admits that the policy makers have not clearly articulated the

interconnectedness of the changes required in the HKEMB Education Reform.

In the last phase of the territory's lifelong learning Education Reform, there is an urgent need for the policy makers to understand the needs of the frontline teachers in different schools. Structural changes in the territory's education system were made between 2001 and 2007. From 2009, teaching and learning of the lifelong learning knowledge, skills and attitude are the focus of the reform implementation. The chief task of the policy makers will be to understand the frontline scenario and respond more proactively to the feedback from the frontline practitioners. As Darling-Hammond (1998) states, the most difficult task for policy makers may be to maintain the delicate balance between ever-rising demands for improvement and school autonomy (p.658).

6.7 The lifelong learning Education Reform in Hong Kong – a new research agenda

According to Smith and Spurling (1999), changing the culture of teaching and learning in schools is as hard as riding a tiger.

In a general lifelong learning culture, every teacher's prime goal will be to trigger and nurture lifelong learning in every learner. This is a vital skill for teachers. It is not the same as the skill of keeping order in class; or of being effective in assessment procedures; or of imparting a body of knowledge; or even of knowing the subject'. (Smith & Spurling 1999, p.139)

With the present constraints of the school environment and teachers' training, inducing

lifelong learning in the secondary school context is really as difficult as riding a tiger. Smith and Spurling (1999) examine the different sets of skills required by frontline teachers in a lifelong learning school context. They argue that teachers' training alone is not conducive to lifelong learning. Besides the training given, satisfactory teaching conditions, adequate school equipment, flexible terms of employment, and generous incentives are crucial in changing attitudes to lifelong learning. Researchers have been calling for more teachers' training and studies on sustaining teachers' interest in lifelong learning.

Those who select and train teachers at any level need to be able to recognize and develop the talent to inspire and encourage continuity in learning, and to ensure that it is not destroyed by the thousand frustrations of teaching life. Yet there is currently little sign of a strong element theory and practice developing in initial or in-service teacher training in the institutions (Smith & Spurling 1999, p.139).

In the context of curriculum reform implementation, HKEMB has sponsored research devoted to improving the efficiency of teaching methods. The new subjects introduced in NSS have also attracted public resources in curriculum development and teachers' training. However, there is still a lack of sound research into the methods and approaches of teaching which increase the probability of continuing learning. To most of the frontline school teachers, lifelong learning is still a slogan that has little to do with real classroom practices and the curriculum. The teaching of lifelong learning skills and attitude is divorced from the syllabus of the public examinations.

The present study suggests that further investigation into the following issues is crucial in the implementation of the lifelong learning Education Reform in Hong Kong:

- The policy of Continuous Professional Development
- The ‘realistic’ pace of implementing New Senior Secondary curriculum reforms after 2012
- Integration of the Education Bureau’s policies to the authentic secondary school calendars
- School-based support to respond to the needs of the low academic achievers and of learners with learning difficulties
- Cost-effectiveness of School-Based Assessment
- Implementation of Assessment for Learning in the classroom
- Case studies on teachers’ stress and workload

Developing from the traditional British blueprint, the school system in Hong Kong possesses the characteristics of a dominant culture in education which is competitive in style and elitist in history. It supports and is supported by traditional academic values and power structure. Although the goal of the HKEMB lifelong learning Education Reform is training lifelong learners for the 21st century, it has indirectly altered the culture and the power structure of the whole secondary school system.

The present research explored the phenomenon of the HKEMB Education Reform during its early years of implementation. There is still a long way to go before the culture of lifelong learning can be instilled in the next generations of learners.

In order to realise the final goal of the HKEMB Education Reform and to create the lifelong learning culture in the school system, much more research has to be carried out to investigate the contextual needs of different school types' frontline teachers in the territory. A better understanding of the needs of frontline teachers is indispensable.

Is it better to have an interest in something than just to know about it?

Is it better to delight in doing something than just to have an interest in it?

Confucius Analects Chapter 6:18

Appendix One



INFORMATION LETTER

The lifelong learning Education Reform in Hong Kong – a review from the perception of frontline teachers

Dear Teacher,

My name is Chan Yee Man, Anne (陳綺雯). I am a secondary school teacher in Hong Kong and I am doing a Doctor of Education degree at the University of Technology, Sydney (Australia).

I am conducting a research into the HKEMB Education Reform on lifelong learning and would welcome your assistance. The research would involve an interview and should take no more than one and a half hour of your time.

Participation is voluntary and the information you provide will be kept confidential. The research has been approved by the UTS Faculty of Education ethics committee.

If you are interested in participating, I would be grateful if you would contact me at the address, phone, fax or email below.

Yours sincerely,

Chan Yee Man, Anne (陳綺雯)

Chan Yee Man, Anne (陳綺雯)

CCC Hoh Fuk Tong College

No. 28 Castle Peak Road

San Hui, Tuen Mun

N.T.

Hong Kong

Tel: 2459 6354

Fax: 2457 2648

e-mail: [redacted]@yahoo.com.hk

NOTE:

This study has been approved by the University of Technology, Sydney, Faculty of Education Human Research Ethics Committee.

If you have any complaints or reservations about any aspect of your participation in this research which you cannot resolve with the researcher, you may contact the Ethics Committee (ph: * 61 2 9514 3830, Alison.Lee@uts.edu.au). Any complaint you make will be treated in confidence and investigated fully and you will be informed of the outcome.

Appendix Two

Participant ID _____

The lifelong learning Education Reform in Hong Kong – a review from the perception of frontline teachers

Please help to fill in the form.

It can help the researcher have a better understanding of the potential participants.

(Please put a ✓ in the ○).

Q1. Please tick the gender Male Female

Q2. How many years have you been teaching?

1-5 years	<input type="radio"/>
6-10 years	<input type="radio"/>
11-15 years	<input type="radio"/>
15-20 years	<input type="radio"/>
Over 20 years	<input type="radio"/>

Q3. Are you taking up any administrative duties in the school?

Yes

No

Q4. Which subject(s) are you teaching?

*Please write down the name(s) of the subject(s) or the name of the key learning area.)

Q5. Please ✓ the school region and district that you are teaching

Region		District	
Hong Kong	○	Central & Western Hong Kong East Islands Southern Wan Chai	○ ○ ○ ○ ○
Kowloon	○	Kowloon City Kwun Tong Sai Kung Sham Shui Po Wong Tai Sin Yau Tsim & Mong Kok	○ ○ ○ ○ ○ ○
New Territories East	○	North Sha Tin Tai Po	○ ○ ○
New Territories West	○	Kwai Chung & Tsing Yi Tsuen Wan Tuen Mun Yuen Long	○ ○ ○ ○

Q6. What is the school type? Please ✓

Government secondary school	<input type="radio"/>
Aided secondary	<input type="radio"/>
Direct Subsidy Scheme secondary school	<input type="radio"/>
English Schools Foundation secondary school	<input type="radio"/>
Private secondary school	<input type="radio"/>
Caput secondary school	<input type="radio"/>

Thank-you very much

The design of this form is to select the most appropriate participants to represent teachers of different backgrounds (gender, teaching experience, administrative experience, curriculum involvement, from different school districts and school type)

Appendix Three

「教師對學校的意見」問卷
Questionnaire: Teachers' views about the school

中學適用 For Secondary Schools

<p>填表須知：</p> <ul style="list-style-type: none"> • 教育統籌局設計了這份問卷，供學校透過不記名的方式，收集你對學校的意見，以幫助學校發展。 • 請依據你的觀察或看法，選出一個最能表達你意見的選擇，並用鉛筆或黑色原子筆塗黑答題紙上所選擇的圓圈。 <p>例：</p> <p style="text-align: center;">非常同意 ○ ● ○ ○ ○ 極不同意</p> <ul style="list-style-type: none"> • 每題只能填上一個選擇。 • 若你是副校長，請無須回答59至62題。 	<p>Guidance Notes:</p> <ul style="list-style-type: none"> • The Education & Manpower Bureau has designed this questionnaire for use by schools, through anonymous returns, to collect your views on your school to assist its development. • Based on your observation or perception, please select the choice which best reflects your views. Use either a pencil or black ball pen to <u>blacken</u> the circle on the answer sheet. <p>e.g.</p> <p style="text-align: center;">Strongly agree ○ ● ○ ○ ○ Strongly disagree</p> <ul style="list-style-type: none"> • Supply <u>one</u> choice only for each item. • If you are the vice-principal, please skip items 59 to 62.
<p>1. 學校的課程發展目標及政策清晰。</p>	<p>1. The school has clear curriculum development objectives and policies.</p>
<p>2. 學校的課程發展配合課程改革的路向。</p>	<p>2. The curriculum development of the school is in line with the direction of the curriculum reform.</p>
<p>3. 學校採用的教學語言政策恰當。</p>	<p>3. The school adopts an appropriate policy on medium of instruction.</p>
<p>4. 學校把不同學習領域的相關學習元素，例如德育及公民教育課題聯繫起來，協助學生學習。</p>	<p>4. Related learning elements e.g. topics in moral and civic education in various Key Learning Areas (KLAs) are linked up to support student learning.</p>
<p>5. 學校為學生編排不同類型的課外學習活動，例如參加校外比賽、參觀科學館等。</p>	<p>5. The school organises different kinds of co-curricular activities for the students, e.g. participating in external competitions, visiting the Science Museum, etc.</p>
<p>6. 學校編排教學時間時，會特別安排共同備課節，讓我們有協作和交流的機會。</p>	<p>6. The school allocates co-lesson planning time in the teaching timetable to facilitate us to collaborate and share experiences.</p>
<p>7. 學校關注各科/學習領域課程的推行情況。</p>	<p>7. The school is concerned about curriculum implementation of individual subjects / KLAs.</p>
<p>8. 科組經常檢討課程實施的成效，並作出跟進。</p>	<p>8. The committees and subject panels often review the effectiveness of the curriculum implementation and formulate follow-up action.</p>
<p>9. 教師經常運用學與教的數據，以加強教學果效。</p>	<p>9. The teachers often use the feedback from learning and teaching to enhance their teaching effectiveness.</p>
<p>10. 教師經常一起分享學與教的經驗和交流教學資訊。</p>	<p>10. The teachers often share experiences in learning and teaching, as well as teaching trends and information.</p>

11. 科組間經常協作推行教學活動。	11. The committees and subject panels often collaborate with each other to conduct teaching activities.
12. 我會因應教學內容, 選取合適的教學資源在課堂上施教。	12. I select appropriate teaching resources for the lesson according to the teaching contents.
13. 我經常因應學生的能力和興趣設計教學內容。	13. I often design the teaching contents according to the students' abilities and interests.
14. 我經常因應學生的學習進度調節教學時間和節奏。	14. I often adjust the teaching time and tempo according to the students' learning progress.
15. 我經常在課堂上安排互動學習活動, 例如小組討論、學生 報等。	15. I often arrange interactive learning activities in my lessons, e.g. group discussion, student presentation, etc.
16. 課堂上, 我經常讚賞學生。	16. I often praise students in the lessons.
17. 我經常鼓勵學生表達意見。	17. I often encourage students to express their opinions.
18. 我喜歡學生多發問。	18. I like students to raise questions frequently.
19. 我盡力回答學生的發問。	19. I try my best to answer the questions raised by students.
20. 我經常與學生在課堂以外的時間討論學習的問題。	20. I often discuss with students the problems in their studies beyond class time.
21. 學生對學習有濃厚的興趣。	21. My students have great interest in learning.
22. 學生對學習甚有自信。	22. My students are confident in learning.
23. 學生積極回應我的提問。	23. My students actively respond to my questions.
24. 學生懂得運用不同的資源學習, 例如互聯網、圖書館等。	24. My students know how to make use of various resources for learning, e.g. the Internet, library, etc.
25. 學生經常互相討論, 交流學習心得。	25. My students often discuss and share their experiences in learning.
26. 學生認真地完成課業。	26. My students complete their assignments seriously.
27. 學生經常在校內閱讀課外書籍。	27. My students often engage in leisure reading at school.
28. 學生經常在校內上網瀏覽資訊。	28. My students often browse information on the Internet at school.
29. 學生經常到學校圖書館借閱書籍。	29. My students often borrow books from the school library.
30. 學生喜歡參加學校的閱讀活動, 例如說故事比賽、閱讀獎勵計劃等。	30. My students are interested in participating in the reading activities organised by the school, such as story telling and reading award scheme.
31. 學生喜愛互相分享閱讀心得。	31. My students like to share their reading experience with others.
32. 學生已養成閱讀習慣。	32. My students have developed a reading habit.
33. 學校的評估政策, 例如家課政策、測考模式、評估資料的使用等清晰。	33. The school has a clear policy on assessment, e.g. homework policy, mode of test and examination, use of assessment information, etc.
34. 學校的評估制度, 例如評估的頻次和安排等恰當。	34. The school has an appropriate assessment system, e.g. frequency and arrangement of assessment, etc.

35. 學校採用不同的評估方式，例如專題研習、閱讀報告、觀察等，評估學生的學習進展。	35. The school uses various methods to evaluate students' learning progress e.g. project learning, book report, observation, etc.
36. 我經常藉著評估資料，例如學生的測考成績、家課表現等，改善教學。	36. I often make use of the assessment information to improve my teaching, e.g. students' achievements in tests and examinations, their performance in assignments, etc.
37. 我經常與學生檢討他們的學習情況，讓他們知悉學習表現和進展。	37. I often review with my students their learning to let them know about their performance and progress.
38. 教師相處融洽。	38. The teachers are on harmonious terms.
39. 教師合作愉快。	39. The teachers cooperate with one another happily.
40. 師生關係良好。	40. The teachers and the students have a good relationship.
41. 教師的士氣良好。	41. The teachers have a good morale.
42. 我認同學校的發展方向。	42. I agree with the direction of development of the school.
43. 教師積極進修，追求進步。	43. Teachers are actively involved in professional development to pursue continuous improvement.
44. 我感到在本校工作很有滿足感。	44. I have a strong sense of satisfaction working in this school.
45. 教職員專業發展計劃配合學校的發展需要。	45. The staff professional development plan meets the needs of the school development.
46. 學校舉辦的教師專業發展活動，例如教師專業發展日對我的工作有幫助。	46. The staff professional development activities, e.g. staff development day organised by the school, are helpful to my duties.
47. 學校積極提供財務支援，讓教師持續進修。	47. The school actively provides financial support to teachers for their continuous professional development.
48. 教職員專業發展計劃配合我的發展需要。	48. The staff professional development plan meets my personal development needs.
49. 學校積極調配校內人力資源，讓教師持續進修。	49. The school actively deploys human resources to facilitate teachers to pursue continuous professional development.
50. 透過考績報告，我清楚了解自己的強弱。	50. The staff appraisal report enables me to have a better understanding of my strengths and weaknesses.
51. 評鑑教師表現的準則合理，能公平地評鑑教師的表現。	51. The staff appraisal criteria are appropriate and serve as a fair basis in assessing teachers' performance.
52. 藉著考績結果，我了解自己的專業發展需要。	52. With the results of staff appraisal, I understand my professional development needs.
53. 教職員考績制度，包括評估準則和程序均清楚。	53. The staff appraisal system including assessment criteria and procedures is clear.
54. 我清楚了解教職員考績制度，包括評估準則和程序。	54. I fully understand the appraisal system including assessment criteria and procedures.
55. 校長有效地帶領學校發展。	55. The principal provides effective guidance to the development of the school.

56. 校長有教育抱負。	56. The principal has his/her own educational vision.
57. 校長與我的工作關係和諧。	57. The principal and I have an amicable working relationship.
58. 我有機會向校長表達意見。	58. I have opportunities to express my views to the principal.
副校長無須回答 59 至 62 題。	The vice-principal does not need to answer items 59 to 62.
59. 副校長能促進領導層和科組間的溝通。	59. The vice-principal(s) can facilitate communication between the management and committees & subject panels.
60. 副校長有效地指導科組工作。	60. The vice-principal(s) provides effective guidance to the work of committees and subject panels.
61. 副校長與我的工作關係和諧。	61. The vice-principal(s) and I have an amicable working relationship.
62. 我有機會向副校長表達意見。	62. I have opportunities to express my views to the vice-principal(s).
63 至 69 題：以下為你對整體科組主管的意見。	Items 63 to 69: below are your consolidated views on the subject/committee heads.
63. 科組主管有效地帶領科組的發展。	63. The subject/committee heads provide effective guidance to the development of their panels.
64. 科組主管有效地處理科組事務。	64. The subject/committee heads manage the affairs of their panels effectively.
65. 科組主管能促進領導層和教師的溝通。	65. The subject/committee heads can facilitate communication between the management and teachers.
66. 科組教師能透過科組主管，向學校反映意見。	66. The teachers can voice their opinions to the school through the subject/committee heads.
67. 科組主管與科組教師的工作關係和諧。	67. The subject/committee heads and teachers have an amicable working relationship.
68. 科組主管勇於承擔責任。	68. The subject/committee heads have a high sense of responsibility.
69. 科組主管重視科組教師的意見。	69. The subject/committee heads show respect for teachers' opinions.
- 問卷完 - 謝謝你的意見	- End - Thank you for your comments.

9. 課堂上，老師經常提供機會，讓我們進行討論和協作。	9. The teachers often provide opportunities for us to discuss and collaborate in the class.
10. 課堂秩序良好。	10. The class discipline is good.
11. 課堂上，老師經常讚賞我們。	11. The teachers often praise us in the class.
12. 課堂上，老師經常提問我們。	12. The teachers often ask us questions in the class.
13. 老師教學認真。	13. The teachers are serious in teaching.
14. 老師經常鼓勵我們努力學習。	14. The teachers often encourage us to strive hard to learn.
15. 老師經常鼓勵我們表達意見。	15. The teachers often encourage us to express our opinions.
16. 老師耐心聆聽我們的發問。	16. The teachers listen to our questions with patience.
17. 老師積極回答我們的發問。	17. The teachers try their best to answer our questions.
18. 老師願意在課堂以外的時間幫助我解決學習上的問題。	18. The teachers are willing to help me solve my problems in the studies beyond class time.
19. 我對學習很有興趣。	19. I am very interested in learning.
20. 我經常在課堂上發問。	20. I often ask questions in the class.
21. 我經常自動自覺地學習。	21. I often take the initiative to learn.
22. 除課本外，我經常參考其他的資料，幫助學習。	22. Apart from the textbooks, I often refer to other reference materials to assist my studies.
23. 我經常與同學互相討論，交流學習心得。	23. I often discuss with my classmates to share what we have learnt.
24. 我認真地完成課業。	24. I complete my assignments seriously.
25. 我喜愛閱讀。	25. I like reading.
26. 我經常閱讀課外書籍。	26. I often engage in leisure reading.
27. 我經常上網瀏覽資訊。	27. I often browse information on the Internet
28. 我經常到圖書館，包括學校圖書館或公共圖書館借閱書籍。	28. I often borrow books from the school library and public library.
29. 我喜歡參加學校的閱讀活動，例如說故事比賽、閱讀獎勵計劃等。	29. I am interested in participating in the reading activities organised by the school, such as story telling and reading award scheme.
30. 我喜愛與同學分享閱讀心得。	30. I like to share my reading experience with my classmates.
31. 老師經常給予我意見，讓我了解自己的學習進展。	31. The teachers often make comments on my performance to help me understand my learning progress.

32. 我經常翻閱習作簿來溫習。	32. I often go over my exercise books for revision
33. 老師能清楚地指出我在習作上的錯誤。	33. The teachers can point out my mistakes in the assignments clearly.
34. 老師批改我的習作時，經常給我清楚的提示，幫助我改正錯誤。	34. When the teachers mark my assignments, they often give clear suggestions to help me correct my mistakes.
35. 老師經常讚賞我的習作表現。	35. The teachers often praise my performance in the assignments.
36. 老師相處融洽。	36. The teachers are on harmonious terms.
37. 學生尊敬老師。	37. The students respect the teachers.
38. 老師關懷我。	38. The teachers care about me.
39. 我和同學相處融洽。	39. I get along with my classmates.
40. 學校對同學的意見積極回應。	40. Our school gives positive responses to the comments from the students.
41. 老師工作認真。	41. The teachers work seriously.
42. 我喜愛學校。	42. I like my school.
- 問卷完 - 謝謝你的意見	- End - Thank you for your comments.

Students' Learning Strategy Survey Form - ESR (HKEMB)

Class : _____

Gender : Male / Female

		Not accurate at all	Not quite accurate	Quite accurate	Extremely accurate
1	I tend to study only what's set; I don't do anything extra.	①	②	③	④
2	While I am studying, I try to think of how useful the material that I am learning would be in real life.	①	②	③	④
3	I regularly take notes from suggested readings and put them with my class notes on a topic.	①	②	③	④
4	I find that the best way to learn many subjects is to memorize them by heart.	①	②	③	④
5	In reading new material, I am reminded of things I already know, and see them in a new light.	①	②	③	④
6	I try to work solidly throughout the term and revise regularly when the exams are close.	①	②	③	④
7	I prefer subjects requiring me to learn facts and details, to subjects requiring a lot of reading and understanding.	①	②	③	④
8	I like to do enough work on a topic to form my own point of view before I am satisfied.	①	②	③	④
9	I try to do all my assignments as soon as they are given to me.	①	②	③	④
10	In most subjects I try to do enough just to make sure I pass, and no more.	①	②	③	④
11	I try to relate what I learn in one subject to what I have learned in other subjects.	①	②	③	④
12	Soon after a class or lab, I re-read my notes to make sure I can read them and understand them.	①	②	③	④
13	I find it better to learn just the facts and details about a topic rather than try to understand all about it.	①	②	③	④
14	I find most new topics interesting and spend extra time trying to find out more about them.	①	②	③	④
15	When a test is returned, I correct all the errors I made and try to understand why I made them.	①	②	③	④
16	I don't spend time on learning things that I know won't be asked in the exams.	①	②	③	④
17	I spend much of my free time finding out more about interesting topics which have been discussed in different classes.	①	②	③	④
18	I try to read all the references and things my teacher says we should.	①	②	③	④

Appendix Four

Lifelong Learning school research

School policies and practices orientated to lifelong learning

Looking at the school as a whole: to what extent are school policies and practices oriented to lifelong learning?

Element	Do we do it? In what way?	How could we do it?
Does the school's underlying philosophy, or mission statement focus on lifelong learning?		
Is the curriculum structured so that it is easy to make links from one field of study to another?		
Is the importance of information literacy skills recognized in all areas of the curriculum?		
Is learning that takes place outside of school (as well as in school) recognized in assessment policies? Do assessment policies make explicit the importance of formative assessment?		
Are teachers supported and encouraged to be lifelong learners?		
Are there established partnerships with local/ community groups that support student learning?		

Lifelong Learning school research

School policies and practices orientated to lifelong learning

How far are teachers in the school lifelong learners?

Element	Do we do it? In what way?	How could we do it?
Are nearly all of the teachers 'lifelong learners'?		
Do teachers view themselves as mentors, facilitators, models, rather than 'dispenser of knowledge'?		
To what extent do teachers encourage reflection and higher order thinking skills in students, rather than rote learning?		
To what extent are teachers encouraged to develop their own information literacy skills?		
Do teachers work collaboratively with each other, with specialist teachers, with librarians, students and community groups?		
Do teachers engage in professional development activities which enhance their understanding of the learning process?		
Are teachers given adequate opportunity to review their own careers and to set their own career goals?		
Do teachers have mentors?		

Lifelong Learning school research

School policies and practices orientated to lifelong learning

What is it like to be student in the lifelong learning student in a secondary school?

Element	Do we do it? In what way?	How could we do it?
Do students work in an environment where they feel safe to discuss and question?		
Are students encouraged to make use of the community outside as a source of knowledge?		
Are students encouraged to examine their own learning process?		
Do students set their own achievable goals and formulate questions / problems related to these goals?		
Are students encouraged to evaluate the extent to which they achieve their goals?		
Do students work collaboratively?		
Are students encouraged to draw on their particular cultural or specialist knowledge?		
Do students recognize that their teachers are learning as well as teaching?		

Lifelong Learning school research

School policies and practices orientated to lifelong learning

Rating scale for: How far is the school in the journey to lifelong learning?

Tick a box to indicate where you would place your school on the scale for each item then add the score. The highest possible score is 30.

Item	1	2	3	4	5	Item
Ownership of the need to learn and its content is with the teacher.						As far as possible ownership of the need to learn and its content is given to individuals.
Education is compartmentalized according to age and subject.						Learning is lifelong in concept and content, there are links vertically and horizontally between age groups.
Learning is about what to think.						Learning is about how to think.
Teachers are dispensers of knowledge.						Teachers are mentors and models of lifelong learning.
Failures are separated from successes.						Emphasis is on progress and encouragement of further learning.
Learning is a difficult chore and is about received wisdom.						Learning is fun, participative and involving.

Appendix Five

Individual interview protocol
(Involves 20 participants)

The interview (conducted in Cantonese) should last about 45-60 minutes. It will be recorded digitally.

Each recording will be transcribed in English, within 7 days, after the interview.

Interview questions (the order of questions may change)

Q1 Warming up introduction (data collected from potential participants' survey: screening survey)

You have been teaching (subjects) in (Name of the school) for (no. of years) years.
Can you tell me something about your school?

Q2 Have you participated in any of the HKEMB Education Reform questionnaire survey? If yes, when was it conducted? Do you still remember what the survey(s) are about?

The researcher will show the samples of the HKRMB APASO survey forms

Hong Kong Education and Manpower Bureau (HKEMB) APASO Instruments:

2a APASO Form A: Secondary Teachers

2b APASO Form B: Secondary Students

2c APASO Form C: Learning Strategies

Q3 How does the Education Reform affect your teaching?

Q4 How does the Education Reform affect students' learning?

Q5 What do you think are the most important changes that the Education Reform brought about?

Q6 How much (do you think) that students in Hong Kong are moving towards lifelong learning?

Q7 How can the school successfully move towards lifelong learning?

Q8 What are factors hindering the lifelong learning Education Reform in Hong Kong?

Q9 The following forms were used in a research about the development of Lifelong Learning in some Australian secondary schools. With reference to these criteria, can you give some comments on ‘How far is your school moving towards lifelong learning’?

Instruments adapted from Bryce and Withers (ACER 2003) *Engaging Secondary School Students in Lifelong Learning*

- 3a ACER Form A: To what extent are school policies and practices oriented to lifelong learning?
 - 3b ACER Form B: How far are teachers in the school lifelong learners?
 - 3c ACER Form C: What is it like to be a student in a lifelong learning secondary school?
 - 3d ACER Form D: How far is the school in the journey to lifelong learning?
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Appendix Six

PS	Recording Time	Understanding	Feelings & emotions	Perceived benefits	Perceived disadvantages	Perceived positive measures	Perceived hindering measures	Others	Total no. of statements transcribed
1	62:36:00	24	18	8	14	9	22	49	144
2	51:38:00	16	15	13	12	16	13	53	138
3	55:38:00	19	12	13	8	19	11	29	111
4	51:22:00	21	11	22	16	27	15	37	149
5	59:04:00	13	18	5	23	9	25	39	132
6	50:48:00	15	12	17	14	24	15	46	143
7	49:52:00	13	16	10	19	18	14	33	123
8	47:06:00	11	29	9	11	19	20	64	163
9	60:51:00	34	16	11	29	13	18	53	174
10	52:33:00	18	13	15	16	7	6	29	104
11	54:01:00	22	9	18	19	17	25	26	136
12	44:02:00	12	19	12	21	12	8	34	118
13	48:11:00	8	33	4	27	5	18	30	125
14	36:22:00	17	30	9	34	7	21	48	166
15	47:56:00	38	14	12	20	16	13	24	137
16	51:41:00	20	16	16	12	21	13	22	120
17	50:13:00	29	13	12	16	13	12	29	124
18	55:46:00	19	24	13	27	8	17	23	131
19	49:29:00	25	10	15	11	17	12	34	124
20	50:45:00	16	27	7	15	12	23	20	120
		390	355	241	364	289	321	722	2682

Appendix Seven

Participants' demographic analysis

Participants	Gender	Teaching experience	Admin. roles	KLA / subject	School district	School type (banding)
1 'Yucho'	M	Over 20	Yes	Maths	Kowloon (Kowloon City)	Aided (Band 3)
2 'Kitlee'	F	6-10 years	Yes	English language	NT West (Tin Siu Wai)	Aided (Band 2)
3 'Kaming'	M	1-5 years	No	Visual Arts	Kowloon (Yau Tsim Mong kok)	Direct subsidy Scheme school (Band 1)
4 'Ngayee'	F	15-20 years	Yes	Geography	NT East (Tai Po)	Aided (Special Education)
5 'Wingkng'	M	1-5 years	Yes	Computer & I.T	NT West	Aided (Band 1)
6 'Isachun'	F	Over 20 years	Yes	English language	Hong Kong (Island)	Government (Band 3)
7 'Meiling'	F	6-10 years	Yes	English	NT West (Tuen Mun)	Aided (Band 1)
8 'Yuenkwan'	F	6-10 years	Yes	Music	NT East	Aided (Band 2)
9 'Chunkin'	M	15-20 years	Yes	Chinese language	Hong Kong (central & west)	Aided (Band 3)
10 'Kamhong'	M	11-15 years	No	P.A.& Computer	NT West (Tin Siu wai)	Aided (Band 2)

11 'Hoiman'	F	1-5 years	No	Chinese	Kowloon (Kwun Tong)	Aided (Band 3)
12 'Waiyip'	M	1-5 years	No	Mathematics	Kowloon (Wong Tai Sin)	Aided (Band 2)
13 'Rochlee'	F	6-10 years	Yes	English	Kowloon (Sham Shui Po)	Government (Boy's school, Band 3)
14 'Kinglin'	F	15-20 years	No	English	Kowloon ((Kowloon City)	Aided (Band 3)
15 'Waihung'	M	Over 20 years	Yes (Vice principal)	Chemistry	NT West (Tuen Mun)	Aided (Band 1)
16 'Cheong'	M	15-20 years	Yes	Chemistry	NT West (Yuen Long)	Aided (Band 2)
17 'Kowksin'	M	Over 20 years	Yes	Mathematics	NT West (Yuen Long)	Aided (Band 2)
18 'Winghan'	M	Over 20 years	Yes (vice principal)	History	NT West (Tuen Mun)	Aided (Band 2)
19 'Feitang'	M	6-10 years	Yes (EMB seconded teacher)	Liberal Studies	Kowloon (Sai Kung)	Direct subsidy scheme (Band 2)
20 'Wingyan'	F	6-10 years	No	PE	NT West (Tuen Mun)	Aided (Band 2)

Appendix Eight

001	✧ Over 20 years
'Yucho'	✧ Academic Committee panel chair, Mathematics panel chair
M	✧ Heavy administrative duties
	✧ Kowloon, Kowloon City, Band 3 school, Aided

'Yucho' was about 40-50 years old. He was introduced by my colleague to the interview. He was the first one to agree to be interviewed.

'Yucho' was a very experienced teacher of Mathematics. Besides teaching Mathematics and being the panel chairperson of the Mathematics Department, he was also in charge of Academic Affairs and curriculum development of the school.

'Yucho' had been teaching in the school for over 15 years. He experienced the Education Reform from its 'genesis'. He talked a lot about how the school leaders (mainly the principal) reacted 'bravely' to the Education Reform. He said that the principal did not actually follow the top-down policy in 'full-swing'. He thought that it was good for the school leader to 'adjust' what was really needed in the school. He described the principal as 'having the guts' to delay a lot of EMB projects so as to 'help the teachers to save more time for teaching'.

'Yucho' could not differentiate the lifelong learning Education Reform from the other education reform initiatives after 1997. It seemed that all the 'changes' in the secondary school system after 1997 were related to the HKEMB Education Reform and that lifelong learning was only a 'slogan' for the implementation propaganda.

Although 'Yucho' mentioned a lot of disadvantages of the Education Reform to the institution (the school) and the frontline teachers, he agreed that the HKEMB Education Reform did induce the elements of lifelong learning in the secondary schools' classrooms.

On the issue of stress, 'Yucho' described the school as 'lucky' because the school principal did not enforce very strict 'requirements' on the staff. He mentioned that the greatest impact on the frontline teachers in his school was the change of the public examinations' requirement in 2012 when the curriculum reform in the New Senior Secondary curriculum had to be completed and all the students in HKSAR had to take the public assessment in a new mode. He mentioned that classroom practices were forced to change because of the change on the requirements of the public examinations.

002	◇ 7 years teaching experience
'Kitlee'	◇ English panel chairperson, ATE teacher (English)
	◇ Administrative duties (school promotion, staff development)
F	◇ New Territories West (Tin Sui Wail, Yuen Long) , Band 2 school, Aided

'Kitlee' was one of the teachers I know personally through the HKEMB ATE (Award of Teaching Excellence) association.

'Kitlee' was very young but was already appointed the assistant-English panel chairperson of the school. She had been teaching in 3 different secondary schools before she got the new appointment in a New Territories West school in 2006-2007.

She described her teaching life as 'happy but extremely busy'. She said that her experiences in the lifelong learning Education Reform had been very different in different schools. She mentioned that different school policy and school culture brought very different experiences in the implementation of the education reform measures.

'Kitlee' mainly described the curriculum reforms she experienced in the Education Reform. She talked a lot about the details and the requirement of the new English syllabus requirement and the introduction of SBA (School-Based Assessment) in the subject of English. She aired the injustice and grievances from the view of an English subject teacher.

She thought that frontline teachers from different subject areas had not been treated 'fairly'. She thought that it was not 'fair' for the language teachers of English and Chinese to shoulder most of the 'change' requirements while the other subject teachers (who were paid the same) could have a much lighter load.

She said that she could manage her teaching in the classrooms and students could benefit from her. Although she mentioned the drawback brought by the 'hasty', and 'large scale' change of the curriculum reform, she agreed that the lifelong learning agenda had been inducing a lifelong learning culture among the frontline teachers. She described that the HKEMB Continuous Professional Development (CPD) requirement which required teachers to take up at least 150 hours professional training in 3 consecutive years had successfully moved a lot of 'old' and 'reluctant' teachers to take the refresher courses and to continue to learn.

003 'Kaming' M	<ul style="list-style-type: none"> ✧ 3 years teaching experience ✧ No need to take up administrative duties (committee members of function group) ✧ Teaching Visual Arts ✧ Kowloon (Yau Tsim & Mongkok), Direct Subsidy Scheme Secondary
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'Kaming' was introduced to me through one of my ex-students. He graduated in a University in Britain majored in Art. His first career was a flight attendant in Cathy Pacific before he took up the teaching post in the Direct Subsidy Scheme Secondary school in Kowloon.

'Kaming' was young and energetic. He described the job of frontline teachers as 'well-paid' but not 'very rewarding'. As he had only been working in the teaching profession for 3 years, he could only make comments on the recent education reform measures that he experienced.

'Kaming' could give a very detailed description on the education reform measures implemented from 2005-2007 including the administrative as well as the curriculum reforms. What he remembered most about the HKEMB Education Reform were the high profile names of the HKEMB leaders Fanny Law and Arthur Lee.

He had a very negative feeling towards the school's Self-Evaluation survey and the External School Review questionnaires collection. He mentioned that he did not trust that the school would use the information for self-improvement. Instead, he mentioned about the 'conspiracy' issue. He thought that the school or EMB would spot those opposition parties and 'eliminate' them.

'Kaming' had a very positive attitude towards the curriculum reform requirements in the subject of Visual Arts. He mentioned that the subject should have been taught and assessed in 'such a way' long ago. He said that students could apply much better knowledge in their artwork and that they could be trained to be much more creative in the new syllabus.

'Kaming' mentioned about his 'contract' job nature and he was worried that his teaching contract would not be renewed in the new academic year. He mentioned that with the annual contract practices in his school, it would be very hard to attract the enthusiastic and 'good' teachers to stay in the profession.

<p>004 'Ngayee' F</p>	<ul style="list-style-type: none"> ◇ 16 years teaching experience ◇ Teaching Putonghua and Geography ◇ Administrative duties (staff development, External School Review) ◇ New Territories East (Tai Po), special education secondary school, aided
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'Ngayee' was introduced to me through a teacher taking the CFP (Certificate for Principalship) course. NGAYEE described herself as a dedicated teacher who decided to contribute to special education in Hong Kong.

'Ngayee' emphasized that the special education schools in Hong Kong had to follow all the policy and reform measures in the HKEMB Education Reform. Although the students in the special education school would never 'compete' with the grammar secondary schools for academic excellence, they were expected to follow the administrative procedures of the education reform measures, including the Self-evaluation exercise, the External School Review appraisal and the New Senior Secondary curriculum.

'Ngayee' mentioned about the extreme learning diversity that frontline teachers in the special education stream had to deal with. She also mentioned about the history of the special education schools' establishment. She explained that special education schools could not attract enough 'qualified' teachers to work in the frontline because most students in the special education stream would not be able to excel.

'Ngayee' held a rather positive attitude towards the implementation of the lifelong learning Education Reform measures. She commented that her school dared to face constant 'change' because they had 'almost nothing to lose'. The frontline teachers could try out the curriculum reforms together with the implied pedagogy because most of their students would not be taking the territory's public examinations.

She emphasized that the lifelong learning reform measures had very different impact on different teachers in her school. For the more proactive and younger teachers, the Education Reform enhanced the pace of their professional development. However, for the older and under qualified teachers, the various benchmarking requirements and professional development training had created very negative feedback. She described the negative feedbacks as 'nagging' in the staff room'. Such repeated complaints had accumulated to low staff morale and high stress working environment.

005	✧ 5 years teaching experience
‘Wingkng’	✧ Teaching Computer Literacy, Computer and Information Technology
M	✧ Taking up administrative duties (data processing and SAMS)
	✧ New Territories West, Tuen Mun, Band 1 school, aided

‘Wingkng’ was introduced to participate in the research through a church friend. He had his education in America and held 2 Master Degrees before he entered the teaching profession. He frankly admitted that teaching was not his first priority career. He entered the profession just because he could not find a better paid job in 2000 when the economic conditions of HKSAR was in its trough. However, he now enjoyed working as a frontline teacher. He described his job as very ‘meaningful’.

‘Wingkng’ liked the school and the students and that he was teaching. He described his school as the ‘cream top BAND ONE school’ in the area. He seemed to be very proud of it. Most students were supposed to come from the ‘best supported families’ and the ‘most hardworking’ group. He described the students in his school as ‘highly motivated’ to learn and to excel. He emphasized that the numbers of ‘A’s acquired in the public examinations was the success indicator for the school, the parents and the students.

‘Wingkng’ described the school as ‘very conservative’ in making any changes. He regarded the lifelong learning Education Reform as something alienated from reforms in the learning and teaching culture in the secondary school. The school culture upheld students’ excellent academic performance in public examinations. He interpreted that the main focus of teaching in the school was still examination- oriented drills. He thought that the education reform measures took too much time from the students’ timetable and the school would not be able to afford it.

As he interpreted, so long as the students’ academic performance could be sustained at the top 5% among the public examinations entries, the best students would continue to choose the school and EMB could do nothing. If the school could continue to attract the ‘best’ students in the community, no body would care about to ‘reform’ or not.

As academic excellence was the utmost purpose for the school to serve, the lifelong learning education reform could not find a real root for development in the school. However, as WINGNG described, it did not matter.

<p>006 'Isachun' F</p>	<ul style="list-style-type: none"> ◇ Over 20 years teaching experience ◇ Teaching English language ◇ Heavy administrative duty (because of small school, in charge of many different sections) ◇ Hong Kong Islands, very mixed banding because of limited S1 applications, government
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'Isachun' was introduced to me through a teacher I met in a seminar. Her sharing in the interview reflected the experience of a teacher in a 'small' village school in HKSAR.

'Isachun' expressed that she had to take up very heavy administrative duty as there were not enough teachers in the school to share out the administrative workload. She explained that HKEMB required all government funded schools to follow the skeleton of the Education Reform. As the school was small (fewer than 250 students), there were not enough senior posts for the frontline teachers to take up. As a result, the senior teachers had to handle a lot of added-on administrative duties caused by the Education Reform.

'Isachun' described 'globalization' as something too 'remote' for her students. She described her students as 'islanders' who had few chances of traveling to the city of Hong Kong. She regarded the physical limitations of the school a big disadvantage for her students to be benefited from the lifelong learning education reform measures.

'Isachun' emphasized the importance of strengthening the moral education element in the HKEMB Education Reform. She was against the rationale of 'training lifelong learners' for the 'globalized economy'. She argued that education should not be only serving the business sector of the territory. She pointed out that the lifelong learning education reform agenda neglected the moral training of the students. Although 'civic education' and 'national education' were two of the reform elements, ISACHUN argued that these elements were not in context with the Confucius teaching.

'Isachun' described her school as one of the 'marginal' government secondary schools that the EMB planned to eliminate. As she interpreted, secondary schools that could not be able to recruit more than 23 Secondary One students had to face closure. Her school might be one of those. She expressed much anxiety and low staff morale due to the unexpected future employment opportunities in the profession.

007 'Meiling' F	<ul style="list-style-type: none"> ◇ 9 years teaching experience ◇ Teaching English ◇ Heavy administrative duties ◇ New Territories, Band 1 school, aided
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'Meiling' was the English panel-chairperson of what she described as a lower Band 1 CMI (Chinese Medium of Instruction) school in New Territories West. 'Meiling' described that she was shouldering the task of enhancing the English competencies of the students of the students.

When being asked about the lifelong learning Education Reform, she could only mention the related measures regarding the changes made to the English syllabus in the public examinations.

In the discussion of the reform measures, 'Meiling' emphasized that she was told (by her principal) that English was of paramount importance in the Education Reform agenda because students' performance in English in the public examinations would directly affect the school's Secondary One intake. She was told that if the school's English standard could not be sustained, the 'Banding' of the school would drop and that would affect the school's survival and the teachers' livelihood.

She described her school as a community with strong peer support and good morale. However, the Education Reform measures had made most of the teachers, especially the language teachers and the teachers with administrative duties 'too busy' to communicate with each other. It seemed the communication gap among the teachers with and without administrative duties had been widened ever since the introduction of the Education Reform measures.

Although the curriculum reforms were targeted at improving students' competencies rather than drilling students on examination skills, most subject teachers still focused on giving more examination practices to students when any changes in the public assessment system occurred. So the curriculum reforms were causing secondary schools to have more regular drillings rather than creating space for the teachers and the students to experiment the lifelong learning attitude and skills.

To 'Meiling', the Education Reform and the training of lifelong learners were two separate issues. The former was the 'cruel reality' and the latter was a 'beautiful dream'

008 ‘Yuenkwan’ F	<ul style="list-style-type: none"> ✧ 7 years teaching experience ✧ Teaching Music and English ✧ Administrative duties required (counseling, school promotion unit) ✧ New Territories North, Band 2, aided
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‘Yuenkwan’ had a very bad experience in the Education Reform and a lot of her comments on the Education Reform were rather negative. She described herself as one of the victims of the Education Reform and she expressed a lot of hard feelings and emotions in the interview.

What affected ‘Yuenkwan’ most was the professional development and the policies related to language improvement in the HKEMB Education Reforms. She described her experience as very unlucky because she was ‘born’ to the teaching profession during the most ‘frustrated’ years. She entered the teaching profession as a Music teacher. However, as there were not ‘enough’ Music lessons for her, she was assigned to take up some English lessons in 2000. The HKSAR language benchmark policy was introduced in mid-2000; stating that from September 2001, all the pre-service teachers of English and Putonghua had to be benchmarked before they join the profession. The serving teachers of English and Putonghua were also required to meet the prescribed benchmarks by taking language tests set by the Hong Kong Examination Authority.

‘Yuenkwan’ described her experience of being benchmarked a horrible nightmare. She failed the benchmark tests three times and was afraid that she might lose her teaching post if she could not pass the tests. She contacted HKEMB to express her stress and worries and was finally advised to take a language Degree course to make up for the test requirement. She enrolled in the course but found that the study mode also caused her much stress when added on her routine workload.

The professional development requirement, instead of helping her to improve her pedagogical skills, had caused her extreme physical and psychological burden which she described as ‘unbearable stress’. She described the stress symptoms as ‘always losing her temper to the students’ and ‘couldn’t help falling asleep’. The stress had lead her to think about quitting the profession.

During the interview, ‘Yuenkwan’ became very emotionally involved when the term Education Reform was mentioned although the benchmark policy was not directly related to the lifelong learning Education Reform measures’ implementation.

009 ‘Chunkin’ M	<ul style="list-style-type: none"> ✧ Over 20 years teaching experience ✧ Teaching Chinese and Chinese History, panel chairperson of Chinese ✧ Administrative duties, admission of S1 students, academic affairs ✧ Hong Kong (Central & West), Band 3, aided
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‘Chunkin’ was a very experienced teacher of Chinese and Chinese History. During the interview, he related a lot of the Education Reform measures to his interpretation of the hidden political agenda that the ‘Chinese’ and ‘British’ government had. He remarked 1997 as the watershed of almost all the ‘changes’ happened to the HKSAR.

‘Chunkin’ perceived the HKSAR Education Reform as a series of ‘movements’ to get rid of the ‘old’ things left in the colonial British government. The territory’s language policy (CMI & EMI) was remarked as a ‘political move’ to remove the British colonial influence of using English as the Medium of instruction.

‘Chunkin’ refused to see the lifelong learning education reforms as part of the HKEMB Education Reform after 1997. To him, lifelong learning was only a cover-up of the hidden agenda of the political change after 1997.

‘Chunkin’ had quite a negative emotion and feeling towards the lifelong learning reform agenda. He described his school as a ‘former Band 5’ and a present ‘Band 3 school’ that the HKEMB would like to ‘get rid of’. He described the majority teachers of the school as the ‘old batch’ who had more than 15 years teaching experience, whom the EMB also found most resistant to the ‘changes’ brought about in the Education Reform.

He mentioned about the Analects and the teachings of Confucius as a counter-interpretation of ‘lifelong learning’ and he also commented the lifelong learning Education Reform’s blueprint as something ‘too western’ to model on. Globalization was regarded as something happened in the commercial world and ‘Chunkin’ thought that education should not be directed by an economic orientation.

Although ‘Chunkin’ expressed that he was not under stress, he quoted a lot of examples from his colleagues and friends who experienced stress and emotional distress during the implementation of the HKEMB Education Reform measures.

<p>010 'Kamhong' M</p>	<ul style="list-style-type: none"> ✧ 11 years teaching experience ✧ No need to take up administrative duties ✧ Commercial subjects ✧ New Territories West, Kwai Chung & Tsing Yi, Band 2, aided
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'Kamhong' gave me the impression that he was not very keen on expressing himself and he always wanted to give objective comments by referring to the raw data. His answers were also short and to the point and he did not show much emotion during the interview.

'Kamhong' described his teaching life as 'on and off' as he changed schools rather often in recent years. He experienced different school's managements style and he said that actually different schools react to the lifelong learning Education Reform very differently.

He remarked that the lifelong education reform actually did not affect students a lot. However, it changed the teachers' mindsets and practices. He gave a lot of examples on how the schools spent a lot of effort on polishing the documents related to schools' Self Evaluation and External School Review to 'show-off' to EMB.

He also gave a lot of examples on how the commercial subjects were required to change accordingly to the new syllabus. He tried to list the routine of a 'junior teacher' who was not allocated any administrative duties. He proportioned the teaching time, lesson preparation time to the non-teaching duties like morning assembly, lunchtime duty, after school duty, meetings and school promotion activities to a 60% and 40% allocation. The implication was that 40% of the teaching and learning time of the school had been eroded by the non-teaching requirements of the school.

Although 'Kamhong' sounded objective in the interview by giving a lot of data on figures and proportions, he pointed out the importance of students' family support and parents' understanding of the lifelong learning reform measures in the success of the Education Reform. Under the current education scenario, 'Kamhong' commented that different parties were having different implications on the reform agenda and nothing could be done to align the focus of the reform unless the policy makers were willing to spend more time and effort to communicate with the frontline practitioners. 'Kamhong' remarked that he was still trying to seek for a school that could balance the school goal with the external requirement of the Education Reform.

011 ‘Hoiman’ F	<ul style="list-style-type: none"> ✧ 3 years teaching experience ✧ No need to take up administrative duties ✧ Teaching Chinese and Chinese History ✧ Kowloon, Sai Kung, Band 3, aided
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‘Hoiman’ was a very young teacher who entered the teaching profession when the lifelong learning Education Reform had already entered the final stage of its implementation, that was when the public assessment mechanism was to be implemented after the change of the theoretical and pedagogical transformation.

‘Hoiman’ had a very comprehensive description on the requirements of the curriculum change and the requirements of the public examination system. However, she admitted that she was not clear about what the lifelong education reform was about. She described that she remembered some booklets and pamphlets being distributed on ‘a group of funny ducks looking blankly to the sky’. She could only relate the lifelong learning Education Reform to slogans like ‘Learning is Fun’ and ‘Learning through Life’. However, she could not related the lifelong learning reform measures to the Education Reform measures that she was required to implement in her teaching life.

In her experience, the most significant change that the lifelong Education Reform brought about was the use of Information Technology. She described that the use of Information Technology had changed the way that students learn and the teachers teach. She admitted that ‘young’ teachers did not have much understanding of the background of the Education Reform though she thought that the ‘intention’ of the HKEMB Education Reform was ‘good’.

As ‘Hoiman’ was a teacher of the Chinese language, she gave a very detailed description on how the assessment mechanism of the Chinese subject was required to change in the curriculum reform. These changes were regarded by ‘Hoiman’ as the core of the Education Reform measures.

Although ‘Hoiman’ was a young teacher, she was concerned about the ‘sudden change’ that the Education Reform bought about. She expressed her worries about the students’ adaptation to the new examination requirement and commented that the ‘do away’ of recital requirement and rote learning in Chinese teaching might have detrimental effects to the study of Chinese in HKSAR.

012	◇ 2 years teaching experience
‘Waiyip’	◇ No need to take up administrative duties
M	◇ Teaching Mathematics and Information Technology
	◇ Kowloon, Wong Tai Sin, Band 2, aided secondary

‘Waiyip’ described himself as a proactive teacher who could adapt to the changing requirements of the Education Reform. His experience of the Education Reform was mainly related to the change of curriculum in the Mathematics and Information Technology syllabus.

He mentioned the ‘problem solving’ issue in the teaching of Mathematics and commented that it should be good for students to continue to learn the subject. He also brought up the issue of teaching Information Technology in school. He commented that students’ IT skills might be even better than most of the teachers. It was very difficult to ‘control’ the students’ behavior in the IT lessons. He commented that most students used IT on entertainment rather than learning. The IT syllabus was too ‘limited’ and too ‘boring’ for most of the junior secondary students.

He admitted that he did not understand much about the lifelong learning Education Reform as he described it as ‘not too much related to teaching’ and that ‘students would not be interested’ in it.

‘Waiyip’ had the impression that the term lifelong learning was to ‘change’ the teachers rather than the students. He explained that HKEMB wanted to promote the idea of lifelong learning among the teachers. That was why and how the HKEMB required teachers to take up 150 hours professional development (CPD) in every three years. He explained that he thought HKEMB wanted to create the scenario in secondary schools that teachers had to continue to learn. When students saw that their teachers had to continue to ‘go to seminars’ or ‘attend the Master Degree course’, students would then understand the necessity of lifelong learning.

‘Waiyip’ said that he realized ‘Globalization’ was the cause of the Education Reform. The commercial incentive of the Education Reform was too ‘very explicit’ to hide.

013	✧ 8 years teaching experience
'Rochlee'	✧ Have to perform administrative duties
F	✧ Teaching English language
	✧ Kowloon, Sham Shui Po, Band 3, 45 years' history, government

'Rochlee' regarded herself as a very competent teacher of English language and boasted that she could find 'any job' she liked if she quitted the profession immediately.

When talking about emotions, she mentioned that she would not have entered the teaching profession if she had predicted that the Education Reform was such 'a mess'. She regarded lifelong learning as a 'reform slogan' that could never be wrong. However, the implementation of the reform measures was regarded as 'extremely chaotic' and 'copycatting'

'Rochlee' thought that she was 'lucky' because the school that she was teaching had a very 'supportive culture' in which the principal was a 'reasonable' man. However, she mentioned that many of her friends who were English teachers had suffered a lot from the Education Reform.

When asked exactly about what reform measures had caused confusion and pressure among 'Rochlee's teacher-friends, she could not mention the exact policy measures. She mentioned about the ever increasing workload in marking and entering data in the assessment files. She also mentioned the profession development requirements (CPD) and the meetings required for collaborative teaching as a 'drain of resources'.

She explicitly stated that lifelong learning and Education Reform as 'two completely separated issues'. She mentioned that 'change' should be embedded in every lesson delivered and professional teachers should be entrusted with the expertise to deliver their lessons. The HKEMB Education Reform measures had done more harm than good to the enhancement of the teaching and learning in secondary schools. She regarded herself as a 'senior teacher' that had not been 'promoted' so that she could say 'No' to a lot of 'unreasonable' requirements. However, the junior teachers dared not.

As she mentioned, a lot of the junior staff had grievances but dared not expressed themselves. It would be leading to institutional problem in the future.

014	◇ 15 years teaching experience
'Kinglin'	◇ No need to take up administrative
F	◇ Teaching English language
	◇ Kowloon (Kowloon City) , Band 3, aided secondary

'Kinglin' described herself as a 'contented' and 'not ambitious' English teacher who dedicated herself to teaching and helping the less able students.

She admitted that although she experienced the HKEMB Education Reform, she did not understand much about the lifelong learning Education Reform other than a 'slogan'. She claimed that she had studied 'all' the education reform documents that were supposed to affect the teaching of the English subject.

When asked about the 'Learning in Life and Learning through Life' reform document, she replied that she was only concerned about the change that would affect the subject that she taught and that the document should have nothing to do with the students. She did not read it and seemed that she had not heard of it.

'Kinglin' gave a lot of details on the syllabus and examination format changes as the data she collected for the 'education reform'. She described her experiences in the HKEMB seminars on the delivery of the new curriculum requirements in the subject of English. She mentioned that the HKEMB and the Hong Kong Examination Authority did not have enough communication before the new policies and measures related to public examinations were released. The frontline teachers had 'nothing to rely on' when they had to implement the 'change' in the classrooms. She was afraid that students would 'lose confidence' in their teachers if they could not deliver the examination requirements confidently.

'Kinglin' reported the stress experience she had in recent years. She said that she had occasional 'rash' in her arms and legs which required medication. The doctor said that such rashes were stress related. 'Kinglin' mentioned that the 'too often' changes required in the subject's public examination syllabus had already caused her much anxiety. She would not bother to know more about the broader issues related to the Education Reform.

015	◇ Over 20 years teaching experience
‘Waihung’	◇ Vice-principal
M	◇ Teaching Chemistry
	◇ New Territories (Tuen Mun), Band 1, aided

‘Waihung’ was the vice-principal of a Band 1 CMI school in New Territories West. He perceived the lifelong learning Education Reform as the government motive to use the ‘teachers’ as ‘agent’ of change in the era of lifelong learning.

He perceived the Education Reform as change from the ‘curriculum’ to the ‘practice of teachers’. He described the curriculum as ‘moving the teachers to change’ and that the assessment mode as ‘leading the schools to practice in a different way’. From his perspective, the school administration was also changing accordingly to the requirement of the External School Review practice. The Education Reform was obviously top-down and schools could do nothing but to follow.

‘Waihung’ pointed out that before 1997, secondary schools were under the administration of the government’s Education Department (ED). WAIHUNG described that the policy measures of ED were much clearer than the EMB. After 1997, HKEMB was trying to integrate school administration into the human resource planning of the territory. Direction given on the school’s administration was becoming very vague. There were too many ‘school-based’ measures to be developed.

‘Waihung’ commented that although school-based administration claimed to be a decentralized measure, it was only a move to delegate accountability to the secondary schools. Many schools just lost their direction in the school-based reforms. Schools were held more responsible for their own survival, including the recruitment and admission of Secondary One students. To WAIHUNG, these chances were unfair to the administrative staff of the secondary schools.

‘Waihung’ had a good understanding of the change required in the EMB curriculum reform. However, when comparing the ‘Learning in Life and Learning through Life’ reform with the other Education Reform measures, he could not state the difference. On the whole, WAIHUNG focused on the change in secondary schools’ administration rather than the goal of the implementation of the lifelong learning Education Reform.

<p>016 'Cheong' M</p>	<ul style="list-style-type: none"> ✧ 18 years teaching experience ✧ Take up administrative duties ✧ Teaching Science subjects ✧ New Territories, Yuen Long, Band 2, aided
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'Cheong' regarded himself as a dedicated Science teacher. He said that he loved teaching but was not interested in carrying out the administrative duties.

He held a positive view on the implementation of the lifelong learning Education Reform in secondary schools in Hong Kong. He mentioned that the school that he was teaching was a new school in a 'newly developed' district in the New Territories. Competitions among the schools were keen and many secondary schools were willing to try out new measures in the curriculum. He stated that the school had a very clear school mission to train students to be an 'upright' person and that learning through life was also the attitude to be promoted in the school.

He described that although there were a lot of new measures being implemented, most teachers were willing to devote more time to try-out the possibilities of the reform measures and to make those measures 'work' in the school so as to benefit the students.

What he had reservations on the lifelong learning Education Reform's implementation was the 'heaps and piles' of documents to be completed when each and every one of the new reform measures was to be introduced.

He perceived that through the process of the implementation of the Education Reform, the school had more collaboration with the organizations in the community. He thought that it was the right direction to merge students' learning in school with the real life experiences in the community.

He described that in recent years, teachers themselves were made to become lifelong learners. The mandatory 150 hours CPD had motivated the Degree holders to continue to study for their Master Degrees and some teachers were even aiming at the Doctorate Degree level. However, 'Cheong' concluded that he was looking forward to retirement rather than trying to survive in the never ending lifelong learning circle.

017 'Kowksin' M	<ul style="list-style-type: none"> ✧ Over 20 years teaching experience ✧ Academic Committee chairperson ✧ Teaching Mathematics ✧ New Territories West, Yuen Long, Band 2 aided
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'Kowksin' was my secondary schoolmate. However, we lost contact in the past 26 years until I reached him through a teacher's friend for this research.

'Kowksin' was leading the academic development of the school. He expressed that it was very difficult to implement the changes of the Education Reform in the classrooms. He remarked that it was very difficult for teachers to 'change' their way of delivery in the classrooms overnight. 'It takes much more time than expected to change the teachers' practices'. He said it had long been in the history of teaching that teachers were playing the role of knowledge giver. The new role of 'facilitator' sounds attractive, but how could a facilitator play the role of 'monitor' and 'discipline mater' in the classroom at the same time? It would be very confusing to many of the teachers.

He remarked most teachers were willing to change. However, the criteria of the change required had not been clearly stated. Most teachers could only follow as the public examination syllabus because it was the most clearly written document for the frontline teachers to follow. He said that most teachers would not care what education reforms were about. It was only the requirement in the public examination system that most teachers would pay attention to. He thought that most teachers in his school were still seeing themselves as the teachers of 'the subject'. The success or failure; their reward or demerit would count on their students' public examinations results. Not only the teachers perceived the success or failure in school in such a way, but also the parents who were paying a more significant role in the education reforms would judge the school upon the students' performance in the public examinations.

'Kowksin' remarked that the reform measures in the curriculum reform could only help to realize the ideal of the lifelong learning education reform to a very limited extent. With the implementation of the New Senior Secondary curriculum and the new public examinations -Hong Kong Diploma of Secondary Education (HKDSE), the teaching practices in the classroom might gradually be shifted through the new forms of assessment required by the public examinations. However, it would take much time.

018	◇ Over 20 years teaching experience
‘Winghan’	◇ Teaching History and biblical knowledge
M	◇ Vice-principal
	◇ New Territories West, Tuen Mun, Band 2

‘Winghan’ was the vice-principal of a Band 2 school in New Territories West. He described himself as ‘a good assistant’ of the principal. When asked about the lifelong learning Education Reform, he said that he was in charge of the students’ affair and was not related much to the academic affairs of the school. When asked about the Education Reform, he said that he did not have much idea about the origin but thought that the reform measures had been implemented for ‘a few years’ in the territory.

‘Winghan’ said that students in his school had very low motivation to learn. Although they were obedient, they were rather passive in learning. Teachers had to do a lot of monitoring and supervision in students’ learning.

‘Lifelong learning was promoted by the principal of the school’ said ‘Winghan’ but ‘I think it is not much related to teaching’. To ‘Winghan’, the lifelong learning Education Reform was segregated from the change in learning and teaching in the school curriculum.

When asked about the curriculum change lead by the public examinations, ‘Winghan’ mentioned about ‘project learning’ and ‘formative assessment’. He also mentioned about the 150 hours CPD requirements. He commented that it was too ideal to expect teachers to become the ‘facilitator of knowledge’ if the students had not been trained for self-access and self-discipline. It was too demanding to induce the technique of high order thinking in the New Senior Secondary curriculum.

School-based measures on ‘reading to learn’, ‘peer observation’, ‘collaborative teaching’ and ‘staff development arrangements’ were mentioned as measures related to the implementation of the Education Reform.

‘Winghan’ commented that it was not fair to use the measurements in the Education Reform to judge the performances of all the secondary schools in the territory. He believed that finally, the fate of the school would still depend on the students’ performance in the one-off public examinations at the end of the secondary school years. If the paradigm of the parents could not be changed, the practices in secondary schools could not be changed.

019	◇ 6 years teaching experience
‘Feitang’	◇ Take up administrative duties
M	◇ Teaching Liberal Studies
	◇ Kowloon, Sai Kung, Direct Subsidy Scheme Secondary School

Being one of the Awardees of Teaching Excellence, ‘Feitang’ was seconded to work in HKEMB in 2006-2007 academic year. He had a very positive attitude on the lifelong learning Education Reform. However, he expressed that it was the leader of the school, the principal, who did not have enough understanding of the reform issues that caused the school to drag on the reform agenda.

He pointed out that the lifelong learning Education Reform had set the ‘correct goal’ for schools to reach. However, the HKEMB related reform measures had confused a lot of the frontline teachers. When education reforms were put under the political agenda and reform measures were related to retrenchment and human resource redeployment, the frontline teachers would feel frustrated. A lot of the effort, which should have been dedicated to the curriculum reforms, had been wasted on the argument of political issues like ‘language policies’, ‘school closure’ and ‘benchmarking’.

‘Feitang’ emphasized that frontline teachers should be pacified before the lifelong learning reform measures continued. He remarked that the final stage of the lifelong learning curriculum reform had begun when the assessment system was finally changed. Frontline teachers should be well equipped with the pedagogy to deliver the skills and attitudes related to lifelong learning education in the secondary schools classrooms. However, with the complication of the political issues, it deemed very difficult to reach the goal of lifelong learning Education Reform in the territory.

‘Feitang’ also mentioned the limitation of his school in meeting the education reforms. He pointed out that most principals had to report to their own school organizations. In recent years, most schools had to participate in the promotion activities which were not directly related to ‘learning and teaching’. With the ‘change’ requirement set by the HKEMB, frontline teachers were facing huge challenges. The changing environment had confused a lot of frontline teachers and most of them could not tell the difference between the lifelong learning related reforms and the promotional activities carried out by school. EMB should be able to exercise more professional leadership and to continue the lifelong learning Education Reform.

020 'Wingyan' F	<ul style="list-style-type: none"> ✧ 8 years teaching experience ✧ No need to take up administrative duties ✧ Teaching Mathematics and PE ✧ New Territories West, Tuen Mun, Band 2, aided
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'Wingyan' had always been elected one of the most popular teachers of her school. She remarked that she treated the students like her own children and she spent a lot of time outside the classroom on the students' remedial work.

When asked about the lifelong learning Education Reform, she attributed the cause to 'changing the teachers before changing the students'. She admitted that she did not read any documents related to the lifelong learning education reform and that she never heard of the 'Learning in Life and Learning through Life' reform document. The lifelong learning education idea was only spread through the mass media. 'Wingyan' regarded the Education Reform only a slogan for the curriculum change to be implemented.

To 'Wingyan', the term lifelong learning implied that 'teachers had to continue to learn and to continue to adapt to the new syllabus'. 'Students had to continue to adapt to the new environment of the new assessment and so they had to continue to learn'.

'Wingyan' complained that the ever-changing requirement had 'eaten away' the time she could spend on her students. The documents required, no matter subject related or not, took up a lot of the lesson preparation and marking time of the teacher. A lot of the school-based reform measures, which were capped by the terms of the Education Reform (e.g. continuous assessment and project work), were actually repeated tests and drilling exercises. She felt rather discouraged by the school-based measures related to the implementation of the lifelong learning Education Reform.

She mentioned that the school had to strive for survival because of the shrinking population in the community. A lot of the school promotion activities were aiming at attracting the Secondary One students rather than improving the learning and teaching conditions of the school. 'Wingyan' turned rather emotional towards the end of the interview when she expressed that her identity of 'being a good teachers' was troubled. She wondered if she could continue to 'be a good teacher'.

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