

The Wider Benefits of Not-for-profit Education for the
Disadvantaged in Hong Kong

Patrick Yun

School of Social Sciences

Cardiff University

A thesis submitted for the degree of Doctor of Philosophy

March 2014

Abstract

This thesis investigates the benefits of not-for-profit education for disadvantaged learners in Hong Kong. The economic success of Hong Kong is seen by many as a miracle of the 156 years' British colonial governance. Hong Kong's world-class education system, which combines British meritocratic education traditions and Chinese conventional philosophies on hard work and respect for examination high fliers, has led to rapid and sustained economic development. However, those who do not fit into the mainstream selective education system are damagingly marginalised. Not-for-profit education providers are increasingly being used to try to repair some of this damage, but their effectiveness is not known. Statistical data on, for example, student enrolment, completion and graduation, courses offered and subsidies spent, do not completely and comprehensively reflect the broad number of ways in which these courses may make a difference.

Using the conceptual framework developed by the Centre for the Wider Benefits of Learning, this thesis draws on twenty-three in-depth life story interviews with four disadvantaged learner groups – young people who are 'not in education, employment, or training (NEET)', 'economically marginalised', 'older adults', and 'new immigrants from mainland China'. The analysis of these interviews uses a learner's capital and capability model and shows that different disadvantaged learners derive different kinds of benefits and capital gains from different not-for-profit education. Youth NEET perceived the highest gains in identity capital and economically marginalised learners reported the highest gains in human capital. Older adult disadvantaged learners perceived the highest gains in social capital and new immigrants from mainland China found human capital gains most important. Different disadvantaged learners also benefitted from different kinds and different levels of unexpected learning benefits which are seen as 'surplus' to their learning. Government subsidies and assistance through student loans and charity funding mean that not-for-profit courses are provided at lower cost than private provision. Moreover, since it is not government-provided, participants who have had a bad experience of government-provided compulsory education may feel they have a better chance of success with non-government courses. Not-for-profit education also tends to be able to offer more flexible provision which helps the disadvantaged learners who often have complex family and personal circumstances.

The implications of this research suggest that more can be done to optimise the social benefits and utilities of not-for-profit education in Hong Kong. In particular, the newly developed qualifications framework should flexibly include and recognise the contribution of not-for-profit education for the disadvantaged. 'Individual Learning Accounts' might also promote citizens' participation in lifelong and life-wide learning. Lastly, a new governing body, a Lifelong Learning Board, should be introduced to coordinate, administer and develop lifelong learning in Hong Kong.

Acknowledgements

I would like to express my special appreciation and thanks to my supervisor Professor Sally Power; who has been a tremendous mentor for me. I would like to thank her for encouraging my research and for allowing me to grow as a social sciences researcher. Her advice and support on both research as well as on my personal development have been priceless.

I would especially like to thank Mr Ian Brown and Ms Monica Slowikowska for helping me to proof-read my thesis.

Table of Contents

LIST OF FIGURES	VI
LIST OF TABLES	IX
LIST OF ACRONYMS AND ABBREVIATIONS.....	XII
INTRODUCTION TO THE RESEARCH	1

PART I SETTING AND BACKGROUND OF THE RESEARCH..... 13

CHAPTER ONE THE HONG KONG EDUCATION SYSTEM: AN EDUCATION SYSTEM NOT FOR THE DISADVANTAGED..... 15

1.1 Introduction	15
1.2 The Landscape of the Hong Kong Education System and the Education Opportunities for Disadvantaged Learners.....	18
1.3 Chinese Culture and the Demand for Not-for-profit Education.....	25
1.4 Not-for-profit Sector and Not-for-profit Organisations in Hong Kong.....	29
1.5 The Relationship between Government and the Not-for-profit Sector in Hong Kong	32
1.6 Not-for-Profit Education in Hong Kong.....	35
1.7 Summary.....	37

CHAPTER TWO LITERATURE REVIEW: ASSESSING THE OUTCOMES AND BENEFITS OF LEARNING..... 38

2.1 Introduction	38
2.2 Overview of Researching Outcomes and Benefits of Learning	39
2.3 Selected Research and Literature on the Study of Outcomes and Benefits of Learning.....	45
2.3.1 UNESCO's Four Pillars Lifelong Learning Outcomes (1996).....	45
2.3.2 European Union Bologna and Copenhagen Process, European Qualification Framework for Lifelong Learning, and European Lifelong Learning Indicators (1997-2010)	47
2.3.3 Social and Non-Market Benefits of Education by the OECD (2000-2006)	54
2.3.4 Quantitative Studies of the Wider Benefits of Adult Learning by the UK Government (1999-2012).....	59
2.3.5 Review of the Outcomes of Community Learning and Development by the Scottish Government (2006-2008).....	62
2.3.6 Study of the Wider Benefits of Adult Learning by the Welsh Assembly Government (2008)	67

2.3.7	Employment-related Learning Outcome Models (2007-2011).....	70
2.3.8	A Framework of Outcomes for Young People (2012).....	72
2.3.9	Other Outcomes and Benefits of Learning Research Studies	75
2.3.10	Research on Learners' Capability, Capital and Wider Benefits of Learning by the Centre for Research on the Wider Benefits of Learning (1999-2010).....	78
2.4	Summary.....	83

CHAPTER THREE RESEARCH METHODOLOGY85

3.1	Introduction	85
3.2	Methodological Approach	85
3.2.1	Aims and Scope of the Research.....	86
3.2.2	Measuring Wider Benefits Learning	87
3.2.3	Narrative Approach of Life Story Investigation	90
3.3	Ethical Issues	101
3.3.1	Ethics of Emancipatory Narrative Life Story Interview	101
3.3.2	Gaining Ethical Approval and Consent.....	101
3.4	Data Collection	103
3.4.1	Accessing and Selecting a Sample of Disadvantaged Learners.....	103
3.4.2	Developing Interview Schedule and the Data Collection Process	105
3.4.3	Issues in the Collection of Data	108
3.4.4	Transcribing and Translating the Interviews.....	110
3.5	Data Analysis.....	111
3.5.1	Coding and Thematic Analysis of the Interview Data	112
3.5.2	Scaling and Presenting the 'Data' for Comparative Purposes	113
3.5.3	Issues in the Analysis of Data	116
3.6	Summary.....	118

PART II FOUR GROUPS OF DISADVANTAGED LEARNERS 120

CHAPTER FOUR REPORT AND ANALYSIS OF DATA: WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION FOR 'NOT IN EDUCATION, EMPLOYMENT, OR TRAINING' (NEET) DISADVANTAGED YOUTH LEARNERS 121

4.1	Introduction	121
4.2	Background of the NEET Youth Problem in Hong Kong.....	122
4.3	The Wider Benefits of Not-for-profit Education for the Disadvantaged NEET Youth	127
4.3.1	Human Capital-Related Benefits: (1) Academic Qualifications; (2) Knowledge and Skills	132

4.3.2	Identity Capital-Related Benefits: (3) Attitudes and Values, Meaning and Purpose of Life; (4) Sense of Achievement, Self-confidence, and Understanding Self.....	137
4.3.3	Social Capital-Related Benefits: (5) Interpersonal and Communication Skills; (6) Friends and Social Networks; (7) Civic Participation.....	145
4.3.4	Other Benefits: (8) Health and Family Relationship.....	152
4.4	Summary.....	154

CHAPTER FIVE REPORT AND ANALYSIS OF DATA: WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION FOR DISADVANTAGED ECONOMICALLY MARGINALISED LEARNERS..... 156

5.1	Introduction	156
5.2	Background to the Disadvantaged Economically Marginalised Problems in Hong Kong	157
5.3	The Wider Benefits of Not-for-profit Education for the Disadvantaged Economically Marginalised Learners	161
5.3.1	Human Capital-Related Benefits: (1) Income and Standard of Living; (2) Certificates and Qualifications; (3) Job Skills and Job Mobility ...	166
5.3.2	Identity Capital-Related Benefits: (4) Self-confidence and Life Satisfaction; (5) Keeping up with the Times and Brainpower.....	179
5.3.3	Social Capital-Related Benefits: (6) Friends and Social Networks; (7) Interpersonal and Communication Skills; (8) Family Relationship.....	186
5.3.4	Other Benefits: (9) As a Model to Motivate Child Learning; (10) Plan for Retirement	193
5.4	Summary.....	197

CHAPTER SIX REPORT AND ANALYSIS OF DATA: WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION FOR DISADVANTAGED OLDER ADULT LEARNERS 200

6.1	Introduction	200
6.2	Background to the Disadvantaged Older Adults' Problems in Hong Kong.....	200
6.3	The Wider Benefits of Not-for-profit Education for the Disadvantaged Older Adult Learners	204
6.3.1	Social Capital-Related Benefits: (1) Friends and Social Networks; (2) Civil Participation	208
6.3.2	Human Capital-Related Benefits: (3) Knowledge and Skills; (4) Job Opportunity	216
6.3.3	Identity Capital-Related Benefits: (5) Motivation to Learn and Learning Needs; (6) Reduce Stress and Enjoyment; (7) Plans and Goals; (8) Open-mindedness	219
6.4	Summary.....	226

CHAPTER SEVEN REPORT AND ANALYSIS OF DATA: WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION FOR DISADVANTAGED NEW IMMIGRANTS FROM MAINLAND CHINA228

7.1 Introduction 228
7.2 Background of the Problems of New Immigrants from mainland China in Hong Kong 229
7.3 The Wider Benefits of Not-for-profit Education for the Disadvantaged New Immigrants from mainland China Learners 233
7.4 Summary..... 246

PART III A CONCLUDING DISCUSSION.....248

CHAPTER EIGHT CROSS GROUP COMPARISON OF THE WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION249

8.1 Attributes of the Learners’ Backgrounds and the Perceived Wider Benefits of Learning..... 249
8.2 Wider Benefits of Learning and Learners’ Capital 251
8.3 Benefits of Learning and the Learner Surplus..... 257
8.4 Implications of and Discussion about the Research Findings 261
 8.4.1 Personal Attributes and Life-changing Incidents 261
 8.4.2 Presumptions and Expectations on the Learning Outcomes and Benefits. 262
 8.4.3 Negative Impacts and Influences 264
 8.4.4 Joint Learning Outcomes and Social Outcomes 265
 8.4.5 Chinese Cultural Aspiration Towards Not-For-Profit Education and Learning 266
 8.4.6 Implications for using the Conceptual Framework of Wider Benefits of Learning in the Hong Kong Context..... 267

CHAPTER NINE POLICY IMPLICATIONS AND THE FUTURE RESEARCH IN WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION271

9.1 Policy Implications 271
 9.1.1 The Need to Include Not-for-profit Education in the Qualifications Recognition System and Individual Learning Accounts (ILA) 272
 9.1.2 The Need to Rebalance Educational Resources..... 276
 9.1.3 The Need for a New Governing Body: Lifelong Learning Board 277
9.2 The Limitations of the Research..... 281
9.3 Questions for Future Research 283
9.4 Closing Comments 285

BIBLIOGRAPHY	287
APPENDIX I: SEMI-STRUCTURED LIFE STORY INTERVIEW SCHEDULE.....	298
APPENDIX II: SAMPLE DATA ANALYSIS.....	302
APPENDIX III: SAMPLE PARTICIPATION INFORMATION SHEET AND CONSENT FORM ..	311
APPENDIX IV: DISADVANTAGED LEARNERS' LIFE STORIES	314

LIST OF FIGURES

Figure 2.1: Timeline of the selected research study of the outcomes and benefits of learning (Source: This research)	40
Figure 2.2: The two notions of learning outcomes and its relationships and interactions with learner's capabilities and capital (Source: This research).....	43
Figure 2.3: Learning – outcomes and benefits, extracted from Bertelsmann Stiftung (2010, p. 14).....	50
Figure 2.4: Assessment of the evidence base for factors that mediate education effects on health and well-being outcomes and behaviours, OECD (2006 pp. 221-222)	59
Figure 2.5: Review and Update into the Wider Benefits of Adult Learning, BIS (2012c, p. 7).....	61
Figure 2.6: The youth outcomes model, The Young Foundation (2012, p. 12)	74
Figure 2.7: Learner's capabilities and capitals and the outcomes and benefits of learning (Source: This research)	79
Figure 2.8: Conceptualisation of the wider benefits of learning, Schuller et al. (2004, p. 13)	80
Figure 3.1: Dynamics and interrelationships between learner's capabilities and capitals, learning activity and process, and outcomes and benefits of learning (Source: This research)	86
Figure 3.2: Range of questions covered in the semi-structured life story interview. (Questions were only asked when needed in order to minimise the possible interruption or corruption of the disadvantaged learner's life story.).....	106
Figure 3.3: The relationship between the learner's expected, perceived and achieved gains/losses in learning benefits and the notion and measurement of learner surplus	114
Figure 3.4: An example of the different radar diagrams to show the different learning outcomes achieved by the disadvantaged learners.....	115
Figure 4.1: The wider benefits of not-for-profit education for the disadvantaged NEET youth learners.....	129
Figure 4.2: Summary of the different levels of capital gains and the learner surplus of the disadvantaged NEET youth not-for-profit education according to Schuller et al. (2004)'s conceptualisation of wider benefits of learning framework.....	130
Figure 5.1: The wider benefits of not-for-profit education for the disadvantaged economically marginalised learners.....	164
Figure 5.2: Summary of the different levels of capital gains and the learner surplus of the economically marginalised disadvantaged learners according to Schuller et al. (2004)'s conceptualisation of wider benefits of learning framework.....	165
Figure 6.1: The wider benefits of not-for-profit education for the disadvantaged older adult learners	206
Figure 6.2: Summary of the different levels of capital gains and the learner surplus of the disadvantaged older adult learners according to Schuller et al. (2004)'s conceptualisation of wider benefits of learning framework	207
Figure 7.1: The wider benefits of not-for-profit education for the disadvantaged new immigrants from mainland China learners	236
Figure 7.2: Summary of the different levels of capital gains and the learner surplus of the disadvantaged new immigrants from mainland China learners according to	

Schuller et al. (2004)'s conceptualisation of wider benefits of learning framework	237
Figure 8.1: The achieved capital gains of the four disadvantaged learner groups in Hong Kong.....	253
Figure 8.2: Learner surplus and achieved capital gains of the four different disadvantaged learner groups in Hong Kong.....	258
Figure 8.3: The original 'Learner's capabilities and capitals and the outcomes and benefits of learning model' (from Figure 2.7) and the 'Traditional Chinese philosophies in virtues and morality' (Source: This research).....	269
Figure 9.1: The expected and achieved learning outcomes of Gary's not-for-profit education experience.....	320
Figure 9.2: The expected and achieved gains in capital and the learning surplus of Gary's not-for-profit education experience	321
Figure 9.3: The expected and achieved learning outcomes of Yash's not-for-profit education experience.....	328
Figure 9.4: The expected and achieved gains in capital and the learner surplus of Yash's not-for-profit education experience	329
Figure 9.5: The expected and achieved learning outcomes of Miranda's not-for-profit education experience.....	334
Figure 9.6: The expected and achieved gains in capital and the learning surplus of Miranda's not-for-profit education experience.....	335
Figure 9.7: The expected and achieved learning outcomes of Jane's not-for-profit education experience.....	339
Figure 9.8: The expected and achieved gains in capital and the learner surplus of Jane's not-for-profit education experience	340
Figure 9.9: The expected and achieved learning outcomes of Mary's not-for-profit education experience.....	345
Figure 9.10: The expected and achieved gains in capital and the learning surplus of Mary's not-for-profit education experience	346
Figure 9.11: The expected and achieved learning outcomes of Kwai-fun's not-for-profit education experience.....	350
Figure 9.12: The expected and achieved gains in capital and the learner surplus of Kwai-fun's not-for-profit education experience.....	351
Figure 9.13: Map showing Wing-han's migration from Changsha, Hunan (A) to Zhuhai, Guangdong (B), finally settling down in Hong Kong	353
Figure 9.14: Summary of the Timeline of Wing-han's Life Story.....	356
Figure 9.15: The expected and achieved learning outcomes of Wing-han's not-for-profit education experience.....	361
Figure 9.16: The expected and achieved gains in capital and the learning surplus of Wing-han's not-for-profit education experience	362
Figure 9.17: Map showing Sandy moved from Guizhou (A) to Guangzhou (B) and finally settled down in Hong Kong.....	364
Figure 9.18: Summary of the Timeline of Sandy's Life Story.....	366
Figure 9.19: The expected and achieved learning outcomes of Sandy's not-for-profit education experience.....	369
Figure 9.20: The expected and fulfilled gains in capital and the learning surplus of Sandy's not-for-profit education experience	370
Figure 9.21: Comparison of the wider benefits of not-for-profit education of disadvantaged new immigrant from mainland China learners of Wing-han and Sandy.....	372

Figure 9.22: Comparison of the expected and achieved gains in capital and the learner surplus of Wing-han and Sandy's not-for-profit education.....373

LIST OF TABLES

Table 1: Not-for-profit education programmes covered in this research (Source: This research).....	7
Table 1.1: Aged 15 and over with post-secondary educational attainment, number of institutes offering adult education / tutorial / vocational courses, and number of student enrolments in institutes offering adult education / tutorial/ vocational courses. (Source: HKSAR Government 2009, 2012a)	18
Table 1.2: Total and Recurrent Public Expenditure on Education (Source: HKSAR Government 2009, 2013a)	19
Table 1.3: Recurrent government expenditure on education (Source: HKSAR Government 2009, 2013b)	20
Table 1.4: Population Aged 15 and Over by Age Group and Educational Attainment (Highest Level Completed) (Source: HKSAR Government 2011)	21
Table 1.5: Typology of Hong Kong’s Voluntary Organisations (Source: Lam and Perry 2000).....	31
Table 2.1: Economic and social outcomes of learning (measures and indicators). Bertelsmann Stiftung (2010, p. 33).....	51
Table 2.2: Catalogue of outcomes of schooling, Wolfe and Haveman (2001, p. 224)	55
Table 2.3: Education systems’ objectives related to civic literacy, by level of analysis, Mainguet and Baye (2006 p. 157).....	57
Table 2.4: Assessment of the evidence base for education effects on health and well-being outcomes and behaviours, OECD (2006 pp. 216-218)	58
Table 2.5: Outcomes of community learning and development, Communities Scotland (2006).....	62
Table 2.6: Social capital outcomes of community learning and development, The Scottish Government (2008)	65
Table 2.7: The wider benefits of adult learning, NIACE Dysgu Cymru (2008, pp. 14-22)	68
Table 2.8: Generic employability skills, Centre of Developing and Evaluating Lifelong Learning (2007, p. 5).....	71
Table 2.9: The Essential Learning Outcomes, Association of American Colleges and Universities (2011).....	72
Table 3.1: Disadvantaged learner profile and interview details	104
Table 3.2: The four thematic disadvantaged learner groups based on the social discussions in recent years in Hong Kong	112
Table 3.3: The degrees of the expected and the achieved learning outcomes	113
Table 3.4: The degrees of the disadvantaged learner’s expected and achieved gains in capital.....	113
Table 3.5: An example of how a disadvantaged learner’s capital gains are rated	115
Table 4.1: Summary of wider benefits of not-for-profit education for the disadvantaged NEET youth learners.....	128
Table 5.1: Summary of wider benefits of not-for-profit education achieved by the disadvantaged economically marginalised learners.....	163
Table 6.1: Summary of wider benefits of not-for-profit education achieved by the disadvantaged older adult learners.....	205
Table 7.1: Summary of wider benefits of not-for-profit education achieved by the disadvantaged new immigrants from mainland China learners.....	235
Table 8.1: Attributes of the disadvantaged learners’ backgrounds that have affected their not-for-profit education and the outcomes and benefits attained	250

Table 8.2: The Wider Benefits of Not-for-profit education achieved by the disadvantaged learners in Hong Kong	251
Table 8.3: The perceived capital gains by different disadvantaged learner groups in Hong Kong.....	255

LIST OF ACRONYMS AND ABBREVIATIONS

AAC&U	Association of American Colleges and Universities
ATS	Award Title Scheme (Under HKQF)
BIS	Department for Business, Innovation & Skills
CCLI	Canadian Composite Learning Index
CDELL	Centre of Developing and Evaluating Lifelong Learning
CERI	Centre for Educational Research and Innovation
CfPS	Centre for Public Scrutiny
CoP	Commission on Poverty
CWBL	Centre for Research on the Wider Benefits of Learning
DfE	Department for Education
DfEE	Department for Education and Employment
ELLI	European Lifelong Learning Indicators
EQF	European Qualification Framework for Lifelong Learning
ERB	Employees Retraining Board
EU	European Union
FCE	Federation for Continuing Education in Tertiary Institutions
GCSE	General Certificate of Secondary Education
GDP (PPP)	Gross Domestic Product (Purchasing Power Parity)
GES	Generic Employability Skills
HKALE	Hong Kong Advanced Level Examination
HKCEE	Hong Kong Certificate of Education Examination
HKCSS	Hong Kong Council of Social Service
HKDSE	Hong Kong Diploma of Secondary Education Examination
HKQF	Hong Kong Qualifications Framework
HKSAR	Hong Kong Special Administrative Region
ICNPO	International Classification of Not-for-profit Organisations
ILA	Individual Learning Accounts
IVE	Hong Kong Institute of Vocational Education
NEET	Not in education, Employment or Training
NGO	Non-governmental Organisation
NIACE Dysgu Cymru	National Institute of Adult Continuing Education, Welsh Assembly Government
OECD	Organisation for Economic Co-operation and Development
PISA	Programme for International Student Assessment
QF Credit	Use of Credit (Under HKQF)
SROI	Social Return on Investment
UNESCO	United Nations Educational, Scientific and Cultural Organisation
VTC	Vocational Training Council
YETP	Youth Employment and Training Programmes
YPTP	Youth Pre-employment Training Programme
YWETS	Youth Work Experience and Training Scheme

INTRODUCTION TO THE RESEARCH

This introduction explains why and how this research was formulated, rationalised, and structured. It starts with offering a brief background of the Hong Kong Education System and the recent rapid development of the not-for-profit education after Hong Kong return to China, which it attempts to associate the current social and educational contexts to support the motives and needs to conduct this research. The research objectives and questions to be answered in this study are also provided in order to articulate the scope and boundary of this study. In addition, the rationale of the research, definition of the key terms used, and the organisation and structure of the study are also demonstrated in this introduction.

A brief background of the Hong Kong Education System and the development of the Not-for-profit Education

The Hong Kong education system has long been seen by many people as a very successful one. According to the OECD PISA (2012) assessments of international student performance, in reading and science Hong Kong ranked number two behind Shanghai, China and ranked number three in mathematics after Shanghai, China and Singapore. The success of the Hong Kong education system can also be measured and represented by the high GDP output where the GDP per capita (PPP) was US\$52,700 in 2013 (Central Intelligence Agency 2013), according to which it ranked number fourteen in the world and number three in Asia behind Macau and Singapore. Moreover, public spending on education amounted to the equivalent of US\$10.1

billion, representing 18.9% of total public expenditure, and the percentage of school enrolment in compulsory education reached 100% (The World Bank 2012) also showing the success of government policy of intervention on education development in Hong Kong. Although taking into consideration international student performance comparisons, economic output and productivity, and public spending and education enrolments, it seems Hong Kong has offered very good value and returns on education for the public. However, not all citizens in Hong Kong can reap and enjoy the success.

To many socially and economically marginalised citizens, for example the not-in-education, employment or training youth, the unemployed and working poor, the vulnerable elderly and the deprived new immigrants from mainland China, the success of the Hong Kong education system has actually brought them no direct benefits, but marginalised and limited their opportunity to contribute to society. Without proper and recognised academic qualifications and relevant job skills and knowledge, and lacking a comprehensive social welfare protection system in Hong Kong, many vulnerable socially and economically marginalised people are living in poverty and suffering substandard living conditions. The increasing social and economic changes, such as direct competition from mainland China, high living costs, rapid technological change, an ageing population, and transformation to a knowledge-based economy have made life for the disadvantaged even more difficult.

To address the educational inequality problems, the Hong Kong Special Administrative Region (HKSAR) government led several structural educational reforms after Hong Kong's return to Chinese sovereignty in 1997. These include the rapid expansion of higher education by increasing university degrees, higher diplomas and certificate programmes as well as the introduction of the controversial associate

degree programmes, the introduction of a series of youth vocation-related training programmes such as the Youth Pre-employment Training Programme and different apprenticeship programmes, the introduction of post-secondary bridging courses such as the Yi Jin Programme and foundation certificate programmes, employment retraining programmes and sectorial training programmes, and the new secondary curriculum and the introduction of the Hong Kong Diploma of Secondary Education (HKDSE) Examination to replace the Hong Kong Advanced Level Examination (HKALE).

The education system reforms in Hong Kong, which were originally aimed to improve and to supply high quality manpower to make Hong Kong ready for the twenty-first century knowledge-based economy, have come under different criticisms. One of the most common criticisms is of not taking care of the interests and needs of the socially and economically disadvantaged. Other criticisms and social concerns include the policy intentions and the dominant and unrepresentative policy decision-making process, the suitability of the educational policy to address the needs of multi-dimensional economic and social developments, the quality and quality assurance of teaching and learning activities, especially on post-compulsory education, the appropriateness of the school curriculum and assessment method for the twenty-first century, impacts on the newly developed qualifications framework, credit transfer system and the international recognition strategy, sources of funding and student finance problems, educational opportunity and social mobility, and allocation of educational resources to support lifelong learning. Despite the HKSAR government's active initiative and leadership on recent educational reforms, it has been condemned as having a lack of vision in its planning for future manpower needs and has worsened social inequality in Hong Kong.

The not-for-profit sector and voluntary organisations have had a long and successful history in Hong Kong since the early 1940s when millions of refugees escaped from the civil war in China and settled in the British colony of Hong Kong, originally a small fishing society (Lee 2005). In the 1970s, not-for-profit voluntary organisations started to introduce adult education courses in the form of part-time night schools to offer education and learning opportunities for disadvantaged and poor students to advance themselves. In the last two decades, because of the rapid economic and social development and transformation, the demand for and number of enrolments in different kinds of continuing education programmes have increased sharply. Following this social trend and to satisfy the increasing demands of education and training for disadvantaged learners, the not-for-profit organisations in Hong Kong have offered different kinds of highly subsidised courses and programmes to those students who cannot afford to pay for private education. Since these courses and programmes are by definition not-for-profit, and by nature non-formal or informal, highly diverse and lacking in governance, the quality, credibility, and recognisability of the outcomes of not-for-profit education are questioned by the public. The mainstream advantaged society and businesses have perceived not-for-profit education programmes, such as the community-based interest and leisure-related courses, youth pre-employment training programmes, and even some employment retraining programmes, as just a social welfare activity for disadvantaged people or as a measurement and strategy for the government to temporarily reduce the number of unemployed, where it does not provide good quality and value for education and employment for disadvantaged learners and for society. (The detailed study of the development of the Hong Kong education system and the recent rapid growth of not-for-profit education for the deprived disadvantaged learners is set out in Chapter One).

Because of the increasing focus and importance of not-for-profit education in Hong Kong following the government's educational reforms, this research aims 1) To investigate, analyse and discuss the wider benefits and outcomes of not-for-profit education for vulnerable marginalised learners in Hong Kong, 2) To explore the interrelationship and the interactivity between learners' capability and capital, learning activities, and the wider outcomes and benefits of learning and 3) To inform and discuss the policy implications for the social value of not-for-profit education and its future development.

In order to achieve its objectives, this research sets out to answer the following questions:

1. What are the major groups of disadvantaged learners in Hong Kong and why and how are they deprived and alienated from the mainstream social and educational system?
2. How does not-for-profit education, as a subclass education measurement, affect or transform the lives of the disadvantaged in Hong Kong? What are the types and natures of benefits and outcomes of not-for-profit education from the disadvantaged learner groups' perspectives?
3. How do disadvantaged learners' 'capability and capital' affect and relate to the 'benefits and outcomes' of their not-for-profit learning and the interactions between them?
4. What are the social implications of the wider benefits of not-for-profit learning both in individual disadvantaged learners and at a social level? What should the government do to respond to the benefits and outcomes of not-for-profit education for the disadvantaged and for the society as a whole?

Rationale of the Research

There are three main reasons to undertake this research. One is the contribution that this study could make to the relatively under-researched area of not-for-profit education in Hong Kong and, in particular, how this special form of education contributes to or affects the transformation of the disadvantaged learner's life. In this sense, in-depth life story interviews and biographical research are the significant features of this study. Another reason is that being involved in different types of post-compulsory education (including not-for-profit education services) for a long period of time and with help from this accumulated knowledge and connection support, has helped the researcher to find a better understanding and position to conduct the research, and the research outcomes could help to reflect and inform future post-compulsory education policy change. The research could also possibly contribute to the enhancement of the disadvantaged learners' participation, engagement and achievement of not-for-profit education in the future. The last reason for undertaking the study was that the anticipated research outcome could help to promote and sustain not-for-profit education development in Hong Kong through active policy consultation participation and future longitudinal study.

Definition of Key Terms Used in the Thesis

Whilst recognising that there is a range of specialist terms used throughout the thesis (some of which are examined more thoroughly in later chapters), it is important at this stage to establish the definitions that have been adopted throughout the research, especially those that are contested. Several key concepts will be explored below,

including ‘not-for-profit education’, ‘disadvantaged learner’ and ‘wider benefits of learning’.

Not-for-profit Education

In this research, Salamon’s structural-operational approach is adopted to define the not-for-profit sector in Hong Kong. According to Salamon, the not-for-profit sector is defined as a collection of organisations that are institutionalised to a certain extent and separate from the government, not profit-seeking in purpose, self-governing, and voluntary (Salamon and Anheier 1997; Salamon et al. 1999). The structural-operational definition is useful in this research as it provides the necessary scope and foundation for theorising and pattern recognition.

The not-for-profit education programmes that have been involved in this research are shown in Table 1.

Table 1: Not-for-profit education programmes covered in this research (Source: This research)

Not-for-profit Programmes	Not-for-profit Organisations	Disadvantaged Learner Groups
Yi Jin Programme	<ul style="list-style-type: none"> • Federation for Continuing Education in Tertiary Institution (FCE): Continuing Education Arm of University 	NEET/ Economically Marginalised
Employment Retraining Programme	<ul style="list-style-type: none"> • Employment Retraining Board • Voluntary Organisation • Labour Union Organisation • Advocacy Organisation • Religion Organisation 	Economically Marginalised/ New Immigrants from mainland China/ Older Adults
Interest and Leisure-related Courses Language and Life Skills-related Courses	<ul style="list-style-type: none"> • Voluntary Organisation • Local Community Centre • Labour Union Organisation • Religion Organisation • Charity Organisation 	NEET/ Economically Marginalised/ New Immigrants from mainland China/ Older Adults
Family Learning Course	<ul style="list-style-type: none"> • Local Community Centre 	Economically Marginalised
Foundation Diplomas/	<ul style="list-style-type: none"> • Federation for Continuing Education in 	NEET Youth/

Certificates	Tertiary Institution (FCE): Continuing Education Arm of University <ul style="list-style-type: none"> • Further Education College • Vocational Training Council 	Economically Marginalised
Associate Degrees	<ul style="list-style-type: none"> • Federation for Continuing Education in Tertiary Institution (FCE): Continuing Education Arm of University 	NEET Youth
Primary, Secondary, Grammar School Curriculum	<ul style="list-style-type: none"> • Government Night School • Voluntary Organisation Night School 	Economically Marginalised
Sectorial Training Courses/ Employment Skills Training	<ul style="list-style-type: none"> • Voluntary Organisation • Non-governmental Organisation • Sport Association 	Economically Marginalised/ NEET Youth
Elderly Curriculum	<ul style="list-style-type: none"> • Elderly Academy 	Older Adults
Youth Pre-employment Training Programme (YPTP)/ Youth Work Experience and Training Scheme (YWETS)	<ul style="list-style-type: none"> • HKSAR Government Labour Department • Voluntary Organisation 	NEET Youth

Disadvantaged Learner

The broader definition of disadvantaged learner means those learners who have suffered from different degrees of deprivation in economic and social resources. According to Mayer (2003), the notion of ‘disadvantaged’ could better be explained by focused on where a ‘disadvantaged’ was ‘denied access to the tools needed for self-sufficiency’. Mayer (2003) emphasised that people see themselves as disadvantaged to the extent they are denied access to and use of the same tools found useful by the majority of society, for example autonomy, incentive, responsibility, self-respect, community support, health, education, information, employment, capital, and responsive support systems, and the feature of ‘disadvantagement’ is the presence of ‘barriers to self-sufficiency’. The barriers are the ways in which people are denied access to needed tools, and include unavailability of resources, inaccessibility to resources, the society’s disregard for a group, government and corporate practices, and certain conditions of the group itself. Based on the above, this research adapts the

definition suggested by Mayer (2003): '*A disadvantaged group is defined by the particular pattern of denied resources and barriers it faces.*'

Four disadvantaged groups of learners are targeted and defined in this research:

1. Not in Education, Employment, or Training (NEET) Youth Learners:
2. Economically Marginalised Learners;
3. Older Adult Learners;
4. New Immigrants from mainland China Learners.

All these disadvantaged learner groups suffer from different degrees of denial of different types of resources by different types and degrees of barrier. Detailed descriptions of these disadvantaged learner groups, the resources denied and the barriers that they face are provided in Chapters Four to Seven.

Wider Benefits of Learning

The study of the wider benefits of learning is at the centre of this research. In the last 50 years, academia and social scientists have tried to use different quantitative and qualitative inquiry methods and models to study and report the learning benefits, but since this is evolving over time and also because of the important implications for government and policymakers, it is still not easy to find an accurate description and definition to explain the notion of the wider benefits of learning. The word 'wider' in this research bears the following meanings: direct and indirect, economic and non-economic, market and non-market, private and public, internal and external, personal and social, intrinsic and extrinsic, and present and future. Although the nature of the wider benefits of learning is complex and is evolving, this research adapts the

conceptualisation of the wider benefits of framework suggested by Schuller et al. (2004) where the learners' capabilities and capitals are the determinants of benefits of learning and the achieved benefits of learning would affect the learners' capabilities and capitals simultaneously. More detailed discussion of the conceptualisation model and the meanings of wider benefits of learning are provided in the literature review in Chapter Two.

Outline and Organisation of the Thesis

This thesis consists of an introduction, three parts and nine chapters. The introduction briefly accounts for the reason why this thesis was written. Referring first to a review of the performance and the current reforms of the Hong Kong education system and its inequality problem, it draws attention to the importance of not-for-profit education in providing alternative education opportunities for the disadvantaged learner. Having described the aim and the nature of study, it then raises the objectives and the three research questions which the thesis attempts to answer. It is followed by the rationale of the research and the definition of key terms used in this thesis.

Part I of the research consists of three chapters and it aims to provide and illustrate the setting and background of the research.

Chapter One is a description of the background of the present study. The first part begins with an introduction of the development of the Hong Kong education system transited from the British colonial system to current educational reforms. Then it examines the education opportunities and their challenges for disadvantaged learners under the present education system. It is followed by an analysis of the relationship between Chinese culture and the growing demand for continuing education. Focus is

then directed to the not-for-profit sector in Hong Kong and its relationship with the government to address the important role of the not-for-profit sector in providing education for the disadvantaged.

Chapter Two introduces and discusses the terrain of the outcomes and benefits of learning by reviewing some of the selected research and literature and discussing key issues and implications that emerge. In order to contextualise this review, a chronological study and review of the development and application of the outcomes and benefits of learning is provided. Justifications on the selected conceptual learning outcomes and benefits models that are applied in this research and how this research possibly contributes to the knowledge and development of the outcomes and benefits of learning are also presented. A summary of the findings of the literature review and discussion is reported at the end of this chapter.

Chapter Three first outlines the theoretical framework and the scope and aims of the research. It is followed by an introduction to the methodology used in the thesis. It also explains and discusses the judgement on a decision to use a qualitative biographical life story approach to investigate the benefits of learning and the interrelationship and interactivity between learners' capabilities and capital and learning activity. Limitations of the chosen research methods and a summary of the discussion are reported at the end of this chapter.

Part II of the research reports on and covers the four data analysis chapters of the wider benefits of not-for-profit education for disadvantaged learners in Hong Kong. In Chapter Four to Chapter Seven, through detailed study of the disadvantaged learners' backgrounds and their attributes, their reasons and motivation to learn and their key life story events, the learners' perceived and achieved benefits of learning and the

capital gains as well as the learner surplus are explained and discussed. A cross-comparison of the benefits and capital gains among the four different disadvantaged learner groups is set out in Part III of the research.

Part III offers a concluding discussion of the research. Chapter Eight begins with a discussion of the research results of the relationship between disadvantaged learners' backgrounds and the perceived wider benefits of not-for-profit education. Discussion then moves to examine the different types and dimensions of the wider benefits of not-for-profit education as perceived by the four disadvantaged groups. It is then followed by a discussion of the implications of the results of the wider benefits of learning and learner surplus. Lastly, Chapter Nine leads to a discussion of the implications of the findings and the limitations of the research as well as questions left unanswered which indicate the need for further research.

PART I SETTING AND BACKGROUND OF THE RESEARCH

In the first part of this thesis, the aim is to provide the reader with the setting and background information of the research. It starts with discussing the Hong Kong education system and the research challenges that the function and the development of the post-British colonial education system is not for and does not aim to help disadvantaged pupils. The meritocratic education system is mirroring the social economic ideologies of the capitalist heaven of Hong Kong which the educational disadvantaged are penalised for due to their degraded social mobility and neglect by the mainstream education system. In studying the Hong Kong education system, Chapter One starts with looking into the landscape of the Hong Kong education system and the education opportunities for disadvantaged learners. It then follows a discussion on how Chinese culture plays an important role in affecting the demand of not-for-profit education and the development of not-for-profit organisation and not-for-profit education.

Following the introduction to the Hong Kong education system and the disadvantaged education opportunities, the research seeks to provide an in-depth literature review on research assessing outcomes and benefits of learning. In Chapter Two, a chronological study and presentation of the research starting from the late 1980s' economic aspects of learning outcomes and benefits to the early 2000s' development of learning outcomes framework and indices and to the recent focus on wider outcomes and benefits of learning. Introduction and discussion on the chosen analysis framework for the research – conceptualisation of wider benefits of learning – are also presented in Chapter Two.

A chapter on research methodology is set at the end of Part I of the research. Chapter Three begins by illuminating the rationale and the background of the chosen research method and approach – the life story approach – and by discussing the key principles of the narrative nature of life story method to investigate the wider benefits of not-for-profit education for the disadvantaged learners in Hong Kong. It then illustrates the detailed data collection process and reviews the limitations and the difficulties faced by the researcher in collecting data. The procedures and issues raised in the data analysis are addressed and discussed at the end of Chapter Three.

CHAPTER ONE

THE HONG KONG EDUCATION SYSTEM: AN EDUCATION SYSTEM NOT FOR THE DISADVANTAGED

1.1 Introduction

The first part of this chapter begins with an introduction to the development of the Hong Kong education system since it transferred from the British colonial system to the current educational reforms. Then it examines the disadvantaged learner education opportunities and their challenges under the present education system. It is followed by analysing the relationship between Chinese culture and the growing demand of not-for-profit education. Focus is then directed to the not-for-profit sector in Hong Kong and its relationship with the government to address the important role of the not-for-profit sector in providing education for the disadvantaged. A summary is also provided at the end of the chapter.

Because of Hong Kong's history, the Hong Kong education system was developed along similar lines to the British education system until Hong Kong returned to Chinese sovereignty in 1997. A major educational reform took place in 2000 to respond to and address the rapid social and economic changes. The total government public spending on education was approximately 18.9% (HKSAR Government 2013a), the largest proportion of its expenditure each year showing its commitment to improve and to invest in better quality manpower. Moreover, the traditional Chinese value of academic success also supported the government decision and investment in education. Many Chinese students and their parents see excellent education and good examination results as the only route to a good job and a prosperous future. However,

obviously academic success is not guaranteed for everyone and those who fail in their public examinations have to seek alternative education pathways to advance themselves. To many socially and economically disadvantaged learners, not-for-profit education is the last resort as it normally accepts lower qualifications to join and the cost of education is comparatively low and, in most circumstances, subsidies are given. Not-for-profit education programmes, for example a year-long Yi Jin Programme which is designed as an alternative route for secondary school non-achievers to gain their Hong Kong Certificate of Education Examination (HKCEE) equivalent qualifications, have become very popular in the last few years and government loans and subsidies are available for disadvantaged learners when needed. The number of students enrolled in Yi Jin programmes increased from 4,170 in 2002 to 18,359 in 2010 (HKSAR Government 2012a).

In fact, the not-for-profit sector has a long history in Hong Kong. In the early 1960s, voluntary agencies, mostly from Christian religious groups, pioneered various kinds of initiatives to help immigrants who were escaping from the Chinese Civil War. During the 1970s and 1980s, in response to the rapid social and economic development, voluntary agencies supported by the Hong Kong government developed diverse social welfare services aimed at improving the general standard of living and meeting the changing social and economic needs. For example, new areas of social services such as rehabilitation, child and youth services, family counselling, elderly services, drug rehabilitation and community development have been developed (Lee 2005). Not-for-profit education also started in the 1970s. Adult night schools were set up to provide basic education, for example offering primary and secondary curricula, to the low education attainer. In the past, not-for-profit education only offered a kind of second chance education opportunity for those people who had missed the

opportunity to receive education or to those students who had failed in formal education pathways. Today, in response to the government's educational reform and to better address and fulfil the diverse social and economic developments and needs for different knowledge and skills, not-for-profit education has extended its services to provide a range of courses, for example job skills retraining programmes, personal capacity growth development programmes, interest and leisure-related courses, youth pre-employment training, Yi Jin and foundation certificate programmes, and even higher education programmes such as associate degrees and top-up degree programmes.

1.2 The Landscape of the Hong Kong Education System and the Education Opportunities for Disadvantaged Learners

From the outset, government statistical data on educational attainment, the number of education providers, and the number of student enrolments on post-secondary adult and vocational related education, show that there has been a huge improvement in the last 15 years for adult-related learning. Table 1.1 shows that the general academic attainment for people aged 15 and over has significantly improved from 17.4% in 1998 to 27.7% 2012. The number of institutes offering adult and vocational education and tutorials has increased from 606 in 1998 to 2,507 in 2012, and the number of student enrolments in adult education, tutorial and vocational courses has also grown from 125,685 in 1998 to 218,606 in 2012.

	1998	2012
Distribution of population aged 15 and over with post-secondary educational attainment (Non-degree and Degree courses)	17.4%	27.7%
Number of institutes offering adult education / tutorial / vocational courses	606	2,507
Number of student enrolments in institutes offering adult education / tutorial / vocational courses	125,685	218,606

Table 1.1: Aged 15 and over with post-secondary educational attainment, number of institutes offering adult education / tutorial / vocational courses, and number of student enrolments in institutes offering adult education / tutorial/ vocational courses. (Source: HKSAR Government 2009, 2012a)

Moreover, Table 1.2 shows that in terms of the total and the recurrent public expenditure on education, the HKSAR government has maintained around the same percentage of public spending on education in these two periods of time. In addition, according to the government budget report, both of these two total and recurrent

educational spendings remain the highest amongst all the different types of public spendings in Hong Kong (HKSAR Government 2009, 2013a).

	1998-99	2012-13
Total Public Expenditure on Education (HK\$ million)	50,780	79,105
Total Public Expenditure on Education as percentage of Total Public Expenditure	18.5%	18.9%
Recurrent Public Expenditure on Education (HK\$ million)	41,614	59,746
Recurrent Public Expenditure on Education as percentage of Total Public Expenditure	21.7%	21.3%

Table 1.2: Total and Recurrent Public Expenditure on Education (Source: HKSAR Government 2009, 2013a)

Drawn from the statistical data shown in Table 1.1 and Table 1.2, on the surface it seems that, in terms of the government's commitment to educational spending, the enhanced general level of education attainments, the increased number of education providers and the growing number of students enrolments, the Hong Kong education system for adults is developing in the right direction and the results appear to be positive. However, when looking more deeply into disadvantaged learning within the Hong Kong education system in the last 15 years, Table 1.3 shows that government spending, specifically on adult education, has been curbed. Due to government-run adult education being completely phased out in 2005 and its budget for disadvantaged adults cut to zero, other types of education showed a healthy continuing growth in spending. The provision of adult basic education, for example primary and secondary curricula, which was provided directly by the government, has now been transferred to the not-for-profit education providers and it reflects the HKSAR government policy shift to focus on formal and vocational education but not on helping and compensating for disadvantaged non-achievers' deficiencies in basic education.

	1998-99	2004-05	2005-06	2006-07	2007-08	2008-09	2012-13
	(HK\$ million)						
Pre-primary education	993	1,246	1,232	1,226	1,709	2,100	2,889
School education	24,328	29,094	29,107	29,224	30,536	33,366	39,569
Higher education	14,381	12,948	12,462	12,535	12,871	13,052	15,984
Vocational education	1,836	1,794	1,714	1,615	1,679	1,795	2,250
<i>Adult education</i>	76	34	10	0	0	0	0
Total	41,614	45,116	44,527	44,602	46,794	50,314	60,692

Table 1.3: Recurrent government expenditure on education (Source: HKSAR Government 2009, 2013b)

In addition, the claim of a ‘general improvement’ in the education level, demonstrated by the number of 15-year-olds and older with post-secondary education attainment up from 17.4% in 1998 to 27.7% in 2012 (Table 1.1), does not mean that everyone in society experiences and benefits from the same education qualification improvement. Cheung (2006) points out that a knowledge-based economy needs and is normally characterised by a large proportion of a highly educated working population. However after detailed study of the different age groups and the distribution of qualifications attainment, Table 1.4 shows that less than 30% of the middle-aged (between 40-64), the largest proportion of the population, has achieved post-secondary education qualifications. The post-secondary qualification attainment rates dropped even more sharply to 16.02% in the 50-54 group, 12.26% in 55-59, and 10.1% in 60-64. The illiteracy rate, represented by the aged 15 and over who have never attended school, is also high when compared with other developed Asian countries. Among the so-called ‘Asian Four Tigers’ countries, the illiteracy rate in Hong Kong is 6.5% and is the highest amongst the tiger countries when compared with Singapore (4.5%), Taiwan (3.9%) and South Korea (2.1%) (Central Intelligence Agency 2013). The gross enrolment ratio for tertiary education is also far below many developed countries. For

example the gross enrolment ratio of South Korea was 101 in 2011, while Hong Kong was 60 (UNESCO 2011).

Population Aged 15 and Over by Age Group and Educational Attainment in 2011									
Age Group	Educational Attainment (Highest Level Completed)							Total	Percentage of population achieved post-secondary education
	Primary and below		Secondary / Sixth Form		Post-secondary				
	No schooling/ Pre-primary	Primary	Lower Secondary	Upper Secondary / Sixth Form	Diploma / Certificate	Sub-degree course	Degree course		
15 - 19	761	68 365	187 547	141 546	20 258	1 702	3 514	423 693	6.01%
20 - 24	1 666	9 963	41 743	233 191	53 206	28 928	82 844	451 541	36.54%
25 - 29	4 587	20 481	71 340	181 508	37 341	39 026	179 832	534 115	47.97%
30 - 34	7 827	32 139	94 312	178 567	35 583	29 923	171 654	550 005	43.12%
35 - 39	11 535	50 020	117 631	177 530	30 522	23 533	151 835	562 606	36.60%
40 - 44	20 068	61 981	124 466	197 002	28 431	20 910	119 821	572 679	29.54%
45 - 49	31 327	112 941	128 487	227 608	28 430	21 019	101 923	651 735	23.23%
50 - 54	79 961	159 130	119 746	176 696	21 210	15 334	65 618	637 695	16.02%
55 - 59	100 754	151 560	95 994	101 852	16 846	5 605	40 458	513 069	12.26%
60 - 64	101 512	119 438	73 263	73 975	12 422	3 952	25 004	409 566	10.10%
65 - 69	80 672	61 291	35 233	33 939	6 465	2 697	14 003	234 300	9.89%
70 - 74	98 972	52 831	27 373	25 667	7 086	2 696	15 815	230 440	11.11%
75 - 79	121 591	40 423	16 135	13 989	3 495	1 314	8 204	205 151	6.34%
80 - 84	102 052	24 202	7 718	6 901	1 473	540	3 196	146 082	3.57%
85+	92 351	18 151	6 392	5 217	783	261	2 184	125 339	2.58%
Total	855 636	982 916	1 147 380	1 775 188	303 551	197 440	985 905	6 248 016	23.80%

Table 1.4: Population Aged 15 and Over by Age Group and Educational Attainment (Highest Level Completed) (Source: HKSAR Government 2011)

The curb in the government's budget on adult education, low post-secondary educational attainment for the majority of the middle-aged, the comparatively high illiteracy rate, and the low gross enrolment ratio for tertiary education within the region, all indicate and evidence the problem of a knowledge deficit of the workforce in Hong Kong. Based on these indications, it implies three major challenges and

problems for the manpower and education policy and the future competitiveness of Hong Kong: 1) Educational resources are not distributed fairly and widely to cover the diverse educational needs especially for the disadvantaged population. The increasing needs of lifelong and life-wide learning mean educational expenditure should be spread out to different life stages and this is seen as important to sustain long-term social and economic development; 2) The knowledge, skill levels and qualifications of the majority of middle-aged working adults are not compatible with the current knowledge-based requirements and standards which may also cause income inequality, poverty problems and substandard living conditions for the disadvantaged middle-aged group; 3) The effectiveness and appropriateness of the educational policy and governmental and society-wide support, for example promotion of the entitlement of lifelong learning, recognition of the learning outcomes within the Hong Kong Qualifications Framework and credit transfer systems, to support not-for-profit organisations to offer different non-mainstream voluntary-based or government subsidised-based programmes and courses for socially and economically vulnerable learners need to be addressed.

In fact, in terms of the wealth gap and income distribution, Hong Kong is the most inequitable place in Asia. The Gini index, an index measuring the degree of inequality in the distribution of family income in a country, shows that in 2011 Hong Kong ranked 11th in the list among all countries in the world while Singapore was 27th, Taiwan 91st, South Korea 109th, and China 30th (Central Intelligence Agency 2013). This implies the problem of income inequality in Hong Kong is very severe and challenging to the disadvantaged. The Commission on Poverty (CoP) showed that around 1.3 million people in Hong Kong, or a fifth of the population, were deemed to be living below the poverty line (HKSAR Government 2013c). Disadvantaged people

with low educational attainment especially amongst the middle-aged need to work longer hours, live below the average standard, are more vulnerable to social and economic changes, and are more likely to be unemployed, but also they are marginalised from all other social opportunities including further study. In fact, it is not easy for them to advance even through continuing education as many of these deprived middle-aged and their families are bound by different financial and family burdens such as child care, elderly care and other family commitments. Middle-aged females are more vulnerable due to their gender roles in the family and the general perceptions and inequalities towards their female identity and social status. This may also explain problems such as worsening income inequality and intergenerational poverty in Hong Kong. In addition, the middle-aged, especially women with heavy family burdens, because of their incompatible education qualifications and lack of relevant work skills which cause them to be excluded from the labour market, are also affected by their low family income and quality of living which in turn affects the supply of labour and possibly the productivity, total economic output and long-term competitiveness of Hong Kong. For example, in some developed countries such as South Korea, Japan and Singapore, due to higher general education qualification attainments, the participation and time in the labour market for women tends to be higher than in developing economies.

The Hong Kong education reforms which emphasise the development and support of continuing education can help to improve the general education attainments and fulfil the increasing need for continuing education and training, especially for the people who have possessed only below post-secondary educational qualifications. Wong (2005) articulates that continuing education in Hong Kong has opened up educational opportunities for those outside the traditional elite group, and Taylor (1994) asserts

that the provision of continuing education in Hong Kong has been ‘a catalyst for innovative change, uniquely in touch with the community and in the vanguard of changes that have already taken place elsewhere in the educational world’ (Taylor 1994).

In fact, as a part of the visions and goals of the Hong Kong educational reforms: ‘*to construct a diverse school system*’ (HKSAR Government 2000) and as a major strategy of the manpower and economic plan, the HKSAR government, through working with different not-for-profit organisations and establishments, developed different employment training programmes and vocational schemes for the general public which include, for example:

- Employees Retraining Board (ERB) retraining programmes, an independent statutory body under the Employees Retraining Ordinance work with numerous not-for-profit organisations offering government-subsidised training courses and provide retraining allowances to people who need job skills transformation;
- The Labour Department of the HKSAR Government under the two main training schemes – Youth Pre-employment Training Programme (YPTP) and the Youth Work Experience and Training Scheme (YWETS) – offers different training programmes to the unemployed and not-in-school young adults;
- Vocational Training Council (VTC) has a long history in Hong Kong and offers a huge variety of programmes with different levels of vocational-related certificate and diploma programmes and courses mainly targeting young adult learners with low educational qualifications.

1.3 Chinese Culture and the Demand for Not-for-profit Education

Decent and all-round formal proper education, the opportunity and ability to study and graduate from a reputable school, and success with flying colours in the public examinations, have long been a dream and perceived by hundreds and thousands of the Chinese culture-dominant Hong Kong citizens as a quick and direct link to a successful and wealthy future. In the ancient Chinese society and political system, success in state examinations not only led to great wealth and superior social status but also provided a path to political power. Family members, relatives, younger generations and even ancestors of successful state examination achievers would also benefit. Cheng (1998) claims parents in Hong Kong regard education as the proper and almost unique route for upward social mobility and this also explains the comparative ease of achieving universal education and a very low drop-out rate.

Kennedy argues that the British governance and administration of the education system for more than a century has not brought any change to the values and culture whereby people in Hong Kong believe academic success is the only measurement of learning and education and they perceive education as the only route to a good job and a prosperous future (Kennedy 2002). In order to allow their children to receive good formal education and study in a well-known reputable school, many Chinese families in Hong Kong are willing to sacrifice everything, including their savings, to buy or rent a property near the school at which they want their children to study. Cheng argues the aspiration for education in Hong Kong is internalised in parents' and students' minds and often requires no concrete economic justification (Cheng 1998). Moreover, many Chinese parents also spend their money to invest in their children's learning and extra-curriculum activities, for example extra hours of learning in a

crammer school or home tuition which is one of the special but common social and education phenomena in Hong Kong. Many students spend hours in a crammer school or sit with their home tutor to revise and receive extra tuition every day after finishing their time at school. In addition, many affluent parents also send their children to different out-of-school extra-curriculum courses such as piano and music theory, drawing and painting, languages, calligraphy and handicraft, sports, and even send their children to different overseas countries to learn languages and cultures during the summer holiday. Many parents believe that by sending their children to the crammer or arranging home tuition for extra hours of lessons every day, and keeping their children busy learning different skills can contribute to their academic success and attainment of higher qualifications. Comparative educationists and researchers in the United States and Australia show that the staying-on rate is high particularly among students of Asian origin (particularly Chinese) because of their high educational ambitions and the belief that without a good education their chances of success were limited (Marks et al. 2000; Steinberg et al. 1992; Sturman 1985). Ogbu (1992) argues that although simply comparing the academic achievement of ethnic groups cannot provide a full explanation of how Asian or Chinese culture affects education outcomes, researchers believe that culture differences in values, attitudes and behaviour play an important role and explain why some racial and ethnic groups do better than others.

Because of the strong traditional Chinese values and beliefs that tie educational attainment to personal and family success, many school failures and unsuccessful learners are keen to seek a second chance at education to compensate for their loss. Cheng (1998) argues these beliefs underline the enthusiasm for all kinds of adult education, majority of which are second-chance attempts at formal qualifications

rather than for personal interest or leisure. Depending on the resources, time, learner's background, and the 'loss' that needs to be rectified, education attainment deficit learners may choose from various types of learning to achieve their purpose. For example, young education losers may choose to study a not-for-profit Yi Jin programme as it can compensate for their academic qualifications, while for those young adults who think they have no interest and are not capable of continuing traditional paper and pen studies, they may choose the not-for-profit young person pre-employment programme such as YPTP provided by the Labour Department. In fact, the range of learning available for the losers in formal compulsory education in Hong Kong is huge and it is mainly supplied by not-for-profit education organisations. It ranges from retaking the secondary education curriculum and resitting public examinations, vocation-oriented certificate and diploma courses, job skills-based pre-employment and apprenticeship training, post-secondary education bridging courses such as Yi Jin and other foundation certificates programmes, and sectorial job skills-based training.

Although Ross and Gray (2005) argue that the real reason western developed countries and economies tackle the issue of school non-completion and the pressure to promote second chance education is to improve their general economic productivity and enhance their country's long-term competitiveness rather than purely for the learner's personal interest and benefits, Hong Kong tries to build on the traditional Chinese culture and belief in education. The HKSAR government in its educational reform vision states that the government will make sure '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' (HKSAR Government 2000, p.34). The HKSAR government

also believes the future success of the Hong Kong economy is not only to rely on the skills and knowledge and the education qualification attainments but also to rely on the core Chinese values of hard work and a positive attitude and that it believes in education. Tweed and Lehman (2002) also find people in Hong Kong generally believe the success of Hong Kong relies on peoples' hard work and that the dominant Chinese Confucian culture which values effort, respect and pragmatic acquisition of essential knowledge as well as behavioural reform, plays an important part in the success of the education system and the economy.

1.4 Not-for-profit Sector and Not-for-profit Organisations in Hong Kong

For historical reasons, the not-for-profit sector and not-for-profit organisations, as with the other social agents and establishments in Hong Kong, have been greatly influenced by British traditions. Without exception, the nature, formation and function of Hong Kong's not-for-profit sector and organisations are closely associated with the situation in the United Kingdom (Brenton 1985; Kendall and Knapp 1996, 1997; Miners 1991). For example, the four major types of voluntary social service organisations in the UK – service providing, mutual aid, pressure groups, and resource and coordination identified by Brenton (1985) – can also be found in Hong Kong. Moreover, Salamon et al. (1997; 1999) claim that although there are different definitions, dimensions, and criteria in different countries attempting to portray the not-for-profit sector and organisations, according to their 'structural-operational approach', the not-for-profit sectors have shared some common unique characteristics. According to Salamon et al. (1997), the not-for-profit sector is a collection of organisations that are: 1) institutionalised to a certain extent; 2) institutionally separate from the government; 3) not-for-profit seeking in purpose; 4) self-governing; and 5) voluntary.

Lam and Perry (2000) argue that Salamon et al. (1997)'s structural-operational approach provides a simple but important and pragmatic framework to identify and investigate the not-for-profit sector and organisations in Hong Kong where it is found difficult because of their loose legal framework and incoherent understanding and perceptions.

Moreover, following the structural-operational approach, Lam and Perry (2000) suggest adapting the International Classification of Not-for-profit Organisations (ICNPO) to classify not-for-profit organisations in Hong Kong and they conclude that the not-for-profit organisations in Hong Kong can be grouped into 11 categories (Table 1.5). The ICNPO classification scheme sorts different not-for-profit organisations in Hong Kong based on their 'primary activity' though many of these not-for-profit organisations normally offer and are involved in a huge range of local and international services and activities, for example World Wide Fund for Nature and Rotary International. As a matter of fact, the complexity and diversity of Hong Kong's not-for-profit organisations in terms of their history and origin, formation, culture and beliefs, scope and scale of services, target and types of service etc. means a full picture of Hong Kong's not-for-profit sector is not available. Lam and Perry (2000) argue that due to the revolving and fluid nature of the sector and the complexity of the service and interactivity and interdependency between not-for-profit organisations, they challenge that even the Hong Kong government does not have the complete information about the scale, the scope, and the composition of the not-for-profit sector.

Table 1.5: Typology of Hong Kong's Voluntary Organisations (Source: Lam and Perry 2000)

Activities	Definitions	Examples
Culture and recreation	Associations focused on the advancement of culture and leisure activities	<ul style="list-style-type: none"> • Lawn Tennis Association • Dramatic Arts Association
Education and research	Organisations delivering education and research services	<ul style="list-style-type: none"> • English Schools Foundation
Health	Direct provision of health care services	<ul style="list-style-type: none"> • Tung Wah Group of Hospitals
Social services	Services to people, in kind or in the form of information and support	<ul style="list-style-type: none"> • Christian Family Service
Environment	Associations focused on betterment of the environment	<ul style="list-style-type: none"> • World Wide Fund for Nature • Green Lantau Association
Law, advocacy, and politics	Advocacy for a cause or group interest	<ul style="list-style-type: none"> • Association for the Advancement of Feminism • Democratic Party • Hong Kong Patients' Rights Group
Philanthropic intermediaries and voluntarism promotion	Associations mobilising fund raising or volunteers	<ul style="list-style-type: none"> • Po Leung Kuk • Caritas
Religion	Churches and other divisions of religious denominations and orders	<ul style="list-style-type: none"> • Maryknoll Sisters • Hong Kong Chinese Christian Churches Union
Development and housing	Associations focused on the betterment of housing and other physical surroundings	<ul style="list-style-type: none"> • Housing Society
International	Associations with missions that cross national boundaries, often with local chapters	<ul style="list-style-type: none"> • Human Rights Watch • Rotary International
Business and professional associations, unions	Mutual benefit associations of professionals, labour and commercial interests	<ul style="list-style-type: none"> • American Chamber of Commerce • The Law Society • Moto Transport Workers Union

1.5 The Relationship between Government and the Not-for-profit Sector in Hong Kong

The relationship between the HKSAR government and the not-for-profit sector and not-for-profit organisations is complicated. Historical and political reasons have formed the foundation of the relationship but the later social, economic, political and international environment changes and their dynamics have further altered and led in a particular direction. Lam and Perry (2000) assert that due to the historical centralised and executive-led political-administrative system and limited interference of the government in society, Hong Kong's not-for-profit sector has always focused on collective problem-solving rather than on governance and it has never been considered to be a legitimate institution for governance. In fact, the return of the sovereignty of Hong Kong to China has not changed the power and working relationship between the government and the not-for-profit sector and organisations. The rapid increase of provision for not-for-profit education by the not-for-profit organisations in Hong Kong is in fact a good example to illustrate the claim made by Lam and Perry that not-for-profit education organisations respond to government policy without participating in governance or policymaking. Lee (2005) also argues that the not-for-profit regime in Hong Kong is characterised as 'statist-corporatist' where it displays the hybrid character of both a statist and a corporatist regime. Lee said a statist regime is seen as having a high degree of autonomy from the state, which tends to limit freedom of association, and is characterised by a low commitment to social provision; while its corporatist character is evident in the high level of participation by designated not-for-profit organisations in selected areas of social provision under government funding.

Instead of direct participation in governance and policy making, not-for-profit organisations are found to be influential for social-norm creation and policy influence by means of active government policy consultation participation and pressure groups' collective action (Ren 1997; Lam and Perry 2000). Lee (2005) however, points out that the not-for-profit sector was not only the agent for service provision, but was also the government's important partner in policymaking. She argues that the Hong Kong Council of Social Service (HKCSS), the umbrella organisation for social services not-for-profit organisations, enjoyed special United Nations consultative status and was closely involved with the government in policymaking. In fact, the HKCSS since its inauguration in early 1950 and through its numerous research projects and consultations with its member organisations has increased participation in advising social service policy in the interests of the public and their member organisations. The policy advocacy groups and pressure groups have also increased their influence in local policymaking through different channels and activities to advocate their values and beliefs on different social issues. Moreover, Miners (1991) believes these interactions between not-for-profit voluntary organisations and government is essential as it allows the government to make concessions and modify its plan before formal public announcement and so avoid possible destructive open confrontation.

Hong Kong's not-for-profit sector and its organisations in fact act as the front-line agents to deliver most of the social services to society for the government though they can be disregarded by the government in policymaking. According to the HKCSS, 90% of social services in Hong Kong are offered by not-for-profit organisations and they receive 80% of their funding from the government (HKCSS 2012). Lam and Perry (2000) argue government is heavily reliant on the network of not-for-profit organisations to deliver its many social services and welfare to the public and their

special mutually dependent relationships are the most effective and efficient mechanism to make sure that good quality social services are delivered. Moreover, Wilding (1997) argues that the strong ethic of voluntarism and the predominant position of voluntary organisations in Hong Kong are the possible reasons for underpinning the government to support voluntary agencies rather than involving itself in direct service provision and it can also be seen as stimulating and encouraging self-help and community action. However, Wilding also stresses that the voluntary provision is potentially an obstacle to the development of public services because the voluntary sector is already there providing a service albeit limited and patchy on occasions.

1.6 Not-for-Profit Education in Hong Kong

Although using the structural-operational approach helps to define and provide a better understanding of the nature and challenge of the not-for-profit sector in Hong Kong and the International Classification of Not-for-profit Organisations (ICNPO) offers a classification system and understanding of the not-for-profit organisations in Hong Kong, however the principles and practicalities of not-for-profit education have still not yet been well investigated and tested in research. The fast-growing not-for-profit education market was in fact the result of the not-for-profit organisations' quick response to the educational reform in 2000. Criticism challenges these rapid responses, and worries that rapid rising demand will consume not-for-profit organisation resources in a new non-primary service market. In fact, since the education reforms a vast number of not-for-profit organisations with diverse backgrounds have been attracted to join in the education market and they have developed and offered wide varieties of programmes and courses for different target students. On the demand side, Young (2008) believes that the high participation rate might largely be attributed to the government's effort in promoting lifelong learning through various sponsorship initiatives, such as the continuing education fund, tax allowances for self-education, and the non-means tested loan scheme for students. He argues the lifelong nature of not-for-profit education has become a way of life in Hong Kong, and the division between formal education and continuing education has been blurred. On the other hand, Chan (1999) claims the imbalance programmes offered by not-for-profit education organisations are demand led. He finds that the ratio of award-bearing courses to non-award-bearing courses has been increasing significantly in recent years. Chan argues that due to the added value of award-bearing the participation in adult

not-for-profit education is mostly limited to work-related courses, and other dimensions of adult learning may have been neglected. Though Chan claims award-bearing courses have greater demand in the work-related adult programmes segment, in fact other student segments of not-for-profit education are also driven by learners' demand and are market oriented. Since the development of not-for-profit education programmes are mainly market-oriented and student demand driven and not-for-profit education providers are principally self-financed, for these reasons not-for-profit organisations have to adopt a business approach to offer education services and they have to be flexible and the programmes offered have to be diversified so that they can attract more enrolments and better satisfy the learners' expectations and needs. In lacking a universal acceptable quality control mechanism among not-for-profit education organisations and in a situation whereby most of the not-for-profit programmes are still not recognised in the qualifications framework, and without long-term planning and sufficient resources and research support, the sudden rapid expansion of not-for-profit education may reduce the overall value and utility of the education effort.

1.7 Summary

Many people believe the success of the Hong Kong economy is the result of combining free market capitalism, non-welfare state social policy and the traditional Chinese hard-working beliefs and respect for educational values. The meritocratic formal compulsory education system in Hong Kong has been proved to not help the educationally disadvantaged. With the public spending curb on adult education, the educationally disadvantaged need to seek different not-for-profit education to compensate for their deficiencies in education. Traditional Chinese values and beliefs link educational success with personal and family success. Chinese people perceive education as the only pathway to prosperity and power. Affluent families are happy and keen to spend their fortunes and sacrifice everything for their children's education. Building on the strong Chinese culture and values on educational success, the education reforms address the needs of continuing lifelong learning. The not-for-profit sector and not-for-profit organisations have a long history in Hong Kong and they provide most of the front-line social services to the public; however they have no direct governance or influence in policymaking. In response to the government education reform and the increasing not-for-profit education needs, many not-for-profit organisations have joined the education market offering a wide variety of education programmes to the public though the quality, the accreditability and the overall social utility of these not-for-profit education programmes are still questionable. The availability of financial assistance has further attracted and encouraged many disadvantaged learners to participate in not-for-profit education.

CHAPTER TWO

LITERATURE REVIEW: ASSESSING THE OUTCOMES AND BENEFITS OF LEARNING

2.1 Introduction

This chapter introduces and discusses the outcomes and benefits of learning by reviewing some of the selected research and literature and discussing key issues and implications that emerge. Firstly, in order to contextualise this review, a chronological overview of the development and application of the outcomes and benefits of learning is provided. A model that depicts the two notions of learning outcomes and their relationships and interactions with a learner's capabilities and capitals is suggested and elaborated. Secondly, key studies from the chronology are reviewed and discussed to justify and lead to the choice of the conceptual learning outcomes and benefits model that is applied in this research. Moreover, a number of associated research studies on the outcomes and benefits of learning and the related issues are also brought in and discussed in the second part of this chapter. Lastly, focus is put on the 'Conceptualisation of Wider Benefits of Learning' framework suggested by the Centre for Research on the Wider Benefits of Learning because this forms the analytical backbone of this thesis. A summary of the findings of the literature review and discussion are reported at the end of this chapter.

2.2 Overview of Researching Outcomes and Benefits of Learning

Research on the outcomes and benefits of learning has increased in international importance and awareness in the last two decades and it has become more popular especially among the developed countries. Figure 2.1 offers a chronological summary of the development and application of the outcomes and benefits of learning. In the early days of the study of the outcomes of schooling, focuses and results emphasised the economic and market benefits such as private benefits, market effects, productivity and return on human capital investment (Schultz 1961; Mincer 1962; Hansen 1963; Becker 1964; Conlisk 1971). Since the renowned education sociologist Bourdieu (1977) suggests the functions and processes of schooling and education are in fact an instrument to facilitate and reinforce the political and socio-economic powers among the socially advantaged groups through the reproduction of social and cultural capitals in schools, economic sociology researchers¹ have swarmed to study the intergenerational effect of parental human capital and neighbour human and social capitals using different economic models and statistical methods (Wolf and Haveman 2001).

Moreover, social and economic research on the wider outcomes and effects of schooling in the area of for example a learner's own health (Grossman and Joyce 1989; Kenkel 1991; Strauss et al. 1993), spouse's health (Grossman and Jacobowitz

¹ such as Datcher (1982), Crane (1991), Haveman et al. (1991), Clark (1992), Brooks-Gunn et al. (1993), Duncan (1994), Aaronson (1997), Manski et al. (1992), Plotnick and Hoffman (1999), Lillard (1993), Duncan et al. (1997), Chase-Lansdale and Gordon (1996), An et al. (1993), Case and Katz (1991), Strauss (1990), Thomas et al. (1991), Glewwe (1999), Kings and Hill (1993), Schultz (1994), Haveman and Wolfe (1984), Michael (1982), McMahon (1997), Wolfe and Zuvekas (1997), Behrman and Stacey (1997), Angrist and Lavy (1996), Murnane (1981), Edwards and Grossman (1979), Blau (1999), Lee (1982), Kenkel (1991), Feldman et al. (1989), and Wozniak (1987)

Selected Research Study of the Outcomes and Benefits of Learning

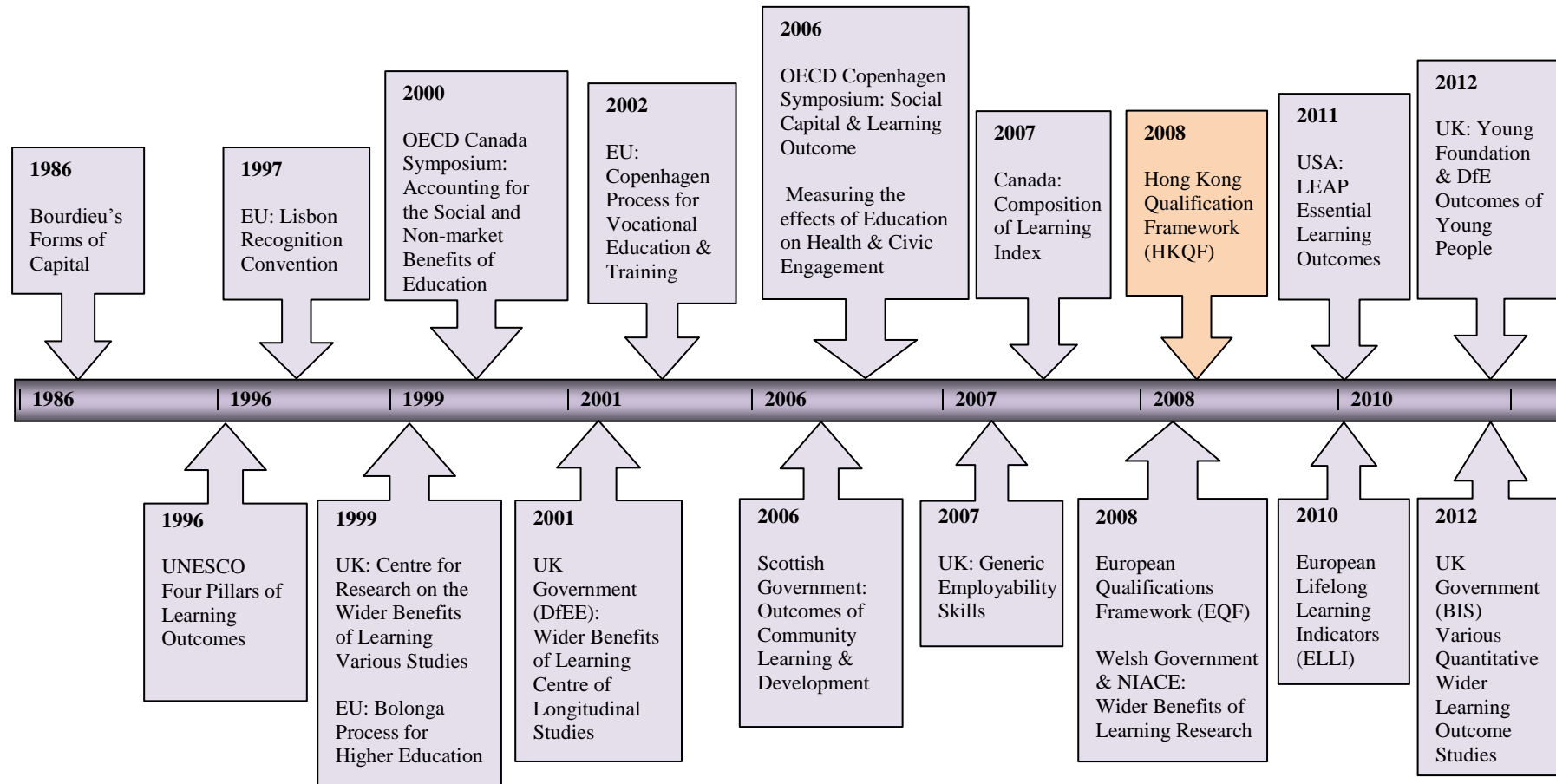


Figure 2.1: Timeline of the selected research study of the outcomes and benefits of learning (Source: This research)

1981), consumer choice efficiency (Rizzo and Zeckhauser 1992; Corman 1986), attainment of desired family size (King and Hill 1993; Lam and Duryea 1999), charitable giving (Hodgkinson and Weitzman 1988; Freeman 1997) were also undertaken during the 1980s and 1990s (Wolf and Haveman 2001).

In the late twentieth century, however due to increasing international political and economical cooperation and rapid globalisation, international organisations such as the World Bank, UNESCO and OECD have initiated and led a series of on-going studies and research to promote and support governments' expenditure on education and to uplift individuals' standards of living. Following the success of decades of research and development on the economic models and formulae using quantitative statistical data analysis to study the outcomes and benefits of learning, the Centre for Research on the Wider Benefits of Learning (CWBL) of the Institute of Education, University of London in the UK was formed in 1999 under the UK government's initiative aimed at investigating the diverse changing outcomes and broader benefits of learning in different dimensions and in different social contexts using a mixture of quantitative and qualitative research methods.

With the increasing governmental and social concerns of educational effectiveness in relation to the enormous public spending and the well-being of individuals, governments, international organisations and academia have developed different measurement tools and models which attempt to assess and evaluate the effectiveness and the outcomes of the public education provision. However, due to the complexities of political, social and economic situations and cultural contexts, the diversities of the learners' backgrounds and education provisions, as well as the rapidly evolving global environment and competition, different countries and different economies have adopted different models and applied different understandings and interpretations of

the outcomes and benefits of learning to reflect and underpin their political and social economical realities.

In order to provide a better understanding of the field of study of outcomes and benefits of learning and to show how it relates to this research, Figure 2.2 attempts to outline the different meanings of learning outcomes and to show the interactions and factors associated with the learning outcomes and learner capabilities and capitals. As Adam (2004) emphasises in his study of ‘using learning outcomes’, he claims that there is currently no precise agreement about, or definition of, the term ‘learning outcomes’ across Europe or the rest of the globe. He also claims that the relationship between learning outcomes and competences is a complex area. In the Adam research, the notions of learning outcomes have been commonly defined as:

‘A statement of what a learner is expected to know, understand and/or be able to demonstrate at the end of a period of learning.’

‘Student learning outcomes are properly defined in terms of knowledge, skills, and abilities that a student has attained at the end (or as a result) of his or her engagement in a particular set of higher education experiences.’

‘Learning outcomes are statements that specify what a learner will know or be able to do as a result of a learning activity. Outcomes are usually expressed as knowledge, skills, or attitudes.’

‘Learning outcomes are specific measurable achievements.’

‘A learning outcome is a statement of what competences a student is expected to possess as a result of the learning process.’

(Adam 2004, pp. 4-6)

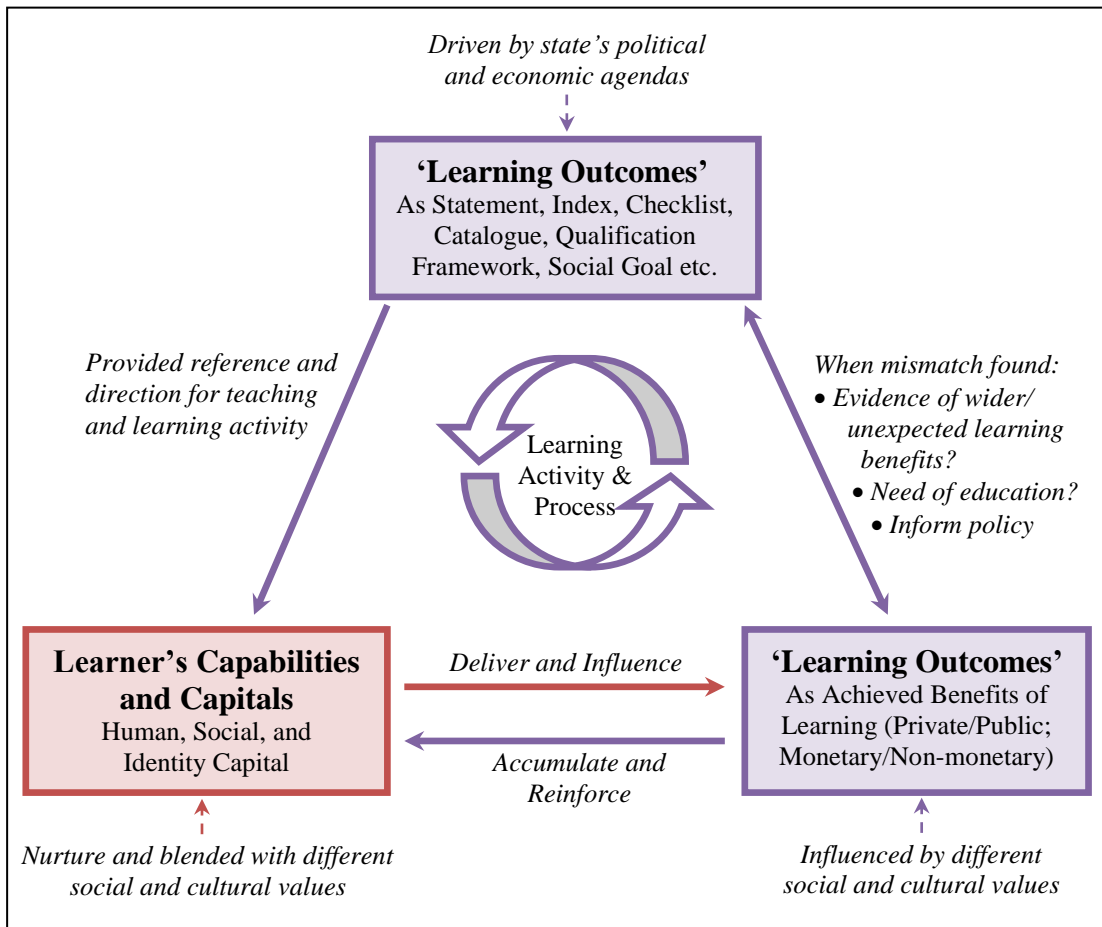


Figure 2.2: The two notions of learning outcomes and its relationships and interactions with learner's capabilities and capital (Source: This research)

The above Figure 2.2 explains that the notions of 'learning outcomes' have two meanings and these two meanings are well adapted and applied in this research. Firstly, 'learning outcomes' function as statement, index, check list, catalogue, qualification framework and social goal to provide reference and direction for teaching and learning activity. The functional aspect of learning outcomes is driven by the state's political and economic agendas. Secondly, 'learning outcomes' are the benefits of learning achieved by learners through the learner's participation in the learning activity and process; it could be private and/or public and monetary and/or non-monetary. The results aspect of learning outcomes is influenced by different social and cultural values and it accumulates and reinforces a learner's capabilities and capitals; while a learner's capabilities and capitals (represented by human, social,

and identity capitals) deliver and influence learning outcomes through the learner's participation and interaction in learning activity and process. When mismatch between the functional and the results aspects of learning outcomes is found, it may evidence the presence of wider/ unexpected benefits of learning or indicate the need for further education. Study and investigation on the mismatch of the learning outcomes can also help to inform policymakers to formulate relevant education policy to address the discrepancy.

2.3 Selected Research and Literature on the Study of Outcomes and Benefits of Learning

2.3.1 UNESCO's Four Pillars Lifelong Learning Outcomes (1996)

An international commission report by UNESCO (Delors et al. 1996) shows that worldwide interdependence and globalisation are the major forces in contemporary life. However, due to the unprecedented global social and economic cooperation and transformation, the gulf between the minority economically advantaged and the majority socially and economically disadvantaged has been quickly widened. Social exclusion, marginalisation, income inequality and poverty problems are deemed to be worsening under the rapid developing and changing knowledge-based economy. UNESCO believes provision of education should not be restricted to children but also extended to adults as it can help the disadvantaged to adapt to rapid global change. 'It is the role of education to provide children and adults with the cultural background that will enable them, as far as possible, to make sense of the changes taking place' (Delors et al. 1996, p. 35). Therefore, in order to encourage and emphasise the importance of education throughout life, UNESCO's International Commission on Education for the Twenty-first Century suggested a conceptual framework of lifelong learning which is based on four pillars: learning to know, learning to do, learning to live together and learning to be. According to the Commission:

- **Learning to know:** by combining a sufficiently broad general knowledge with the opportunity to work in depth on a small number of subjects. This also means learning to learn, so as to benefit from the opportunities education provides throughout life.

- **Learning to do:** in order to acquire not only an occupational skill but also, more broadly, the competence to deal with many situations and work in teams. It also means learning to do in the context of young peoples' various social and work experiences which may be informal, as a result of the local or national context, or formal, involving courses, alternating study and work.
- **Learning to live together:** by developing an understanding of other people and an appreciation of interdependence – carrying out joint projects and learning to manage conflicts – in a spirit of respect for the values of pluralism, mutual understanding and peace.
- **Learning to be:** so as better to develop one's personality and be able to act with ever greater autonomy, judgment and personal responsibility. In that connection, education must not disregard any aspect of a person's potential: memory, reasoning, aesthetic, sense, physical capacities and communication skills.

UNESCO's conceptual framework of the four pillars of lifelong learning is in fact the result and product of five years' international consultations and global cooperation among different governments and different education stakeholders. It provides an essential blueprint and directive to worldwide educators and governments to plan and to customise their education and their learning outcome framework according to their own political and economic situations and cultural contexts. For example, the Canadian Council on Learning has adopted procedures based on the four pillars framework to develop their own Composite Learning Index to measure the annual progress in lifelong learning in Canada (Canadian Council on Learning 2010); the European Union specifies the European approach and regards the four pillars of learning as the supranational level with different education policies which include the

European Lifelong Learning Indicators (ELLI) aiming to promote lifelong learning within the four pillars (Bertelsmann Stiftung 2010).

UNESCO's four pillars framework provides a direct and easy understanding of what successful education and learning looks like and what thriving learners are capable of doing. However, it has not provided detailed strategic and operational suggestions on how to deliver and achieve educational success under the diverse social economic and cultural contexts; recommendation on the assessment and measurement of learners' progress and achievement are similarly not available. Besides, lacking empirical data and information to testify and support UNESCO's proposed lifelong framework, it is hard to estimate the causal relationship and interactions between pillars as well as with the other direct and indirect learning factors, for example learners' diverse backgrounds, student capability, school policy and government education plans etc.

2.3.2 European Union Bologna and Copenhagen Process, European Qualification Framework for Lifelong Learning, and European Lifelong Learning Indicators (1997-2010)

The European Union (EU) Lisbon Recognition Convention, the Convention on the Recognition of Qualifications concerning Higher Education in the European Region, was held in 1997 in Lisbon; it was agreed that a common assessment of learning outcomes and qualification framework must be developed to enable the EU member countries and some non-EU member countries to recognise the higher education qualification and achievement awarded by different member states within the treaties. The Bologna Process started in 1999 to negotiate and set up a mutually acceptable and reliable assessment mechanism to measure the outcomes of learning and to enhance

recognition of qualifications at the higher education level. A declaration to establish a European Higher Education Area was also agreed in the process. In addition, in 2002 Education Ministers from the EU met in Copenhagen and signed another treaty to promote and construct a mutually acceptable assessment of the outcomes of learning and qualification framework for vocational education training.

With the joint forces and efforts of the Bologna and Copenhagen process, the European Qualification Framework for Lifelong Learning (EQF) was started in 2008 and the European Lifelong Learning Indicators (ELLI) started measuring and reporting the outcomes and benefits of learning in 2010. EU educationalists believed that through a common recognised and easily understood assessment of the outcomes of learning, the EQF could promote lifelong and life-wide learning and enhance the mobility of European citizens for studying or working abroad, while the ELLI helps to show and compare the conditions for lifelong learning across different learning environments within the EU.

There are a couple of issues of the ELLI worth discussing here. Firstly, as claimed by Bertelsmann Stiftung, the developer and assessor of the ELLI index, the ELLI model is a newly developed and modern model that has combined years of effort on research into the outcomes and benefits of learning. It not only offers comprehensive and scientifically comparable results for governments and educators to review the effectiveness of their education policy but also helps to advise and construct long-term education policy and strategy. The Germany-based Bertelsmann Stiftung explains in their first report of the challenges, difficulties and limitations of the landscape of the assessment of outcomes and benefits of learning and proudly suggests the possible contributions and advantages of the use of the newly developed ELLI:

“There are already several learning indexes produced by several organisations. However, all of them tend to suffer from common conceptual or methodological weaknesses. Either they take too narrow a view on learning to be relevant to the needs of modern societies (eg by examining only secondary or post-secondary completion rates), or they have been created in such an arbitrary manner that the results have limited credibility (eg the variables are combined using arbitrary methods without checking on the validity of the results). ELLI is the first international index of learning conditions to provide a holistic picture of lifelong learning produced with replicable scientific statistical methods.”

(Bertelsmann Stiftung 2010, p. 50)

In fact, based on collective international expert opinions and accumulation of years of research on outcomes and benefits of learning, and especially with the experience and support of the Canadian Composite Learning Index (CCLI), the suggested Bertelsmann Stiftung’s ELLI model has offered a holistic and comprehensive illustration on how different types, different levels and different life stages learning activities (lifelong and life-wide learning) interact with the learners’ diverse capabilities (competences, skills, attitudes) and capitals (human and social) to generate diverse levels and aspects of learning outcomes and benefits for researchers and educational practitioners to study and follow. Figure 2.3 depicts the ELLI’s idea from learning to the wider outcomes and benefits of learning.

This research attempts to look into the interrelationship between the “Dynamic Interplay” and the “Wider Outcomes / Benefits of Learning”, where it was not covered by Bertelsmann Stiftung.

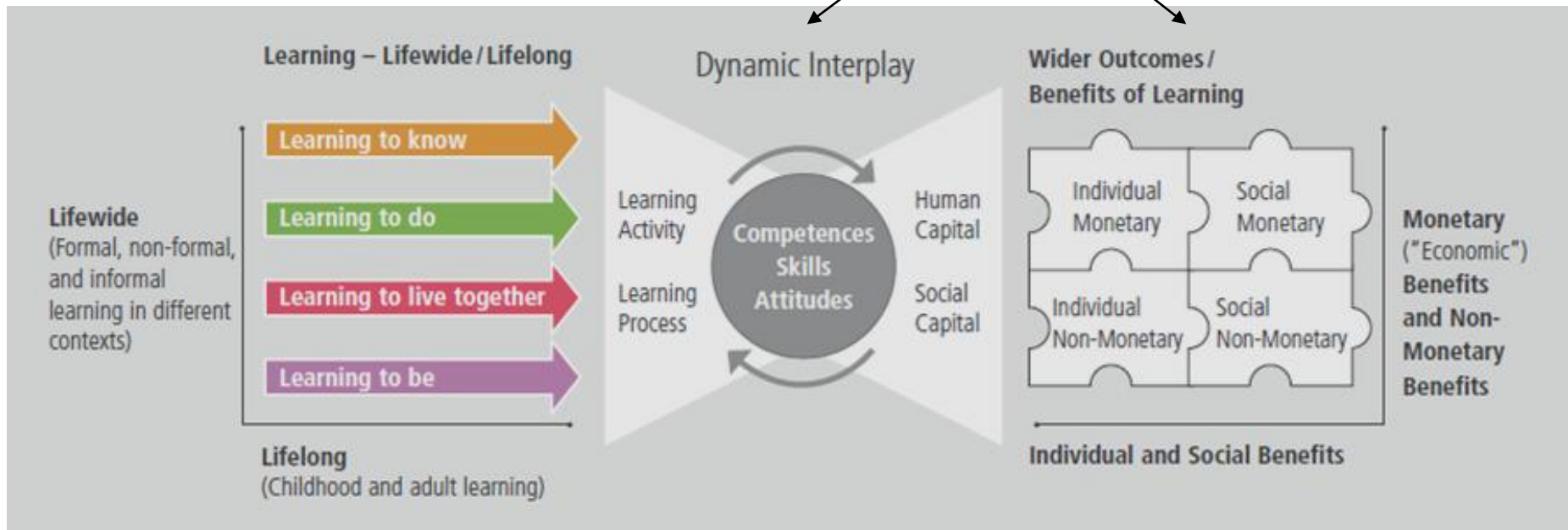


Figure 2.3: Learning – outcomes and benefits, extracted from Bertelsmann Stiftung (2010, p. 14)

Secondly, in addition to the efforts spent on the composition of the ELLI index through the detailed statistical investigation and analysis of different learning factors and indicators according to UNESCO’s four pillars framework, ELLI also attempts to investigate the outcomes and benefits of learning in terms of economic and social aspects and tries to investigate the connection between learning and the outcomes and benefits of learning although it has very limited success. As shown in Table 2.1, ELLI suggests a detailed structure on the measures and indicators of the economic and social outcomes of learning.

Table 2.1: Economic and social outcomes of learning (measures and indicators). Bertelsmann Stiftung (2010, p. 33)

Learning Outcomes	Indicators	Measures	
Economic	Earnings/Income	Mean equivalised net income	
		GDP per head	
	Productivity	Labour productivity per person employed	
	Employment	Employment rate	
Unemployment rate			
Social	Health	Self-perceived health	
		Self-reported conditions or health habits	
		Life expectancy at birth	
	Life satisfaction/ Happiness	Life satisfaction	
		Happiness	
		Satisfaction with job	
	Social cohesion and democracy	Satisfaction with home	Satisfaction with home
			Long-term unemployment rate
			Gini coefficient
			Material deprivation rate by poverty status in the EU
How satisfied with the way democracy works in the country			
Sustainability	Voted last European election	Trust in political institutions	
		Environmental Performance Index (EPI)	

Despite the success of Bertelsmann Stiftung in introducing the ELLI index, due to the scale and complexities of the investigation and the limitation of the research method chosen, the implication of some of the limitations are discussed as follows:

- As reminded by Bertelsmann Stiftung (2010), the ELLI index and the results of the outcomes and benefits of learning do not provide an in-depth evaluation of a country or region's policy and performance on education. It is believed that the huge diversity, in terms of political, economic, social, historical and cultural differences of the EU member states and lack of relevant and reliable statistical data are the reasons for not being able to provide education policy-related analysis. For this reason, insights and information on how state education policy affects outcomes and benefits of learning cannot be learnt from the ELLI project.
- Besides, ELLI itself is in the process of evolving, indicators and measurements that have been chosen for quantitative statistical analysis may not be ideal and it may not be able to reflect the true and complex reality of the learning situation and the outcomes of learning.
- In addition, the ELLI initiative has still not yet been able to connect learning (represented by the four pillars and the ELLI index) and the outcomes and benefits of learning (represented by economic and social benefits). Due to the complexities and insufficient data and information, Bertelsmann Stiftung (2010) admitted they can only provide limited statistical prediction and find few commonalities in the data; three correlated indices: ELLI and Global Competitiveness Index, ELLI and Consumer Health Index, and ELLI and Corruption Index are produced and presented in the ELLI 2010 reports.

The complicated interwoven interactions between the learning activity/process, the learner's capabilities (competence, skills, and attitudes) and the learner's human and social capital states – the ELLI calls this process 'Dynamic Interplay' – cause quantitative statistical methods inertia and fail to explain and link up learning and the outcomes and benefits of learning together. Besides, the ELLI lifelong learning model has also not taken into consideration other non-educational or accidental factors in the model, for example tragedies that may have happened in the course of a learner's life, where it can affect the reliability of the index and the representation of the results.

- Nevertheless, concern is raised on how effectively the Bertelsmann Stiftung includes, assesses and quantifies some complicated qualitative learners' related opinions such as learners' perception and satisfaction. The ELLI model has also not been able to comprise and take into consideration some important sophisticated humanity factors, for example a learner's language capacity, ethnic capital, values and beliefs.
- Lastly, the ELLI index and the report of the outcomes of learning only offer macro country-level education performance information. Learner, school, course, curriculum levels of analysis and information are not possible in the ELLI measurement system.

2.3.3 Social and Non-Market Benefits of Education by the OECD (2000-2006)

The Organisation for Economic Co-operation and Development (OECD) has since the 1960s been through different research and investigations to promote sustainable economic growth and employment in member countries. The OECD believes effective educational investments and policy not only provide direct economic benefits to the learner and to the economy but also offer non-market external benefits which it is believed are important for both the country and for global sustainable economic and social development.

In the last two decades, the OECD has been actively involved in and led many major research and conventions to promote lifelong education and to emphasise the importance of assessment of the outcomes and benefits of learning. In 2000, the Centre for Educational Research and Innovation (CERI) held an international symposium ‘The Well-Being of Nations: The Role of Human and Social Capital’ in Canada to address the growing interest in how human and social capitals influence economic growth, social cohesion and sustainable development; and in 2006 in the Copenhagen Symposium, the CERI of OECD delivered an intensive study on ‘Measuring the Effects of Education on Health and Civic Engagement’ (OECD 2001, 2006).

In the OECD 2000 symposium, Wolfe and Haveman (2001) argued that the social and non-market effects of education are as large as the marketed effects of education where optimum levels of social investment in schooling needed to be considered. Moreover, based on a review and study of the three decades of economic social research on the effects and outcomes of school learning, Wolfe and Haveman offered their contribution to a ‘Catalogue of outcomes of schooling’ (Table 2.2).

Table 2.2: Catalogue of outcomes of schooling, Wolfe and Haveman (2001, p. 224)

Catalogue of Outcomes of Schooling	
Outcome	Economic Nature
1. Individual market productivity	Private; market effects; human capital investment
2. Non-wage labour market remuneration	Private; market and non-market effects
3. Intra-family productivity	Private; some external effects; market and non-market effects
4. Child quality: level of education and cognitive development	Private; some external effects; market and non-market effects
5. Child quality: health	Private; some external effects
6. Child quality: fertility	Private; some external effects
7. Own health	Private; modest external effects
8. Spouse's health	Private; modest external effects
9. Consumer choice efficiency	Private; some external effects; non-market effects
10. Labour market search efficiency	Private; non-market effects
11. Marital choice efficiency	Private; non-market effects
12. Attainment of desired family size	Private
13. Charitable giving	Private and public; non-market effects
14. Savings	Private; some external effects
15. Technological change	Public
16. Social cohesion	Public
17. Less reliance on income and in-kind transfer	Private and public
18. Crime reduction	Public

The catalogue of outcomes of schooling has provided essential background and information for this research to investigate the wider benefits of learning for the disadvantaged. However, caution should be shown as the Wolfe and Haveman's outcomes of learning are based on the summarised results of decades of quantitative economic and statistical research analysis which cover huge diversities of learning activities and learners' backgrounds. In lacking qualitative evidence in relation to the outcomes of learning and the learners' learning experiences and backgrounds, it is difficult to draw a clearer and better conclusion on the causal relationship between the development of learners' capitals and the outcomes and benefits of learning.

In 2005, based on the foundation and collaborative research success of the Canada Symposium, the OECD's CERI launched another international project to measure social outcomes of learning. It aimed to find relevant evidence to support and inform economic and social policy that relates to education and lifelong learning and to explore the feasibility of developing social outcome indicators. Thirteen countries have participated in the project which involves in-depth quantitative investigations into the nature of the link between learning and well-being in the two domain areas: Health (physical and mental) outcomes of learning; and civic and social engagement outcomes of learning (Desjardins and Schuller 2006). However, although the quantitative-based research project has presented fairly strong links between education and health and civic and social engagement outcomes, due to the questions over the relative size of the effect and the complex causal relationships of learning and learning outcomes (Hundson and Andersson 2006), OECD quantitative researchers did not reach a consensus to develop indicators to examine and represent the relationship between learning and learning outcomes.

“It has explored the issues involved in developing an understanding of the causal relationship in this field; in other words, how to go beyond simple associations between education and social outcomes in order to understand how education directly or indirectly affects them. (However), the material gathered to date does not include qualitative studies which may give important insights into the causal processes. An equally rigorous overview of this material is important.”

(Desjardins and Schuller 2006)

In reviewing the OECD report, Mainguet and Baye (2006) claim ‘recognising that it is not possible, or not feasible, to get data to cover and measure every issue’;

alternatively they have proposed some guidelines for data collection and indicator development. According to the educational research experience in the French Community of Belgium, Mainguet and Baye suggest research on the relationship of learning and the outcomes of civic and social engagement should be broken down into different levels of analysis, ie at micro (individuals), meso (schools) or macro (society) levels (Table 2.3).

Table 2.3: Education systems' objectives related to civic literacy, by level of analysis, Mainguet and Baye (2006 p. 157)

Micro (Individuals)	Meso (Schools)	Macro (Societies)
<ul style="list-style-type: none"> • knowledge, skills • responsible citizenship • self-confidence • trust in institutions • respect • critical thinking • sense of responsibilities • humanitarian values • social engagement • civic engagement 	<ul style="list-style-type: none"> • integration and participation in the local community • enhanced democracy • pluralism • cultural open-mindedness • trust in the school institutions 	<ul style="list-style-type: none"> • enhanced democracy • pluralism • cultural open-mindedness • social and civic engagement • trust in institutions • social cohesion

Although the OECD's 2006 Copenhagen Symposium and the project of measuring of social outcomes of learning concluded due to diverse social, economic, educational, cultural and political country backgrounds, universal learning outcomes indicators are not feasible, at least for the time being. However the symposium has provided some very important information and knowledge for further research and investigation in relation to learning and learning outcomes and for individual countries to develop their own assessment of outcomes and benefits of learning according to their own country context and constraints.

Firstly, the OECD has offered the statistical results of their sophisticated quantitative social outcomes of learning project (Table 2.4) for further research purposes, though

some of the results are constrained by different factors such as country specific factors, types and levels of learning, pedagogies and causal effects of other factors.

Table 2.4: Assessment of the evidence base for education effects on health and well-being outcomes and behaviours, OECD (2006 pp. 216-218)

Outcome	Strengths of Effects	Outcome	Strengths of Effects
Mortality	Substantial	<i>Health Behaviours (continue)</i>	
Physical health conditions	Substantial	Physical activity	Substantial
Functional ability (adulthood)	Contradictory	Use of illicit drugs	Uncertain
Adult depression	Substantial	Teenage parenthood	Contradictory
Life satisfaction / happiness	Small	<i>Service Use</i>	
Self-rated health	Substantial	Use of primary health care	Contradictory
<i>Child Health</i>		Use of specialist care	Substantial
Child mortality	Substantial	Hospitalisations	Substantial
Child anthropometric measures	Substantial	Use of preventative health care	Substantial
<i>Health Behaviours</i>		Use of emergency services	Small
Smoking	Substantial	Use of social health care	Substantial
Alcohol consumption	Uncertain	Chronic health conditions	Substantial
Obesity	Substantial		
Fruit and vegetable intake	Uncertain		

In addition, the OECD has also provided ‘evidence on mechanisms for education effects’ (Figure 2.4) for further research of learning and outcomes and benefits for health and well-being purposes. The OECD claims the mediators and the mediation effects are important channels for the effects of education on health in all the social contexts and social levels considered. However, OECD also claims that it is not possible to specify the relative importance of each of these mediators in each of these contexts with any confidence due to the state of the data and information base.

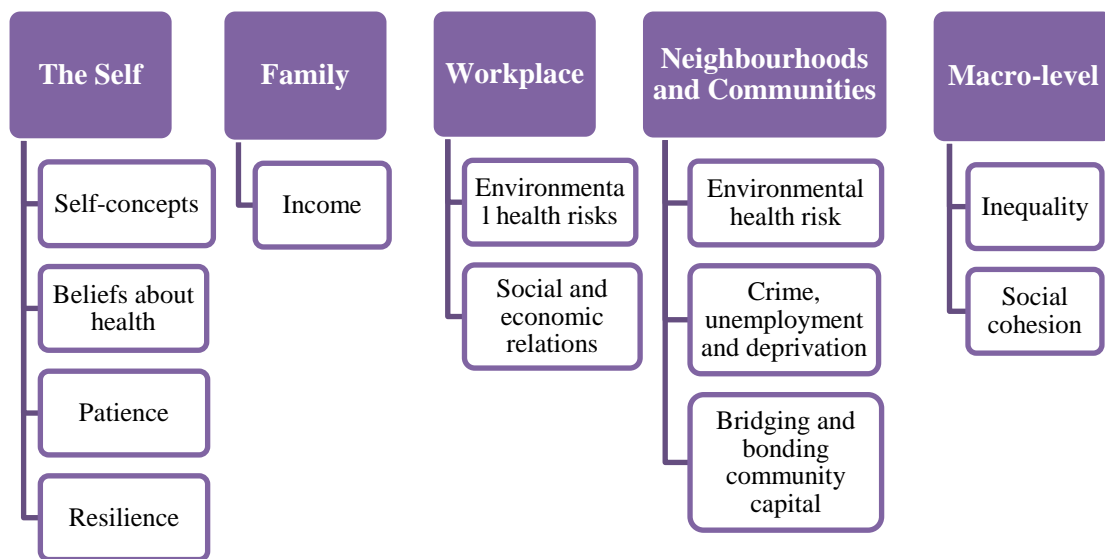


Figure 2.4: Assessment of the evidence base for factors that mediate education effects on health and well-being outcomes and behaviours, OECD (2006 pp. 221-222)

2.3.4 Quantitative Studies of the Wider Benefits of Adult Learning by the UK Government (1999-2012)

In attempting to investigate and support education policy to improve adult basic skills that benefit the individual and society, the Department for Education and Employment (DfEE) Research Centre of the UK Government invited the Centre for Longitudinal Studies (Institute of Education), the Centre for Economic Performance (London School of Economics) and the Institute for Fiscal Studies using British longitudinal data collected in the 1970 British Cohort Study and the National Child Development Study (1958 birth cohort) together with modelling based on the Family Expenditure Survey and Family Resources Survey to analyse and attempt to find out the wider benefits of adult learning (Bynner et al. 2001).

Based on the economic modelling and statistical analysis, individuals who improve their basic skills were able to have better chances in the labour market, suffered less

health-related problems, were less likely to have children experiencing difficulty at school, were more active in social participation, and more liberal and less discriminatory in their attitudes.

Moreover, the research has also provided economic estimates on the national and individual income gain as well as the savings for taxpayers due to basic skills improvement and projections on the gain in wider benefits, for example learners' physical and psychological health, learners' children's education and social participation.

Since the quantitative nature of this research is designed and aimed to prove to the government the possible economic and financial gains and savings, it does not provide much detail on in-depth qualitative outcomes and benefits of learning from the learner's perspective.

Follow-up research was undertaken during 2012-2013 by the Department for Business, Innovation & Skills (BIS). The BIS has conducted a scoping review and a series of quantitative research exercises to investigate both the economic and non-economic outcomes and benefits of learning in different learning settings and different learner groups to address and inform the government educational policy on adult learning. The range of wider benefits of learning studies conducted during 2012-2013 includes:

1. Learning and Wellbeing Trajectories Among *Older Adults in England* (BIS 2012a)
2. Evidence of the Wider Benefits of *Family Learning*: A Scoping Review (BIS 2012b)
3. Review and Update of Research into the Wider Benefits of *Adult Learning* (BIS 2012c)
4. The Impact of *Further Education Learning* (BIS 2013a)

5. The economic and social benefits associated with *Further Education and Skills: Learning for those not in Employment* (BIS 2013b)

In the 2012 wider benefits of adult learning research (BIS 2012c), the BIS used the longitudinal data collected in the British Household Panel Survey to analyse the economic and wider benefits gained in adult learning and they reported that adult learning has its greatest impact in the domain of health and wellbeing and the impact on civic participation and attitudes are less pronounced. Figure 2.5 summarises and shows the findings of the 2012 research.

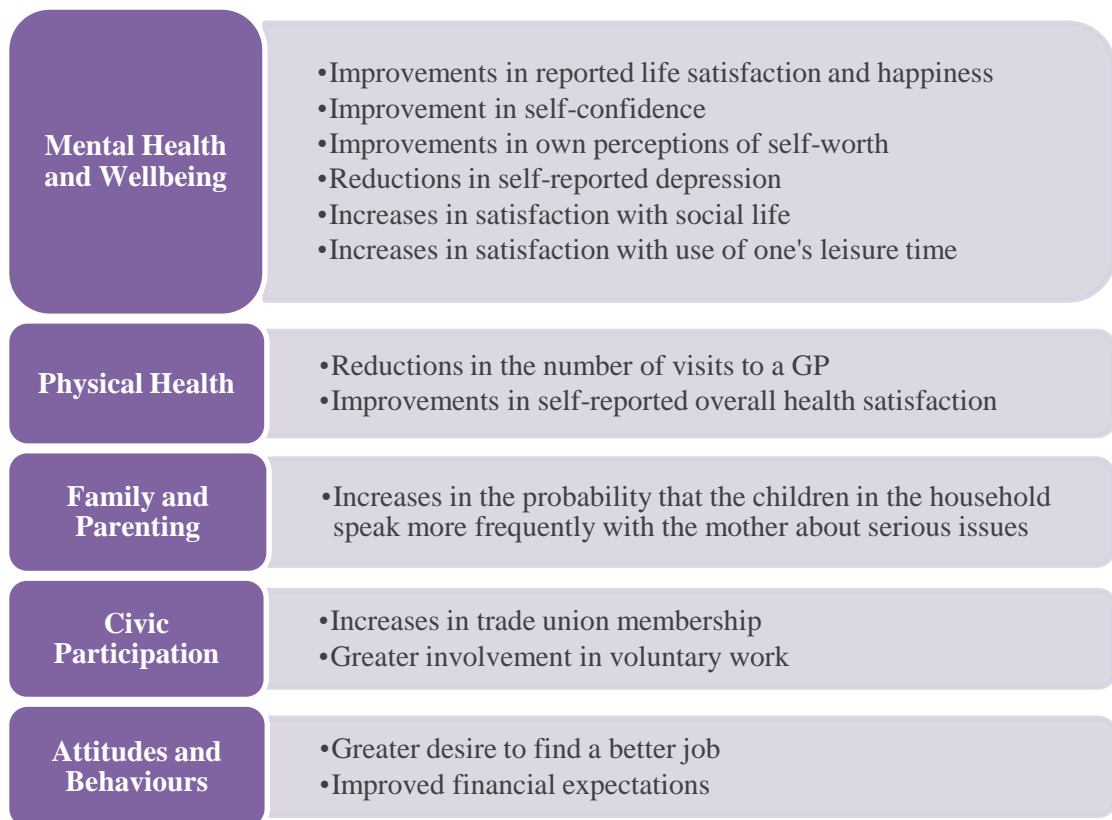


Figure 2.5: Review and Update into the Wider Benefits of Adult Learning, BIS (2012c, p. 7)

2.3.5 Review of the Outcomes of Community Learning and Development by the Scottish Government (2006-2008)

Communities Scotland (2006), an executive agency of the Scottish Government, conducted a literature review of the outcomes of community learning and development in 2006. The research was based on the context of community learning and development for disadvantaged learners in Scotland. According to Communities Scotland, the intermediate outcomes of learning activities and the end outcomes were chosen after an extensive review of the current literature from 2000 onwards. Most of the literature is empirically based and only a few were theory and concept based. A summary of the intermediate and end outcomes are shown in Table 2.5.

Table 2.5: Outcomes of community learning and development, Communities Scotland (2006)

End Outcome	Intermediate Outcomes of Community Learning and Development
Improving self-confidence and skills	Building self-confidence and self-esteem Changes in attitudes Changes in behaviour
Increasing sustained employment	Building skills, knowledge and understanding Creating pathways to employment Learning and parenting
Regenerating neighbourhoods	Community Social capital Neighbourhood regeneration
Improving health	Building social capital and health Impact of learning on health

As the contexts of the research of Communities Scotland are similar to this research, a brief discussion on the end outcome of the community learning and development are provided.

End outcome 1: improving self-confidence and skills. The research shows that community learning and development contributes to the outcomes of improving self-

confidence and skills for adults and young learners, and these outcomes are also integral to the engagement of learning activities, ie they are means as well as ends. Communities Scotland (2006) emphasises that this is crucial to the disadvantaged learners as many of them suffer from marginalisation and discrimination and their self-confidence and self-esteem are undermined. Research also shows that community learning has a positive impact on the adult learners' attitudes as they were able to reap individual and social benefit from the education. However, for the socially excluded or young learner who is involved-in-criminal-behaviour, the outcomes of learning are less pronounced.

End outcome II: increased sustained employment. The research result shows that the socio-economically vulnerable learners are less likely to benefit from sustained employment community learning and development because of the excess supply in the labour market. Communities Scotland (2006) believes community learning and development can only uplift the labour quality and enhance their mobility which is on the 'supply side' of the labour market but in fact the 'demand side' is the ultimate determinant of the future employability of the disadvantaged unemployed learner. Besides, community learning and development enhances disadvantaged learners' children's attainment in school because of their own participation and decision to rejoin learning.

End outcome III: regenerating neighbourhoods. The research concludes that community learning and development contributes to regenerating neighbourhoods by building capacity in the socio-economically disadvantaged communities. Moreover, both disadvantaged adults and young learners are able to improve their social capital through boosting friendship networks and realising the assets of the community and building connections outside the community. Apparently, it will depend on the

available resources to motivate and support the disadvantaged to go back to school to learn and to assist them to explore and outreach within or outside their community.

End outcome IV: improving health. The research finds that community learning and development can help to improve health, particularly mental health, through building social capital and engaging in learning; however, health-related behaviour is difficult to change. Although the build-up of human capital-related health benefits may not proceed directly from the participation in community learning and development, research should consider and investigate how the continuous advancement of social and identity capital processes can affect and achieve better learner health.

Follow-up research (The Scottish Government 2008) which focused on the measuring of social capital outcomes of community learning and development was conducted in 2008 aimed at informing and supporting the Scottish Government's educational policy on disadvantaged learning. In total, 21 individual learners who had experienced different community learning and development programmes were interviewed lasting from 11 to 55 minutes. Questionnaires were used to identify possible behaviour or attitudinal changes that contributed to the results of learner participation in community learning and development provision. Moreover, school tutors were also telephone interviewed to triangulate the data collected for the research.

Based on the notion of social capital as suggested by educationalists (Putnam 1993; Bourdieu 1977; Baron et al. 2000; Schuller et al. 2004; Field 2005; Balatti et al. 2006), 'Social capital is the networks, together with shared norms, values and social trust that facilitate co-ordination and co-operation for mutual benefit, within and between groups', The Scottish Government (2008) reports that the social outcomes of

community learning and development are in four main parts – social networks and trust, civic participation, power relations and bridging social capital. Table 2.6 summarises and illustrates the detailed outcomes and benefits of community learning and development.

Table 2.6: Social capital outcomes of community learning and development, The Scottish Government (2008)

Social Capital Outcomes	Outcomes and Benefits of the Community Learning and Development
Social networks and trust	Friendships and associations with other people Action to solve problems Nature of attachments to networks Trust levels
Civic participation	Changes in involvement Changing views Voting intentions
Power relations	Changing difficulties with authorities Changing responses to authorities Support Achievement against authorities Changing expectations and ability to express opinions Influencing authorities Financial position Wants
Bridging social capital	Social interactions with people from different backgrounds Nature of memberships in networks Beliefs about your own life and that of others

The impact of participation on social networks and trust: Community learners reported they had increased friendships and associations, and had expanded their social networks to a wider range of people. Moreover, learners were also more capable of taking action to solve their own and others’ problems. Levels of trust have increased as well which leads to involving them with others within and outside communities.

The impact of participation on developing civic participation: Only half the respondents to the research project showed they had been involved in some form of civic engagement and activity and very few were involved in political parties or social pressure groups. However, the research claims that there seems to be a good causal relationship between community learning and civic commitment as learners are able to learn new knowledge and skills, and build up confidence and social networks where it increases their involvement in civic engagement and an interest in taking on new roles.

Impact of participation on power relations: The research finds that the biggest change noted by the learners occurred in relation to their expectations about themselves, what they could do, and their willingness to voice their opinion. This is a change in attitudes and ability leading to the power to think and act differently and challenge authority (The Scottish Government 2008, p. 15). However, students of community learning reported they have only limited success in influencing decision-makers and changing the official agenda as well as limited influence on authorities that had power over them. The research suggests the relationship between social capital and changed power relations will vary with the size of the network and the levels of capital possessed.

The impact of participation on bridging social capital: The Scottish Government (2008) refers to bridging social capital as relations with friends, associates and colleagues with different backgrounds in terms of socio-economic status, age, generation, religion or ethnicity and successful bridging of social capital could contribute to the potential for regeneration. Research finds that learners experienced increased social interactions, shared more and became aware of how to access

information from others. In some situations they were able to change some of their beliefs about their own lives and those of others.

2.3.6 Study of the Wider Benefits of Adult Learning by the Welsh Assembly Government (2008)

Evidence to support non-economic and wider benefits of learning, especially for adult and continuing education, are of increasing importance to policymakers in Wales; in order to provide relevant social and economic context information for educational policy decision making, the joint forces of the Welsh Assembly Government and the Welsh arm of the National Institute of Adult Continuing Education (NIACE Dysgu Cymru 2008) carried out an exploratory study to assess the need for further large-scale research on the wider benefits of adult learning. Drawn from 32 adult learners' semi-structured interviews across Wales with different learners' backgrounds and different education settings, through the case-study approach the research aims to investigate and report how learners' participation in adult learning affects their life course. Table 2.7 summarises and illustrates the results of the research on the outcome and benefits of adult learning in Wales.

Table 2.7: The wider benefits of adult learning, NIACE Dysgu Cymru (2008, pp. 14-22)

Theme of Research	Outcomes and Benefits of Adult Learning in Wales
1. Learner Identity	Improved self-image and self-identity
2. Inter-generational Attitudes	Reduced anti-learning attitudes
3. Non-Instrumental Benefits and Credentials	Wider non-instrumental positive personal and social outcomes
4. Social Aspects of Learning and Progression	Extended and strengthened existing social networks
5. Benefits to Family and the Wider Community	Improved family relationship and wider benefits within community
6. Confidence and Personal Empowerment	Increased confidence and personal empowerment
7. Mental and Physical Health	Improved mental health

A brief report of the research findings are provided as follows:

Theme One: Learner Identity. NIACE Dysgu Cymru (2008) reports that negative learner identity caused by poor education experience and the subsequent negative self-image often results in a self-perpetuating cycle which can then lead to inter-generational social and economic exclusion. It is found that adult learning can play an important part in redressing previous educational disadvantages and subsequent negative learner identity and self-concept.

Theme Two: Negative Inter-generational Attitudes. The research shows that negative learner identities and attitudes to learning are often the result of ‘anti-learning’ attitudes that are passed from one generation to the next and adult learning can play a key role in breaking this negative cycle.

Theme Three: Non-Instrumental Benefits and Credentials. It is found that economic pay-off for older learners’ learning was mostly irrelevant. Moreover, all the research participants reported they enjoyed the feelings of achievement associated with

completing a course and elder learners did not attach value to certificates issued for passing examinations.

Theme Four: Social Aspects of Learning and Progression. The research finds that the social aspect of learning was expressed as fundamentally important for most of the learners and it not only allowed learners to extend their social networks but also strengthened their existing social networks.

Theme Five: Benefits to Family and the Wider Community. It is found that most of the adult learners, especially married women, through their participation in adult learning are able to gain some positive benefits within their family unit. Wider social benefits were also found within the community.

Theme Six: Confidence and Personal Empowerment. The research shows that the majority of learners reported they have increased confidence as a result of a wider variety of positive social benefits and social productivity. The effect of empowerment is notable and more commonly found in those learners who possess negative learner identity.

Theme Seven: Improved Mental and Physical Health. The research results point out that involvement in adult learning has a significant positive impact upon mental health and preventing or recovering from depression.

As an exploratory research, the NIACE Dysgu Cymru's research on the wider benefits of adult learning was limited by the time and resources given but it has provided crucial evidence to support and explain the important relationship of learning and wider non-economical outcomes and benefits of learning. NIACE Dysgu Cymru (2008) suggest The Welsh Assembly Government should commission in-depth,

qualitative studies of the processes of adult learning amongst targeted population groups in Wales to provide a stronger basis for the development of policy initiatives for such groups.

2.3.7 Employment-related Learning Outcome Models (2007-2011)

Although employment-related learning outcomes and benefits models are often perceived as narrowly economic-centric to an employer's interest-focused approach, due to rapid global economic integration and transformation as well as increasing technological change, employability and social mobility are no longer only relied on for the acquisition of basic job skills and knowledge or qualifications but also emphasise development of 'soft-skills', for example working with a team, creativity, adaptability, and brainpower. Some ideas and notions like generic employability, liberal education, global education and skills have emerged and are welcomed by employers.

Collaboration with the Centre of Developing and Evaluating Lifelong Learning (CDELL) at the University of Nottingham in the UK with the South West Skills and Learning Intelligence Module at the University of Exeter (CDELL 2007), and based on their research on the employment skills in the global context, suggests a list to describe the required 'generic employability skills' in today's economy for the UK employment skills trainers and organisations to consider. The CDELL defined generic employability skills as transferable and independent of particular occupational sectors or organisations. They believe the individual's capacity to adapt, learn and work independently will affect their overall long-term employability. Moreover, the CDELL (2007) finds that although employability skills frameworks vary in terms of the particular skills and attributes they include, all major generic skills schemes

include people-related skills and conceptualising/ thinking skills. Table 2.8 summarises and depicts the generic employability skills suggested by the CDELL.

Table 2.8: Generic employability skills, Centre of Developing and Evaluating Lifelong Learning (2007, p. 5)

Generic Employability Skills	Meaning / Learning Outcomes
Fundamental skills	Literacy, using numbers, technology skills
People-related skills	Communication skills, interpersonal skills, influencing skills, negotiation skills, team-working skills, customer service skills and leadership skills
Conceptualising / thinking skills	Managing information, problem solving, planning and organising skills, learning skills, thinking innovatively and creatively and reflective skills
Personal skills and attributes	Enthusiastic, adaptable, motivated, reliable, responsible, honest, resourceful, committed, loyal, flexible, well presented, sensible, able to manage own time and deal with pressure
Skills related to the business world	Innovation skills, enterprise skills, commercial awareness, business awareness
Skills related to the community	Citizenship skills

On the other side of the Atlantic Ocean, the Association of American Colleges and Universities (AAC&U) in the United States through its global education initiative ‘Liberal Education and America’s Promise’ has conducted research on the education outcomes, practices and impact based on the American employers’ views (AAC&U 2011). In their College Learning for the New Global Century report, they suggest educators and schools should have their visions and practices set on the future global environment and to fulfil their promise to provide essential and competitive learning outcomes to their students. Through the successful delivery of liberal education in schools – empower individual learners and prepare them to deal with complexity, diversity, and change – the AAC&U (2011) believes it can not only sustain the capability of the States but also provide essential competitiveness for the country to

remain amongst the dominant world powers. Table 2.9 shows the Essential Learning Outcomes suggested by the AAC&U.

Table 2.9: The Essential Learning Outcomes, Association of American Colleges and Universities (2011)

The Essential Learning Outcomes		
Learning Outcomes	Outcomes and Benefits of Learning	Strategy
Knowledge of Human Cultures and Physical and Natural World	Through study in the sciences and mathematics, social sciences, humanities, histories, languages and the arts	Focused by engagement with big questions, both contemporary and enduring
Intellectual and Practical Skills	<ul style="list-style-type: none"> • Inquiry and analysis • Critical and creative thinking • Written and oral communication • Quantitative literacy • Information literacy • Teamwork and problem solving 	Practised extensively, across the curriculum, in the context of progressively more challenging problems, projects, and standards for performance
Personal and Social Responsibility	<ul style="list-style-type: none"> • Civic knowledge and engagement – local and global • Intercultural knowledge and competence • Ethical reasoning and action • Foundations and skills for lifelong learning 	Anchored through active involvement with diverse communities and real-world challenges
Integrative and Applied Learning	Synthesis and advance accomplishment across general and specialised studies	Demonstrated through the application of knowledge, skills and responsibilities to new settings and complex problems

2.3.8 A Framework of Outcomes for Young People (2012)

The Young Foundation (2012) with support from the UK Department for Education (DfE) has suggested a framework to assess the wider social service outcomes which include for instance school, social work, homelessness support, hospitals, youth work and youth justice. The Young Foundation (2012) believes that development of young

people's 'social and emotional capabilities' would support positive life outcomes in such as educational attainment, employment, and health. Since young people and their development are affected by a mixture of different social agents and platforms, for example formal institutions (such as schools), peer networks, families, neighbourhoods, media and internet and what has been called the 'wider learning platform' to which it is particularly difficult to ascribe the cause and effect (The Young Foundation 2012, p. 14), the Youth Foundation suggests social institutions which provide services to young people should assess their service performance using a relevant outcomes model. For example school is just one of the social agents and platforms that affect young student learning and it is rather difficult and too naïve to prove and link student performance with the school teaching since student results are also affected by other social agents such as family and friends. Instead schools should emphasise and look into the whole person development of the student and to adjust their teaching and learning activities in order to achieve better development outcomes; in fact this is the idea of outcome-based learning.

The Young Foundation finds that all outcomes for young people can be mapped into a single conceptual framework defined by two dimensions – the distinction between individual and social outcomes and between intrinsic and extrinsic outcomes (Figure 2.6).

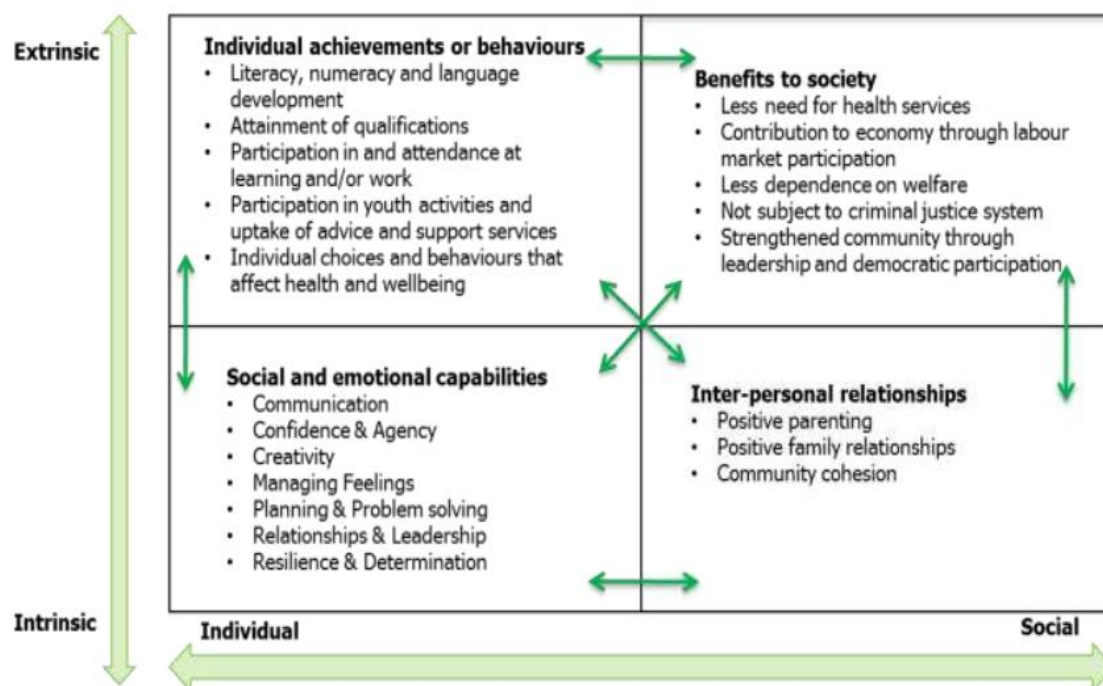


Figure 2.6: The youth outcomes model, The Young Foundation (2012, p. 12)

The model emphasises that there are potential links between all four quadrants of outcomes and social institutions, such as school should focus on the development of ‘Social and emotional capabilities’ (the bottom left quadrant) as it has crucial significance to the achievement of other outcomes (the other three quadrants of outcomes). Besides, the Young Foundation reminds us that the four quadrants of outcomes cannot easily be aligned to a particular timescale and it could occur in the short, medium or longer-term and so ‘interim indicators’ should be considered to better measure and reflect the true value of different outcomes.

2.3.9 Other Outcomes and Benefits of Learning Research Studies

Obviously it is hard to cover and discuss all the issues, opinions, and developments of the idea of outcomes and benefits of learning in this literature review. However, several concurring research results and suggestions were selected and the researcher has tried to provide some insights and stimulations in investigating learning outcomes and learners' capital.

Practicalities of learning outcomes

When putting learning outcomes into practice, Allais (2012), based on her insights from South Africa, argues that learning outcomes do not carry sufficient meaning if they are not embedded in knowledge within a curriculum or learning programme, but if they are thus embedded, they cannot play the roles claimed for them in assisting judgements/assessments to be made across curricula and learning programmes. For this reason, Allais suggests 'sufficient transparency' in learning outcomes, curriculum and assessment is crucial for the educational success. On the other hand, Werquin (2012) argues all the assessment of learning, qualification framework and qualification recognition systems all rely on the concept of learning outcomes. Learning outcomes provide a base for equitable assessment in the world of education and lifelong learning and approaches relying on learning outcomes bring more equity to the world of education and training and to the world of work. Werquin believes a universal recognition of non-formal and informal learning outcomes as a policy tool could possibly promote better and higher social and educational equity. However, Bohlinger (2012) questions whether development of qualification frameworks, using the European Union as an example, could yield the anticipated benefits of the 'shift to learning outcomes'. Bohlinger argues that in lacking sound and research-based

fundamentals and evidences, a universal qualification framework such as the European Qualification Framework, cannot prove to provide better social and individual learning outcomes.

Moreover, since increasing public concerns and awareness of the accountability of government decisions and policy on publicly funded learning and education, an effective and reliable method to reflect the true social and economic values and returns on education is important. The Centre for Public Scrutiny (CfPS) of the UK Cabinet Office suggests using ‘social return on investment’ (SROI) to measure the social value of government policies and recommends the seven principles: viz. involve stakeholders, understand what changes, value the things that matter, only include what is material, do not over-claim, be transparent, and verify results (CfPS 2011). CfPS believes that the combination of the SROI concept with the traditional value-for-money method or cost benefits analysis could provide better insights and interpretations of the effectiveness of government investment in education.

Capitals, capabilities and learning outcomes

Van de Werfhorst (2010) argues that two weaknesses are found in Bourdieu’s work on cultural capital. Firstly he argues that an anomaly is found between the work on social mobility and on lifestyles. He claims Bourdieu’s arguments of multiple dimensions of social origin, ie cultural and economic capital, being related to a uni-dimensional outcome of learning do not reflect the true result of learning outcomes where it would be more appropriate to study multi-dimensional education outcomes instead of single dimensional. In addition, Van de Werfhorst argues that Bourdieu sees a close resemblance in the types of resources affecting lifestyle preferences and political orientations which include the choice of education. However, Van de

Werfhorst suggests these outcomes are in fact affected by the two different types of resources namely cultural and communicative capitals. Watson (2012) also agrees cultural and communicative capitals deliver and affect academic performance and learning outcomes. Watson uses data from longitudinal cases and focus groups which conclude that the linguistic capital, academic capital, professionally-oriented capital, and social capital play an important role in the learning outcomes in the UK higher education context.

On the other hand, for Hammond and Feinstein (2005) their interest is to investigate adult learning and self-efficacy where they believe self-efficacy can translate into a range of wider benefits as it may afford protection from depression and other forms of social exclusion. Their research results show that perceptions of achievement in adult education increase self-efficacy and lead to more challenging occupations, which in return help to build self-efficacy. Moreover, they also found that resistance to participation in adult education is reduced as self-efficacy increases and learning on the job can also build self-efficacy. However, in the comparative analysis study carried out by Janmaat and Green (2013), although people in the UK generally believe in individual opportunity and reward based on merit, ie education and skills opportunities, in fact skills inequality is actually higher and social mobility lower in Britain than in other western countries. Janmaat and Green argue that in theory adult learning could reduce the skills gap but that in reality it only magnifies skills inequality since in the UK the well-educated and people in work have higher participation rate than the poorly educated and unemployed.

2.3.10 Research on Learners' Capability, Capital and Wider Benefits of Learning by the Centre for Research on the Wider Benefits of Learning (1999-2010)

In the last section of this literature review, focus is put on the research studies and the conceptualisation framework of the learners' capability/capital and wider benefits of learning undertaken and suggested by the Centre for Research on the Wider Benefits of Learning from where the data analysis and the discussion on the findings of this research are drawn.

From 1999 to 2010, the Centre for Research on the Wider Benefits of Learning (CWBL) of the Institute of Education, University of London, has conducted and published numerous research reports on the wider benefits of learning which have helped to advise and support governments and international organisations to formulate different educational and social policies.

Contributions offered by the research team of CWBL are multi-dimensional and one of the major contributions of the centre is to offer a holistic and complete picture and explanations on how the outcomes and benefits are derived from the learners' learning activity. According to Schuller et al. (2004), learning is a process whereby learners build up their assets in the shape of different capitals and then benefit from the returns on their investment in education in terms of different types of outcomes and benefits, and these outcomes and benefits themselves feed back to or even constitute the capitals (Figure 2.7).

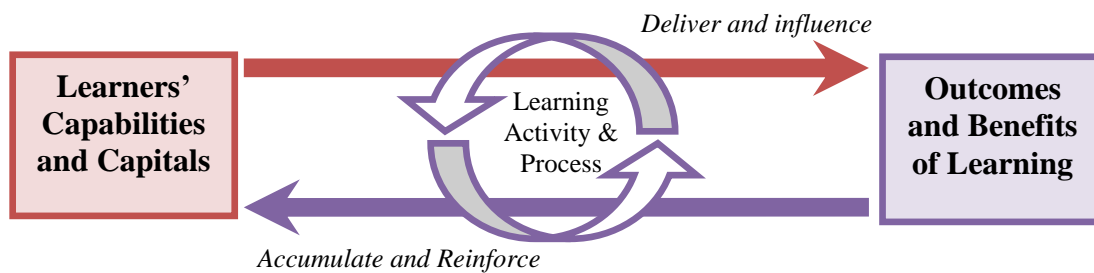


Figure 2.7: Learner's capabilities and capitals and the outcomes and benefits of learning (Source: This research)

Schuller et al. (2004) further claims effective learning activity enables a learner's capital to grow and to be mobilised and the learner's capitals are made by a collection of different changing and dynamic learners' capabilities. For example, a learner's human capital is made up by different learners' capabilities mainly in the form of qualifications, knowledge, various skills or even health, while through the learning activity and process these capabilities will be affected and will renew the human capital. However, the causal relationship of the capital, capabilities and learning outcomes are far more complicated and affected by many different simultaneously changing and moving factors, for example learners' background, different social and cultural contexts and values, learners' psychological state, intergenerational factors, and learning experiences (Schuller et al. 2004; Bynner et al. 2001).

Moreover, based on the interaction theories between capabilities, capitals and learning outcomes and benefits, Schuller et al. (2004) has laid down a triangle conceptual framework (Figure 2.8) and tried to demonstrate the complex and interactive natures and relationships of capitals and capabilities and to explain how learning possibly influences and changes these dynamic relationships.

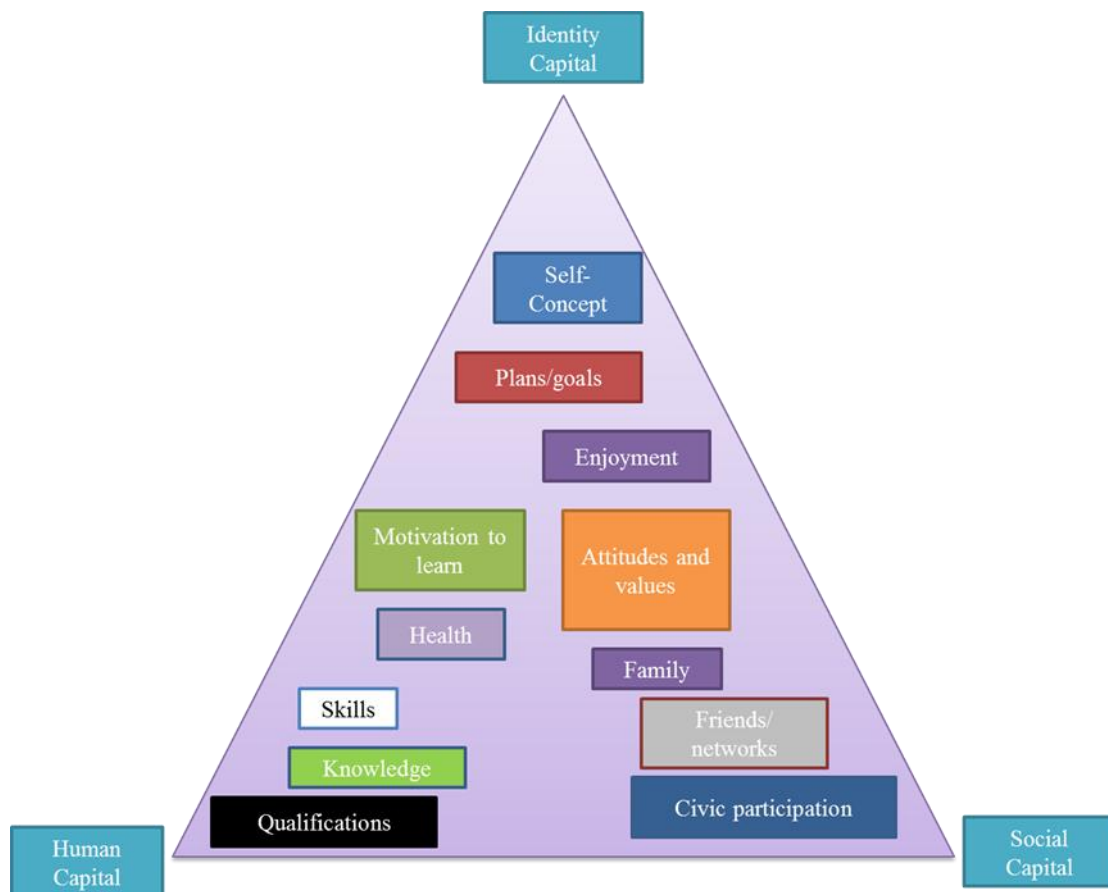


Figure 2.8: Conceptualisation of the wider benefits of learning, Schuller et al. (2004, p. 13)

According to Schuller et al. (2004, p. 14), educational researchers must always be careful when they try to explain the causal relationship between learning and the learning outcomes (transformed capabilities); simplistic conclusions of the interactions and interrelationships should be reconsidered and avoided. For example, a particular education or learning event seems able to trigger and provide a particular direct and simple learning outcome but in fact it is always associated and influenced by multiple, complex and hidden learners' specific factors and backgrounds. Schuller et al. suggests researchers should explore the sequence of different important events in the learners' lives in order to grasp a better picture and explanation on the cyclical interactivity between learning and learning outcomes and how they transform learners' lives.

Furthermore, the conceptualisation of the wider benefits of learning framework also means to remind and to show the interactions between different outcomes that should not be neglected. For example, Schuller et al. suggest assessment on how self-esteem and civic participation are inter-related as joint outcomes are possible. However, again, since the interactions are so complex and multidimensional it seems it is impossible to represent them by a simple cause-and-effect relationship. ‘...the interactions are so complex that we are unlikely to aspire to bring them all into a single equation with numerical values assigned to each interrelationship’, and Schuller et al. suggest ‘Qualitative investigation of dyadic and multiple relationships is needed to illuminate the interactions between the different spheres of people’s lives... We need to do this diachronically, over time, as well synchronically, capturing the interactions at any given point’ (Schuller et al. 2004, p. 14).

The CWBL and its team of researchers such as Schuller, Bynner, Preston, Hammond, Brassett-Grundy, Green, Blackwell, Gough and Feinstein and with the support of the Department of Education (DfE) by using a mixture of different quantitative and qualitative research methods, have undertaken a series of researches and investigations on the wider learning outcomes and benefits in different social and learning contexts; the areas, topics, and themes of study include:

Individual well-being

Practitioner views of wider benefits of learning, training and skills, attitude change, identity, engagement, leisure contexts in adolescence, development in the early years, progression and qualifications, aspirations, risk and resilience, low levels of attainment, three Rs, numeracy and literacy skills, health, preventive health care, depression and obesity.

Family

Family learning, family formation and dissolution, mothers' educational attitudes and behaviours, child nutrition, inter-generational benefits, Education Maintenance Allowance programme, mother's parenting, parenting capability, children's development and children's academic performance etc.

Social

Crime, youth crime, social cohesion, equity, inequality, social capital, peer relationships, policy initiatives etc.

Learning and school

Continuing adult learning, young people, post-16 education, primary school, secondary school, self-regulated learning etc.

There are a number of reasons to support choosing CWBL's conceptualisation of a wider benefits of learning framework as the analytical backbone of this research. Firstly, the conceptualisation of a wider benefits of learning model is developed to show the close ties and interactivity between a learner's capabilities and capitals and benefits of learning which are potentially to be affected and influenced by the learner's education experience. Moreover, the triangular shape of the wider benefits of learning framework also serves to remind researchers of the interrelationships between the three learner's capitals and the interactions between different learning outcomes inside the triangle. Lastly, the wider benefits of learning framework emphasise the changing dynamics and complicated causal relationship between capitals and learning benefits which a researcher must be vigilant about when conducting learning benefits research.

2.4 Summary

This literature review provides an overview of the development of the outcomes and benefits of learning over time. Through the selected learning outcomes and benefits models, indices, frameworks and research results, the interrelationship between outcomes and benefits of learning and learners' capabilities and capitals are discussed. The literature review shows that the type, nature and scope of interests of the outcomes and benefits of learning are evolving from their purely economic market value-focused outcomes and benefits to the twenty-first century focus on both economic and non-economic and private and public benefits, ie social benefits and outcomes. Because of the shift and change of the focuses and concerns about the outcomes and benefits derived from education and learning, especially on publicly funded education and learning, educational researchers develop different research methods from the early day quantitative statistical data methods to the later qualitative life course research approach. Researchers of the wider benefits of learning argue that because of the high complexity and interactive nature of learners' attributes and learning activity, study of learning outcomes and benefits and its causal interactive and interwoven relationship cannot be achieved using simple quantitative data analysis. Policymakers and governments, however, favour the quantitative approach and measurement as it provides simpler and more direct understanding and comparison to the value and cost of education.

Moreover, review of the literature and models of learning outcomes and benefits provide essential foundations and references for this research to investigate the wider benefits of learning for the disadvantaged in Hong Kong, particularly the capital and benefits model: the conceptualisation of wider benefits of learning suggested by

Schuller et al. (2004), where it emphasises and explains the complex relationship between individual learner's capital and capabilities and the learning activity and wider outcomes. In addition, the Schuller et al.'s capital and learning benefits model also draws on qualitative tradition which believes qualitative inquiry could provide deeper and wider insights into the individual and social benefits as a result of participating in learning activity. Because of these reasons, the conceptualisation of wider benefits of learning model is chosen as the analytical framework for this research.

CHAPTER THREE

RESEARCH METHODOLOGY

3.1 Introduction

The aim of this chapter is to explain the rationale and the background of the chosen methodological approach – semi-structured life story interviews to investigate the wider benefits of not-for-profit education for disadvantaged learners in Hong Kong. The key principles and the limitations of the narrative nature of life story interview are addressed and examined following the discussion on the rationale of the methodological approach. The chapter then focuses on illustrating the detail of the data collection process and reviews the issues and the difficulties experienced in the research. The procedures of the data analysis and the issues raised are also presented and discussed at the end of this chapter. A brief summary of this chapter is also provided.

3.2 Methodological Approach

In order to explain and justify the adoption of the semi-structured life story interview approach for this research, the aims and scope of the research are firstly reviewed and discussed. Then based on the six dimensions of the methodological approach for measuring wider benefits of learning suggested by the Centre for Research on the Wider Benefits of Learning (CWBL), the research argues that a life story interview

approach is the most appropriate method to investigate and answer the research questions.

3.2.1 Aims and Scope of the Research

This research set out to study the wider benefits of not-for-profit education for disadvantaged learners in Hong Kong. This research is one of the few studies of the wider benefits of learning that build on specific learner groups, specific education providers, and specific geographic and social contexts. It aims to explore the dynamics and interrelationship between (1) Learners' Capability and Capital, (2) Learning Activity and Process, and (3) Outcomes and Benefits of Learning (Figure 3.1).

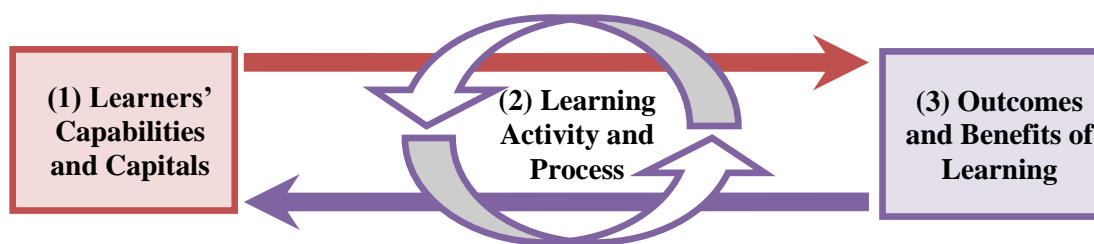


Figure 3.1: Dynamics and interrelationships between learner's capabilities and capitals, learning activity and process, and outcomes and benefits of learning (Source: This research)

The purpose of this research is underpinned by three main questions, of which the first two drive the empirical investigation:

1. What are the types and natures of benefits and outcomes of not-for-profit education from the four disadvantaged learner groups' perspectives?
2. How do disadvantaged learners' capability and capital affect and relate to the benefits and outcomes of learning through their participation in not-for-profit education?

3. Based on the research results on the benefits for the disadvantaged, what are the policy implications and the future of not-for-profit education?

In attempting to answer these questions, it was important to be mindful of some of the issues which have been raised in connection with the difficulties of measuring the wider benefits of learning.

3.2.2 Measuring Wider Benefits Learning

In a synthesis on *Modelling and Measuring the Wider Benefits of Learning* published by the CWBL, Schuller et al. (2001) summarise the methodological issues in measuring wider benefits of learning into six dimensions of which the methodological approach of this research has been referred to. A life story approach is strong and weak in different ways along each of these dimensions.

1) Validity versus precision

The first dimension is concerned with the appropriate balance between the validity of the measure used and the precision (or reliability) of the measurement. Schuller et al. (2001) remind us that if balance between validity and precision cannot be evenly progressed, justification on the decision of the selected measurement has to be carefully considered. This is particularly an issue with a life story approach because it is hard to assess both validity and precision.

2) Scope: formal and informal learning

The second dimension of methodological issues relates to the growing concerns of the educational benefits and outcomes brought about by informal education, for example effects on learner's human capital, though many research studies failed to investigate

and present these results and outcomes to the policy makers. Life stories help us with this issue, because they enable the researcher to gain insights into *both* kinds of learning.

3) Association/correlation/causality

In the third methodological dimension, Schuller et al. (2001) argue policy makers prefer strong causality to weak association though in fact it may be difficult to distinguish the two when investigating learning and learning outcomes. They remind researchers that they have to be careful about the kinds of learning benefits and causal relations (and including causal direction) that they want to present and the degree of confidence and clarity. A life story approach is good at explaining aspects of causality – but generally only on an individual or group basis.

4) Data sources and practitioner research

The fourth dimension of methodological approaches reminds us that the choice of dataset brings particular issues. For example, longitudinal evidence helps to establish temporal ordering in relation to the impact of learning and its outcomes. Schuller et al. (2001) suggest the use of a wide range of different types of evidence, such as the practitioner point of view, arguing that combining different data sources will enable triangulation. However, in this research, it was important to give voice to the disadvantaged learners alone as they are so rarely heard.

5) Pragmatism versus optimalism

The fifth dimension emphasises the need to identify and to stress the methodological or data inadequacies. Remedies to reduce the potential impacts on inadequacy should

also be considered. This research makes only a small contribution and highlights the need for more research on different groups of disadvantaged learners.

6) Perverse effects

The sixth methodological dimension suggests that education and learning also create diverse unwanted consequences. Measurement of these kinds of effects should also be taken by educational researchers. It is easier to identify these unwanted consequences with a life story approach than it is with a survey where the issues are determined beforehand.

So, it can be seen that, based on the aims and scope of the research and the six dimensions of methodological approach for measuring wider benefits of learning, there are a number of reasons that support and validate the use of qualitative semi-structured life story interviews to investigate the wider benefits of not-for-profit education for the four disadvantaged learner groups in Hong Kong.

Firstly, since benefits of learning are multi-faceted and interrelated in nature and are greatly affected and determined by individual learner's attributes and backgrounds, it would have been difficult to have a clear quantitative measurement to reflect and explain these complicated causal interrelationships.

Besides, given the limited research studies in this area and a lack of similar large-scale survey data in Hong Kong, for example statistical data from longitudinal learner cohort studies, without resourceful research support it would not be feasible to use a quantitative approach to conduct the research. The numbers of different groups of disadvantaged learners are also too small (in total of 23 disadvantaged learners were interviewed) that it would be difficult to yield robust statistical analysis.

In addition, this research sought to explore the disadvantaged learners' perceptions of their learning and the wider perspectives of learning benefits in some depth because very little research has been done on these groups. Since the disadvantaged learners' past learning experience and their diverse life experience would have significant impacts and influences on the learning benefits that they perceived, a semi-structured narrative life story interview which allows respondents to speak in their own voice, control the introduction and flow of topics and encourages them to extend their responses is deemed to be more valid and reliable in providing deeper and better understanding and explanations of the individual learner's perceived learning benefits. Besides, any perverse effects because of the influence of the disadvantaged learner's not-for-profit education would also be possibly identified and analysed. Moreover, since it was based on an aide-memoire of key topics rather than a formal interview schedule, the semi-structured interviews were designed to facilitate interviewees in reflecting upon both their experiences of education and their benefits of education.

Although a semi-structured narrative life story approach seems to be the most appropriate approach to investigate and answer the research questions, limitations such as its subjective and hermeneutic inclinations and non-generalisation nature needed to be observed.

3.2.3 Narrative Approach of Life Story Investigation

The narrative interview approach was selected to conduct this research. It is believed that in comparison with the other forms of life story investigation, narrative approach can provide more direct, accurate and better explanations and evidences on the causal

relationship between diverse learning activities and wider perspectives of benefits of learning for disadvantaged learners in Hong Kong.

Chase (1995) articulates that the ultimate aim of the narrative investigation of human life is the interpretation of experience. Chase argues that although researchers disagree about what constitutes narrative investigation and have developed divergent approaches to accommodate their research interest and tackle the potential research limitation, the narrative approach is in fact popularly deployed in western social enquiries. Chase argues that all forms of narrative share a fundamental interest in making sense of experience, in constructing and communicating meaning.

Polkinghorne (1995) also points out that narrative inquiry is set within qualitative research and deals with the stories that are used to describe human behaviour. He adds that qualitative researchers have applied the notion of narrative in various ways, but in the context of narrative inquiry, narrative refers to a discourse form in which events and happenings are configured into a temporal unity by means of a plot in the inquiry.

Moreover, Roberts (2002) argues that narrative study of lives has become a substantial area for analyses of life experience and identity as it is well connected to the subject's social groupings, situations and events.

Josselson (1995) asserts that researchers cannot rely on logical positivist statistical methods to study people's lives. Josselson (1995) and Flax (1990) suggest researchers in order to successfully approach life story investigation, need a metaphysics that embraces relativity and an epistemology that is simultaneously empirical, inter-subjective, and process-oriented.

3.2.3.1 The Three Dimensions of Variation of Narrative Life Story

According to Bertaux and Kohli (1984), there are three major dimensions of variation in life story method which are worth reviewing.

1) Number of life stories: Several hundred versus Single one

Bertaux and Kohli (1984) realise that some life story research is based on several hundred life stories, others rely on a single one, and the majority fall somewhere in between. Bertaux and Kohli assert that the number depends on whether empirically grounded generalisations are being sought or whether one is using a case study approach, where only generalisations based on theoretical plausibility but not statistical induction are being sought.

2) Research orientation: Objective versus Subjective

Bertaux and Kohli (1984) argue that life story researchers have an orientation toward subjectivity. The validity of retrospective data becomes much more important for those sociologists looking for patterns of historically given socio-structural relations than for those studying perceptions, values, definitions of situations, personal goals, and the like. Bertaux and Kohli suggest sociologists who incline to a more subjectivist orientation need to acknowledge the existence of social structures, and those with a more objectivist orientation have to consider the fact that social structures are the result of socio-historical process in which action, and therefore subjectivity, is playing its part.

3) Academic discourse versus Humanistic-literary

Bertaux and Kohli (1984) point out that orientation toward academic discourse tends to explain the theoretical and scientific-based argument, whilst a humanistic-literary

based argument emphasises the links between the sociologist and the researched. For the humanistic-literary approach, Bertaux and Kohli suggest researchers should look into the issues of rapport, feedback and readability of life stories, while sociologists, as publishers of life stories should also aim to advocate the people and groups who would be disregarded by the public.

Taking into account Bertaux and Kohli's (1984) three dimensions of variation of narrative life story, since the aim of this research is to investigate and reflect the complicated and diverse disadvantaged learner's not-for-profit education experience and how it affects and interweaves with the learner's life and their capitals, thus the orientation of this research is deemed to be interviewee orientated and subject to interaction and communication between the researcher and the researched. Through twenty-three in-depth narrative life story interviews, a manageable and feasible number of interviews, this research is designed to interpret, analyse and publish the disadvantaged learner's humanistic story in an attempt to reflect the subjective social reality and the social constructions and turmoil that have affected the disadvantaged learners' lives in Hong Kong.

3.2.3.2 Epistemology of Life Story Research

The epistemology of the narrative life story inquiry for this research is also reviewed and discussed in order to provide more guidance and insights for the research to plan and carry out the data collection and analysis. Bannister et al. (1994) argue that qualitative research is in fact part of an ongoing debate and the role of epistemology in relation to qualitative research is crucial to this debate. Bannister et al. remind us that engagement in the pursued knowledge and influences on the writing of a life

story and constructing theoretical framework and meanings are vital for the life story researcher and writer.

Moreover, Goodley et al. (2002; 2004) and Clough and Nutbrown (2002) suggest life story research is often viewed as having the following epistemological origins:

- Idiographic not Nomothetic – interested in the private, individual and subjective nature of life rather than the public, general objective;
- Hermeneutic not Positivist – preoccupied with capturing the meanings of a culture/person rather than measuring the observable aspects of a culture/person;
- Qualitative not Quantitative – focused on the wordy nature of the world rather than its numerical representation;
- Specificity not Generalisation – amenable to the specific description and explanation of a few people rather than the representative generalities of a wider population;
- Authenticity not Validity – engaged with the authentic meanings of a story and its narrator rather than devising measures that measure what they purport to measure;
- Language as Creative not Descriptive – recognises the constructive effects of language rather than language as a transparent medium for describing the world.

(Goodley et al. 2004, p. 97-98)

Josselson (1995) argues that the question is not whether narrative approaches are scientific, but how researchers take biographical awareness into scholarly conversation with their understanding of science. He argues although the narrative life story telling approach inherently includes various natures and doubts that positivists may see as the fundamental hurdles to adopt, in fact the narrative method is a unique

and irreplaceable way to uncover the deepest inner level of an interviewee's personal complicated and confused feelings. Researcher's major challenge is to deal with the confusion and complexity of the human condition and to write a 'superordinate narrative' that encompasses this life experiences. Josselson argues:

“Narrative is the representation of process, of a self in conversation with itself and with its world over time. Narratives are not records of facts, of how things actually were, but of a meaning-making system that makes sense out of the chaotic mass of perceptions and experience of a life.”

(Josselson 1995, p.35)

However, Stanley (1994) claims that the increasing popularity of the study of lives in recent years has raised central epistemological and political issues for all forms of social inquiry and praxis. He argues that questions are being raised regarding explanation, understanding and interpreting the determination of individual and group actions and assumptions regarding social being.

Larson (1997) also points out that narrative knowing is in fact complex because the researcher needs to question their own deeply held assumptions about research and the ways in which the researcher conceptualises individuals theoretically. According to Larson, the researcher's deep assumption of the targeted interviewee group and the ability to discover and appreciate the true background and characteristic of the individual interviewee in a given short period of time will directly and greatly influence the authenticity of the life story acquired.

Goodley (2004) on the other hand, claims that life story research can be seen as a post-positivistic approach to research that abstains from the long-held traditions of positivistic approaches to social science, and life story researchers often bring with them a lot more specific considerations. He argues that in the postmodernist view,

positivists' 'grand narratives or metanarratives' are increasingly open to doubt. Goodley (2004) asserts that using the term 'grand narrative' instead of 'truths' has encouraged researchers to rethink and question the very status and function of these grand narratives. Assiter (1996) also claims that in the most radical anti-foundationalist moments, postmodernism escapes the modernist horrors and offers a collection of empowered alternative narratives to researchers. Poststructuralists argue that human selves are constructed via a mass of discourses and grand narratives. Individual human beings are not biological or natural givens and the associated sense of self but are in fact created through power and knowledge (Assiter 1996; Goodley 2004). Goodley suggests for some individuals who are labelled, for instance, as 'abnormal', 'insane', 'criminal', 'having learning difficulties', 'lacking intelligence', 'behaviour incompetent', 'maladaptive functioning' and 'immature development' under the structuralist's power and knowledge structure should be viewed with scepticism rather than as truth.

In addition, Weedon (1987) argues subjectivities are often locked into the social meanings in the institutionalised and segregated settings. He argues that the aim of life story is to capture the socially constructed nature of experiences, the language of the wider culture and their accompanying subjectivities. Weedon emphasises the importance of observing the language use in narrative life story inquiries:

"Language is the place where actual and possible forms of social organisation and their likely social and political consequences are defined and contested. Yet it is also the place where our sense of ourselves, our subjectivity, is constructed... Subjectivity is produced in a whole range of discursive practices – economic, social, and political – the meanings of which are a constant site of struggle over power."

(Weedon 1987, p.21)

3.2.3.3 Emancipatory Style of Narrative Life Story Interview

Researchers believe interaction between the interviewer and the interviewee has significant impact and influence on the results of narrative life story interview.

Josselson (1995) argues that narrative research by nature is the means by which both participants and researchers shape the understandings and make sense of them.

Goodley et al. (2004) also argue that researchers collecting life stories through emancipatory interview approach in fact conduct a collaborative project between the interviewer and interviewee. It allows the interviewee – or co-researcher – to build the story and have full editorial control and present a first-person narrative. The focus of emancipatory research is not only on full participation but ownership of the narrative by the interviewee where Chase (1995) claims that life story narratives are about some life experience that is of deep and abiding interest to the interviewee. Goodley et al. (2004) also articulate that the key element of the life story interview is the idea of emancipation and if doing research ethically the interviewee might usually gain something from the production. They argue emancipatory research in its purest form has roots in action research paradigms.

Moreover, Bertaux and Kohli (1984), cited in Schutze (1980), suggest in practice narrative interview consists of two major components:

1. A preferably extensive narration by the interviewee/narrator, during which the interviewer restricts his interventions to the minimal hearer utterances required to keep the narration going; and
2. A period of questioning when the interviewer tries to elaborate on the issues presented in the narration and introduces additional topics.

Ochs and Capps (2001) on the other hand assert that a life story presented as a finished product contains researched voice which should be clearly visible and the interviewer's voice which is implicitly visible. Ochs and Capps explain the interactions and relationships between interviewer and interviewee in the emancipatory style of narrative life story approach:

“Narrative activity becomes a tool for collaboratively reflecting upon specific situations and their place in the general scheme of life... the content and direction that narrative framings take are contingent upon the narrative input of other interlocutors who provide, elicit, criticise, refute and draw inferences from facets of the unfolding account. In these exchanges, narrative becomes an interactional achievement and interlocutors become co-authors.”

(Ochs and Capps 2001 p. 2-3)

3.2.3.4 Interview and Questioning Techniques

Because of the interactive and interviewer's participation nature of narrative life story interview, the researcher's techniques and skills in interview and questioning are important. Bertaux and Kohli (1984), cited in Schutze (1980), stress that in life story interview the researcher should first be able to apply adequate stimulus to elicit primary narration and then for subsequent questions. Bertaux and Kohli argue that given the necessary structural conditions, narration interview allows the researcher's opportunities to reconstruct the real sequence of past events and evokes more detail than the narrator originally intended or thought he or she would be able to give.

Bertaux and Kohli (1984) on the other hand argue that the key methodological point of topical life stories research is 'the rediscovery of the process of saturation' by which researchers will advance and enrich their narrative skills and mindset while conducting life story interviews. They argue that through modifying the questions

asked, improving his or her communication skills, and correcting the mental picture of the social process under study, the researcher will eventually reach a point beyond which every new case merely confirms the validity of the sociological interpretation.

3.2.3.5 Limitations and Difficulties of Narrative Life Story Interview

Despite the fact that narrative life story interview earns its popularity and significance across a variety of disciplines, Chase (1995) argues that qualitative researchers rarely focus specifically on eliciting narratives in the interview context and pay little attention to the narrative character of talk produced during interviews.

Mishler (1986) claims that conventional methods of sociological interviewing tend to suppress respondents' stories, and that conventional methods of interpretation ignore the import of stories that the interviewees long to tell despite the interviewer's attempts to stifle them. Mishler points out that the impulse to narrate is such an integral part of human experience that interviewees will tell their stories even if the interviewer does not encourage the interviewee to do so. However, as many have already argued, narration is a complex social process, a form of social action that embodies the relation between narrator and culture, Chase (1995) articulates that taking narrative seriously also means directing the researcher's attention to that process of embodiment, to what narrators accomplish as they tell their stories, and to how that accomplishment is culturally shaped.

Polanyi (1985) on the other hand argues that many researchers fail to conduct life story interviews correctly and ask inappropriate questions which induce topical reports rather than life story. Polanyi complains that many stories are told to make a point and to transmit a message about the world the teller shares with other people and

the narrator takes responsibility for making the relevance of the telling clear. Although a report (life story) is typically elicited by the recipient, Polanyi points out that the burden of assigning differential weightings to the various narrated propositions thus falls to the receiver of the report.

Moreover, Chase (1995) suggests interview questions should be phrased in everyday rather than sociological language and need to ask about participants' experiences, thoughts, and feelings in order to gather data thick enough to shed light on the sociological problems. However, even when the researcher phrases such questions in everyday speech and intends to produce a collaborative research relationship, Chase criticises sociological questions which direct the interviewee to the researcher's concerns and away from the interviewee's own life experiences. In some situations, Chase claims that participants willingly enter such a conversation to help the researcher with his or her questions.

In addition, a good relationship between researcher and the researched is important. Plummer (2001) asserts that life story research, perhaps more than any other, involves establishing and maintaining a close and intimate relationship with the subject, often for a number of years, meeting regularly each week. However, it was not possible for this research to develop longitudinal contact because of the scope and limited resources and time available.

3.3 Ethical Issues

3.3.1 Ethics of Emancipatory Narrative Life Story Interview

Goodley et al. (2004) emphasises that the ethics of the emancipatory life story interview approach are complex and the issues of confidentiality and anonymity are crucial. Moreover, they argue that by nature, the interviewee should always guide and direct the focus and content under the emancipatory interview approach and the researcher should focus on assessing and probing the relevance and meanings of the life story with the area of study along the whole interview process. However, the life experience that is being drawn upon is always owned by the interviewee and no amount of clarity, ethical undertaking and transparency can undermine the narrator's wish to tell a good tale.

3.3.2 Gaining Ethical Approval and Consent

This particular project was granted approval by Cardiff University Social Research Ethics Committee and was mindful of the guidelines laid down by the British Educational Research Association for the ethical conduct of research.

In contacting the respondents, a Chinese translated 'Research Participant Information Sheet and Consent Form' (Appendix III) (stating the purpose of the research, The Data Protection Procedure and Protection Act, ethical committee and clearance procedure, and the researcher and research supervisor contact information) was explained and provided to the interviewee. The consent letter was also signed by the interviewee prior to the interview and this has helped to gain the interviewee's confidence concerning the confidentiality and anonymity of the research.

In order to protect both the researched and the researcher's interest, pseudonyms are used to cover the real identity of the interviewees.

3.4 Data Collection

3.4.1 Accessing and Selecting a Sample of Disadvantaged Learners

A total of twenty-five disadvantaged learners were interviewed in a three month period, and twenty-three life stories were selected and reported in this research. Interviewees were selected based on four major sources: 1) Researcher's ex-students, 2) Referrals from researcher's personal network, 3) Referrals from the interviewees, and 4) Referrals from not-for-profit organisations. A simple and short telephone call was made to each potential interviewee prior to the actual interview, to cross-check the interviewee's suitability and relevance for this research, for example questions were asked regarding the type of not-for-profit education studied and the time of studying. Although continuous efforts and communication being made to the not-for-profit education organisations prior to interview, two referred life stories were dropped and discontinued from this research because the background of the disadvantaged learners (they were newly arrived and temporarily staying in Hong Kong under asylum status) did not fit the scope of the research and the time and place and the language communicated in the interview had restricted the quality and validity of data.

The interviewees profile and the details of the interview are listed in Table 3.1.

Table 3.1: Disadvantaged learner profile and interview details

Pseudonym	Gender	Age	Major Not-for-profit Education attended or Not-for-profit Education Provider ¹	Place of Interview	Length of Interview (Hours: Minutes)	Source of Interviewee ²
<i>Not in Education, Employment, or Training (NEET) Youth</i>						
1. Yash	Male	25-30	YPTP, YiJin	Park	00:48	From Personal Network
2. Gary	Male	20-25	Cert, YPTP, YiJin	Park	01:11	From Personal Network
3. Yammy	Female	25-35	YiJin, VO, Cert	Park	01:18	From Personal Network
4. Lai-fa	Female	25-35	Cert, Dip, VO	University Campus	01:17	From Personal Network
5. Peter	Male	20-25	Cert, FD, Dip	Park	01:09	From Interviewee
6. Ting-fung	Male	20-25	YiJin, FD	Park	00:52	From Personal Network *
7. Paul	Male	20-25	YPTP, YiJin, FD	City Hall	01:12	From Interviewee
8. Fiona	Female	25-35	Cert, Dip	City Hall	01:08	From Personal Network
9. Connie	Female	20-25	YiJin, FD, AD	Restaurant	01:32	Ex-student
10. Brian	Male	20-25	YPTP, YiJin, FD	Park	01:16	Ex-student
11. Lok-yin	Male	20-25	Cert, Dip	College Campus	00:52	From Interviewee
12. Yun-ling	Female	20-25	YiJin, FD, AD	Park	00:41	Ex-student
<i>Economically Marginalised</i>						
1. Kok-sing	Male	40-50	ERB	Park	00:56	From Personal Network
2. Miranda	Female	50-55	NS, ERB, LCC	Church	01:41	From Personal Network
3. Jane	Female	50-55	NS, VO, LCC	Park	01:40	From Personal Network
4. Suet-lai	Female	50-55	ERB, VO, LCC	Interviewee's Home	01:27	From Personal Network
5. Fong-lan	Female	45-50	NS, ERB, LCC	Restaurant	01:11	From Personal Network
6. Dolly	Female	55-60	ERB, LUO, LCC	Hotel Café	01:48	From Personal Network
<i>Older Adults</i>						
1. Mary	Female	65+	ERB, RO, LCC	Religious Organisation	01:21	From Personal Network
2. Lai-kuen	Female	65+	ERB, RO, LCC	Restaurant	00:36	From Interviewee
3. Kwai-fun	Female	65+	ERB, RO, EA	University Campus	01:22	From Personal Network
<i>New Immigrants from mainland China</i>						
1. Sandy	Female	30-40	ERB, LUO, VO	Interviewee's Home	01:37	From Personal Network
2. Wing-han	Female	30-35	LUO, VO	City Hall	01:14	From Personal Network

Remarks¹: YPTP: Youth Pre-employment Training Programme; YiJin: Yi Jin Programme; Cert: Certificate; Dip: Diploma; FD: Foundation Diploma; AD: Associate Degree; ERB: Employees Retraining Board; NS: Night Secondary School; VO: Voluntary Organisation; LCC: Local Community Centre; RO: Religious Organisation; EA: Elderly Academy; LUO: Labour Union Organisation. Remarks²: *: Accompanied by the interviewee's teacher.

The composition of the samples of the four learner groups were NEET Youth: 12; Economically Marginalised: 6; Older Adults: 3; New Immigrants from mainland China: 2. The composition of this sampling result was because: 1) Interviewees were randomly sought from different sources where interviews were held in time sequence

within the three months data collection period; 2) After the interview and preliminary data analysis, interviewees were categorised and grouped into different learner groups based on the learner's background, attributes, and learning experience. For instance, Dolly is categorised as an Economically Marginalised disadvantaged learner instead of belonging to the Older Adults group in this study, because of her strong interests and active participation in economic activities as well as her intention to join not-for-profit education to gain relevant job skills and knowledge.

3.4.2 Developing Interview Schedule and the Data Collection Process

Since the semi-structured interview approach was adopted for the life story interviews, scheduled and pre-set research questions were only asked if the disadvantaged life stories did not cover the information or data required for analysis. The range of questions asked to assist the researcher to compose the disadvantaged learner's life story was divided into six different parts which were sequenced from disadvantaged learner's background, education experience, present life situation and experience, not-for-profit education experience and comments. Figure 3.2 shows the range of questions covered in the semi-structured life story interviews. However, questions were only asked when necessary in order to avoid any possible interruption and corruption of the disadvantaged learner's life story. The detailed interview schedule and questions covered are listed in Appendix I.

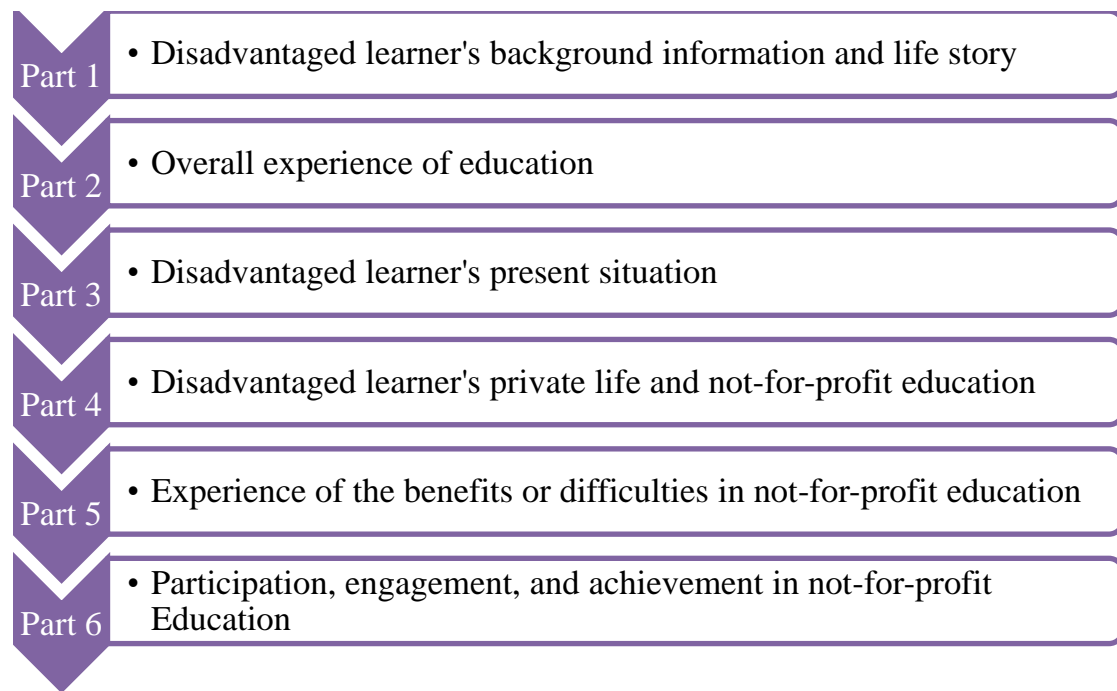


Figure 3.2: Range of questions covered in the semi-structured life story interview. (Questions were only asked when needed in order to minimise the possible interruption or corruption of the disadvantaged learner's life story.)

For the 23 disadvantaged learner cases interviewed and collected in this research, instead of following and asking the prepared questions listed in the interview schedule shown in Appendix I, interviewees were encouraged to start telling their own stories in their own way while the researcher only provided minimal 'aide-memoires' to facilitate the interviewee in telling their story. One pilot interview was held to test the procedures, equipment and techniques required to conduct a semi-structured narrative life story interview.

Moreover, because most of the selected interviewees were newly recruited and not known to the interviewer, in order to avoid the interviewee feeling any embarrassment or reluctance to share their own life story, it was essential for the researcher to quickly build up rapport and trust with the interviewees. Ice-breaking and trust-building dialogues such as a friendly introduction of the interviewer's own background and

detailed explanations of the purposes and objectives of the research project were deemed to be very important. The sampling and accessing strategy adopted in this research where most of the interviewees were introduced or referred by someone related to the interviewer were also crucial to build up trust between the interviewer and interviewee. However, in return, the interviewer had to be very careful and subtle to maintain the trust that the interviewee gave to the interviewer as the interviewee might worry his/her private life story would be disclosed to the person who introduced them for the interview.

The location and time of interview were considered based on 1) Convenience to the interviewee, 2) Safety concerns, 3) Quietness and Privacy, and 4) Cost. In fact, it was very difficult to fulfil all these four criteria, especially, for the quietness and privacy of the interview location, since Hong Kong is a small and crowded city where quiet meeting places are limited.

Two digital voice recorders were used to record the narrative life story. The researcher also used a notebook to quickly jot down key observations or notes during the interview though detailed note writing was not possible as the researcher had to be very concentrated to listen and follow the development of the disadvantaged learner's life story and to provide proper help to the interviewees to continue and develop their stories. Face-to-face seating arrangement between interviewer and interviewee was avoided in most of the circumstances. The interviewer and interviewee were sitting and facing the same direction, for example sitting on the same bench in a park, to provide a less pressured and more relaxed atmosphere to encourage the interviewees to tell their stories.

3.4.3 Issues in the Collection of Data

There are a number of issues which the interviewer was not expecting when conducting the life story interviews.

Firstly, although interviewees were told to tell their own life stories and the interviewer tried not to intervene or direct the life stories, many interviewees needed the interviewer to lead them to go through their life stories. Besides, many interviewees were focused on their education experience rather than their life stories as they were told by the interviewer before the start of the interview that the life stories collected were for educational research purposes. To address the problem and make the interviewee's life story more complete and detailed, the interviewer needed to be very careful to encourage the interviewee to explain in more detail some of the areas of their life which were not clear to the interviewer. For example, the interviewer asked a question like: 'Can you explain a bit more about your divorced life?' or 'Can you tell me more about your childhood and your family?' etc.

Moreover, some interviewees showed that the interviewer did not understand or have an interest in their situation and the problems that they had faced. It may have been because the disadvantaged learners perceived they have much poorer backgrounds and social status when compared with the so-called 'doctorate researcher' and thought the researcher have no real interest in understanding them. The retired and older adult interviewees they might perceive the researcher was not old or mature enough to feel and understand their difficult life experience. The new immigrants from mainland China interviewees might doubt the interviewer's knowledge on the cultural and identity differences between Hong Kong and China. To reduce the possible impact caused by the interviewee's perception of the interviewer, the interviewer had to be very focused and show he was listening and understanding and able to feel what the

interviewee felt. Moreover, the narrative researcher had to be very sensitive and reactive to the meanings of the word or hints uttered by the interviewee, and even the changes of facial expression or body language. Since the research provided no visual recording, the researcher needed to write down these physical observations in his notebook.

Furthermore, in some interviews especially with the older adult disadvantaged learners, they were not able to link their life stories or they confused the time or sequence of events in their life. Also, some interviewees were reluctant to disclose certain key events in their life which made their life stories fragile and difficult to understand and follow. For example, some interviewees were reluctant to tell the researcher they had to rely on government welfare to sustain their family as they felt embarrassed due to their Hong Kong Chinese culture.

Lastly, a number of interviewees said that they felt content and satisfied after participating in a life story interview. They felt rewarded by the life story interview as they were asked to tell their life story to someone which they had never done so before. It also provided them with a chance to reflect on their lives and helped them to think about their future. As Plummer (2001) claims, emotional rewards are often more important than financial or material rewards for the life story participants as they have someone to listen to them and document their life stories. However, the interviewer came across several life stories which were not expected and were extremely shocking. Several interviewees were crying and sobbing during the interview so that the interview had to be temporarily stopped. The researcher had to manage to control his personal emotions and feelings at the scene when he was listening to these traumatic stories so as to allow the life story research to continue.

3.4.4 Transcribing and Translating the Interviews

Firstly, all the life story interviews were conducted in Cantonese, the native language of the people in Hong Kong. First, transcriptions were needed to transcribe the spoken Cantonese narratives (voice recordings) to written Chinese (narrative scripts) where the spoken Cantonese can be totally different from the written Chinese in terms of both the use of words and the meaning of the words used. Moreover, the use and the interpretation of the words used in spoken Cantonese and written Chinese are hugely affected by the social and cultural contexts. The person who transcribed the narrative life stories needed to have mastered both spoken and written Cantonese and Chinese very well and have a good understanding of the local culture and context when doing the first transcriptions. The quality of the written Chinese narrative scripts was cross-checked by the writer of this thesis by comparing the original voice recording with the written Chinese scripts.

Second transcriptions were needed to translate the written Chinese narrative scripts into English. In order to ensure a high quality of translation, two native English speakers helped to proof-read the English translated narrative scripts. A native Chinese reader helped to interpret and proof-read the English narrative scripts back to the writer of thesis who translated the Chinese narrative scripts into English. These back-and-forth translations, proof-readings, and interpretations were aimed at reducing any shortfall or misinterpretation in the transcription process. (Appendix II)

3.5 Data Analysis

Life stories present the researcher with a number of challenges. Chase (1995) asserts that the life stories themselves embody what the researchers need to study, for example the relationship between social action and social word that the narrator shares with others, the way in which culture marks, shapes, and/or constrains narrative, and the ways in which the narrator makes use of cultural resources and struggles with cultural constraints. By analysing the complex process of narration in specific instances, Chase believes the researchers learn about the kinds of narratives that are possible for certain groups of people, and learns about the cultural world that makes particular narratives possible in certain ways. Chase claims that the significant point is that generally it is not fully evident to the researcher in advance but fully only through its embodiments.

Gubrium and Holstein (1995) in addition suggest that, in analysing the interview data, the term 'narrative linkage' needs to be considered. It refers to the experiences that the narrator links together to specify the subjective meaning of their life. Moreover, the notion of 'local culture', referring to the local shared meanings and interpretive vocabularies that narrators in relatively constrained communities or settings use to construct the content and shape of the lives, should also be measured. Gubrium and Holstein claim that local cultures are diverse, setting-based, and more socially encompassing which provide circumstantially recognisable and accountable interpretive resources for constructing and understanding of lives.

Moreover, Bertaux & Kohli (1984) argue that discussions of data analysis often centre on the question of whether 'routines' for analysis comparable to those used in

quantitative research may be found or should be sought. Two approaches aimed at achieving some degree of routinisation of narrative data analysis should be considered. Firstly, in narrative interviewing, the analysis starts with a detailed formal analysis of the text structure. A step-by-step process of identifying typical cases and relevant theoretical categories should then be followed.

3.5.1 Coding and Thematic Analysis of the Interview Data

Disadvantaged learners perceived benefits were coded and categorised according to the ‘Conceptualisation of Wider Benefits of Learning’ framework suggested by Schuller et al. (2004). Data was analysed and reported on four disadvantaged learner groups. The four disadvantaged learner groups were identified because they have been popularly discussed among different stakeholders in society in recent years, though other thematic analyses was also possible, for example disadvantaged female learners, age-specific, or course-specific. Table 3.2 summarises the four thematic disadvantaged learner groups based on the social discussions in recent years in Hong Kong.

Table 3.2: The four thematic disadvantaged learner groups based on the social discussions in recent years in Hong Kong

Thematic Group	Social Discussion Focused On
Not in Education, Employment, or Training (NEET) Youth	Age, qualification, skills, job opportunities-specific problems
Economically Marginalised	Job, income, and standard of living-specific problems
Older Adults	Age, standard of living, retirement protection-specific problems
New Immigrants from mainland China	Immigrant identity-specific problems

3.5.2 Scaling and Presenting the ‘Data’ for Comparative Purposes

Qualitative data derived from the narratives of the disadvantaged learner’s life stories was categorised and presented into different types of benefits of learning according to the ‘Conceptualisation of Wider Benefits of Learning’ framework. In order to provide a better presentation for comparative purposes on the different degrees of the expected and achieved benefits gained, two simple five-scale tables were developed and used in all the data analysis chapters in this research. The degrees of the expected and the achieved learning outcomes are shown in Table 3.3 and the degrees of the disadvantaged learners’ expected and achieved gains in capital are shown in Table 3.4.

Table 3.3: The degrees of the expected and the achieved learning outcomes

Scale	Expected Learning Outcomes (Degree of expectations)	Achieved Learning Outcomes (Degree of achievement)
0	Not desired or expected at all	Failed to achieve/not relevant
1	Not aware of it	Limited achievement and gain
2	Some desires and expectations	Some achievement and some gain
3	Good to be achieved	Achieved and gained
4	Desired and expected to gain of it	Achieved and gained over expectation
5	Urgently desired and expected of it	Fully achieved and gained with success

Table 3.4: The degrees of the disadvantaged learner’s expected and achieved gains in capital

Scale	Learner's Expected Gains in Capital (Degree of expectations)	Learner's Achieved Gains in Capital (Degree of fulfilments)
0	Not desired and expected at all	Failed to fulfil or make gain
1	Not aware of it	Limited fulfilment and gain
2	Some desires and expectations	Some fulfilment and some gain
3	Good to be fulfilled	Fulfilled and gained
4	Desired and expected to gain of it	Fulfilled and gained over expectation
5	Urgently desired and expected of it	Fully fulfilled and gained with success

Moreover, the notion of ‘Learner Surplus’ is suggested in this research. The idea of learner surplus is taken from the study of ‘Consumer/Supplier Surplus’ in economics studies where it measures the social welfare/surplus gains thanks to the differences between the expected and actual price paid by the consumers or received by the suppliers. Following a similar concept, learner surplus in this research is to measure the differences between the expected learning benefits gains/losses and the achieved learning benefits gains/losses. It is important to note that the ‘expected’ and the ‘perceived’ gains/losses are from the learner’s perspective, that is perceived and reported directly by the disadvantaged learner, while the ‘achieved’ gains/losses including those benefits gains/losses which the disadvantaged learner was not aware of or did not recognise were from the researcher’s perspective. Moreover, since the notion of learner surplus still has not yet been fully researched and discussed, it is therefore mainly used to represent the unexpected benefits gains or the ‘surprise factor’ in the disadvantaged not-for-profit education. Figure 3.3 shows the relationship between the learner’s expected, perceived and achieved gains/losses in learning benefits and the notion and measurement of learner surplus.

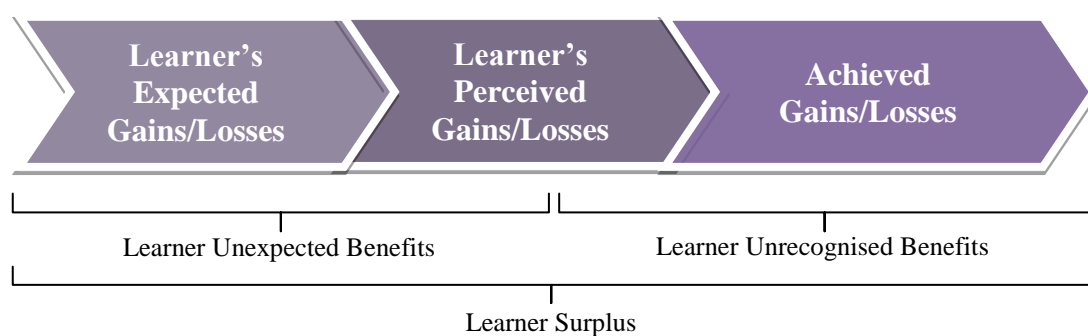


Figure 3.3: The relationship between the learner’s expected, perceived and achieved gains/losses in learning benefits and the notion and measurement of learner surplus

Individual disadvantaged learner's benefits of learning will then be rated according to the five-scale table. Table 3.5 shows an example of how the disadvantaged learners' capital gains are rated.

Table 3.5: An example of how a disadvantaged learner's capital gains are rated

Economically Marginalised	Identity Capital				Social Capital				Human Capital			
	Expected Benefits	Perceived Benefits	Achieved Benefits	Learner Surplus	Expected Benefits	Perceived Benefits	Achieved Benefits	Learner Surplus	Expected Benefits	Perceived Benefits	Achieved Benefits	Learner Surplus
Kok-sing	2.0	2.0	2.0	0.0	1.0	1.5	1.5	0.5	4.0	4.5	5.0	1.0
Miranda	2.0	3.5	3.5	1.5	3.0	3.0	4.0	1.0	4.0	5.0	5.0	1.0
Jane	3.0	3.5	3.5	0.5	3.5	4.0	4.5	1.0	2.0	3.0	3.5	1.5

Moreover, different radar diagrams (eg Figure 3.4) were used to show the different learning outcomes achieved by different disadvantaged learners. Two disadvantaged learners' life stories were also analysed and discussed in each learner group to facilitate understanding of the complex interrelationships between learning outcomes, learning activity and the learner's capital and capability.

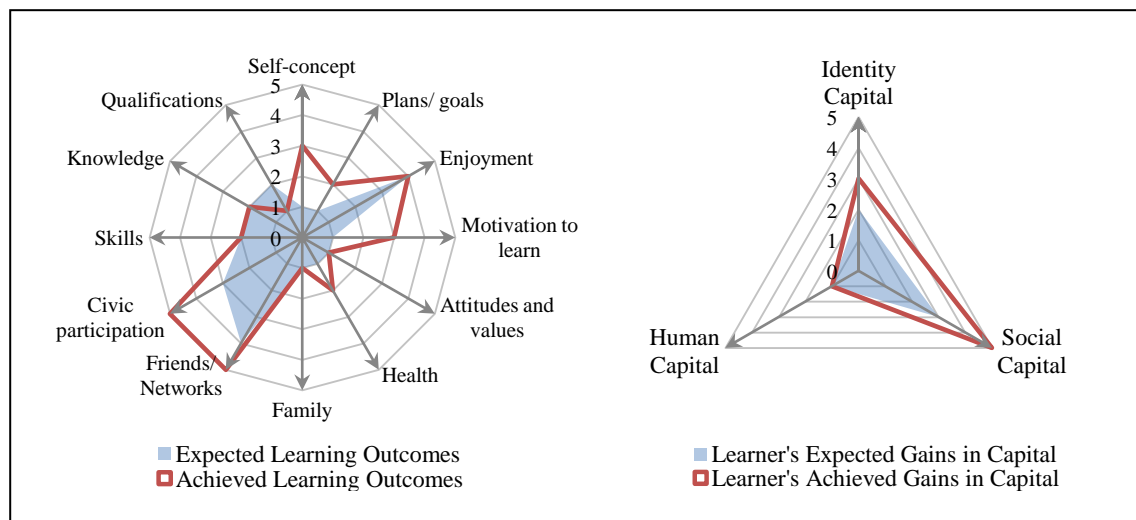


Figure 3.4: An example of the different radar diagrams to show the different learning outcomes achieved by the disadvantaged learners

3.5.3 Issues in the Analysis of Data

According to Mishler (1986), in a pure emancipatory interview the researcher transcribes the voice recordings and sends the full and unedited transcript to the interviewee for editing and confirmation. Researcher and interviewee will then meet and discuss the story and its form. Borland (1991) also claims that stories can be disowned or distanced if researchers' lenses are not shared by their participants. However, due to the nature of this research and the limited research resources and time and the geographical distance between the interviewees (in Hong Kong) and the researcher (in the UK), the interviewer has only been able to meet once with each selected interviewee in Hong Kong. Further discussions on the narrative scripts between the researcher and the disadvantaged were not feasible and arranged in this research. For this reason the transcriptions and constructions of the life stories in this research will wholly depend on the interviewer. Although life stories were not edited and confirmed by the interviewee, the semi-structured narrative life story interview approach that has been adopted in this research is still believed to be able to provide valid and reliable research data and findings especially when compared with the other research approaches where full confirmation of data is also not viable.

As discussed, all the life stories were conducted in Cantonese which required careful and precise transcriptions and translations. Although a certain amount of effort and resources have already been spent and input to improve the precision of the narratives, there is still a risk and this can be seen as a weakness that possibly affects the accuracy of the data and the research findings.

In addition, the uses of scaling and radar diagrams to represent and compare the disadvantaged learners' perceived benefits of learning can only provide comparative results of the different learning outcomes but not the means to provide absolute values

of the benefits gained. The use of scaling to reflect the changes in learning benefits and capitals may also not reflect the complicated and interrelated diverse personal nature of lives and not-for-profit learning experiences. Moreover, though few harm or losses from the disadvantaged learner's participation in not-for-profit education were reported in the research, the data analysis was still mainly focused on the benefits gained rather than exploring and covering the potential harm or losses.

The use of various visual diagrams, such as triangular and circular radar diagrams and column diagrams in this research, aims to simplify and effectively communicate the generalised diverse and complicated interrelationship of disadvantaged learner's wider benefits of not-for-profit learning and capitals have provided an eye-catching presentation of information to the readers, however it may oversimplify and over-generalise the collected data and not reflect the vast diversities of individual disadvantaged learners' learning experiences and their life changes brought about by their not-for-profit education learning.

Lastly, the notion and application of 'learner surplus' as discussed is still underdeveloped and has not yet been fully explored. The findings and implications of the results shown in the research can only be seen as being exploratory and are subject to further discussion. Further research on learner surplus is also required.

3.6 Summary

This chapter has provided the rationales and an overview of the chosen methodological approach to studying the wider benefits of not-for-profit education for disadvantaged learners in Hong Kong. The semi-structured narrative life story interview approach is seen as the most appropriate to investigate and answer the research questions as it provides better understanding and clearer explanation of the temporal causal relationships between a learner's capital and capabilities, learning activities, and the wider learning benefits which other research approaches can fail to achieve. Based on the fact that no single research method is perfectly suited to solving research questions, the limitations and difficulties of the selected approach are also discussed.

Moreover, the detailed data collection process, from accessing and selecting the interviewees to develop interview schedules, and detail data collection processes have been explained and discussed. It has been found that it is crucial for the interviewer to develop a rapport and build up trust with the interviewee before the actual interview is held in order to provide a safer and more comfortable atmosphere for the interviewees to tell their life stories. The researcher should also always carefully maintain that trust and stay vigilant and responsive to the learner's life stories and their physical behaviour. In addition, the researcher needs to guide and provide direction for the interviewees to develop their life stories as interviewees life stories could often be diverted to the education perspective only and so could be incomplete. Interviewees also showed that they enjoyed and felt satisfied by the opportunity to tell their stories to someone that they have never met before as it helped them to reflect on their lives

and plans for the future. However, the researcher should also always be ready to encounter sad and shocking life stories.

In the discussion of data analysis in this research, it has been found that transcriptions and translations from the spoken Cantonese narratives to the English written narrative scripts were crucial to the research as misinterpretation of the narrative data will corrupt and affect the validity and reliability of the research findings. Moreover, narrative data was thematically analysed and categorised in four different learner groups following the popular social discussions of the disadvantaged in Hong Kong. Narrative data was analysed according to the 'Conceptualisation of wider benefits of learning' framework and scaled according to two scaling tables. The notion and measurement of learner surplus were also explained. Different radar diagrams were also used to present the scaled learning outcomes and capital gains. Two disadvantaged learners' life stories were arranged to be analysed and discussed in full in each disadvantaged learner group in order to enhance data analysis. However, due to the limitations on resources and time and the geographic distance between the interviewees and the interviewer, it was not possible to send the transcribed life stories to the interviewee for editing and confirmation. Besides, the implication and the results of learner surplus could only be used for exploratory study purposes and further research is required.

PART II FOUR GROUPS OF DISADVANTAGED LEARNERS

In the second part of this thesis, the wider benefits of not-for-profit education for the four disadvantaged learner groups are analysed and discussed, each beginning with the background to the issues facing each group of disadvantaged learners. The data analysis is then undertaken and structured, categorising different kinds of benefits according to the ‘conceptualisation of wider benefits of learning framework’ as suggested by Schuller et al. (2004). The benefits of not-for-profit education are then illuminated using extracts of narrative data and case study narratives of the selected individual disadvantaged learners. A summary of the findings of each group of disadvantaged learners is also provided at the end of each chapter.

The wider benefits of not-for-profit education for the four groups of disadvantaged learners are analysed and presented in the following sequence:

Chapter Four: Not in Education, Employment, or Training Disadvantaged Youth;

Chapter Five: Disadvantaged Economically Marginalised;

Chapter Six: Disadvantaged Older Adults;

Chapter Seven: Disadvantaged New Immigrants from Mainland China

Moreover, cross group comparisons and conclusions of the findings of the different disadvantaged learner groups’ wider benefits of not-for-profit education as well as the policy implications and suggestions are provided and presented in Part III of this thesis.

CHAPTER FOUR

REPORT AND ANALYSIS OF DATA: WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION FOR ‘NOT IN EDUCATION, EMPLOYMENT, OR TRAINING’ (NEET) DISADVANTAGED YOUTH LEARNERS

4.1 Introduction

This chapter is the first to analyse and discuss the wider benefits of not-for-profit education for the four different disadvantaged learner groups and focuses on disadvantaged NEET youth learners. It starts by illustrating the background of the NEET youth problem in Hong Kong and discusses the problems and consequences caused by the disadvantaged NEET youth from different socio-economic perspectives. It attempts to explain the causes of the disadvantaged NEET youth status and shows how the government responded to the problems. Through the narrative data collected from the twelve NEET youth’s life stories, this chapter then focuses on fully analysing and discussing the wider benefits of not-for-profit education for the disadvantaged NEET youth and demonstrates two life stories to support the findings. This chapter also provides a summary of the findings of the wider benefits of not-for-profit education for the disadvantaged NEET youth learner group and leads to further discussion on comparing the wider benefits of learning of the other disadvantaged learners group in Part III of this thesis.

4.2 Background of the NEET Youth Problem in Hong Kong

The rapid transformation and integration of world-wide economies in the last two decades and the return of Hong Kong sovereignty from the British to the Chinese in 1997, has significantly changed the social economic landscapes and activities in Hong Kong. Following the prolonged global economic downturn and increasing competition from mainland China, many disadvantaged young people in Hong Kong found it difficult to progress from school to work and were stuck in between. The problem of ‘Not in Education, Employment, or Training’ (NEET) has become severe and it has caused different levels of damage to both disadvantaged young people and to society. After years of accumulation of NEET youths in Hong Kong, the problem became more critical and has turned into one of the major social concerns in the last few years.

In fact, young people in Hong Kong are facing a very high unemployment rate and exceptionally challenging career prospects. It is especially hard for those young college leavers who left college without qualifications, working experience, and relevant skills to start their career. Their future is even more grim and worrying if they are not willing or not able to participate in further education or vocational training, and not active in socialising with others. According to the government statistics record (HKCSS 2013), Hong Kong is in fact one of the highest youth unemployment economies among developed countries. In the first quarter of 2013, the unemployment rate of the group aged 15-19 stands high at 13.5%, which is four times higher than the overall labour unemployment rate in Hong Kong. It is much higher than other developed economies such as Germany (1.7 times), Japan (1.8 times), United States of America (2.7 times), and the UK (3.7 times). The unemployment rate of the 20-24

group was also recorded as very high at 7.3% and there were 32,100 young people classified as not in education, employment, or training group. Many people believe the increasing number of young people falling into NEET status is seen as a generational time bomb for the knowledge-based economy of Hong Kong.

Problems and Consequences of the Disadvantaged NEET Youth

Research has shown that young people who had experienced a NEET situation tend to have higher chances to suffer from various behaviour problems such as drinking, smoking, and illegal drug use, which could in turn cause health problems. A higher possibility of family confrontations and violence and youth mental health problems such as depression were also found in the group. In certain serious cases, some youth ended up committing suicide or self-harming. Besides, NEET youth are more likely to be liable to deviant and delinquent behaviour such as indulgence in internet bars/ game centres, cyber-bullying, threatening others, fighting and blackmailing. They also tend to lose their direction, lack moral values, and suffer from low self-esteem (HKCSS 2013; HKSAR Government 2012b). Negative and unfairly exaggerated media labelling, which has created underprivileged public perceptions of the NEET youth group, further make it difficult for disadvantaged youth to advance themselves and causes them delay in labour market entry. Young people suffering from a prolonged NEET situation or remaining in so-called 'status zero' without proper social engagement opportunities will not only damage their own upward social mobility but also cause worrying social problems and burdened social consequences. Cyclical disadvantaged status and poverty problems may also persist in the NEET youth group as a result. As a result, increasing and higher public spending to deal

with the NEET youth associated personal and social problems are required and anticipated for the future.

Causes of the Disadvantaged NEET Youth Status

Similar to many other countries, the long-standing global economic downturn and rapid globalisation are the primary reasons causing millions of youth unemployment around the world and NEET youth problems in Hong Kong. Hong Kong is especially seriously hit and affected as Hong Kong heavily relies on export business and has a close connection and association with the mainland China economy. Businesses tend to employ experienced workers rather than young workers in order to save training costs and ensure guaranteed productivity and quality. Moreover, decades of China economic booms have absorbed nearly all the manufacturing businesses which originated in Hong Kong. Factories and manufacturing production lines are now hardly to be found in Hong Kong. With all the manufacturing jobs gone, Hong Kong has tried hard to transform itself to absorb the excessive supply of an unskilled labour force, leaving fewer opportunities for those college leavers with low education attainment to find a job in the unskilled labour market. The new immigrants from China further heat up the low level jobs competition as Chinese immigrants are more likely to accept lower paid jobs than the young college leavers.

Government education policy emphasising the nurturing of elites and uplifting the general standard level of education by increasing university degrees, associate degrees, and diploma courses has left the disadvantaged non-qualified young people further penalised from the unfair qualification inclined labour market competition and blocked their social mobility. The inflation of qualification forces many highly

qualified university graduates to take up low level jobs which were previously available for the unqualified young college leavers. Moreover, the rapid evolution of information, communication and automation technology have drastically changed the nature of many jobs and replaced many low level labour forces which left the inexperienced youth badly hit in the job market. The ageing population and delay of retirement also relentlessly blocked many job opportunities for the green college leavers. An inflexible labour policy and laws such as the recently implemented minimum wage in 2011 may also affect employers' confidence and flexibility to try new young workers.

Besides, young people from generationally poor families who are not able to provide sound and sufficient material and cultural support for them to engage in educational and learning activities tend to achieve lower education attainment and this stop them from progressing further. For example, crammer schools and home tuition are popular in Hong Kong and those disadvantaged students who do not have families to pay the extra money for them to attend expensive out-of-school tuition tended to have a smaller chance of performing well in public examinations. Youth from deprived families who have less opportunities and exposure to participate in extracurricular and social activities such as uniform groups and voluntary social services also tended to have less friends and social network supports, and this is believed crucial when they encounter adversity and need help to solve their problems.

Government Education and Manpower Policies to Address the NEET Youth Problem

To tackle the increasing and potential societally and economically dangerous NEET youth problems, the HKSAR government has launched several NEET youth specific employment training programmes to soothe the youth unemployment problem. The Youth Pre-employment Training Programme (YPTP) and the Youth Work Experience and Training Scheme (YWETS) were developed to help 15-24 year-old college leavers get ready for employment. The two programmes provided around 12,000 subsidised on-the-job vacancies in 2009-2010. Moreover, along with other education reforms after Hong Kong went back to the China, different alternative academic pathways were paved for NEET college leavers. Project Yi Jin was launched in 2000 and is aimed at providing college leavers with a second chance to obtain the equivalent qualifications of the Hong Kong Certificate of Education Examination (HKCEE). Promotion pathways are also available, for example diplomas and associate degree programmes for Project Yi Jin graduates and A-level examination failures. Students with financial difficulties could apply for government non-means-tested loans to pay for their study to be repaid when they started work. Other alternative educational pathways include courses offered by trade unions, non-governmental organisations (NGO), and private educational institutes; however not all the courses offered were accredited under the qualification framework.

4.3 The Wider Benefits of Not-for-profit Education for the Disadvantaged NEET Youth

Twelve youth life stories were collected for the study of the NEET youth not-for-profit education experiences and their perceived wider benefits of learning. Among all twelve cases, two NEET youth were selected and discussed in full detail. The twelve disadvantaged learners were selected and discussed because they have experienced not-for-profit education during their NEET youth status. At the time of interview, four of the disadvantaged youth were still struggling in their NEET situation and the rest of the interviewees had been able to progress or transform to further education or employment opportunities.

According to Schuller et al.'s (2004) 'conceptualisation of wider benefits of learning' framework, a majority of interviewees reported that the main reasons to rejoin learning was to repair their deficit on academic qualifications and to learn new knowledge and skills. Moreover, nearly all the NEET youth learners expressed that they have experienced attitude and value changes and in some cases they have found the meaning and purpose of their life through their not-for-profit education. In addition, thanks to the activity-based and flexible learning nature, a large number of NEET youth learners reported they were able to feel a sense of achievement and gained self-confidence through the non-traditional school learning activities. NEET youth learners also reported they were able to meet new friends and developed their social networks in school as well as increased civic participation. Others reported wider benefits of learning from the NEET youth including improvement in health and family relationships. The reported wider benefits of not-for-profit education by the disadvantaged NEET youth learners are summarised in Table 4.1.

Table 4.1: Summary of wider benefits of not-for-profit education for the disadvantaged NEET youth learners

Disadvantaged NEET Youth Learners (<i>Not-for-profit Education Attended</i>)	Capitals and Perceived Benefits of Not-for-profit Education							
	Human Capital		Identity Capital		Social Capital			Others
	(1) Academic Qualifications	(2) Knowledge and Skills	(3) Attitudes and Values / Meaning & Purpose of Life	(4) Sense of Achievement / Self-confidence / Understanding Self	(5) Interpersonal and Communication Skills	(6) Friends and Social Networks	(7) Civic Participation	(8) Others: Health / Family Relationships
Yash (<i>YPTP, Yi Jin</i>)	G(Q)	G	G(Q)	G(Q)			G	G(Q)
Gary (<i>Certificate, Yi Jin</i>)	G	G(Q)	G(Q)	G	G(Q)	G	G	G(Q)
Yammy (<i>Yi Jin, Certificate</i>)	G	G(Q)	G	G	G(Q)	G(Q)	G(Q)	
Lai-fa (<i>Certificate, Diploma</i>)	G	G	G(Q)	G(Q)	G	G	G(Q)	G(Q)
Peter (<i>Certificate, Diploma</i>)	G	G	G(Q)	G(Q)				
Ting-fung (<i>Yi Jin, Diploma</i>)	G	G			G(Q)			
Paul (<i>YPTP, Yi Jin, Diploma</i>)	G(Q)	G(Q)	G(Q)	G	G(Q)	G		
Fiona (<i>Certificate, Diploma</i>)	G(Q)	G	G	G(Q)	G	G(Q)	G(Q)	D(Q)
Connie (<i>Yi Jin, Diploma</i>)	G(Q)	G	G	G(Q)	G	G(Q)		
Brian (<i>YPTP, Yi Jin, Diploma</i>)	G	G(Q)	G	G		G		
Lok-yin (<i>Certificate, Diploma</i>)	G(Q)	G	G	G	G(Q)	G		
Yun-ling (<i>Diploma</i>)	G(Q)	G	G	G	G	G(Q)		

Keys: G = Gained Benefits, D = Damaging, Q = Narrative Quoted in the Analysis

Moreover, in terms of the strength and level of benefits perceived by the NEET youth, Figure 4.1 shows that disadvantaged NEET youth perceived they have achieved stronger and higher levels of benefits in relation to (3) Attitudes and Values, and meaning and purpose of life, and (4) Sense of Achievement, Self-confidence, and understanding self, which are all identity capital related. These were followed by significant gains in (2) Knowledge and Skills and (1) Academic Qualifications, which

are human capital related. The disadvantaged youth also perceived they have gained some essential benefits in (5) Interpersonal and Communication Skills and were more able to meet (6) Friends and make social networks as well as increase (7) Civic Participation which are all social capital related. Some achievements in (8) Health and Family Relationships were also reported.

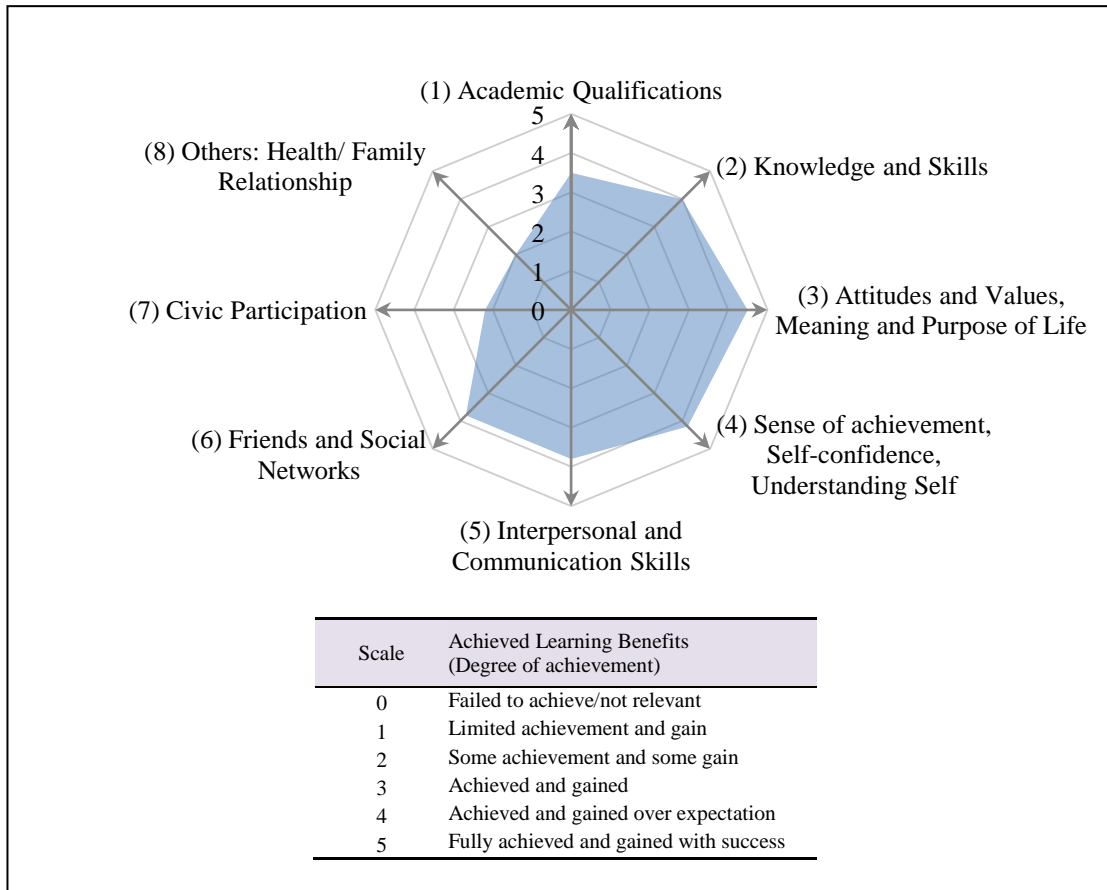


Figure 4.1: The wider benefits of not-for-profit education for the disadvantaged NEET youth learners

In addition, based on the perceived not-for-profit education benefits reported by the disadvantaged NEET youth and according to the ‘conceptualisation of the wider benefits of the learning’ framework suggested by Schuller et al. (2004), Figure 4.2 shows that the disadvantaged NEET youth learners have achieved high levels of gain in all three capitals and they have put a comparatively higher expectation on human

capital (ie academic qualification, and knowledge and skills) than the identity and social capital before they participated in the not-for-profit education.

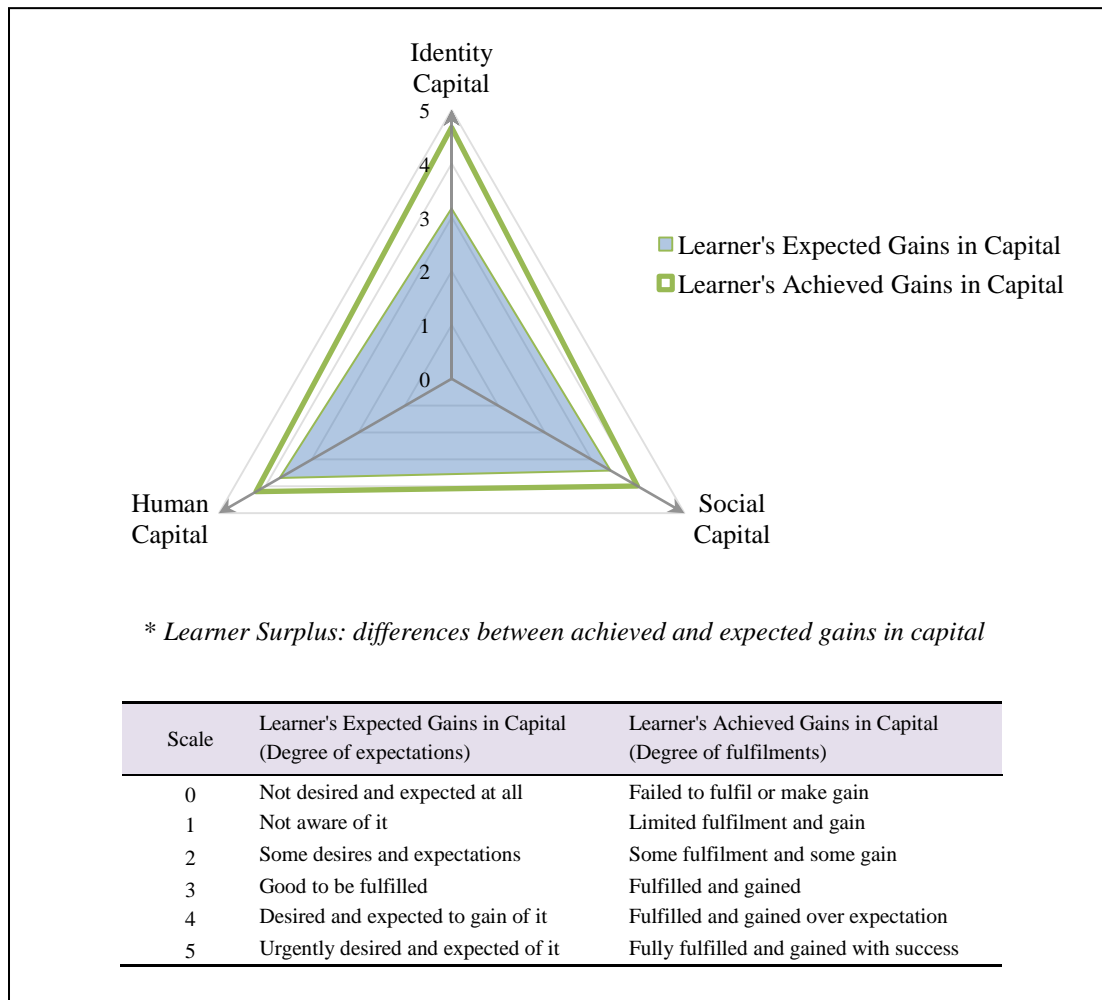


Figure 4.2: Summary of the different levels of capital gains and the learner surplus of the disadvantaged NEET youth not-for-profit education according to Schuller et al. (2004)'s conceptualisation of wider benefits of learning framework

Furthermore, when looking into the building of relationships between these three capitals, NEET youth reported that not-for-profit education has helped them to repair and rebuild their identity capital (in terms of attitude change, increased self-confidence and finding purpose and meaning in life) which has also empowered them to gain crucial human and social capitals. In fact, rebuilding the disadvantaged NEET youth's identity capital is especially important as many of them were lost in direction and had no confidence and no hope in their future. On the other hand, gains in human

capital (academic qualifications and knowledge and skills) and social capital (interpersonal communication skills and friends and social networks) have provided the disadvantaged NEET youth with the essential foundations and capabilities to compete and develop in the highly competitive labour market in Hong Kong. These findings also support Schuller et al.'s (2004) argument that a gain in one capital is complementary and could help to gain in the other two capitals. For example, the sense of achievement (identity capital) gained through the skills and knowledge (human capital) learnt from the disadvantaged NEET youth's not-for-profit education has not only helped to improve NEET youth's interpersonal and communication skills (social capital) but also in return increased their self-confidence (identity capital). This explains why the NEET youth have achieved high levels of gain in all three capitals as learners' capitals are closely interrelated and inter-influenced.

Moreover, in terms of the learner surplus – the unexpected capital gains measured by the differences between achieved and expected gains in capital – Figure 4.2 shows that disadvantaged NEET youth learners have enjoyed higher learner surplus in identity capital and achieved similar levels of learner surplus in human and social capitals. The significant gains in learner surplus also mean that the NEET youth have perceived they have gained high and strong values and benefits of learning through their not-for-profit education where it has well exceeded their expectation. It could also prove to policymakers that provision of not-for-profit education has offered very good and high values to the disadvantaged NEET youth learners and in fact the demand for and expectations of not-for-profit education are also very high .

4.3.1 Human Capital-Related Benefits: (1) Academic Qualifications; (2) Knowledge and Skills

(1) Academic Qualifications

All the disadvantaged youth learners expressed that their initial reason or motive to join not-for-profit education was to repair their unfulfilled or uncompleted academic qualifications. In fact many NEET youth found not-for-profit education was their last resort as there was literally no other better education or employment options available to them. Courses such as Project Yi Jin (which offers recognised qualifications equivalent to five subjects pass in the Hong Kong Certificate of Education Examination (HKCEE) under the qualification framework) became popular for the NEET youth. Foundation certificate and diploma courses offered by technical institutes such as the Hong Kong Institute of Vocational Education (IVE) also provide different academic pathways for students to progress further in academic study.

In the first NEET youth case, Paul, because of his broken family background and his poor childhood life, wasn't able to learn well in college and performed badly in and failed the HKCEE examination. Having experienced and suffered from his NEET youth status for a year he eventually found an opportunity to progress:

“...in fact I don't like to study, it is true, I don't like to spend any effort on studying. But since I have this opportunity and so simple that I could get a government recognised qualification, it seems it is a very good thing and so I joined the course (Project Yi Jin). After I got the 5 passes (HKCEE equivalent results) from the Project Yi Jin, then I continued to study for a diploma. They accepted me and so I continued... I think a diploma is like an A-level qualification.” (08.15)

After finishing three different levels of not-for-profit education programmes, Paul was able to find a job working as a merchandiser earning satisfactory income for several years. However, because of a row with his boss, he was fired and became unemployed. Though Paul was unhappy and regretted his silly acts in confronting his boss, he is confident to find another job soon as he claimed he has at least some basic required qualifications and working experience.

In the other NEET youth case, Yash was a spoiled secondary school ‘failure’; he hated studying and was getting lost after he returned from his study of GCSE in the UK as his qualification was not recognised in Hong Kong.

“Having studied in the UK for three years, I have passed my GCSE qualification but I can’t find a job in the (Hong Kong) government. My dream was to work as a fireman but the government didn’t recognise my GCSE qualification... Then in Hong Kong one should have at least possessed secondary HKCEE qualifications, even at my time; now it is different, the basic requirement is university degree qualification. I have no choice but I have to continue my studies. I have also heard from the graduates of Project Yi Jin that study of it (Project Yi Jin) won’t be as difficult as studying at night secondary school and much easier (to get pass) than the HKCEE public examination. For this reason, I went for it.” (10.27)

Yash, after finishing his Project Yi Jin study with his recognised academic qualification and along with his years of experience in outdoor training, was ultimately accepted and worked as a police officer.

To some disadvantaged NEET youth learners, like Connie and Yun-ling, the alternative not-for-profit education was something they claimed they must do in their lives as academic qualifications are so important to them. They found a second chance,

and the flexible nature of not-for-profit education helped them to thrive and enabled them to progress further.

Connie: "I will find myself a waste of time if I didn't take up Project Yi Jin. If I didn't study, I will probably go to work, I will have chances to study different courses but ultimately I will have to study Project Yi Jin. It is because it's equivalent to HKCEE pass results and it is very important. The best I gained from Project Yi Jin is my HKCEE equivalent qualification." (1.17.37)

Yun-ling: "I found alternative qualification-bearing learning (not-for-profit education) more suitable for me and I could perform well as it offers choices, flexibility, and freedom." (15.30)

Both Connie and Yun-ling benefited from their not-for-profit education and they were able to progress further in their academic studies. Eventually, after years of different not-for-profit education, they both progressed and finished their university degree studies and were able to find decent jobs. Yun-ling even performed outstandingly in her university study and had her name awarded on the 'Dean's List'; so she was planning to study a Masters degree.

The academic qualifications brought by not-for-profit education to some NEET youth learners were so important because they not only helped them to transform from college to work but also to improve their lives and fulfil their dreams. Fiona, through her years of subsequent not-for-profit education and her hardworking efforts in her workplace, was able to become a qualified social worker. She was planning to do a degree and a Masters degree in social work in the future as she was experienced and motivated from her not-for-profit education and understood that academic qualifications are essential not only to improve her earnings but provide more work freedom.

“I am very glad that I have finished the course (diploma), at least I gained the qualification, it is much better. In this sector, however hard you work as a social work assistant, you won’t have a chance to get promoted without qualification, absolutely no chance. Though you have finished the social work course and you are promoted as a registered social worker, and there is still no hope for promotion, you are still better off. At least the salary will be better and I will have more freedom to do my work; I think it is rather important.”
(16.25)

In Lok-yin’s situation, at the time of interview he was still in technical college studying his higher diploma course. Lok-yin was a school failure and he left college without qualifications. After NEET youth status for months, Lok-yin’s first study and the qualification gained from a foundation course in the not-for-profit technical institute have led him to progress further to his current higher diploma study of electrical engineering in IVE. Lok-yin’s dream was to study and finish a university degree and become a qualified chartered electrical engineer.

“The (higher diploma) course that I am studying could lead me to a university part-time degree course if my average score is 65 or above... I would think I am a successful person if I can graduate from university engineering degree studies, work as an engineer, and be awarded the professional chartered qualification, this is my dream...I foresee and really hope I can finish my part-time degree course in five years and gain my professional chartered qualification within 10 years.” (50.56)

The academic progress that Lok-yin achieved not only improved his upward social mobility and offered better opportunities for his future but also empowered him to pursue his dream and create meaning and purpose in his life.

(2) Knowledge and Skills

Moreover, instead of academic qualifications, disadvantaged NEET youth also reported they have learnt some vocational or practical knowledge and skills to make them ready for their future career development, although they have different levels of appreciation of the knowledge and skills learnt. For example, Paul said he had learnt some useful computer skills when he was studying in the Project Yi Jin programme so that he felt proud of himself and found the knowledge practical in the real-life working situation.

“I found myself interested in studying computer skills in Project Yi Jin... I learnt some software skills like Microsoft Office and I can apply it to my job, I mean my summer job. In my summer job, not many people know how to use these (computer) functions, you know Excel has a lot of functions, but I know what they are. When nobody knows I know. I can teach the others or I can tell the others I know this software. This IT module is helpful.” (58.30)

In some other vocational skills-oriented courses like YPTP, disadvantaged NEET youth learners such as Brian needed to choose a professional work skill to learn during which learners are sent to practise their skills in a real workplace as a part of the curriculum. Brian chose hair-styling and was sent to learn and practise in a salon though he decided not to progress further in the hair and beauty sector after finishing the course due to low income and grim prospects.

“I didn’t learnt much in the YPTP; basically I went to school just for fun. But I learnt most from the practical session of the course, as it allowed us to choose two subjects to learn, I chose computers and hair-styling. I learnt a lot of practical knowledge and skills from the course on hair-styling... I learnt and practised in a salon, and after finishing the course the school helped us to find a job in a salon. I didn’t go to work in the hair salon in the end because I

didn't have much interest in it after I have tried it and the income is really very low though one of my classmates really worked at it for years.” (20.01)

Some other disadvantaged learners, such as Yammy and Gary, however had highly valued and appreciated the knowledge and skills they learnt from their not-for-profit course. They found the knowledge and skills learnt from the not-for-profit education to be practical and useful.

Yammy: “I realised and felt very happy that I can in fact learn all this special knowledge (caring for the terminally ill) from the course. I feel happy because to me, to those people surrounding me, and to my work, I can use the knowledge and skills that I learnt from the not-for-profit course to help many people.”(31.38)

Gary: “I know very well all the knowledge required to hold a sports day in school or as a judge... I understand well the programme scheduling, how to plan and how to execute the plan. I found all these skills and knowledge that I learnt from (not-for-profit) college practical and they are real gains.” (57.48)

4.3.2 Identity Capital-Related Benefits: (3) Attitudes and Values, Meaning and Purpose of Life; (4) Sense of Achievement, Self-confidence, and Understanding Self

(3) Attitudes and Values, Meaning and Purpose of Life

As discussed in the previous section, the primary motivation and intention for most of the disadvantaged NEET youth to join not-for-profit education is to gain the necessary academic qualifications and to acquire relevant job skills and knowledge. However,

the majority of disadvantaged NEET youth learners found the most important and impressive experience of not-for-profit education was they were motivated to think and reflect their attitudes and values toward themselves and to others and they were also stimulated to find meaning and purpose in their lives through different not-for-profit education learning processes. In fact, this kind of self-concept building and enhancement process is crucial as it can help the ‘Lost Generation’ of NEET youth to navigate and to set their own course of direction to progress and grow. Disadvantaged NEET youth learners often found and treasured that they were able to seize the not-for-profit education opportunities as a buffer space to think, adjust, adapt, test and plan for their futures.

In Yash’s case, he successfully transformed from his NEET youth status to become a police officer serving society. As he said, he was greatly motivated by his instructor during the adventure training activities in his not-for-profit education and he changed totally and suddenly his attitudes and values toward learning and found his life purpose:

“I am an active person and so I selected the ‘Adventure Training’ elective module to study in the YPTP. I met that life-changing hiking instructor in the module; I had some interest in the adventure area, and so afterwards I followed him to learn more things and go for licence examinations... In fact I was very bad in the UK, I had serious drinking and smoking problems, and even taking illegal drugs. But he changed me, this boss. I have forgotten what he said to me, something like do you find yourself wasting time. It was just like ‘ting’ and I woke up all of a sudden and I changed my attitude and values toward learning and everything in my life. I followed him and helped him for around three years after YPTP.” (05.39)

The adventure training instructor in fact transformed Yash’s life through different challenging not-for-profit course adventure activities and personal care and guidance

as well as the subsequent work exposure with the instructor as an activity assistant back in the YPTP course. As a matter of fact, many NEET youth were lost and hungered for someone that they trusted to talk to and guide them over their difficult situation. Paul also recalled when he was studying in the not-for-profit education he liked to talk and share with one of his not-for-profit college teachers where he not used to talk and share with teachers in school.

“I met a teacher in a module in Project Yi Jin; he liked to talk just like a social worker; sometimes I will talk to him. I won’t tell much of myself to the others especially to the people older than me, but I used to talk and share with him all my troubles and difficulties.” (57.00)

Although Paul’s not-for-profit college teacher did not change or transform him dramatically like in Yash’s case, it actually encouraged and helped Paul to share and get through some of his difficult times and helped him to reposition himself and form his own new value and belief system during his difficult NEET youth situation. The non-compulsory and relaxing nature of not-for-profit education may build confidence and make Paul feel more comfortable and trusting to talk and share with his not-for-profit college teacher whereas he did not talk and share with his teacher when he was studying in formal compulsory secondary education.

In Gary’s situation, the not-for-profit education and the subsequent exposure to his intern service opened and changed his mind to accept the status quo of the education and social system where he used to complain and not engage in it. In fact Gary is a straightforward competent young person with a strong will to help others. Though he was an achiever in his uniformed voluntary service in college, he saw the education and the social system was not fair and had given up his studies and subsequently left his secondary school without qualifications. Gary joined his first not-for-profit

certificate courses after he found he was not able to progress further in education or find a decent job and he later joined Project Yi Jin after he quit his full-time ‘temporary’ work in the airport as logistics assistant. Gary found that the Project Yi Jin course had not only ‘civilised’ him but also motivated him to participate in future learning opportunities, though he claimed he was still a cynical and sceptical person about education.

“In fact, I found Project Yi Jin is an excellent thing, because it can really help some people. Though I believed that in this society there are always some very bad people, but Project Yi Jin can help some people who want to become good but they can’t be good by themselves and help them slowly to change. I am an example. If I were still working in the airport logistics centre, I would still be a coolie boy and know nothing. But I had really joined Project Yi Jin, I am really more mature now. I am no longer so wild, I mean the coolie’s characters, speak in foul languages and always complain, only know how to complain. I found I am more cultured, it (Project Yi Jin) really can make someone more civilised, it has changed me.” (1.01.58)

Gary continues to explain the change of his view and attitudes on learning and education:

“I have thought and found nearly everyone in society has a degree qualification now; though I always say that there are a lot of ‘high marks but low in IQ’, but they still have the university degree qualification. It is since they have the university degree qualification, however stupid they are, their qualifications are still higher than mine. Because of this, I thought to go back to school again. But with the financial burden, I think I need to find a job first and I will enrol part-time or in some other form to continue my studies.” (55.01)

Although Gary was still unemployed and not able to work for his dream job in the government’s disciplined forces (policeman, fireman, immigration officer, or

ambulance assistant) that he has longed for, he now possesses a more positive attitude and believes in education and has more confidence in his future.

On the other hand, to some NEET youth learners, they perceived not-for-profit education as a means to help them to search for life meaning and purpose. Lai-fa was a school 'failure' but through her years of continuous not-for-profit studies, she was able to develop herself and found her career as a social worker. She claimed that she enjoys learning, and that studying has become an essential part of her life even back in her NEET status days. It is because learning had helped her to reflect on her life purpose and make her life meaningful. Lai-fa said that without the opportunity to rejoin learning she felt lost in her life and was not able to progress:

“I had a period of time that I didn't have a chance to seek ways to learn... it was like I didn't have the chance to find something for myself to 'impact' my life and let me know what I need and what I am looking for (in my life). It was like having no pathway for me to think more, so I felt I was not progressing. There wasn't anyone to impact me and I lacked knowledge to analyse things. I thought I wouldn't be happy.” (1.01.30)

In fact, like Lai-fa, many disadvantaged NEET youth leaving college without qualifications found their not-for-profit education provides them with an alternative channel and opportunity to think and reflect about their life. Peter is a young innovator and social entrepreneur. He was a school 'failure' due to his lack of education culture from his blind parents and his deprived family background. He had no idea of what he wanted to do after he left college without qualifications and the education and employment opportunities in fact were very limited for him. Without any clue of what to do he had ultimately studied in one of the not-for-profit courses offered by a technical institute. Surprisingly, Peter found himself tremendously

interested in his final year project which led him to several international industry prizes and recognition by large multinational corporations like Samsung. The success of the final year project in Peter's not-for-profit education not only gave him a sense of achievement and fame, but more importantly Peter has found the purpose and meaning of his life. Peter declined all the commercial invitations to launch and sell the product in the market and decided to form a social enterprise to produce his innovative product for the blind.

Peter recalled how his not-for-profit education brought him a sense of achievement and helped him to find the meaning and direction of his future:

“I hadn't found my goal (life meaning) yet at the time when I was studying in the course. I was planning to get a pass and find a job, a job that allowed me to have a self-sufficient life. I didn't think about doing anything for society... I was a marginal pass in my first two years of study, but in the final year, I don't know why and I can't explain, but through the final year project I suddenly found an interest in my study... I started to enjoy doing research and I gained some achievement. My two science research subjects were outstanding and I was among the few able to finish my project on time. I felt the sense of achievement, I can really feel the very high sense of achievement.”
(11.26)

“After I won the first prize, many factories and businesses contacted me and invited me to work together and sell the product to earn big money. I was initially very excited but after that I was thinking at home one night and it reminded me why I started this project. It is because I want to help society but not to earn money. After the excitement, I knew I shouldn't do that (selling the concept to businesses), I had to follow the original motive for the project (to help the disadvantaged blind people) and so I turned down all the commercial invitations and offerings. After that I discussed with my final year project supervisor and we decided to work with the University of Science and Technology to continue our research. Luckily we won the Gold Award and it

attracted even more people to contact us... I hoped and I found I am interested to start a social enterprise to manufacture the product... it would be better in the production process to benefit people, and to avoid using cheap labour... I am now talking with the Hong Kong Society for the Blind for the opportunity to work together.” (23.59)

(4) Sense of Achievement, Self-confidence, and Understanding Self

In fact, to many repeated school ‘failures’ like Peter, the sense of achievement gained from their alternative second chance experience is something curious and new but important. The taste of achievement and recognition from their college teachers and classmates not only helped the NEET youth to raise their self-value but also helped to rebuild their self-confidence which is believed crucial for their future advancement and success. Yash recalled in the interview how the adventure activity-based learning experience in the YPTP course had brought him a surprising and needed sense of achievement:

“The YPTP social workers were very keen and enthusiastic to help us. They told us where and when we can find an activity to participate in, and when we and our friends’ group had nothing to do we joined them. I still remember once I joined a weekly police training school to experience camp activities when I was in YPTP. I was initially not very keen to join but since every one of my friends joined, I went with them. Afterwards I liked it and I have a great sense of achievement from it and I enjoyed it very much... I mean all these activities such as rock climbing, I can feel the sense of achievement from all of them. These things are easy to learn, I could learn it at once after hearing how to do it. Unlike studying, even repeated many times I still can’t understand it.” (26.09)

Moreover, the flexible nature of not-for-profit education means disadvantaged learners can choose when to start and what to learn according to their individual circumstances and readiness. When learning is initiated by the learner and not by the authority or is compulsory, the learner tends to be able to enjoy and reward themselves more. To Lai-fa, the flexible, non-compulsory, relaxing and continuous learning nature of not-for-profit education are the main features that attracted her to keep on participating. She claimed that the new knowledge and skills that she learnt, the new friends that she met, and the new challenges that she was exposed to in her not-for-profit education have helped her to understand herself and make her feel more secure and happier in her life.

“Learning is important, learning lets me understand myself more... in fact in the learning process I realised I may dare not to express myself, maybe because I was still finding it (myself)... in the self-finding process, through learning, may be because I have seen more (new things), more time with (new) friends, and I allow more different things to happen to me. Before I was quite stubborn and selective in dealing with friends ... and I am happy since I may know more and have more knowledge than the others, it seems I have some confidence (in myself)... I didn't feel afraid, less afraid to face myself and my future... It may be because I failed and I can fail in (not-for-profit) learning, and it doesn't matter. I can still continue, continue to explore new knowledge and learning about myself.” (41.06)

Similarly, Fiona found learning is a crucial process for her to understand and accept herself. After her early young adulthood not-for-profit education experience, Fiona continued her studies and she highly valued the benefits of her not-for-profit education.

“In fact studying can help me a lot, I don't mean what I have learnt in terms of academic knowledge, but I can understand myself more. I think it is very

meaningful... I can accept myself more; I think it is very important. Before I used to think, I always thought in a naïve way that if I found something not ideal then I will change it. But in fact more important is to accept myself, to accept myself is like that... Why I was not happy in the past was because I can't accept myself as such a person like that. Now through continuous participation in learning, I think in a more open-minded manner, I have become more mature, I think more, and sometimes I can accept myself, I am what I am... This is what I think learning has taught me and I think it is of utmost importance.” (53.52)

Connie also found that with more knowledge gained and more exposure through her not-for-profit education and learning experience, she could understand herself more and it helped her to think in a more critical and confident manner:

“Gaining knowledge is something personal. Although I didn't study very well, I have forgotten many things that I learnt in (not-for-profit) school, I don't know but I enjoyed the learning process and everything about the course... I found I am more mature and I can think critically and with more self-confidence.” (1.16.39)

4.3.3 Social Capital-Related Benefits: (5) Interpersonal and Communication Skills; (6) Friends and Social Networks; (7) Civic Participation

(5) Interpersonal and Communication Skills

Since learning in school is the major out-of-home socialisation platform it is not difficult to understand disadvantaged NEET youth's appreciation of the social benefits aspect of not-for-profit education. However, for some disadvantaged slow

learners such as Ting-fung, the alternative and activity-based nature of not-for-profit education has not only allowed him to make friends and socialise with the other learners in school but it has also helped him to learn the essential interpersonal and communication skills to be included in society. Ting-fung is a slow learner and secondary school failure. Due to his badly failed HKCEE results he had attempted suicide but was saved. In fact, he was badly bullied and discriminated against in college. He became a 'hidden youth' and spent most of his time hiding at home, isolated from others. Ting-fung eventually joined Project Yi Jin and progressed to the diploma course and graduated with the academic qualifications that he desired. He left the not-for-profit college and remained unemployed at the time of interview. To Ting-fung, Project Yi Jin has offered him another chance to meet new people who have different backgrounds and has helped him to learn the interpersonal skills that he had not managed to master when he was studying in his secondary school.

"I think I have improved my interpersonal relationships through doing group projects. All subjects in my study (Project Yi Jin) had a group project to submit. From the planning, discussion, and doing the project together. That is division of labour, PowerPoint, or typing, or printing... Before (Project Yi Jin) I was just like a 'hidden-youth', I didn't like to speak but now I speak more... I am now more anticipatory. I am willing to help others, before I won't help other people." (32.05)

To Yammy, her not-for-profit education experience taught her how to get along and work with other people and accept different people with different abilities which she was not able to deal with before:

"In fact I don't like other people to help me, I'm afraid of help from the others and I don't know how to let go, to let other people help me. It is because I am afraid that help from the others may not fit my expectation and I need to do it again and I will feel annoyed. I will feel annoyed only for myself as I know I

can't show it to my friends. I will feel agitated why it happened like that; it is a waste of time and it couldn't help me. But now after a longer period of learning, I learnt and realised that to allow other people to help me could make me very happy. I could focus on the big things and allow the others to do the small things. My time could be better used and the assignment or the task could be more perfect."

The interpersonal skills that were learnt and reported by Ting-fung and Yammy were also found in other NEET learners such as Paul and Gary. They all found these interpersonal and communication skills practical and useful for them to interact and communicate with different people from different backgrounds:

Gary: "In Project Yi Jin, instead of the qualification and certificate, I found the Communication Module was very good. Up till now I have still been able to apply these skills to communicate with different people. I really feel I learnt and gained something, and know how to apply it." (57.48)

Paul: "I met some new friends in the course training camp; I learnt how to communicate. It is because you will meet a big group of people and you need to express yourself and share with others or share with some of the course instructors. I found I gained from talking with the others (learnt from other life experience or sharing). Some are still my friends." (55.02)

(6) Friends and Social Networks

In fact, unlike traditional primary or secondary school education where most of the students are similar in age, experience and exposure, participants in not-for-profit education could be greatly different in terms of age, background, experience, exposure, social networks, and reason to study etc. Learners in not-for-profit education needed to engage and learn how to deal with different people with backgrounds different to themselves. Interestingly, some NEET youth learners

reported that they enjoyed and benefited from meeting new classmates with hugely diverse backgrounds and life experience. Lok-yin said he enjoyed and benefited from meeting and making friendships with the other mature classmates in his not-for-profit education:

“I have a wider network of friends, my course has different types of student, some had left college and worked for several years but came back to study again... Since I have some classmates with working experience, if I have questions, I can ask them. Since they have working experience, they have their social networks and also they have more life experience and knowledge than me. I could gain from these classmates; whether regarding work or interpersonal relationships, they are better than those who never left school.”
(48.13)

In Yammy’s case, she told us that she liked to help other people and it is the main source of her happiness and reason to live. Though Yammy said that she didn’t want to study Project Yi Jin but had no choice because her hostel assistant job required her to have proper academic qualifications, she found the flexible nature of not-for-profit education experience enjoyable and rewarding as she can meet and help different people in the class.

“Now I have grown up, until I think I need to learn more and until I have another chance to learn again, I feel very happy. Why do I feel happy? I enjoy the opportunity to learn, enjoy the timing of learning. In this learning process, it allows me to meet many new people and lets me see and understand different things and different people in this world, that’s why I feel very happy.”
(39.33)

“I have another gain from my studies. I can help (support) different people in both emotional and study. I have some friends, classmates I met in college, and we have become good friends. I had the chance to understand their backgrounds, many of them were weak in soul and they have no idea of their

life purpose, (they were) very weak. But in fact, through the school environment, I know these people, I can support them. It makes me... I realised I can influence people, I can influence them and see them transform their life so that they see the world differently now... Because of all the help I offered to other people, my self-confidence and my exposure were further extended.” (45.30)

After finishing study with Project Yi Jin, Yammy continued to participate in different not-for-profit courses which were both job and personal interest related. Yammy said that the flexible nature of not-for-profit education allowed her to participate in learning whenever she wanted to and she felt not-for-profit education became part of her life and it kept her happy.

“Now I have finished Project Yi Jin I hope I could continue to study. I want to study not because I want to get a degree or to get anything but I love the process of study (the study life). I feel very happy. It is because I can walk through my life with a group of people (classmates), we can do assignments together and develop our social network to meet different people.” (42.40)

To other NEET youth learners such as Connie, Fiona and Yun-ling, they have expressed that their classmates have supported them to learn during their studies and their classmates have become their best friends. Apparently, friendship and friends' social support during or after learning is believed to be important, and is especially crucial to the disadvantaged NEET youth as they tend in many cases to be less self-confident in socialising and making new friends.

Connie: “At that time (study of diploma), we had a Business Plan group project, we (team members) were well united; we were a group of four female students. Since I needed to go for part-time work I can't attend some meetings. One of the group members approached me seriously and asked me whether I

can balance my work and study, and was worried about my finances. I was really touched. We shared and learnt from each other, it is my first time to feel the meaning of group work. She is one of my best friends now.”(1.13.27)

Fiona: “My best close friends are all from my school time and they have helped me a lot. It is because at that time (time of studying) I wasn’t emotionally stable. They are very good because I have had them accompanying me for these years; we have maintained very close friendships. I feel very happy that because of these years of study, I know this group of friends, it is very important. Though we are not seeing each other often, but whatever happens we will help each other out and we really can talk and discuss anything, it is very important.” (54.51)

Yun-ling: “I had met some very good friends in college who could not be found in other places.”(15.55)

(7) Civic Participation

Lastly, some disadvantaged NEET youth learners tend to be more sensitive to social issues and they were more interested in participating in social events after participating in not-for-profit education. For example, Lai-fa claimed that she was invited by her classmate in not-for-profit education to join the volunteer social service team and she enjoyed and felt happy in her new experience.

“I joined the volunteer social service team because of all these friends I met in college. They all fully participate in volunteer social services and they invited me to join them...When I work as a volunteer I can feel the happiness, the atmosphere of interacting with the others, the harmony, working with a group of people for a particular purpose without much conflict of interest and disagreement.” (48.40)

To Fiona and Yammy, their interest and understanding of social systems and their later active participation in social events were nurtured and gained from their not-for-profit education. Fiona explained:

“After studying, since I learnt more new things, I realised there were many things that I hadn’t encountered before, for example things related to politics, something related to Hong Kong society. I didn’t have much interest before, and I didn’t care about it. For instance, I wasn’t concerned about elections or things happening in society even though some people went to demonstrations. I would think they were boring and silly, they must have too much time. But after learning, I learnt things were not like that, I realised that in society there are things called social justice and equality. I have more interest to know more and I participated more... I will go to have a look at what really happened, though I won’t be the leader to lead the demonstration but definitely I will join them... I won’t say it is my interest, but I will do it.”
(28.25)

Yammy also explained how she was changed and motivated to care about Hong Kong society after the influence of her not-for-profit education:

“To be honest, it is because I directly learnt from my not-for-profit social service course, it makes me more concerned about these incidents (political and social incidents). Before for instance, when I see this social confrontation (a particular confrontation named), I will switch off the television immediately. I wouldn’t look at it as I found it annoying, it seems this is not related to me and I have no idea what they want. Now after studying the course, I realised these incidents are in fact related to me. I have a right to assess social justice. Was the government right or does someone want to take advantage of a social confrontation? I think I can develop further, even so that one day if I want to express my opinion, I can participate, go on a demonstration on the streets. The course has deeply influenced and changed me; before I really showed no concern about it.” (1.09.00)

4.3.4 Other Benefits: (8) Health and Family Relationship

Other wider benefits of not-for-profit education were also found and reported by the disadvantaged NEET youth learners. The success of the learners' identity enhancement and empowerment brought by the not-for-profit education provided different benefits to the disadvantaged young learners which were often unexpected for many of them. For example, disadvantaged learners may benefit from better health due to the reduction in or cessation of the use of illegal drugs or alcohol consumption after they found their life purpose through the course. In Yash's case, he reported that since his YPTP had given him new meaning and purpose in life, he had stopped the use of illegal drugs and reduced alcohol and cigarette consumption. Some disadvantaged NEET youth learners like Gary also claimed they have done more exercise since good health is part of the requirements of many government jobs. However, not all the disadvantaged youth learners found not-for-profit education helped to improve their health. In Fiona's case she reported that due to her studies and busy working life, she was feeling under pressure and suffered from emotional problems.

"At that time I needed to manage work and study, it made me feel very tense. Also I have very high expectations of myself, and so I have emotional problems... At that time the pressures were very high and I needed to consult a psychiatrist." (16.58)

Moreover, a few disadvantaged NEET learners also reported that their learning had caused some impact on their families. For example, Lai-fa expressed that her not-for-profit education had helped her to improve the communication and relationship with her family.

“My relationship with my family has improved, I didn’t know how to get along well with family members... even we had some workshops in our social service learning, I didn’t dare to share (feelings) with my family. Now (after different learning experiences), when I am back home, before whatever happened in my workplace I would take it by myself only, but now I could talk to them, share with them how difficult I feel in my workplace. My family will cook me soup to soothe me, though I used to have these before, but now I will feel more precious for it. Because I talk to them, if I tell them what I like they will give me more or arrange things for me.” (42.25)

Two NEET youth life stories, Gary and Yash, were selected and studied in detail in Appendix IV to show how not-for-profit education influenced and changed their lives in different ways. It also attempts to articulate how the results of the disadvantaged NEET youth group were processed and derived.

4.4 Summary

Study of the disadvantaged NEET youth learner group shows that due to the rapid economic and social transformation in Hong Kong in the last few decades and the prolonged global economic crisis, the youth unemployment and potential high social cost worried many people in Hong Kong. To deal with the social concern in the increasing NEET youth problem, the HKSAR Government has launched different youth pre-employment training programmes and academic bridging courses for disadvantaged non-achievers in education. Not-for-profit organisations were the main education providers for these training and education programmes which fitted into the government's education and manpower policies.

The perceived benefits of not-for-profit education for the disadvantaged NEET youth were multi-dimensional. The NEET youth's education experience, background and attributes, and their expectations for the second-chance nature of not-for-profit education played an important role to affect the learner's perceived learning outcomes.

In terms of the wider benefits gained by the NEET youth not-for-profit education, disadvantaged youth were empowered through learners' attitude and value changes, acquired new meaning and purpose in life, experienced a sense of achievement and built-up self-confidence. Such 'personal empowerments' are believed important to rebuild learners' confidence to embrace their future and to motivate them to learn and progress. Moreover, learners were also able to repair and gain their desired academic qualifications, acquire new knowledge and skills, make new friends and construct their social networks. Other wider benefits, for

example enhanced civil participation and improved health and family relationships, were also reported.

Moreover, disadvantaged NEET youth have gained significant learner surplus in identity capital where they were surprised with the unexpected gains in identity capital-related benefits in such as enhanced self-concept, changed personal attitudes and values, improved motivation to learn, and developed personal plans and goals.

CHAPTER FIVE

REPORT AND ANALYSIS OF DATA: WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION FOR DISADVANTAGED ECONOMICALLY MARGINALISED LEARNERS

5.1 Introduction

This chapter starts by illustrating the background of the unemployed and working poor problem in Hong Kong and discusses the problems and consequences caused by the economically disadvantaged group from different levels and socio-economic perspectives. It attempts to explain the causes of the increasing unemployment and working poor problems in Hong Kong in the last few decades and shows how the government responds to these challenges. This chapter then focuses on fully analysing and discussing the wider benefits of not-for-profit education for the economically marginalised disadvantaged learners and demonstrates two life stories of the economically disadvantaged learners to support the findings. This chapter also provides a conclusion of the findings of the wider learning outcomes of the economically disadvantaged and marginalised learner groups and leads to further discussion in Part III of this thesis on the comparison of the wider benefits of not-for-profit education for other disadvantaged learner groups.

5.2 Background to the Disadvantaged Economically Marginalised Problems in Hong Kong

The General Economic Situation in Hong Kong

Hong Kong is one of the most successful and affluent economies in the world. The gross domestic product (GDP) that reflects the total output of the economy was US\$50,900 per person in 2012 and Hong Kong was ranked 14th compared to the rest of the world. Government reserves of foreign exchange and gold were US\$317.4 billion and it also ranked high in the top 10 list (Central Intelligence Agency 2012). Productivity and international competitiveness were strong; the net current account balance, showing the overall net earnings from foreign markets after all international economic activities, stood high at US\$6.064 billion in 2012. Thanks to continued strong domestic consumption and business investment and the robust international trade performance, unemployment in Hong Kong remained low at 3.3% (Central Intelligence Agency 2012). Although it seems Hong Kong was an ideal and successful place to accumulate wealth due to its unique historical relationship with the west and proximity to the Chinese market as well as its free market capitalist ideology, many grassroots working class and economically inactive people were however in fact being marginalised and exploited because of the government's hard-core 'positive non-interventionism' free market philosophy which failed to help the disadvantaged to adapt to the fast-changing social and economic environment.

The Poverty Problem

Due to the rapid transformation of social and economic activities in Hong Kong in the last three decades as well as the government's failure to address the needs of the disadvantaged, the income inequality and substandard living problems suffered by the economically marginalised have become a centre of discussion and concern in society. In a rare government-led study of the poverty problems in Hong Kong, a recent report published by the Commission on Poverty (CoP) showed that around 1.3 million people, or a fifth of the population, were deemed to be living below the poverty line (HKSAR Government 2013c). To address the imminent threats to the economy brought about by income distribution and poverty problems, the CoP was reinstated by the HKSAR Government in 2012 to formulate a widely and socially accepted poverty line and to devise relevant poverty alleviation policies.

High Cost of Living in Hong Kong

Hong Kong is an overcrowded city with more than 7.1 million citizens and 48.6 million tourists per year living in and visiting this highly condensed urban environment (HKSAR Government 2012a; Hong Kong Tourism Board 2012). Owing to the lack of supply of land and the high land price economic policies affirmed by the Hong Kong government since the period of British rule, the cost of living has significantly increased, household disposable income and buying power have been reduced, making low income earning families and individuals' lives very difficult. Hong Kong in fact is one of the highest cost of living places in the world and accommodation rental cost is the main reason behind that. The rapid expansion and development of the mainland China economy which encourages many of their

affluent citizens to invest, shop and travel in Hong Kong has also further pushed prices to historically high levels and caused many local people to suffer and complain. To many disadvantaged low income earners, the unbearably high rental and living costs have left them to reside in a very poor living environment. Undersized and unthinkable living conditions such as cocklofts, bed spaces, cubicles and even cage homes, are commonly found in some deprived districts in Hong Kong. It is especially difficult for those families with children and elderly to be taken care of. Although the government has continued to provide essential education and subsidised health care and social services to all the citizens in Hong Kong, many economically disadvantaged still find it hard to achieve a decent standard of living because of their very low take-home pay and long working hours. The middle-aged low skills and low qualification working class especially worry about their future as comprehensive retirement protection is not available to shelter them when they get old. The results of the increasing economically disadvantaged along with the growing ageing population problem and the rapid rise of the uncontrollable number of migrants from mainland China, the Hong Kong government now faces a tough dilemma to protect their economically disadvantaged citizens and to balance their fiscal budget to ensure long-term economic success.

The Disadvantaged Life and the Government Policy to Address Income Inequality and Poverty Problems

In fact, economically marginalised individuals and families are likely to suffer and be exposed to various hardships and different long-term problems in Hong Kong; for instance, substandard living environment, long working hours and reduced family and

leisure time, less chances to learn and advance themselves, abuse and family violence, deficiency in children's learning support and multi-dimensional development opportunities, generational poverty, discrimination against age, gender, and backgrounds, inactive social participation and social isolation, weak social mobility, poor physical and mental health, and less enjoyment and satisfaction of life and fear of the future.

To tackle the disadvantaged poverty problems, the government has offered different kinds of assistance to people in need. Public housing is available for low income families and individuals to apply for though the demands on public housing are extremely high and the waiting time is long. A minimum wage law was finally approved in 2011 after years of discussion and rows; however critics believe that it has caused even longer working hours for the poor and generally pushed prices to a higher level. Various direct government subsidies and comprehensive social security assistance are available to support the financially poor and disadvantaged families and individuals, however the financial tests have been blamed for being too rigid and the amount of assistance was low and insufficient. However, the government's taxation policies have protected low income earners from paying income taxes; sales related taxes such as value added tax have not been imposed on most of the products and services in Hong Kong. Last but not least, the Hong Kong government through different not-for-profit organisations has offered various subsidised not-for-profit education opportunities, for example Employees Retraining Board (ERB) programmes, to different disadvantaged learner groups to advance their skills and improve their standard of living.

5.3 The Wider Benefits of Not-for-profit Education for the Disadvantaged Economically Marginalised Learners

Six disadvantaged unemployed and working poor life stories were selected for the study of the disadvantaged economically marginalised not-for-profit education experiences and their perceived wider benefits of learning. Among the six stories, two disadvantaged economically marginalised poor learners have been selected and discussed in full detail. The six disadvantaged learners were selected and discussed because they have experienced not-for-profit education at different points in their different life stages. At the time of interview, one of the disadvantaged economically marginalised learners still remained struggling in unemployment, one worked in a part-time job, and the remaining four interviewees had been able to seek and work in a full-time job.

Summary of the Perceived Not-for-profit Education Benefits of the Economically Marginalised Group

According to the analysis of research results of the disadvantaged economically marginalised learners group, a majority of interviewees reported that the main reason and the primary benefits enjoyed were the transformation of their job skills and uplift in their job mobility, as well as an improvement to their income and standard of living. Most of the economically marginalised learners also expressed that they benefited from their newly gained certificates and qualifications. In addition, not-for-profit education had repaired and fulfilled some of the disadvantaged learners' personal identity-related needs such as increased self-confidence and self-esteem and raising of

life satisfaction. Moreover, economically disadvantaged learners also found they were able to keep up with the times by increasing and maintaining their brainpower which had helped them to improve relationships with their families and make easier their difficult lives. Furthermore, economically marginalised learners have also reported they were able to make new friends in the not-for-profit college and enhanced their interpersonal and communication skills and extended their social networks even after finishing their learning. Some economically disadvantaged learners also reported that they acted as models for their children's learning. Finally yet importantly, some economically disadvantaged learners found not-for-profit education helped them to plan for their retirement. Table 5.1 summarises the reported wider benefits of not-for-profit education for the disadvantaged economically marginalised learners.

Table 5.1: Summary of wider benefits of not-for-profit education achieved by the disadvantaged economically marginalised learners

Disadvantaged Economically Marginalised Learners (<i>Not-for-profit Education Attended</i>)	Capitals and Perceived Benefits of Not-for-profit Education									
	Human Capital			Identity Capital		Social Capital			Others	
	(1) Income and Standard of Living	(2) Certificates and Qualifications	(3) Job Skills and Job Mobility	(4) Self-confidence and Life Satisfaction	(5) Keeping-up with the Times and Brainpower	(6) Friends and Social Networks	(7) Interpersonal and Communication Skills	(8) Family Relationship	(9) As a Model to Motivate Child Learning	(10) Plan for Retirement
Kok-sing (<i>ERB</i>)	G(Q)		G(Q)							
Miranda (<i>Night Secondary School, ERB, Community Centre</i>)	G(Q)	G(Q)	G(Q)	G(Q)	G(Q)	G(Q)	G(Q)			
Jane (<i>Night Secondary School, ERB, Community Centre</i>)	G	G	G(Q)	G	G(Q)	G(Q)	G(Q)	G(Q)/D	G(Q)	G
Suet-lai (<i>ERB, Community Centre, Trade Union</i>)	G	G	G	G(Q)	G(Q)	G(Q)	G(Q)	G(Q)		
Fong-lan (<i>Night Secondary School, ERB, Community Centre</i>)	G	G(Q)	G(Q)	G(Q)				D		
Dolly (<i>ERB, Trade Union</i>)	G	G(Q)	G(Q)		G(Q)	G(Q)			G(Q)	G(Q)

Keys: G = Gained Benefits, D = Damaging, Q = Narrative Quoted in the Analysis, ERB = Employees Retraining Board Programme

Moreover, in terms of the strength and level of benefits enjoyed by the economically marginalised learners, Figure 5.1 shows that the highest levels of benefits achieved were human capital-related: viz. (2) Certificates and Qualifications, (1) Income and Standard of Living, and (3) Job skills and Job Mobility. Moreover, disadvantaged learners in the economically marginalised group also achieved higher levels of learning benefits such as (6) Friends and Social Networks and (7) Interpersonal and Communication Skills, which are social capital-related. Some learning benefits such as (4) Self-confidence and Life Satisfaction, and (5) Keeping up with the Times and Brainpower, which are identity capital-related were also reported at higher levels .

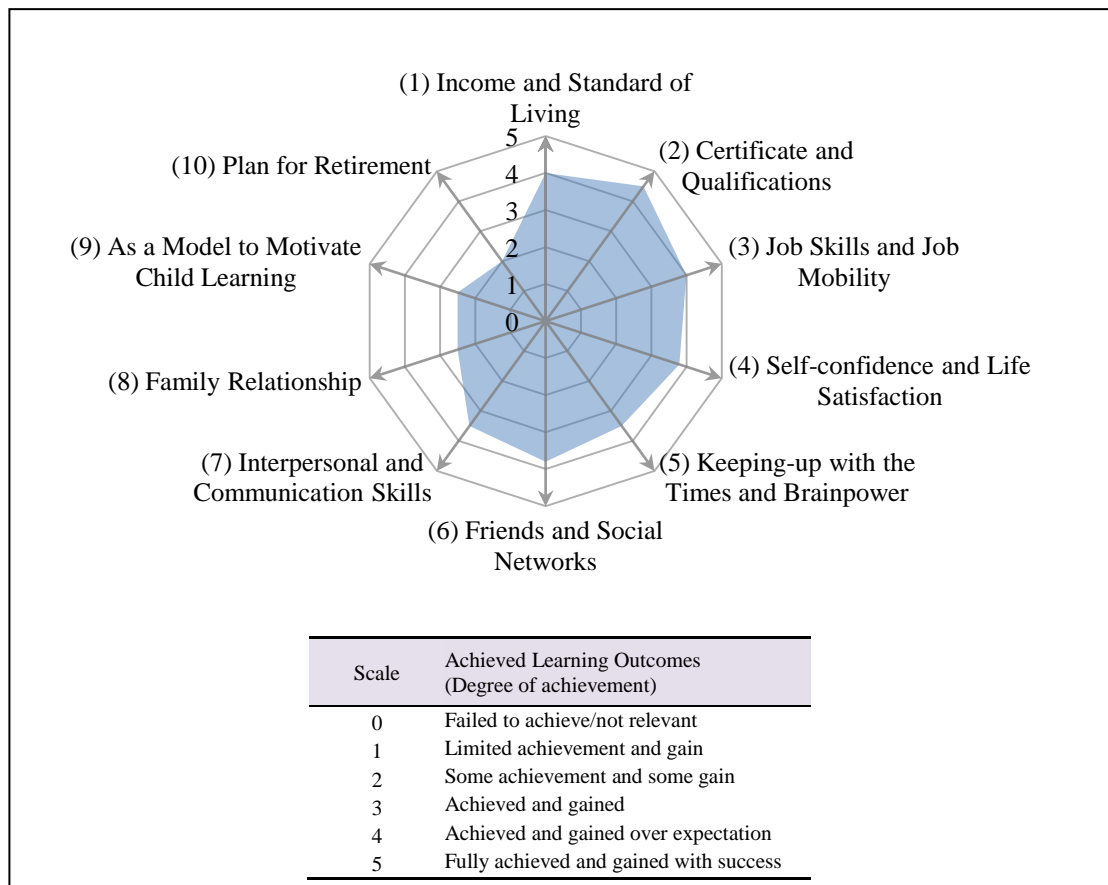


Figure 5.1: The wider benefits of not-for-profit education for the disadvantaged economically marginalised learners

In addition, in terms of the gained capital and according to the ‘conceptualisation of the wider benefits of the learning’ framework suggested by Schuller et al. (2004), Figure 5.2 shows that the economically marginalised disadvantaged learners experienced most in both expected and achieved gains in human capital followed by social and identity capitals. These results imply economically disadvantaged learners perceived and found their not-for-profit education benefited them the most in for example job skills change, improved standard of living and acquired new qualifications (human capital-related) and they also enjoyed making new friends and expanding their social networks in the not-for-profit school, while they see they have achieved some but comparatively less identity capital-related learning benefits such as self-confidence and life satisfaction.

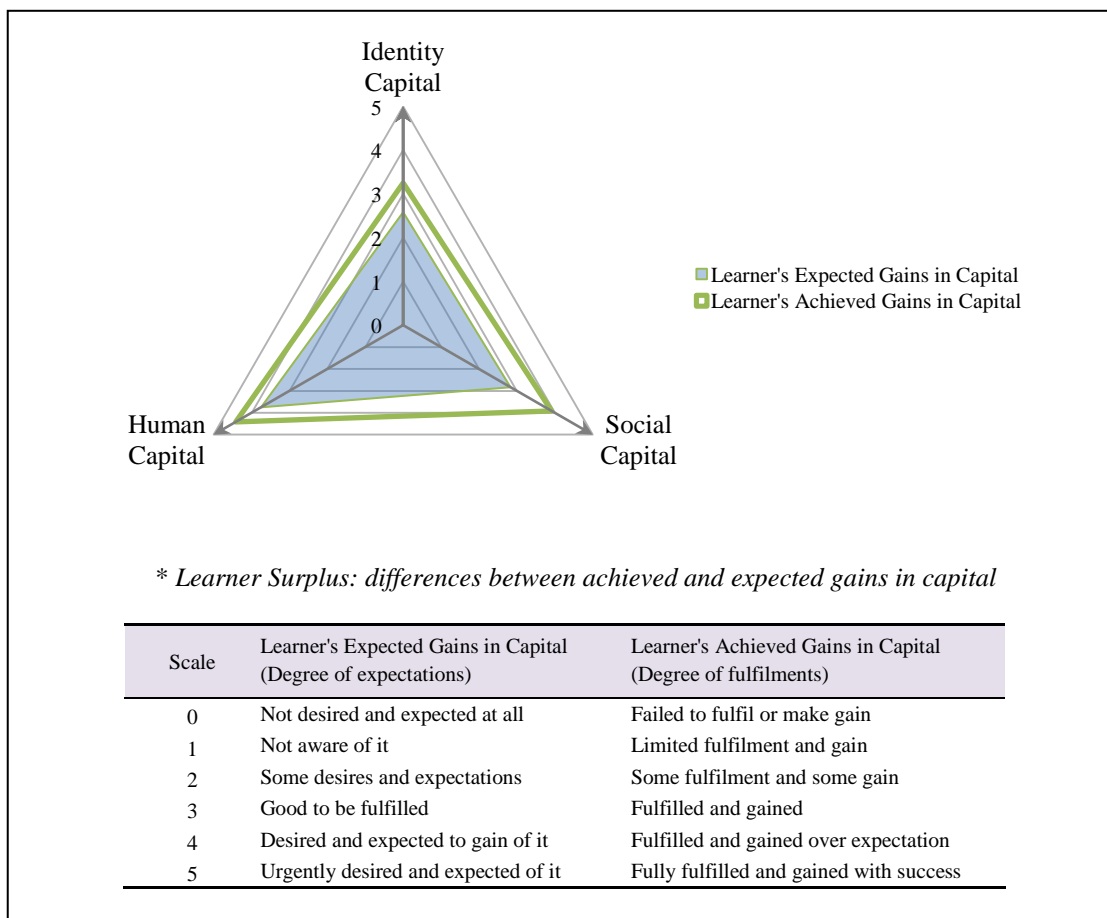


Figure 5.2: Summary of the different levels of capital gains and the learner surplus of the economically marginalised disadvantaged learners according to Schuller et al. (2004)'s conceptualisation of wider benefits of learning framework

Moreover, Figure 5.2 also illustrates that economically disadvantaged learners experienced the highest learner surplus (unexpected learning benefits) in social capital where it means the economically disadvantaged learners were not putting too much expectation on meeting new friends and extending social networks before they participated in the not-for-profit education but the high level gains of learning outcomes in social capital surprised them. In fact, socialising is one of the most important components of the economically marginalised learners' not-for-profit education where disadvantaged learners were able to find new friends with similar backgrounds and life experience to talk with and share their difficult times.

5.3.1 Human Capital-Related Benefits: (1) Income and Standard of Living; (2) Certificates and Qualifications; (3) Job Skills and Job Mobility

From the study of the benefits of learning for the unemployed and working poor group, it was found that the initial motive for most of the disadvantaged learners to participate in not-for-profit study was to try to enhance their job mobility and to advance their job-related skills. It is not difficult to anticipate and understand this finding as the economy and job markets in Hong Kong have experienced dramatic ongoing transformations in the last three decades. Unskilled work such as labour-intensive manufacturing jobs have nearly all disappeared in Hong Kong and moved to mainland China with its lower manufacturing costs. With the demand for low-skilled jobs in the local job market eliminated, workers without relevant certificates and proper qualifications to support transformation of their job skills and experience to

another labour market have been left out as unemployed or have to accept very low wages.

(1) Income and Standard of Living

Kok-sing was in his mid-forties when we met him in the interview and he suffers from a mild case of Poliomyelitis. Kok-sing is an early school leaver due to his broken family background; he was trained as a mechanical engineer under a traditional Chinese apprenticeship but without any certificate to prove his skills and qualifications. He lost his engineering job due to the economic transformation when manufacturing activities moved to mainland China during the 1980s. Kok-sing became unemployed and he tried to look for different jobs in both Hong Kong and China but he found the income that he earned could not sustain his family life. He joined several government-funded not-for-profit education programmes aimed primarily to transform his job skills and to earn a better income.

“I have a better standard of living after studying with the Employees Retraining Board (ERB). At the beginning, I thought as I need to change my career and I worked as a security guard, I can only earn HK\$7,000 a month. Afterwards I worked with my classmate and I earned \$11,000 a month. After I came back to Hong Kong, I was left unemployed and I thought if I worked again as a security guard I can only earn HK\$6,000-7,000. I joined another ERB programme; I was thinking it would be nice if I can earn HK\$8,000-10,000, and I can have a good life as my mortgage has already been paid off. Now I am working (as a masseur). Though the working time is a bit long, I can earn at least around HK\$15,000-16,000 a month.” (47.55)

In fact, the government-initiated and subsidised ERB training courses have helped many disadvantaged low-skilled unemployed people transform their job skills and become open to new job opportunities. According to the ERB's annual report, since 1992 it has trained 1,459,958 graduate trainees and it has appointed 126 training bodies with 410 training centres offering more than 800 different training courses or 130,000 training places across 30 different industries (Employees Retraining Board 2012). In our research, more than half of the unemployed and working poor disadvantaged learners reported they have participated in ERB training courses and all have experienced a different degree of impact and benefit to their work and personal life. In Kok-sing's story, he was able to earn his ideal living wage after receiving relevant job skills training from the ERB. In fact, many low-skilled low income and no qualification workers like Kok-sing have no other alternative to advance their skills so as to improve their income. Not-for-profit education was seen as the last resort opportunity for them to transform themselves in the new economy. As Kok-sing said:

“At that time I needed to change my career but there were not many jobs available to me. I joined the government subsidised ERB programme offered by a not-for-profit organisation, the security guard course. I can't do anything but follow my fate and find a job first. My belief is I have to find a job first as I have no income at all. I immediately found a security guard job after graduating from the programme.” (02.48)

In fact, according to Kok-sing's experience, he said he was one of the lucky ones as he was able to find a new job right after he graduated from the ERB training course and passed all the licence examinations. He argued that the demand for low-skilled jobs was too weak and it was especially difficult for middle-aged low qualifications

workers. Kok-sing said he knows many of his course mates were still not able to find a decent job and income though many of them were able to transform their skills to other service-related sectors but they have to accept a very low salary.

In another disadvantaged learner's story, Miranda shared a similar reason to Kok-sing for joining the not-for-profit education. Miranda was also a victim of Hong Kong's fast-changing economic transformation and China's Open Door economic policy. Miranda worked in the same shipping company for over 28 years and since her company was not able to cope with the competition from the firms operating in China, it closed down during the global financial crisis in 2008 and Miranda was left unemployed in her early 50s. All of a sudden, at an age close to her retirement, and having worked and stayed in the same company for a very long period of time without any advancement of her job skills and qualifications and with no up-to-date knowledge of the job market for more than two decades, Miranda felt lost in her life and felt frustrated about her future. After she was laid off, she could only do some temporary jobs to sustain her living. Because of her age, Miranda was bullied by some young colleagues in one of the few firms that were willing to employ her and it left her no choice but to resign from her new job. During Miranda's temporary job employment amid her frustration and anger, she attended several ERB training courses aimed at getting her back into the labour market and finding a new job. Miranda said:

"I worked in the same company for 28 years, I was just like a flower living in a greenhouse. I had no idea about the outside world, and I had absolutely no idea how to interact with outsiders. I hadn't tried to find a job (in the last 28 years), and I lost all my self-confidence suddenly when the company closed down. Where is my value, what kind of work am I capable of doing?" (04.50)

“I enrolled in the ERB course when I was unemployed. I had no idea what I should study, I think there is a demand for security guards; everywhere recruits security guards and so I enrolled in the course.” (16.05)

After Miranda finished her ERB training course and successfully passed all the security guard licence examinations, she was quickly employed as a property assistant in a large property management company. Although her new salary was barely able to cover Miranda’s living at only around one quarter of the old income that she used to receive from her previous employer, it at least allowed Miranda to settle down and sustain her life.

(2) Certificates and Qualifications

In fact, Miranda is a strong believer in education and she often emphasised the importance of certificates and qualifications in the interview. She was especially pleased and proud of her secondary education qualifications after spending more than 10 years at night school to achieve them. She believed her secondary school education qualifications had literally saved her and at least enabled her to find some temporary jobs even at her age. Miranda said:

“When the company closed down I lost my life, but I have a certificate (secondary school education qualifications), and I have found this certificate to be the most precious thing.” (04.55)

“Because I am now 50, my competitiveness is not good...but I found even at my age, and even though I have no experience of the outside world, there were still people interested to interview me and offer me a job. I found that I had value, I am a lucky one. I reckon that if I did not have that certificate, though the level (the result) was not ideal, in fact I realise it is a kind of support. If

you needed to find a job at that time in 2008 (the global financial crisis), the most basic (qualifications) is Form five (secondary school) graduation and if you did not have this it would be very difficult to find a job.” (07.57)

Because of Miranda’s perception of the importance of certificates and qualifications, and her successful experience and rewards gained in her ERB training, Miranda kept on learning and attending different job skills-related training courses such as Chinese typing, Mandarin and English offered by different not-for-profit organisations to advance herself. Miranda claimed:

“In fact I think if people need to transform their skills and change their careers, for example if you are unemployed but you still need to work, you have to top yourself up; it is something personal, and you must continue to study.” (1.31.41)

A similar situation was also found in another middle-aged disadvantaged learner, Dolly. Dolly grew up in a broken family and ran away from home with her boyfriend at the age of 17 after the death of her father without achieving any academic qualifications. After years of change and struggle in her personal life, she ended up as a single mum. Dolly worked at different jobs including waitress in a hotel coffee shop, fashion sales, real estate sales, and beauty and body masseur. Dolly took over and ran a beauty salon business after her remarriage and worked for different beauty business firms after she closed down her own business. When Dolly realised that she did not have any certificates or qualifications to prove her skills and knowledge, which left her only very limited bargaining power in the beauty job market, she joined several ERB training courses to certify her abilities. Dolly told us:

“When I was unemployed, I read a newspaper advertisement for an operations manager; I understand that certificates and qualifications are required for most jobs. I had been working as an operations manager before but I didn’t have a certificate, so I had no qualification. It is my weakest point, and so I went to study that (beauty management) ERB course.” (29.43)

To Dolly, not-for-profit education not only helped her to learn and certify her skills and knowledge and offered her qualifications but it also acted as an active agent to change her life and her role in her family. After Dolly remarried, she spent most of her time at home taking care of her young children. She was literally isolated from the outside world and relied on her husband, however she was not satisfied as she felt she was not able to fulfil her ambitions to start a business. To fulfil her dream, Dolly later participated in different not-for-profit education which brought her the certificates, qualifications, knowledge and skills that were required for her to start her business. Her decisions to learn and start her business also changed her role and life from a housewife and mum into a major family income earner as her husband’s printing business was also badly affected by the keen cost competition from China.

“In fact I didn’t get along with other people for many years, over ten years. It is because I hid at home taking care of my son. I was confining myself, but since I wanted to start my beauty business, I kept reading beauty magazines to update myself and until someone persuaded me to go to study. The Federation of Trade Unions offered a lot of different inexpensive training courses and as I think at least I need to show to my customers that I have the required qualifications and certificates to prove my professional services, so I started to enrol and studied a lot. Since then I have kept on studying.” (23.18)

In fact, it is not difficult to find out why the middle-aged low-skilled disadvantaged workers suffer the most during economic transformation. Firstly, since the Hong Kong education system was still developing and incomplete during the 1950-60s, this period of time was the main school time for many now middle-aged workers. Since education was not compulsory, many of these disadvantaged middle-aged workers were not able to receive education at their young age due to many reasons, for example family background, financial constraints and poverty, high demand for child labour etc. As a result the average level of education qualification attainment of the middle-aged workers group is rather low when compared with the average education level of the younger generation today. In fact, the six years' free compulsory education system was only introduced in 1971 by the British Hong Kong colonial government and expanded to nine years in 1978. If for any reason these disadvantaged workers fell into unemployment because, for instance, manufacturing jobs were moving to the rapidly developing economy of China, these disadvantaged workers were exposed to a very difficult situation to get back to work as they lacked academic qualifications and certificates to compete with younger, more highly educated graduates. Besides, Hong Kong has long proudly proclaimed that the success of the region was because of the effective government policies to promote a minimum welfare state and minimum market intervention. When the middle-aged disadvantaged workers became unemployed and lost their value and bargaining power in the labour market, with only very limited welfare protection and help, their life changed and deteriorated and their future became grim. To the middle-aged deprived unemployed, it seems they were being exploited, abandoned, ignored and marginalised by society.

Indeed, all the disadvantaged learners in the research show different levels of concern and awareness about their low and uncompetitive education qualifications. They also

expressed their worries about their futures, especially their retirement life, since many of them were not able to keep up with basic skills and qualification requirements in the labour market and the economic transformation was so fierce and fast which directly affected their ability to find jobs and incomes.

On the other hand, those disadvantaged learners who were able to advance themselves through continuous not-for-profit education, for example night school, secondary school studies and not-for-profit training courses, tended to feel more secure and optimistic about their futures. Disadvantaged learners like Fong-lan, Jane and Miranda, who spent more than 10 years' effort and time studying at secondary night school to achieve their secondary school education qualifications, found themselves lucky and proud when they experienced an economic transformation as they were more likely to be able to stay in their job or able to settle in a new job soon after they again became unemployed. Fong-lan said:

“I have achieved my dream; I managed to achieve the things that I wanted to... at last I have completed my secondary education; it was very difficult but I completed it. Even without a higher education qualification, I managed to work in the education sector for many years and my superior relies and depends on me. I feel satisfied with this.” (40.33)

Fong-lan in fact grew up in a very poor and broken family in the 1950s. She was not allowed to study in secondary school because of her mum and brother's traditional Chinese thinking and bias about girls' needs in higher education and as a result she worked in a garment factory as child labour. She soon married her husband who worked in the kitchen in a Chinese restaurant and she gave birth to their first son. Due to her low income and the poor living environment in the city, Fong-lan accepted a

public housing offer and moved to a rural town where she claimed she was depressed and nearly mentally collapsed because of the distance and isolation from her mum and sisters. To fulfil her childhood dream to study in secondary school and achieve higher education qualifications, Fong-lan spent 11 years at night studying for her secondary education qualifications. Fong-lan had also received employment retraining education during her night school studies and it led her to a work opportunity in a school as a part-time school administrator which soon changed to full-time after probation. Fong-lan's ambitions and determination to spend 11 years on her night school studies was in fact stimulated by a poor experience in a job interview where she was discriminated against because of her low qualifications. Fong-lan explained:

“After I finished my Secondary 3 (year 9) grammar school studies, I applied for a job as a teaching assistant in a kindergarten. At that time, they accepted Secondary 3 graduates to work. The headmaster interviewed me and he liked me very much and he wanted to sign an employment contract with me. However, when I showed him my qualifications he said ‘We are very sorry, we can’t accept qualifications from grammar school studies; we need comprehensive college qualifications.’ I felt very sorry for myself and it made me realise that studying in the grammar school has no future and I needed to study at a Comprehensive College. When I was in my Secondary 4 (Year10), my husband became unemployed and a friend of mine introduced me to study an ERB training course. He said it is very good as you can learn new things and receive a subsidy, and they even introduce work.” (21.06)

“I kept on doing part-time jobs until I finished my Secondary 5 (year 11) grammar school studies. I felt the qualifications were not enough for me as I can’t even work as a kindergarten teaching assistant. After I finished Secondary 5 (Year 11) grammar school studies I restarted from Secondary 1 (Year 7) again to study at a Comprehensive College at night, five nights a week. Another five years of study so I have spent a total of 11 years in my night school studies.” (24.17)

Although Fong-lan had fulfilled her dream to achieve secondary education qualifications at last, she felt and showed serious regrets about the time lost with her two sons as she was fully occupied by her job and her 11 year-long night studies. To Fong-lan, she has paid a very high and serious price for her lack of education qualifications and to fulfil her learning needs.

“I think this saying is apt: ‘Give and take’. I lost the opportunity to get along well with my two boys when they were still young. Although I can still take care of their meals, I can still take care of their basic needs, and I can help them to avoid going astray, as well as these I want to take care more but I was not able to. At that time the problem wasn’t too obvious, but when they grew up I could feel it. I felt very sad and hurt when I knew what they have said or what they have written about me as a mum. I tried very hard to fulfil my dream and worked very hard to raise them; though these two goals seemed to have been achieved, something very important had been neglected. I feel deeply sorry about that... I feel regretful that I couldn’t take care of their inner minds and inner needs; I could only take care of surface things.” (30.04)

Similar to Fong-lan’s story, Jane spent 10 years completing her secondary education in night school. Jane is a mum of two children and has suffered extensive abuse and bullying from her husband. Because of her worries about the future of her two children, she decided not to divorce and accepted her fate. Thanks to her night school secondary education qualifications and other not-for-profit education experiences, Jane was able to work at a couple of good income part-time jobs where she was very pleased and proud of herself. Jane has also kept on joining different not-for-profit interest-related courses such as dancing, singing, drawing, as well as social voluntary services, to balance her unhappy marriage life.

“When my boys were still young until my younger son studied in Primary four, I worked in a supermarket as a part-time cashier so that I could spend more time taking care of them. I didn’t want my work to affect their academic results and their future. When someone noticed that I have secondary education qualifications, they suggested I should go for a better job as a supply teacher in a kindergarten. I went to the interview and they liked me and employed me... Many people had no idea I have secondary school qualifications, even my husband’s family, since after I married I didn’t go to work and stayed at home as a housewife. After they knew about my qualifications, my husband’s sister introduced me in 1980 to work in the Examination Board... I feel very happy as I could work part-time for a good income, and at the same time I can also take care of my family.” (10.39)

(3) Job Skills and Job Mobility

The research findings also show that all the disadvantaged learners have benefited from gaining some useful job skills from their not-for-profit education. In Kok-sing’s story, he joined his first ERB security guard training course and found a security guard job working in a newly built property. He later joined another ERB training course after losing his job in China and learnt to become a professional masseur. He was successful in finding a job and worked in different massage parlours earning a decent salary for more than six years. For Dolly, she has learnt the skills required for her new beauty business and her later career in the beauty sector has changed her role and life in her family. For Miranda, having worked in the same company for more than 28 years and after she has been laid off by the company, she joined ERB courses to transform her skills and she also immediately found a new job right after her training. Miranda claimed that what she has learnt in a not-for-profit organisation and ERB training courses is practical and it has helped her to settle into her new job:

“When I started working again (as a customer service assistant in a property management company) I felt that what I had learnt in the ERB course could be applied in my workplace... The ERB training course was able to help us as the things that I learnt in school were similar (in my workplace), but only when you start working can you really apply it.” (24.00)

Miranda also said:

“I learnt Chinese typing in a not-for-profit organisation. In fact, I didn’t need Chinese typing when I was working as a shipping clerk since all the goods were shipped overseas and so everything was in English. I learnt Chinese typing as I was chairman of a catholic social care group and I needed to prepare meeting minutes. But after I was laid off I needed to go for a job interview, and they set the programme in the computer to test my English and Chinese typing skills... If I hadn’t learnt it before, I would have had no idea how to type in Chinese... Even now, when I work in a retreat centre, I still need to use Chinese. When I contact outsiders I need Chinese, unless I deal with foreign visitors or my boss, and I will then use English. My work now is all in Chinese; I found what I had learnt was practical.” (29.21)

Miranda believed what she has learnt would be beneficial for her future, both in her workplace and for her personal social life, and so for this reason she continues to study new skills and join new courses:

“I feel that in these two learning experiences (I have actually studied more than two courses but I have forgotten what I have studied), I have gained a lot from my studies; I can apply the knowledge learnt from the courses now or in the future.” (30.06)

In Jane’s case, thanks to her English conversation skills learnt in an English course offered by a local not-for-profit education centre, she managed to take up a new part-

time job and worked for the Hong Kong Examination Board. Jane claimed that the English language skill that she has learnt from the course has helped her work and she found it useful and practical:

“When I worked part-time in the Examination Board for the Royal Music School Examination held in Hong Kong as a waiting supervisor, I had to work and assist examiners coming from the UK. At the beginning I was very anxious as I have never tried to talk with any foreigner using the English learnt in school... having worked in the job for some period of time and with more chances to talk and communicate with these British examiners, I found what I had learnt in school was useful and practical. Since I have studied English conversation in school before, I think I am better than those who haven't had a chance.” (09.44)

5.3.2 Identity Capital-Related Benefits: (4) Self-confidence and Life Satisfaction; (5) Keeping up with the Times and Brainpower

In the previous section, as discussed, a majority of disadvantaged learners reported and claimed that through their participation and learning in not-for-profit education they were able to gain new job skills, acquire qualifications, enhance job mobility, improve incomes and uplift standards of living. This section focuses on the wider benefits of not-for-profit education that have helped to satisfy and acquire disadvantaged learners' personal identity capital needs.

Since most of the unemployed and working poor were the result of deprivation of learning culture and lack of human capital, for instance broken and poor family backgrounds, below average academic qualifications, lack of relevant job skills, and deficiencies in job and social mobility, as a consequence they were more likely to

show a lack of self-confidence, perceive they were second-class in society, and worry about their depressing future. The disadvantaged unemployed and working poor learners with an external locus of control like Jane and Kok-sing tended to internalise their own misfortune, fate and hardship through bringing their hopes to their offspring and attempting to earn better income and providing a better standard of living for their children. Other disadvantaged learners however, such as Miranda, Dolly, Fong-lan and Suet-lai, believe that through their continuous not-for-profit education they were able to advance themselves and regain some of their lost self-confidence and improve their satisfaction with life.

Moreover, the economically marginalised disadvantaged learners also reported that their not-for-profit education can help them to keep up with the times and improve their brainpower and, together with the enhanced self-confidence, it is believed that all these personal-related benefits had helped to repair and reshape the disadvantaged economically marginalised learners' self-concept and to increase their self-value.

(4) Self-confidence and Life Satisfaction

Another disadvantaged economically marginalised learner, Suet-lai, was in her mid-50s when she participated in the life story interview. Suet-lai grew up in a big family and, as she didn't like learning in school and without any objection from her parents, she worked in a clothing manufacturing company as a garment worker right after finishing her primary school education. Though Suet-lai joined night school when she was working in the garment factory she failed to complete her secondary education and gained no qualifications. She met her husband in the night school and gave birth to her first son soon after marriage. After her first son was born, Suet-lai and her

family moved to a newly developed rural town for the public housing allocation. As job opportunities were limited in the newly developed town, and with no work opportunities opening for Suet-lai, she attended her first not-for-profit course offered by a local community centre to learn how to help her son to study. Since then Suet-lai has enthusiastically participated in the local community centre volunteer services and kept on joining different not-for-profit courses. Having actively and successfully built-up her local networks in the local community and her continuous participation and experience in the volunteer social services, Suet-lai was invited to work in a mental disability centre as a hostel assistant. Suet-lai said her marriage is not perfect due to her husband's extramarital affairs and the poor relationship between her husband and elder son. She has considered divorce but in consideration of her two children and as she had no job she tolerated and accepted the status quo. After her two sons finished their education and left home, Suet-lai continued her work in the hostel to sustain her life, living with her husband in the rural town.

After working in the social services sector for more than 20 years and continuing to participate and learn in not-for-profit courses, Suet-lai reflected that she felt she was more empowered and had more self-confidence now than when she was young:

“I have more self-confidence. I was a timid person, I am not afraid of anything now. I have learnt more, experienced more, I see things differently now... if I was not so cowardly and timid, and with the things (marriage crisis) happening to me now, I would choose to divorce. I will consider doing nothing, and I will settle down in my life. Since I have confidence and self-assurance I will seek help from others, but at the time (before) I did not know how, I had no idea who can help me and I didn't want to tell anyone.” (1.11.13)

Similarly in Miranda's story, her not-for-profit education and assessment experience and her quick re-employment soon after school have brought her some vital confidence where it was lost when she was traumatised by the unexpected lay off after her 28 years' long service in the same company.

“After finishing the security course, I was awarded the certificate and then I had the (licence) examination. The examination required serious study and preparation, multiple choice questions etc., and everyone was very serious about it. For me, it was a very good experience. I achieved high scores in the examination – I was awarded more than 90 marks in both papers and I felt highly satisfied. I had made the effort and achieved the reward, so it seemed to be recognition of myself, and it increased my self-confidence.” (18.58)

To Fong-lan, since her family would not allow her to study secondary education, she felt ashamed when she told others that she had only achieved primary education qualifications. Moreover, due to her poor education qualifications, she lost an opportunity to work in a kindergarten as a teaching assistant which significantly damaged her confidence and self-worth. Fong-lan recalled:

“When I was working in the garment factory, some factory workers went to study at night school. I wished I could study as well as I really wanted to. But when I fought for it, everyone was against it. My brother said night schools were places where people find relationships. He told this to my mum and my mum was afraid and so she did not allow me to go out to study. In fact, I really wanted to leave that situation as I was feeling unappreciated. That is I had only primary school qualifications, and it was difficult to tell others as I didn't want them to know my poor qualifications and my background. I wanted the opportunity to study, but I was not allowed to. It was just like I wanted to jump but I was pressed down, I wanted to jump higher but I was pulled down harder by others. I regretted that I was so obedient.” (10.37)

However, soon after Fong-lan gave birth to her first son and her parents moved to the rural town to live close by her, she took the chance to study at a night school and fulfil her wish to study.

“I asked my mum to take care of my child when I went to study but she always complained. Then I told her that when I was a child I didn’t have a chance to study and so I needed to study now. My mum then had nothing to say. My dad was more supportive of my study as he had a chance to take care of and play with my little fat boy.” (18.11)

Actually Fong-lan was very proud of her perseverance and satisfied with the qualifications gained from her 11 years’ night school studies. Her qualifications also led her to further satisfaction in her career and job performance.

(5) Keeping Up with the Times and Brainpower

Moreover, many economically marginalised disadvantaged learners said that they were pleased that they were able to learn new knowledge and keep up with the times. They think it is essential as they do not fall behind others and it had helped them to communicate and relate to their family and friends. They also felt more satisfied and confident in themselves if they knew more about things happening in the world. To Jane her not-for-profit education not only enabled her to fulfil her ambition to learn and made her feel more complete, but it also allowed her to keep up with the times.

As Jane claimed:

“I have no idea, I think I would like to increase my... that is I am not sure, because I had no chance to learn when I was young. Due to the environment I wasn’t able to learn, and now I can, I really want to increase more of my knowledge and be more productive, and I will feel more complete. My inner

self feels more fruitful psychologically. To me this (kind of personal interest-related) learning is useless (for jobs), I told you I won't go for qualification examination after learning, but I want to make myself feel totally complete. I won't be out of touch with the outside world. I recognise this as a kind of psychological need for me.” (37.24)

Suet-lai also believed that not-for-profit education had helped her keep up with the times and that she related to her family more closely and in a more enjoyable way. She gratefully reflected:

“For example I went to learn English. Having learnt a lot at least I won't find myself out-of-date when I relate to my children. I can follow the current trends, and at least my family and others won't find me 'old-fashioned'. Even now, my grandchild has started learning English... though he is only a few months old, when he joins a playgroup he will need to learn English. When I know what he has learnt, I can teach him as well.” (54.37)

In fact, to the economically disadvantaged learners keeping up with the times, knowing local and global trends and being aware of social, cultural and economic developments not only helped to maintain their competitiveness in the labour market but also fulfilled their psychological needs such as security, a sense of belonging, self-worth and having a purpose in life in different ways.

In addition, Suet-lai argued that if she had not joined in not-for-profit education, she might have remained a narrow-minded and old-style person like many of her friends in the same age group. Suet-lai believed the not-for-profit education that she had attended had helped her to keep active and resilient and maintain better brainpower:

“If I hadn't gone for this learning and locked myself up instead, and remained with a primary education qualification without taking part in these not-for-

profit courses, I think I would be a narrow-minded person and I may not be able to communicate with young people. I have a group of friends of similar age and they are more old-style in thinking and exclude themselves. I feel I am better than they are.” (55.17)

“In the workplace, I think I am more flexible, flexible in thinking. It is because I have learnt and experienced more new things; I can think faster, I am more energetic overall when I work.” (1.08.59)

Jane also agreed with Suet-lai’s claims that learning had made her better off than others in the same age group. Jane realised up-to-date knowledge particularly through her peer learning in school has enhanced her brainpower and increased her knowledge.

Jane said:

“In fact I feel very lucky that I keep on learning, it has helped me..., in fact my mind is comparatively..., compared to the same age group of people, I think I am a bit better than them.” (1.27.03)

“I watched the movie (Inception), and my son told me that it was a new movie and teased me that if I didn’t understand it I could watch it again, so I was very nervous and excited. I understood the movie maybe because I keep up-to-date (in my knowledge). In fact, I found myself because I am learning, I keep on learning, it builds my knowledge level..., in fact there are different knowledge levels; or I can learn from the people I know. When I went to learn calligraphy, I met a group of new friends, and I can learn something from them. It can help me increase my knowledge. In fact, knowledge (learning) cannot be stopped.” (1.28.30)

Dolly, a modern practical single mum with an entrepreneurial mindset always emphasising the need for change and being prepared, on the other hand claimed keeping up with the times and maintaining up-to-date job skills and brainpower

helped to reinforce her competitiveness and possibly make her open to better opportunities in the future. She claimed:

“The motivation for my learning is to update myself. I worry if I fail to update myself then all of a sudden I can’t find a job. I update myself in order to build my life; it is essential. Now everything has become very competitive, am I right?” (52.57)

Miranda, as a strong supporter of and believer in continuous education and learning, argued that the continuous not-for-profit education she received had helped her to keep up-to-date and avoided her becoming an ignorant person.

“The knowledge that I learnt from different interest courses can only be gained when you go to learn. You have to go to classes before you can learn. If you fail to learn you won’t get more up-to-date knowledge. In fact you are ignorant, but once you go to school and you realise that you will learn more, it definitely helps.” (35.32)

5.3.3 Social Capital-Related Benefits: (6) Friends and Social Networks; (7) Interpersonal and Communication Skills; (8) Family Relationship

Learning in school, the school environment, and the carefully designed curriculum and learning activities to motivate and promote socialisation all play important parts in not-for-profit education for economically disadvantaged learners. Adult disadvantaged students have diverse backgrounds, reasons and motivations, and constraints when they participate in not-for-profit education. Peer support, friendships, networking, and sharing of job and life information can greatly enhance and enlarge

the utility and value of continuous forms of not-for-profit education, and it is particularly important in the case of economically marginalised disadvantaged learning. In fact, many of these economically marginalised disadvantaged learners when they joined not-for-profit education desperately needed help and were at the lowest point of their lives and could find no way out. For example, as we have seen, Miranda was unemployed after 28 years' service in the same company and lost her job, so she joined several ERB courses hoping to find a new job in her mid-50s; Kok-sing also joined ERB courses when he desperately needed a job and living income to sustain his family; Jane suffered extensive abuse and bullying from her husband. She wasn't able to divorce and get away from her painful fate so she spent hours and hours learning and serving in a local community centre to ease her pain; and Fong-lan and Suet-lai joined community centre courses when they moved into a new rural town and found themselves isolated from their families with no work. As a matter of fact, the economically marginalised disadvantaged learners in the research showed they had only limited and narrow social networks and less friends' support due to their years of hardship and engagements in their work and family lives and they were not able or afford to communicate via information and communication technology. For all the above reasons, nearly all the economically disadvantaged learners found their not-for-profit education experiences and outcomes, in terms of gaining new friends and social supports, treasured and highly valued.

Moreover, not-for-profit education had also enabled and enhanced the disadvantaged's communication and interpersonal skills. In some cases, it had helped the disadvantaged learners to improve their communication and performance in their workplace, and for other learners it had improved and repaired relationships with their family members and as role models to motivate their children's learning.

(6) Friends and Social Networks

As discussed, friendship and social networking for some of the disadvantaged learners are among the most treasured things they enjoyed in their not-for-profit education process. Economically disadvantaged learners also claimed the friendship and social networking that they formed had been extended and maintained even after the course finished. To Suet-lai, she had met and gained many good and important friends in her community-based not-for-profit school. In fact, Suet-lai was a socially able person, her social skills and friendship gained in school had led her to a permanent job in a disabled centre where she worked for more than 20 years. Moreover, Suet-lai had also led a women's society as a chairperson in a local community centre for a very long period of time. Suet-lai shared her views of the values and benefits of friends and social networks gained in her not-for-profit education:

“When you go to learn, you meet many people. You extend your social networks and you know more things. Since you go for learning, you will obviously learn something but the most important thing is to extend your social network. You exchange ideas and interact with others during the (learning) process, and you will gain a lot.” (53.43)

Jane met a group of new friends when she went to join a course organised by a local not-for-profit organisation aimed at assisting parents to help their children learn at home. She found the friendships and the social networks were the most important things that she had gained from her learning in the community centre. In fact, Jane has heavily participated in the voluntary services in the community centre since then and she claims she also learnt from her service in the community itself. Jane was very grateful and excited about sharing her experience:

“When my two sons were still in their primary school I joined an adult education course in a local NGO education centre. In fact, this was very simple learning as it studied a primary school curriculum and aimed to help parents to assist their children to revise and study at home. It is quite interesting but more importantly I made a group of friends. After we had finished our studies we joined a social voluntary group and we participated in voluntary services and organised activities for children in our community... My two sons joined these activities too. It is all because of my own learning that my children joined in different activities and exposures... After I worked as a volunteer for social services, I felt I also learnt something; I have continued my work as a volunteer right up to the present.” (14.47)

As discussed before, in fact Jane’s on-going learning and participation in not-for-profit education and social volunteer services were possibly the only safe haven and escape from her marriage problems. It had growing importance as Jane’s two children grew up and left home and she was left alone living with her husband in a shared flat.

To Dolly, learning new things, gaining knowledge through meeting and communicating with new people in class and interacting with course instructors were the things she treasured the most. She believed participating and learning in not-for-profit education which she was able to afford had not only helped her to gain new knowledge and expanded her interests but also enlarged her social networks:

“I met a lot of new friends who I treasured the most. When you study in class, instructors like the one I am studying with now will tell you about other things. For instance I was surprised that we needed to learn how to brew a cup of coffee or gain extensive knowledge of red wine. We chatted a lot when we have time, they will give you some knowledge during breaks, and teach you how to access the internet; that is knowledge not covered in the course. As a result I have learnt many different things, and I had no idea I didn’t know them before.” (44.36)

In Miranda's case, since she had divorced her husband and when her only child left home for university, she had to live and work alone to sustain her life. Miranda had a very good experience from her not-for-profit education and she was excited to tell us that she had met many new friends with different backgrounds in the not-for-profit school and she was able to have someone to talk to and share with:

"I so enjoyed the learning process when I studied for my security certificate course. Do you know why? We had more than 20 students in the class and everyone came from different job backgrounds. Half were male and half were female. We had a taxi driver, a hairdresser, a cook who worked in the kitchen in a Chinese restaurant, a make-up artist, a clerk, a housewife, an office boy, a real estate agent, and we also had someone who had lost his job, went back to mainland China as an electrical engineer, got sacked and returned. That is, in our security class we had 20 of us and we found no one shared the same career with the other. In the first lesson, we formed a circle and introduced ourselves. We all concentrated very hard in class. It was a whole day course and we received a subsidy from the government, it was around HK\$150. We were motivated to engage in class and the class atmosphere was very friendly; we had a lot of course handouts and we had many things to learn. That moment was great as we all felt we had a group of new friends; it seems we are a group of old friends." (17.36)

(7) Interpersonal and Communication Skills and (8) Family Relationship

Moreover, Miranda also claimed that she was able to improve her interpersonal skills and build up relationships with other people. It was important to Miranda as it helped her to curb her isolation and her feeling of loneliness.

"After I attended the courses, I socialised with more people around me, and the not-for-profit courses improved my interpersonal relationship and communication skills. It taught me how to build up relationships with different

people and deal with other people. It helped a lot in both my personal and working lives. I felt I had more friends and I didn't feel bored and lonely anymore.” (35.50)

In Suet-lai's case she believed that the interpersonal relationship skills that she learnt and experienced in her not-for-profit education had helped to improve and repair the relationship with her husband. In fact, it was crucial to Suet-lai and her husband as her marriage was ruined once by her husband's extramarital affairs and the poor relationship between her husband and elder son. Suet-lai said that she had become more considerate and was able to think more deeply before making judgments. She had also learnt to share her story and to listen to and accept the views of other people:

“I learned from school how to understand the others and to accept and forgive people. Sometimes our own thoughts may not be the best but you always believe your thoughts are the best. If you don't allow the others to explain and don't allow yourself to listen to and accept the others and you don't share with other people and learn from other people's life experiences, you may always think you are right, I wouldn't be surprised. But once you gain experience, that is understand others' experiences through sharing and sharing your own story with the others, you will know why things happen and the cause and effect. But at the time when things happened, I was not able to see through it and I judged it was not right. Learning has helped me to understand that and repaired the relationship with my husband.” (58.33)

Suet-lai also said that her relationship with her husband and the relationship between her husband and her son had significantly improved due to her more tolerant and understanding interpersonal and communication skills and her improved approach to talking with her husband and making him listen to her.

“So even through my husband’s irritable temper, I feel and understand that people have shortcomings. If his shortcomings are not too unacceptable and if it is because of his childhood background, I have learned to consider these factors as I learnt about them in class. Now I have tried to share more ‘life truths’ with him, and he said he felt very comfortable listening to me and he has changed a lot. I found he has really changed a lot... at least he has repaired quite well his relationship with my elder son; now my son is willing to see him and they can communicate quite well.” (1.00.31)

Jane also excitedly and gratefully talked about her personal interest and skills in computers learnt in a not-for-profit centre that had helped her to have better and closer communications with her two sons when they left home and were no longer living with her. She was very pleased about this and enjoyed the experience as she was living alone in a flat shared with her husband who used to bully and abuse her.

“I have also taken some time to join adult computer courses in an NGO community centre, and I have attended all the computer courses offered by them... I am lucky as my son bought me a computer and now I can use it very well since it belongs to me and I don’t worry about anything. I can use it very well, and I am very happy. Every day I have something to rely on as I don’t like watching TV, and every day I can communicate with my sons using my computer.” (18.32)

However, not all the disadvantaged learners found their learning helped to improve family relationships. Fong-lan, as discussed in the previous sections, had paid a very high price, a total of 11 years’ night time study, to achieve her secondary qualifications. She was very proud of her perseverance and determination to achieve her own dream but at the same time she much regretted the time lost with her two children when they were still young and when Fong-lan believed they needed her the most.

Although Fong-lan found she had sacrificed her important family time to not-for-profit education, Jane on the other hand was able to balance her miserable married life through joining different interest-related low-cost courses and spent hours studying and serving in a local not-for-profit education centre several days a week. Jane claimed her not-for-profit education was a temporary safe haven to calm her afflicted marriage problems. In fact, Jane tried to participate in and attend all the not-for-profit courses that she could afford.

“I have also joined... I love, this is dancing. In fact, I started learning dancing when my boys started learning in nursery. When I have time I will participate in community centre healthy dancing classes, but I always consider the cost; that is I will join inexpensive and affordable activities. Until now I have learnt to dance different dances, most of them are from the community centre, or not-for-profit organisations, women’s societies etc.” (16.31)

“To me, I feel fully satisfied, I can learn so many different things and I feel very happy. It is true that through learning I can escape from the reality and my marriage problem. For example, when I learn to sing and dance, I really escape from reality. When I am engaged in these activities, I can free myself.” (1.03.00)

5.3.4 Other Benefits: (9) As a Model to Motivate Child Learning; (10) Plan for Retirement

(9) As a Model to Motivate Child Learning

Unlike Suet-lai and Fong-lan, Jane’s marriage was not so lucky and she still maintained a very poor relationship with her husband. Though the abuse and bullying of Jane’s husband had lessened a lot due to the retirement of her husband, Jane and

her two sons were still not able to accept and communicate with him. However, Jane believed her learning not only allowed her to relax amid the poor marriage relationship but also provided a good model for her children. Jane said:

“My continuing study of not-for-profit education may also possibly have affected my two sons... that is when they saw their mum keep on learning it may influence them, that is to let them know that they needn’t become like some people (implying her husband) who learn nothing.” (37.58)

Dolly also reckoned her continuing study and demonstration of hard work and her keenness to pursue new knowledge and new skills had motivated her children to learn.

Dolly was very proud when she shared:

“I always showed and let my children know that I also sit here to revise and prepare for tests and examinations. I let them see I am making progress. My children have realised their mum has been awarded many certificates, and was still working hard to improve herself. I told them I need to improve. When they see me talking formally with others on some occasions, they realise I know a lot of things, and that I’m not an ignorant person.” (33.58)

“My children know I like to pursue new knowledge, as they know it is impossible to live without knowledge and qualifications. They know that some knowledge cannot be found in textbooks and they need to seek it elsewhere.” (45.36)

(10) Plan for Retirement

Some of the economically marginalised disadvantaged learners told us that when they enrolled in their not-for-profit courses they were taking their retirement plan as one of the considerations. It is not difficult to understand since the general retirement protection and welfare systems are neither comprehensive nor adequate in Hong Kong,

and as the average life expectancy and age of the population is increasing, the economically disadvantaged worry, especially when they find they are not able to earn and save up for their retirement. Despite the Mandatory Provident Fund (MPF) being introduced in 2000, it has been criticised that it is only targeted to help the employed. The living allowances for the retired elderly provided by the government were also very small in Hong Kong. Disadvantaged learners like Dolly said that she was worried about her retirement as her husband's business wasn't doing well and she didn't expect her own children would take care of her when she was getting old:

“You can't take care of two families (your own and your parents), can you? I think in the future, I wouldn't expect my children to take care of me. I didn't do that (for my parents), so how can my children manage to do that? Until they get married, they can take care of me.” (58.08)

“In the school my teacher introduced us to a course studying mediation; that is to become a mediator. I think it is very good because as a mediator there is no age limitation, it requires nothing. Even if I retired in the future, it would be very nice if I could work part-time for one or two cases from time to time. If it is what I thought, it is a possible way for me to sustain my livelihood. You should know, when you retire or become old, you don't want to sit at home and do nothing, right?” (30.33)

Moreover Jane, since her husband retired in his early 50s and though her two sons were able to sustain their lives, prefers to keep on working and earning her own living, as she did not want to be too much of a burden to her two sons and affect their own plans and developments. As her part-time work in the Examination Board has been significantly cut back, it has seriously affected her income and her retirement plan. Jane blames this on her overlooking taking professional examinations on her dancing skills which she learnt from her not-for-profit education. She said in fact she was

offering professional volunteer teaching of dancing to students in the community centre for some time but she cannot earn the money from it as she has no certificate or qualifications to prove her skills. Besides, she is not able to take up part-time teaching assistant work in a kindergarten either since the education regulations changed to require teaching staff in kindergartens to possess relevant teaching certification.

“I am now in my mid-50s, in fact I used to earn quite a good income from my work in the Examination Board but they have cut back a lot of the hours for us. I can now earn very little from them and I’m afraid I will have nothing to do soon...sometimes I review what I have learnt in the past, the only regret is I have overlooked going for professional examinations to prove my skills. For example, I learnt dancing and I think if I go for a professional examination, I will have the qualification to teach students. I know I am capable of teaching students because I have taught students to dance voluntarily... it also includes my work as a supply teacher in kindergartens. The head teacher told me I am suitable for this work and asked me why I didn’t go for the professional certificate. I was thinking I may be too old to do the work but in fact at the time I was only in my early 40s. Now they have changed the regulations and I am no longer able to teach without a certificate.” (32.00)

In contrast, disadvantaged learners like Fong-lan, Suet-lai and Miranda, because of their continuous not-for-profit education and qualifications and being able to settle in a permanent job and earn a decent salary with monthly contributions to the MPF, tended to feel more secure about retirement.

To support and demonstrate the research analysis and the methodologies used in analysing the disadvantaged economically marginalised learners’ not-for-profit education outcomes, two disadvantaged Economically Marginalised learners’ life stories have been studied and illustrated in detail and shown in Appendix IV.

5.4 Summary

The study of the wider benefits of not-for-profit education for the economically marginalised group shows that the benefits gained from the not-for-profit education by the economically marginalised disadvantaged group were multifaceted and are greatly affected by the disadvantaged learner's backgrounds, their past education experience and achievements, and their expectations and motivations to join the not-for-profit education.

Moreover, since the not-for-profit education which was normally highly subsidised in nature and the opportunity costs for the unemployed to join learning were comparatively low, the economically marginalised and the financially tight learners were attracted and motivated 'to come and see' to experience the not-for-profit courses, even though they might not have had much confidence in the beginning and they might have had doubts about the applicability of their learning and questioned the accreditability of the qualifications provided.

Since Hong Kong has been relentlessly and badly affected by rapid social and economic transformations in the last two decades, the provision of not-for-profit education, for example the 'Employees Retraining Board' training programme, were vital and were seen as a last resort to many economically vulnerable disadvantaged learners to transform their job skills and open themselves to new job opportunities. Those economically marginalised who were able to transform their skills and settle in a new job through their participation in not-for-profit education found their learning valuable and life-changing as it had not only helped them to rejoin the job market but more importantly it had helped them to improve their competitiveness and uplifted

their job and upward social mobility. Therefore, human capital gains were seen as the primary reasons and benefits for the economically marginalised disadvantaged learners to join not-for-profit education.

Moreover, the economically marginalised disadvantaged learners perceived they benefited from their gains in social capital such as the making of new friends in school, expanded social networks and increased social participation. Not-for-profit education has provided a rare and valuable platform for many economically disadvantaged learners to socialise with other learners who shared similar backgrounds and life situations. It has also helped the economically marginalised disadvantaged to reduce their feelings of social isolation and increase their sense of belonging in society. The social interactions and socialisations were also the crucial components of not-for-profit education as it has not only offered the disadvantaged learners opportunities to air their grievances and provided mutual emotional support in the class, but also encouraged the disadvantaged learners to exchange and share important information, for example job market information, further learning opportunities, availability of social benefits and assistance, as well as the news and trends of social and economic development. Consequently, social capital gains were seen to be second to the human capital gains from not-for-profit education for the economically marginalised disadvantaged learners.

Lastly, the highest learner surpluses (unexpected learning benefits gain) in the identity capital gains were observed in the economically marginalised learners group. Since the primary reason for the majority of the economically disadvantaged learners to join not-for-profit education was to enhance their job skills and to earn a better living, so they tended to have fewer expectations of self-advancement through not-for-profit education. However, disadvantaged learners reported that they had benefited from

different psychological and self-related benefits, for example they were able to repair and increase their self-confidence and self-value, complete their unfulfilled learning needs, feel more up-to-date, demonstrate improved brain power, maintain good health and attain personal interest and knowledge. Moreover, some economically marginalised disadvantaged learners also found they benefited from improved family relationships and could act as models to motivate their children's learning.

CHAPTER SIX

REPORT AND ANALYSIS OF DATA: WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION FOR DISADVANTAGED OLDER ADULT LEARNERS

6.1 Introduction

This chapter starts by illustrating the background of the problems faced by vulnerable older adults in Hong Kong. It attempts to explain the causes of the disadvantaged older adults status and shows how the government responds to the problems. This chapter then focuses on fully analysing and discussing the wider benefits of not-for-profit education for disadvantaged older adult learners and demonstrates two life stories of disadvantaged learners to support the findings. This chapter also provides a conclusion of the findings of the wider benefits of learning of disadvantaged older adult learner groups and leads to further discussion on the comparison of the wider benefits of learning of other disadvantaged learner groups in Part III of this thesis.

6.2 Background to the Disadvantaged Older Adults' Problems in Hong Kong

The increasing and deteriorating problems of the elderly poor have been at the centre of social policy discussion in Hong Kong over the last few years. In October 2012, the Hong Kong Legislative Council held a number of political debates on the newly proposed controversial government initiatives to alleviate the growing elderly poverty problems in Hong Kong. In fact, the elderly poverty problem has been worsening in

the last decade and the problems became more serious and worrying after the impact of the global financial crisis and the influence of the rapid economic integration with the Chinese economy. Although the elderly are a deserving group and should be able to live in dignity, many deprived vulnerable elderly people in Hong Kong actually need to collect and resell paper scraps and soft drink cans or pick up rotten food in the market to sustain their basic living. In fact, there are many reasons for the acceleration of the elderly poverty problem in Hong Kong but many people believe the centre of the problem is that the government has still not seriously considered and addressed the problem and helped the economically and socially marginalised elders.

Firstly, the high cost of living and fierce inflation make the lives of the vulnerable older adults more difficult than ever before. High land costs and phenomenally high property prices in recent years have pushed the general price of everything in Hong Kong to an unaffordable level. Besides, the Chinese open-door economic policy which allows people from mainland China to invest and spend their fortunes in Hong Kong has also further lifted the cost of living to an unimaginably high level. The vulnerable elderly are among the poor people who suffer the most as jobs and work are not available to them and they have no extra income or savings to cover the fast-rising prices.

Secondly, due to the fact that low-skilled labour-intensive work has nearly all moved to China, many low-skilled and poorly qualified workers have been forced to retire early or retire without sufficient savings to cover and protect their retirement. In the absence of a universal retirement protection system in Hong Kong, many economically marginalised and deprived older adults find it hard to sustain their retirement life.

Besides, although the HKSAR government has offered an Old Age Allowance or the newly revamped Old Age Living Allowance for the needy and deprived elderly, the amount given is believed to be too small and the eligibility criteria are seen as too high and unrealistic to many vulnerable older adults. In fact, according to a prediction made by the HKSAR Government Census and Statistics Department, the number of people aged 65 or above will rise to 2.56 million or 30 percent of the population by 2041. The imminent threat of an ageing population and the government's failure to formulate an effective policy to address and help the elderly poverty problem have resulted only in concern for short-term economic growth and gains for the rich which have made the public angry and worried.

The situation is getting even more worrying and difficult for those elderly people who live without any close family or friends to look after them and support their daily lives. Feelings of isolation, alienation, loneliness and hopelessness can be commonly found among disadvantaged older adults and lead to some undesired consequences, for example family violence and elderly suicide. Although the government has provided some basic social security welfare to the disadvantaged elderly, for example public hospital services, subsidised elderly homes for the disabled elderly who have no one and are not able to take care of themselves, very little and limited public resources have been spent on education, training or life enhancement-related programmes for the able elderly. In fact, most of the welfare spending for the elderly is on the disabled elderly at the very last stages of life; the needs of the socially active and able older adults are neglected and ignored.

To respond to the ageing population and to the increasing demand for education and self-enhancement programmes for the able disadvantaged elderly learners, not-for-profit organisations have played an important role in supporting and providing good

quality education. However, due to the significant curbs on government budget to not-for-profit organisations under the newly revamped controversial subvention funding scheme, the number of elderly learners who have been able to join and benefit from not-for-profit education are comparatively much lower than other disadvantaged learner groups.

6.3 The Wider Benefits of Not-for-profit Education for the Disadvantaged Older Adult Learners

Three disadvantaged older adults' life stories were drawn for the study of their not-for-profit education experiences and their perceived wider benefits of learning. Among the three stories, two disadvantaged older adult learners have been selected and discussed in full detail. The three were chosen and discussed because they have experienced not-for-profit education at different points in their lives. At the time of interview, all three disadvantaged learners had retired from work but continued to participate in different kinds of not-for-profit education and voluntary social services.

Summary of the Perceived Not-for-profit Education Benefits of the Disadvantaged Older Adults Group

According to the results of the research analysis of the disadvantaged older adult learners group, disadvantaged older adult learners reported that the main reason and the primary benefits enjoyed were to make new friends and socialise with other older adults through the learning process and participation in after-school civic activities such as local community voluntary social services, as well as to reduce the feeling of boredom and isolation. Most of the vulnerable older adult learners also said that they benefited from learning new knowledge and skills, fulfilled their uncompleted learning needs and were motivated to learn. In addition, not-for-profit education repaired and pacified some of the disadvantaged older adult learners' psychological needs so that they achieved increased self-esteem and pride, increased life satisfaction and enjoyment, reduced stress, greater hope, and more open-mindedness. Table 6.1

summarises the reported wider benefits of not-for-profit education for the disadvantaged older adult learners.

Table 6.1: Summary of wider benefits of not-for-profit education achieved by the disadvantaged older adult learners

Disadvantaged Older Adult Learners (<i>Not-for-profit Education Attended</i>)	Capitals and Perceived Benefits of Not-for-profit Education							
	Social Capital		Human Capital		Identity Capital			
	(1) Friends and Social Networks	(2) Civic Participation	(3) Knowledge and Skills	(4) Job Opportunity	(5) Motivate to Learn and Learning Needs	(6) Reduce Stress and Enjoyment	(7) Plans and Goals	(8) Open-mindedness
Mary (<i>ERB, Community Centre, Religious Group</i>)	G(Q)	G	G(Q)	G(Q)	G	G	G(Q)	G(Q)
Kwai-fun (<i>ERB, Community Centre, Religious Group, Elderly College</i>)	G	G(Q)	G(Q)		G	G		
Lai-kuen (<i>ERB, Community Centre, Religious Group</i>)	G	G(Q)	G	G	G(Q)	G(Q)		

Keys: G = Gained Benefits, D = Damaging, Q = Narrative Quoted in the Analysis, ERB = Employees Retraining Board Programme

Moreover, Figure 6.1 illustrates different types with different degrees of learning benefits enjoyed by the vulnerable older adult learners. The figure shows that the highest degrees of benefit achieved by the learners were social capital-related including (1) friends and social networks and (2) civic participation which are social capital-related. Moreover, disadvantaged mature learners in the group also achieved higher degrees of learning benefits in such as (6) Reduced Stress and Enjoyment of

Life, (5) Motivation to Learn and learning needs which are identity capital-related. The older adult learners also found they had learnt some useful new (3) Knowledge and Skills (human capital-related) and tended to become more (8) Open-minded (identity capital-related) in their not-for-profit education. Though (4) Job Opportunity is not the primary concern for older adult learners to join not-for-profit education, some older adult learners found they were open to work in some part-time jobs.

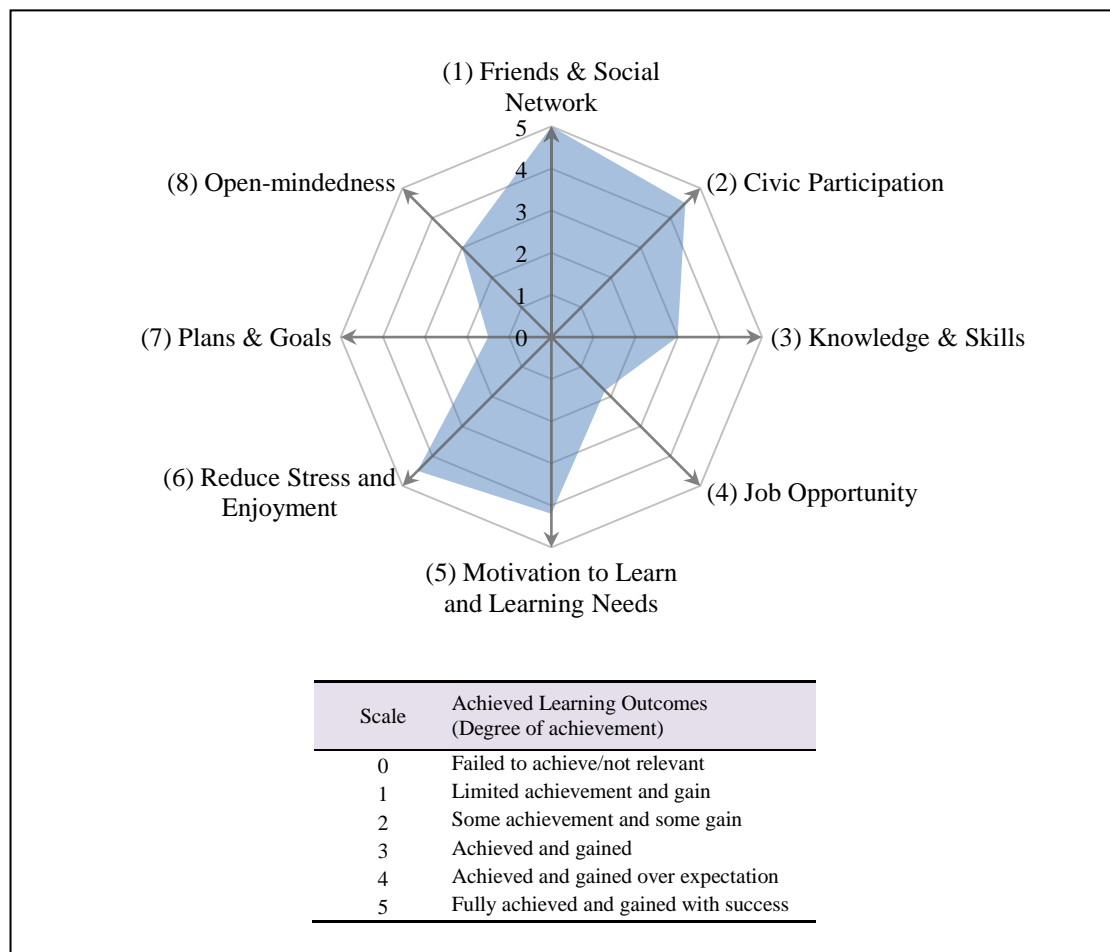


Figure 6.1: The wider benefits of not-for-profit education for the disadvantaged older adult learners

In addition, in terms of the gained capital framework as suggested by Schuller et al. (2004), Figure 6.2 shows that the disadvantaged older adult learners experienced most in both expected and achieved gains in social capital. However, Figure 6.2 also illustrates that the vulnerable older adult learners experienced the highest learner surplus (differences between learner's expected gains and the achieved gains) in both

social and identity capital, whereas expected and achieved human capital gains were small. It also implies that the main values and benefits of not-for-profit education for the disadvantaged older adult learners were to improve their social life and to enhance some of their personal value and self-concept.

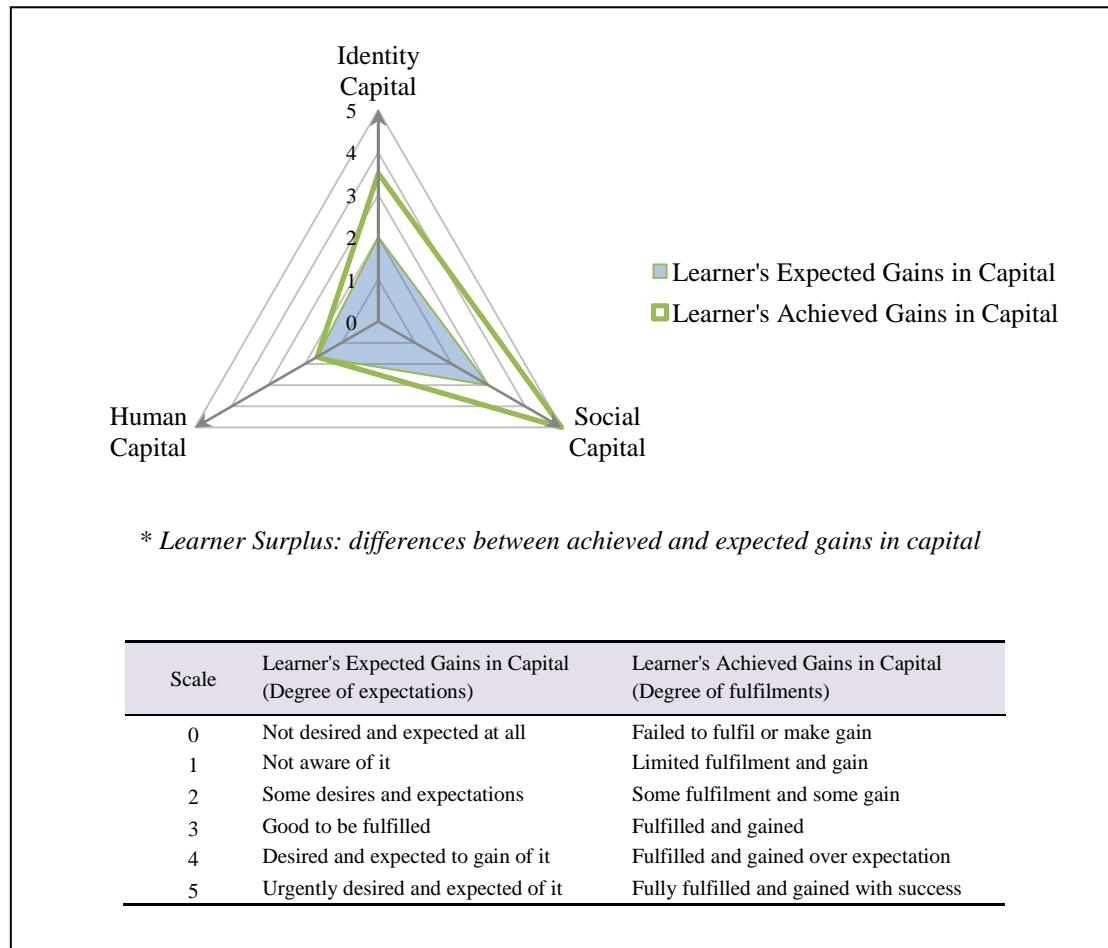


Figure 6.2: Summary of the different levels of capital gains and the learner surplus of the disadvantaged older adult learners according to Schuller et al. (2004)'s conceptualisation of wider benefits of learning framework

6.3.1 Social Capital-Related Benefits: (1) Friends and Social Networks; (2) Civil Participation

The study of the benefits of learning for the disadvantaged older adults group shows that the initial motives for most of the older adult learners to participate in not-for-profit study were to extend their social networks, make new friends and try to reduce boredom and the feeling of isolation. It is not difficult to anticipate and understand this finding as the economically inactive older adult students, especially for low-skilled and low qualifications learners, found it very difficult to compete and find a job in the contracting and rapidly changing unskilled labour market in Hong Kong.

Mary was an elderly lone mother who had gone through a horrible depression experience a few years ago and her severe mental illness had nearly cost her her life. After recovering from her suffering, Mary actively participated in not-for-profit education and the related community social services and activities which enabled her to interact and socialise with other older adult learners and different people from different backgrounds. She thought it had helped to keep herself busy and occupied so that she could avoid suffering from her mental illness again.

Kwai-fun and her husband were long-term unemployed and since their continuous efforts to look for a job were in vain and they had three in-school children to look after, without other choices Kwai-fun and her family had to rely on social security welfare to sustain their living. Though Kwai-fun's family were protected by the safety net provided by the government, Kwai-fun felt she was discriminated against and looked down upon by other people because of her family's need to receive social benefits from the government; it made her suffer from tremendous stress and

embarrassment. After all her children had grown up and started working and she was free from the scheduled social work order from the Social Welfare Department, Kwai-fun started her retirement mainly spending time with her husband at home. Kwai-fun joined some interest-related courses offered by the local not-for-profit community centre and aimed to meet and socialise with new friends to reduce her feeling of boredom and isolation.

Lai-kuen describes herself as an introverted widow and after all her five children had grown up and left home leaving her living alone in a deprived public housing area, she was able to find friendships and peer support from her not-for-profit education provided by a local community centre.

(1) Friends and Social Networks

Not-for-profit education is in fact one of the most important and valuable socialisation opportunities and platforms for many disadvantaged older adult learners to keep up their everyday life. It is especially important for those old and poor people such as Lai-kuen and Mary who do not have their close family members around or lack a tight family bond and love and do not have enough resources to spend on other leisure activities. In fact, feelings and problems of social isolation, loneliness, and loss of meaning and purpose in life were easily found, being common among vulnerable older adults in Hong Kong. The friends, teachers, staff and other people that the older adult learners met in not-for-profit schools then became the major listeners for them to confide in and share their everyday trivia. The community-based, low-cost, interesting, relaxing, keeping up with the times, socialising, and promoting mutual help and support natures of not-for-profit education and its associated learning

activities and social services brought back some enjoyment and meaning of life to the many lonely elderly who desperately needed someone to listen to them and share their lives.

Mary is a good example of showing how not-for-profit education and the friends that she made in school have helped her to reduce her loneliness. After Mary's twin daughters grew up and left home, Mary joined different not-for-profit courses which included ERB training courses and local community centre interest-related courses, hoping to meet some new friends. Although the not-for-profit education that Mary attended brought her some job opportunities, Mary perceived she had enjoyed and benefited from the chance to meet new friends and participate in active socialisation at school rather than at work. Mary said:

“I have many friends in school and I associate very well with all of them because I like to talk and be sociable. I am a very simple-minded woman and I like to talk and share my happy things and the things I know with other people. When I was attending a Chinese and Western cooking course for a month, I met 25 new classmates and they were all different. When I joined a homecare assistants course, I met another group of people, and again everyone was different. I have a couple of very good friends in school and we talk and laugh a lot, and so I am very happy and enjoy my life” (01.10.34)

In fact, after Mary retired, she spent most of her time actively participating in different learning and servicing tasks in different local not-for-profit centres and in a monastery. The friends and social interactions that she made in school have helped make Mary's life more enjoyable.

In another older adult learner's story, Kwai-fun, 58 years old, is a retired housewife and she has been actively participating in not-for-profit education and associated social services since all her three children have grown up and started working. In

comparison with Mary, Kwai-fun has had a relatively much better and smoother life experience. However, since Kwai-fun's family received social security welfare from the government, Kwai-fun felt the tremendous pressure of discrimination and was looked down on by other people; she also had to deal with the stresses of compulsory social work orders under the Social Welfare Department's Support for Self-reliance Scheme. Kwai-fun actively took part in different not-for-profit education courses and activities and tried to reduce her feelings of boredom and isolation at home. This also enabled her to socialise with other people. Kwai-fun recalled her first encounter with not-for-profit education when she found herself bored at home where she was bound by her responsibilities as a mum.

“After my children had grown up, I felt bored at home and I was thinking to find a job but my husband did not agree as he already had two jobs and he thought that if I went to work I would not be able to take care of our young son, and so I joined a short homecare assistant course offered by a not-for-profit organisation.” (49.22)

Since Kwai-fun and her husband retired a few years ago, Kwai-fun has spent more of her leisure time in learning, joining in different not-for-profit courses and serving in different learning-related social activities. From the story of Kwai-fun and from the other learners' sharing, it shows there is an increasing need for socialisation and friendship, especially for those disadvantaged female older adult learners whose social networks are narrower and who were not able to communicate using new technology, relying on traditional face-to-face communication. The community-based not-for-profit education activities are deemed to be the most important platforms for them to meet and socialise with different people in similar backgrounds and situations. Kwai-fun said:

“I am very satisfied with my present learning. I took part not only because it is free-of-charge, but at least I can learn something and I can meet some friends, different types of friends. Although we are all elderly at least we can talk about anything we like and it is much better than just staying at home. Though I enjoy talking at home, and still do so though not with my husband, I need to wait for my children to come back to talk with me. These young people, even when they come back home, they won’t talk much with me – they just spend time on their computers.” (01.11.40)

Similar benefits of not-for-profit older adults’ education were also found through studying Lai-kuen’s life story, a widowed elderly learner who raised her five children by herself with the help of social security welfare. Lai-kuen is 59 years old and retired. She was born into a large family with five siblings of which she is the oldest. Her father had stable work and her mum sold used flour bags in a market earning a low income. Due to the poverty of her family, Lai-kuen was sent to live with her grandmother and she needed to help in the market and take care of the housework. Lai-kuen was asked to terminate her primary school study to take care of her newborn brother at her grandmother’s home. She left school without qualifications, and worked in a factory making gloves and earning piece-work wages. Though Lai-kuen had spent two years studying at night, she failed to gain any qualifications due to distractions from her boyfriend, the man whom she married at the age of 26.

Lai-kuen gave birth to five children and moved to public rented housing in a remote rural town where she stayed at home taking care of her children. Lai-kuen’s husband was a part-time electrical worker on different construction sites and in order to help earn more money for the family, Lai-kuen took some work from a factory home with her. When Lai-kuen’s children were getting older, she rejoined the labour market and worked in a food kiosk in a primary school and afterwards in a carpet factory.

However, due to Lai-kuen husband's cancer, she quit her full-time job and stayed home taking care of him. When Lai-kuen's husband died within two years of diagnosis of his cancer, the life of her family became vulnerable and very difficult. Lai-kuen and her five in-school children needed to rely on social security to help them. After Lai-kuen's children started working, she was employed by an architectural firm as an office assistant until she retired in 2005.

After Lai-kuen retired at the age of 54, she was recruited by a not-for-profit school for a subsidised employee retraining programme in 2006. She joined the Home Care Assistant course and was able to work at several homecare jobs. Moreover, Lai-kuen continued to join different interest-related courses and volunteer services through several not-for-profit organisations. Lai-kuen found her not-for-profit education interesting and the skills learnt in school practical. When all Lai-kuen's children left home and had their own lives, Lai-kuen ultimately found all the freedom that she longed for and she could do whatever she wanted to do, for example go for learning and travelling at any time. It is interesting to see how after Lai-kuen was liberated from her long-deprived, vulnerable life and family burdens, she linked her future life and happiness with not-for-profit education:

“Now I have all my freedom and I want a happy life. I can go to learn the things that I have never experienced before... I have no family burdens to stop me to learn now.” (10.50)

Lai-kuen perceived and associated her not-for-profit education with her happiness and future life as she was able to make new friends and extend her social networks and develop a feeling of belonging and social inclusion. In fact, it was simply not possible for Lai-kuen before she joined her not-for-profit education as she was an unsociable

person with huge family burdens and responsibilities to look after. Lai-kuen shared her experience and joy of being included and accepted in her social circle through her studies in not-for-profit courses:

“I am a quiet, stubborn and introverted person... but I met new friends in school and we organised social gatherings where we can talk and we can share our life experience and support each other; I feel happy about it.”
(22.40)

To many socially marginalised and inactive disadvantaged older adult learners like Lai-kuen and Kwai-fun, community-based not-for-profit education has opened a rare but real opportunity for them to make friends and enjoy exposure to and interaction with the outside world. These expanded social networks have empowered vulnerable, old not-for-profit learners to make enhancements to their retired lives.

(2) Civic Participation

The second major wider benefit of not-for-profit education perceived by the vulnerable older adult learners was their active and routine civic participation as a result of their not-for-profit education. For example, Mary spent a tremendous amount of her personal time after her not-for-profit education helping other people in need in different NGOs; Kwai-fun helped out in a not-for-profit monastery and participated in different local NGOs’ fund-raising activities such as flag days and service in the community using her own leisure time; Lai-kuen regularly visited homes for the elderly and participated in different volunteer social activities organised by her not-for-profit school.

To disadvantaged older adult learners, their increased civic participation and regular participation in local community volunteer social services have not only given them an opportunity to reach out and help other disadvantaged people but also increased their sense of self-worth, improved life enjoyment and enhanced their life satisfaction. The social participation and volunteer movement which it promotes, ‘Help Yourself by Helping Others’, is seen as one of the major aspects of the wider benefits of not-for-profit education to the vulnerable older adult learners.

To Kwai-fun, her regular learning, socialising and offering of volunteer service in an Elderly College and a local Buddhist monastery have given her enjoyable and fruitful life experiences:

“It felt excellent to learn and socialise with friends in the Elderly College. Sometimes we also do volunteer service and help out in a (Buddhist) monastery which is associated with the college. We go every Monday and Thursday, sometimes learning and practising Chinese calligraphy. When it was near to the Chinese Lunar New Year we learnt to make Chinese handicrafts, and we also learnt to make desserts and cooked food together. When we finished cooking, we gathered together to enjoy our meal there in the monastery.” (01.04.35)

For Lai-kuen, she felt satisfied and joyful when she realised that the skills she learnt from her not-for-profit education and her participation in social volunteer services can help other disadvantaged people who need greater help.

“I felt very happy to learn and provide social volunteer services in the not-for-profit organisation in the last few years... I feel very happy and at peace when I can learn and help others. When I found my handicraft skills that I learnt in school and the gifts that I made can make other disadvantaged people happy, I feel very good.” (13.38)

“I went to learn as I wanted to help others, not just to get a job.” (25.10)

6.3.2 Human Capital-Related Benefits: (3) Knowledge and Skills; (4) Job Opportunity

Although to the vulnerable older adult learners, ‘learn to work’ was not the primary reason and motivation for them to participate in not-for-profit education, disadvantaged older adult learners in our research expressed that they were excited and pleased to gain new knowledge and skills in school. However, the not-for-profit education that the older learners received could only provide limited temporary job opportunities for them which did not impress them.

(3) Knowledge and Skills

Mary believes that the not-for-profit education that she received has not only advanced her knowledge and skills but, more importantly, through the accumulation of knowledge she learnt and discovered some essential rules of life that allowed her to absorb even deeper and wider knowledge. In fact, Mary said that she had changed a lot since she received her not-for-profit education and she perceived that she is a better-rounded person with broader and deeper views of everything that has happened in her life. She fully appreciates the knowledge gained through her not-for-profit education which has resulted in her growth in knowledge.

“I think learning means knowledge; I now know more new things and it has definitely helped me in different dimensions. It helps me to learn and understand the principles of life and helps me to absorb more diverse new

knowledge through stronger brainpower. More study definitely helps me as I will gain knowledge and it is important to me as I like to advance myself. Everyone pursues different things and different knowledge, and if someone can benefit from their continuous study, then they should go for it.” (35.16)

The vulnerable older adult learner Lai-kuen had not received any formal education and training since her primary education and she was surprised and excited about what she gained in her not-for-profit education:

“I knew nothing before I joined the class; now I know different and better methods and procedures to do a job, and I have learned how to save time and gain better results after I studied in school.” (22.10)

When Lai-kuen found out that even her daughter was not able to master the Chinese typing skills that she learnt from her not-for-profit education, she felt a sense of achievement and was extremely proud of herself. It has not only reinforced and motivated Lai-kuen to keep on her not-for-profit education but has made her believe her efforts spent on non-accredited not-for-profit education can bring her some useful and competitive knowledge and skills and make her feel contented and satisfied.

“I was very proud of my Chinese typing skills that I learnt from the not-for-profit course as I found my daughter can only type English and she was not able to type Chinese characters using a computer. I found I was stronger than her and I felt very happy because of this.” (11.02)

(4) Job Opportunity

Even though the not-for-profit employment retraining courses that Mary received have not brought her any qualifications and offered her very limited work

opportunities due to her mature age, Mary believes she could compete and rejoin the labour force if she had the chance to acquire the required qualifications and skills. Mary also believes the skills and knowledge that she gained from her not-for-profit education can one day fulfil her dream to work as a cook and as a cook-book writer.

“After I divorced, I needed to increase my value. When I went for a job interview, they asked for my qualifications. I have only primary education qualifications and the employer thought I was not suitable for the job. I did not have even Form 3 or 4 (Year 10 or 11) qualifications and I did not have any chance at all to work at even much lower levels of job. If I had qualifications, I could increase my value and I could do the things I like. I want to be a cook and I want to publish my own cookbook, but I can’t do it now. Since I want to achieve my dream, I will carry on my studies.” (42.45)

For Lai-kuen, although the not-for-profit homecare assistant course has led her to a few homecare work opportunities, she refused and stopped work as she found the required working hours conflicted with her personal and family life. On the other hand, Lai-kuen believes that thanks to the knowledge and skills that she learnt from the not-for-profit retraining course, she can in fact continue to work like her other classmates if she is able and willing to.

“In fact, the ERB has helped a lot of people. I know a few friends who are still working now; they have done their homecare assistant jobs for several years, which is very good, right? And they have kept very good relationships with their employers.” (11.15)

In contrast, Kwai-fun found her not-for-profit employment retraining was useless and was a total failure as she was unable to secure a long-term job and the take-home wages were far too low. Kwai-fun also thought that she was too old to fit into the

employment retraining and she preferred to rely on social security welfare instead. Kwai-fun ceased to join any employment retraining-related courses and took part mainly in interest and leisure-related not-for-profit courses.

6.3.3 Identity Capital-Related Benefits: (5) Motivation to Learn and Learning Needs; (6) Reduce Stress and Enjoyment; (7) Plans and Goals; (8) Open-mindedness

The third group of wider benefits of learning concern disadvantaged older adult learners' personal identity and self-image related. It is believed that not-for-profit education was able to address some of the deficiencies of and damages to learners' self-concept and identity, for example the need to learn, to be respected, and to gain self-actualisation, and a stress-free life. All these learning benefits subsequently helped and contributed to an uplift in older adult learners' life satisfaction and created a meaningful and purposeful retirement.

(5) Motivation to Learn and Learning Needs

There is no doubt that continuing not-for-profit education and participation in associated learning-related activities generate diverse benefits for adult learners, and it is especially important to the disadvantaged adults as the potential transformations and enhancements for a disadvantaged life can be significant. Yet finding a way to motivate the disadvantaged learners, especially for the vulnerable older adult learners, to continue their learning is essential when the economic incentives and motivations are small.

In fact, Mary is one of the few successful and lucky old-aged citizens who was able to achieve and gain some learning benefits through participation in not-for-profit education. Actually, Hong Kong has more than 1.9 million or 27.2% of the population aged above 55 years old (HKSAR Government 2012a); the provisions of education for the older adults are small and very limited and mainly rely on not-for-profit organisations. Based on Mary's experience, she believes the provision of not-for-profit education can help many illiterate learners to fulfil their learning needs and it is especially important to the vulnerable older adult as the general literacy rate is believed to be low in this age group. Mary suggested:

“A lot of women like me at my age did not have a chance to receive education when they were young. I have more than 20 classmates and most of us are illiterate. So I wish not-for-profit organisations or the government could provide us with more learning opportunities so that we can redeem our deficiencies in education. It would be great and I wish those people like me who have only primary qualification could have a path to study and advance themselves.” (45.25)

Despite years of education effort and budget spent on general education in Hong Kong, there are still 20.6% of population (HKSAR Government 2012a) with only primary and below educational attainment. Mary believed other vulnerable people similar to her in qualifications would be motivated to participate in not-for-profit education if the government promoted and encouraged learning for older adults:

“Government should promote and let more people know about the opportunities to study. There are a lot of people like me, for example people without qualifications, and they don't dare to tell other people that they do not have qualifications as they don't want to lose face and are afraid that other people will look down on them.” (45.51)

As a beneficiary of not-for-profit education, Mary believes governmental direct subsidisation of not-for-profit education for the disadvantaged older adults would not only attract and motivate more disadvantaged older adults to join classes but also uplift the social benefits for many people.

“I reckon there are a lot of people of my age who would really like to learn. However, since it is costly to study a course and many of them could not afford to pay, they decided not to go for learning. If the government could subsidise us to learn, I think there would be a lot more people studying, and it would benefit a lot more people. If the government could subsidise learning, it would not be necessary for the learner to achieve a very high qualification but it would be good enough for them to complete a secondary qualification. Many courses need to be paid for and many people choose not to go for study. How could they pay the fees especially when it is so difficult to earn their living at the moment?” (46.35)

Moreover, Kwai-fun believes her motivation to keep up not-for-profit education was backed by the low-cost courses offered by not-for-profit organisations and the good quality of teaching and learning activities, for instance qualified volunteer teachers, free lecture notes and high quality learning materials, and interesting outdoor learning activities. In addition, Kwai-fun also found the certificates and prizes offered by the school encouraged her to participate:

“I don’t think anything needs to improve. If it was for profit, it wouldn’t be possible to charge so little. But in not-for-profit schools all the teachers are volunteers; they all have full-time school teacher backgrounds; they don’t charge anything and they spend their own leisure time teaching us. They print and provide us with all the learning materials, and books are also available. Lecture notes are printed for us in class, and they clearly list all the procedures; it is very good. In the photography class, they took us outside. We

took photos by ourselves and submitted them to our teacher for comments. Many people joined the class, more than 60 of us, and we filled up a big coach. We received certificates every year and if the results were outstanding they would give us a trophy and a prize. It is true!” (01.13.32)

“This not-for-profit secondary school is also an Elderly College and I learnt Taichi Rouli ball there. They charged us a token HK\$20 which is very cheap. You can’t learn anything in any school for just HK\$20. I learnt about computers, photography and Chinese calligraphy there and they all cost me only HK\$20 each!” (56.10)

(6) Reduce Stress and Enjoyment

It is widely recognised that due to a lack of close family and friends’ care and love, feelings of isolation, alienation, loneliness and hopelessness are commonly found among some of the disadvantaged older people in Hong Kong. Besides, deteriorating health conditions and deprived retirement lives have further made the situation even worse and high stress may develop as a consequence.

For Kwai-fun, due to her family needing to rely on social security welfare and her perception that she was discriminated against and looked down upon by other people, she was also under tremendous stress because of her compulsory social work order. Kwai-fun repeatedly expressed the benefits of her not-for-profit education – that it had helped her to release some of her stress and that she was very pleased:

“I had learnt and knew how to write Chinese calligraphy when I was in school but I didn’t practise it for decades; now I started to write it again and I felt good. It had helped me to express myself and release my stress.” (48.19)

“I simply want to learn something, firstly so I can gain some new knowledge, and also so that I can meet some new friends; it helps to kill time. I didn’t need to spend the whole day sitting at home watching TV or cleaning my home like

the others did. I can go outside and be in touch with other people and talk to them; it helped to reduce my pressure.” (57.05)

For disadvantaged older adult learners Lai-kuen and Mary, their life has been greatly transformed and enhanced due to their active participation in not-for-profit education and the related social activities. They were able to make some good friends at school, learn new knowledge and skills, and fulfil some of their social needs. They found their daily retirement life more enjoyable, meaningful and stress-free even though their immediate family was not able to support them closely.

(7) Plans and Goals

Because of limited financial resources and inadequate social welfare protection, many disempowered vulnerable older adults are not able to make any plans or hold any hope for their retirement futures. Many vulnerable older adults in Hong Kong are literally struggling to live from day to day; future and hope are something unrealistic and irrelevant to them. For the older adult learners like Kwai-fun and Lai-kuen, they did not have any specific plans and hopes for their future but wished their standard of living could be maintained at the current level. However Mary, since she has been afflicted and has suffered a lot in the course of her life and she was excluded from the opportunity to learn in school when she was young, has put hope in her continuing not-for-profit education and expects this to help to make her life better in the future:

“I really treasure my opportunity to study and learn now. In fact, I know nothing and I need to rely on other people, I need to ask them for help. I hope through my learning I can be more independent and so I do not need to rely on others. I hope my life could be better and so I will have no regrets. I have

already passed half of my life and I hope another half of my life will be better.”
(44.07)

(8) *Open-mindedness*

It is not difficult to see the Hong Kong general public stereotyping and perceiving the elderly as outdated, stubborn and old-style. However, the research shows that expanded social networks, acquired up-to-date knowledge and enhanced new ways of thinking as a result of participation in not-for-profit education has helped vulnerable older adult learners become more open-minded.

Disadvantaged older adult learner Lai-kuen found it difficult and became fed up with trying to communicate with her children as her children thought she was old-style, stubborn, and not willing to listen; Kwai-fun's children found they had no common interests to share with their mum and it made Kwai-fun feel isolated and disappointed. Although not-for-profit offers no quick fix or cure to change other people's perception of vulnerable older adult learners, however it provides an opportunity and guides vulnerable older adult learners to think, understand and accept things that happened to them from a different and broader angle.

Mary reckons that what she saw as her aggressive narrow-minded stubborn character and behaviour were the result of a lack of education and it has affected her life in many different ways. She believes her not-for-profit education has given her an opportunity to absorb new knowledge and allowed her to interact with different people which has driven her to change and become a more open-minded and reasonable person:

“My learning helps me to learn the principles of life and I won’t be that stubborn and unreasonable... When I was young, I was narrow-minded and very stubborn. I never took others’ feelings into my consideration, I just did what I liked, and I was a barbaric and unreasonable person. Even my ex-husband said my character was very wild and irrational. It may have been because no one taught me when I was a child and I did not study much; I was very rude, and I did not know how to negotiate and express myself slowly, I was an impulsive and impatient person.” (37.55)

To support and demonstrate the research analysis and the methodologies used in analysing the disadvantaged not-for-profit education outcomes, two life stories were studied and illustrated in detail and shown in Appendix IV.

6.4 Summary

In the study of the wider benefits of not-for-profit education for the vulnerable older adult learners, it was found that the economically and socially marginalised deprived older adult learners were able to gain different learning benefits which led them to a more enjoyable and meaningful life. The most obvious and positive learning benefits for the older adult learners are they were able to make friends through socialising in school. It is believed that friendship and social networking are important to support older adults as many of them are socially isolated and have feelings of loneliness without close family and friends to look after and support their daily lives. Moreover, not-for-profit education that the older adults received had led them to different social participation such as local community services and regular visits to other vulnerable people who had greater need of help. Not-for-profit related civic participation not only helps older adults to further expand their social networks but also provides an opportunity for them to get in touch with the external world and allows them to keep up with the times and to think and accept things in a more open-minded manner.

Furthermore, the research also found that the provision of continuing subsidised or heavily sponsored not-for-profit education can help to motivate poor older adults to keep on learning and fulfil their learning needs. Since many deprived older adult learners were excluded from the opportunity of mainstream formal education when they were young when education was not compulsory and only available to affluent people, the alternative second-chance learning opportunity was deemed to be important to compensate for the deprived old learners' personal identity-related learning needs. Moreover, the poor and old not-for-profit education learners also perceived they were able to gain some confidence and improve their self-esteem when

they proved the skills that they learnt in school were useful and they could help other people. It also brings some hope and enables them to make plans for their retirement. Continuing participation in not-for-profit education and associated social activities, eg interest and leisure-related learning and voluntary social services, also help to reduce and soothe the stress of their lives and make their lives more meaningful and purposeful.

Although for the vulnerable older adult learners 'learn to work' was not the main reason for them to enrol in not-for-profit education as they had experienced different degrees of discrimination against their age and doubts over their ability by potential employers, the vulnerable old learners were pleased they were able to learn some job skills and up-to-date knowledge from their not-for-profit education though getting back to work was often nearly impossible.

Taking into consideration all the benefits and learner surpluses gained and achieved and the significant improvements in terms of the enjoyment and satisfaction of the disadvantaged older adult learners' lives, policymakers should seriously address the problem of insufficient public resources available for disadvantaged older adults learning which relies heavily on the benevolence of non-governmental organisations to promote and fulfil the demand for learning in this group.

CHAPTER SEVEN

REPORT AND ANALYSIS OF DATA: WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION FOR DISADVANTAGED NEW IMMIGRANTS FROM MAINLAND CHINA

7.1 Introduction

This chapter draws from the narrative life stories of two new immigrants from mainland China. The focus of the study is firstly on investigating and analysing how the new immigrants from China struggled to adapt to their new life in Hong Kong. Through understanding of the two learners' diverse backgrounds and life stories, their personal experience of not-for-profit education and their perceived benefit and value of their learning, the analysis then aims to explore and illustrate how not-for-profit education transforms their lives and shapes their futures.

The rationale behind the decision to draw two new immigrants' cases from mainland China as a separate disadvantaged learner group to study is to reflect the growing number of migrants from China settled in Hong Kong and their unique circumstances and backgrounds that are not found among local Hong Kong disadvantaged learners. Although the number of cases collected and analysed is small in this stage of research, through these two cases this chapter aims to address the looming social phenomena that not only hinder the new immigrants' settlement in Hong Kong but also bring new challenges to the local Hong Kong citizens and to the government.

This chapter also provides a conclusion of the findings of the wider benefits of learning of disadvantaged new immigrants from mainland China learner groups and

leads to further discussion on the comparison of the wider benefits of learning of other disadvantaged learner groups in Part III of this thesis.

7.2 Background of the Problems of New Immigrants from mainland China in Hong Kong

There are increasing grievances and concerns about the social problems and cultural conflicts caused by new immigrants from mainland China in Hong Kong. Local Hong Kong people have great doubts and dissatisfactions over their government's inertia and uncontrolled immigration policy. Many native Hong Kong people grumble about the new mainland Chinese immigrants affecting their livelihoods and lowering their standard of living in different ways. It is not difficult to find new immigrants from mainland China who are perceived and negatively labelled as locusts, slackers and uncivilised lower class intruders in Hong Kong. On the other hand, many newly settled immigrants complain about their suffering from discrimination in different ways and find their lives difficult and unsatisfactory in Hong Kong.

The opening up of the Chinese economy and the corresponding rapid expansion through economic policies and reforms dating back to the 1980s has greatly improved the standard of living of hundreds of thousands of Chinese people and changed the world in different ways. However, the rapid transformation of the communist socio-economic ideology towards capitalist principles in mainland China has also created many undesirable and unpredictable social problems and consequences for both China and Hong Kong. The untested development of Special Economic Zones in the south-east coastal cities has attracted many rural villagers from different provinces who choose to work and settle down in these economic powerhouse cities. At the same

time, it has also attracted many Hong Kong-based businesses to seize the opportunity to extend their competitive advantages by investing in and starting new businesses. The results of these welcome business investment policies have brought in a large number of cross-border workers from Hong Kong to work and explore their lives in China. Many of these cross-border workers, mainly middle-aged male manual workers, eventually found romance and married a local Chinese girl. However, many of these cross-border Chinese brides were not well educated, lacked relevant qualifications and work skills, and were diverse in their cultural orientation. The increasing requests of family reunification because of the growing cross-border marriages caused a sharp increase of immigrants from mainland China and this has accelerated since the return of the sovereignty of Hong Kong from Britain to China in 1997. The present controversial daily allowance and issuance of one-way permits (right of abode in Hong Kong) for family reunification is 150 entrants per day. The number of mainlanders who have settled in Hong Kong on one-way permits from July 1997 to December 2012 was 762,044, that is around 10% of Hong Kong's total population (Lau 2013).

The growing number of Chinese migrants flooding into the small city of Hong Kong together with the unprecedented significant increase of inbound Chinese tourists due to the simplification of the visa application system for mainlanders to visit Hong Kong (34.9 million mainland Chinese tourists visited Hong Kong in 2012, representing 71.8% of total tourist arrivals, an increase of 24.2% over 2011 (Hong Kong Tourist Board 2012)) has further worsened and intensified the cultural and social conflicts between new immigrants and native Hong Kong residents.

Many people believe that the rapid increase in the population of Hong Kong owing to the influx of new Chinese immigrants has caused shortages and tensions in various

public economic resources such as housing, education and training, medical and hospital services (especially maternity services), recreational facilities, social services and welfare, and even the recent high quality infant food products crisis. Moreover, due to the high land price and transformation of the economy, the high inflation and high unemployment of unskilled labourers make living in Hong Kong very difficult for the socially and economically disadvantaged.

On the other hand, many new immigrants claim they are penalised and suffer from different degrees of discrimination in both their workplace and daily lives; a new Chinese immigrant's identity can be easily noticed from their Hong Kong Identity Card which they (in common with all Hong Kong residents) have to show to a prospective employer when they look for a job, and from their strong Mandarin or provincial accents when they are speaking Cantonese. Because of the poorly perceived identity and their uncompetitive Chinese background and qualifications, many Chinese immigrants suffer from social marginalisation and in turn become disadvantaged and have to endure lower levels of standard of living in Hong Kong.

There is very limited government help for new immigrants from mainland China to support their new lives and to be included in the knowledge-based society in Hong Kong. New Chinese immigrants, in order to gain the necessary and relevant job skills and qualifications to be accepted and survive in Hong Kong, have to seek education and learning opportunities from not-for-profit organisations. For example basic English, Cantonese, computer skills and information literacy, and job skills-related training are among the most popular education programmes that new Chinese immigrants are seeking. However, the Hong Kong government education policy fails to distinctively address and fulfil these educational needs and to provide bespoke programmes to meet the increasing demand. Due to the lack of government education

provision for these immigrants, not-for-profit organisations have played an important role in filling the gap and fulfilling this increasing demand for education and training.

In fact, not-for-profit organisations in Hong Kong deliver and provide different self-managed, funded and government-subsidised education programmes to address the needs of education for the disadvantaged Chinese immigrants. Because of their not-for-profit and subsidised nature and because the courses and curricula are designed for low education attainment learners, the demand for not-for-profit education is high especially for the unemployed and disadvantaged new Chinese immigrant learners.

7.3 The Wider Benefits of Not-for-profit Education for the Disadvantaged New Immigrants from mainland China Learners

The two narrative life stories show that the mainland Chinese immigrants disadvantaged status are caused by different social and economical circumstances and special factors related to their country of origin, ie mainland China. These include, deprived family background and poor childhood experience in a remote underdeveloped village in China, farmland parents lacked children's educational and knowledge culture, incomplete schooling and low educational attainment, premature participation in the labour market, shortage of vocational training opportunities and career development support, the unprecedented rapid transformation of the Chinese economy, differences in social and economic ideologies between China and Hong Kong, lack of close family and friends network support due to geographic distance, and confrontation and discordant relationships with their Hong Kong family members due to the differences in value and belief systems. Moreover, many of these new mainland Chinese immigrants are not able to communicate in English and their strong Mandarin or provincial accented Cantonese doesn't help them to communicate and to be accepted in Hong Kong. Inability to communicate via information and communication technologies further alienates and marginalises the disadvantaged immigrants in the fast-changing knowledge-based economy of Hong Kong.

The reported learning experiences and the perceived benefits of not-for-profit education of this group are diverse and multidimensional. It is found that the learner's personal attitude and beliefs, their reason and motivation to participate and engage in learning activity, the nature and structure of the learning course, and the provider of the education have direct impact and influence on the outcomes and benefits of not-

for-profit education. The life course of disadvantaged immigrant learners and their ability to adapt and handle their adversities also affect the degree of enjoyment and level of rewards of their learning.

Due to the low cost and subsidised nature of not-for-profit education, disadvantaged new immigrants from mainland China learners have been motivated and attracted to join learning. They expect they can learn some useful and relevant job skills and knowledge and acquire certificates and qualifications from the course which will lead to a job opportunity. Disadvantaged new immigrant learners also reported that they were able to improve their confidence through the learning process and meet some new friends and extend their social network. Moreover, it is found that the disadvantaged new immigrant learners' participation in not-for-profit education has helped them to adapt to the local language and understanding the local culture and values as it is important for them to be included and accepted in society. Disadvantaged new Chinese immigrant learners were also motivated to participate in further learning where they believe learning can change their life and give them hope for their future. One disadvantaged new immigrant learner also found her participation in not-for-profit education had helped her to improve relationships with her family.

In considering all these perceived and observed benefits and outcomes of the not-for-profit education found in the disadvantaged Chinese immigrant learners, in fact not-for-profit education can be seen as a process to blend and regenerate social, human and identity capitals and create a special kind of cultural capital that is significant to help the new immigrant learners to settle and be inclusive in Hong Kong. Gaining and accumulating this crucial 'cultural capital' seems to be one of the most important and prioritised goals and tasks for new Chinese immigrants to join not-for-profit education

although the two new Chinese immigrants for this research showed that they did not realise this ultimate benefit but in fact had aimed to achieve it. Table 7.1 summarises the wider benefits of not-for-profit education achieved by the disadvantaged new immigrants from mainland China.

Table 7.1: Summary of wider benefits of not-for-profit education achieved by the disadvantaged new immigrants from mainland China learners

Disadvantaged New Immigrant from mainland China Learners (<i>Not-for-profit Education Attended</i>)	Capitals and Perceived Benefits of Not-for-profit Education								
	Human Capital				Identity Capital			Social Capital	
	(1) Knowledge and Skills	(2) Language and Culture	(3) Certificates and Qualifications	(4) Job Opportunity	(5) Motivate to Learn and Self-Confidence	(6) Attitudes and Values	(7) Plans and Goals	(8) Friends and Social Networks	(9) Family Relationship
Wing-han (<i>Labour Union Organisation, Voluntary Organisation</i>)	G(Q)	G(Q)			G(Q)	G(Q)	G(Q)		
Sandy (<i>ERB, Labour Union Organisation, Voluntary Organisation</i>)	G(Q)	G(Q)	G(Q)	G(Q)	G(Q)	G(Q)	G(Q)	G(Q)	G(Q)

Keys: G = Gained Benefits, D = Damaging, Q = Narrative Quoted in the Analysis, ERB = Employees Retraining Board Programme

Moreover, according to the Schuller et al. (2004) ‘conceptualisation of wider benefits of learning’ framework, Figure 7.1 shows that disadvantaged new immigrant learners achieved the highest gains in terms of (5) Motivate to Learn and Self-confidence, (7) Plans and Goals, and some achievement in (6) Attitudes and Values, all of which are identity capital-related. In addition, there were also perceived higher gains in (1) Knowledge and Skills and (2) Language and Culture, which are human capital-related.

Other benefits of not-for-profit education in such as (3) Certificates and Qualifications and (4) Job Opportunity, which are human capital-related, and (8) Friends and Social Networks and (9) Family Relationship which are social capital-related were also reported.

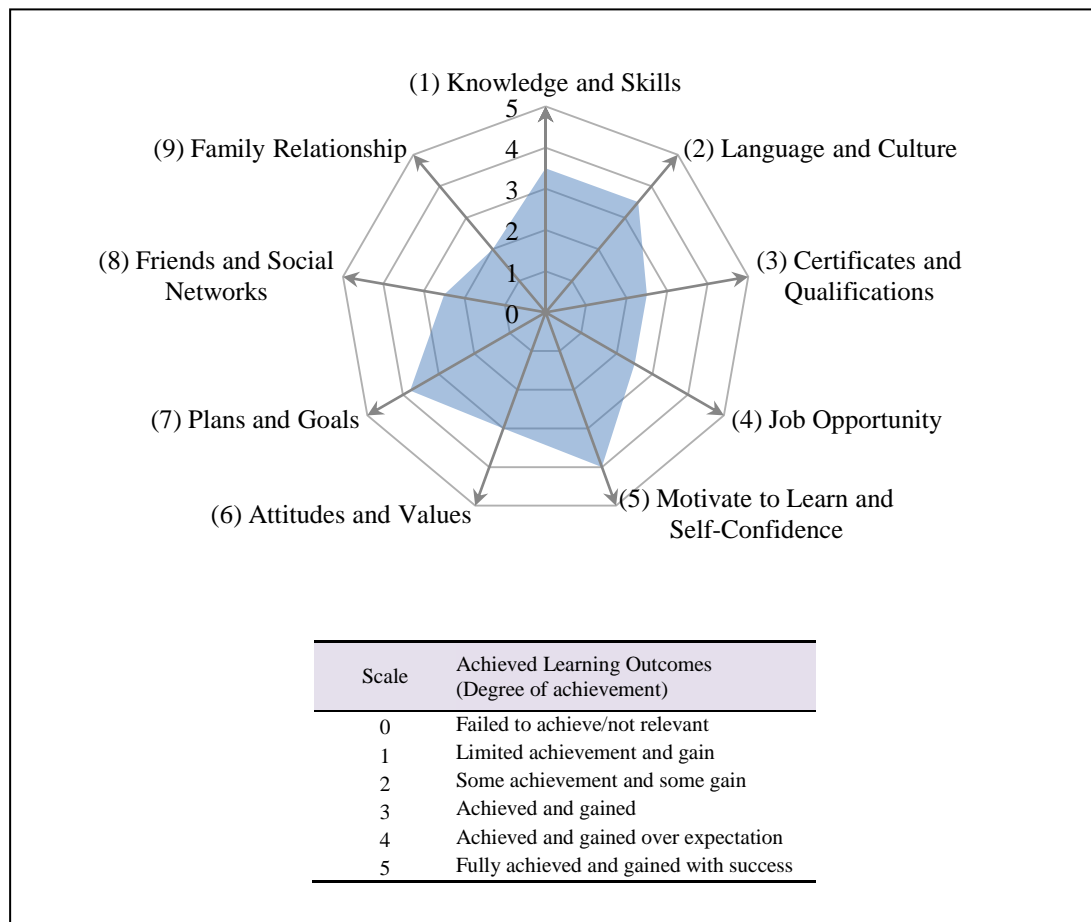


Figure 7.1: The wider benefits of not-for-profit education for the disadvantaged new immigrants from mainland China learners

In addition, Figure 7.2 shows that the disadvantaged new Chinese immigrant learners had placed higher expectations on the human capital-related learning benefits where the not-for-profit education had met and fulfilled their expectations. Highest learner surplus (unexpected gain) was found in identity capital where it shows the disadvantaged new Chinese immigrant learners have been surprised at how they have

changed their self-concept and improved their self-confidence and adapted to the local culture through their participation in not-for-profit education. Compared with the gains in human and identity capitals, the disadvantaged new immigrant from China learners expected and achieved the lowest gain in social capital.

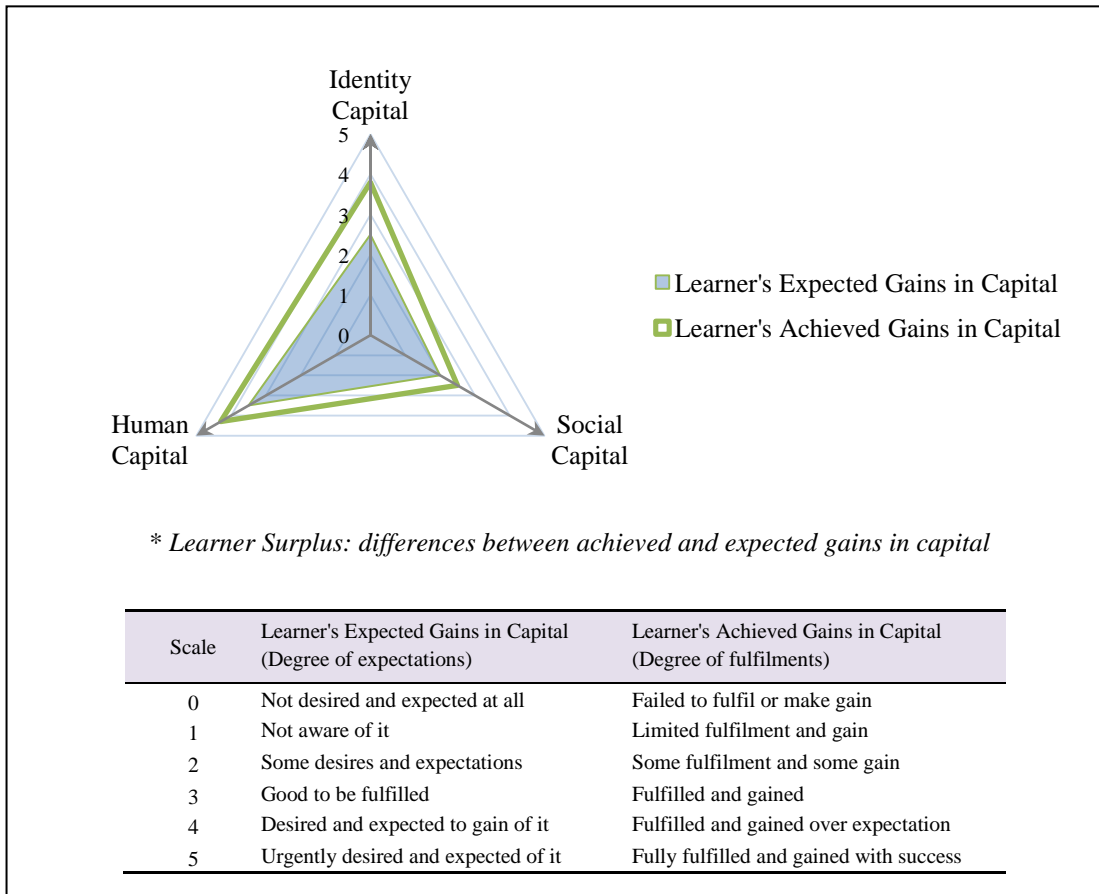


Figure 7.2: Summary of the different levels of capital gains and the learner surplus of the disadvantaged new immigrants from mainland China learners according to Schuller et al. (2004)'s conceptualisation of wider benefits of learning framework

Since there are only two disadvantaged new immigrants from China learners cases were collected and analysed in this research, the detailed analysis and report of the wider benefits of not-for-profit learning of this group are presented in an individual learner case basis. The two detailed disadvantaged learner life stories and the analysis method used are shown in detail in Appendix IV.

Wing-han's Experience and Her Perceived Benefits of Not-for-profit Education

Wing-han is sceptical and cynical toward education; she said this may be caused by her self-criticism and lack of opportunity to study in school during her early childhood in the village. She has low ambition to rejoin school and possesses a rather low internal locus of control. She believes learning can only come through doing, and a person's future is greatly determined by some uncontrollable external factors. She believes qualifications don't help one to become successful and moral, but luck does.

"I don't think studying can help my self-criticism, in fact it depends on how you see this and now I understand. Before I may think why I didn't go for studying and learn more and it makes me feel regret. In fact, it is not like that.. Even if I had studied and learned more, it wouldn't have helped me. Like what TV news reported or what TV said, studying doesn't help, studying has no use at all. You need to walk your own path in your future, don't you?" (53.49)

"Qualification doesn't mean everything; a lot of university graduates have done something wrong and shameful. Even though I do not have any qualifications, I always tell the others I do not have qualifications, and so what? I do not have qualifications but you have qualifications, it doesn't mean anything. In terms of work, it would be fine as long as you do yours and I do mine." (55.22)

Wing-han's motive to rejoin school and participate in not-for-profit education was simply job and work related. She hoped to learn basic English and acquire some computer skills, as she believed English and IT skills were essential for her to survive in Hong Kong as an immigrant from China.

“In fact, the basic English course that I have attended in the labour union has helped me a lot. I was working as a cashier in a supermarket, I even didn't know how to count 1-100 in English, to be honest I was quite ashamed as I really know nothing about English and often there are some English-speaking foreign customers visiting the store... the trade union school taught me how to count and speak in English, I started to know some, they taught us numbers, how to greet foreign customers when they come to the supermarket and how to speak when they leave. I have only learnt these things, I didn't learn anything else after that up till now.” (41.25)

To Wing-han, not-for-profit education was simply a gateway to knowledge and allowed her to know more, and although she claims that her not-for-profit education experience and her studies didn't help her much in any respect due to her personal problems, Wing-han has planned to enrol in more courses and engage in more learning opportunities in the near future:

“Learning means knowing more and increasing your value. That is to allow yourself to know more things. Though I do not understand a lot of things or the knowledge in the book, I will go to check it out using a dictionary and try to explain it by myself. At least when people say and explain something, I will know about it or at least have heard about it. Learning is knowledge, you can learn through working and practising.” (56.03)

“I have planned and will keep on learning; there is a course starting soon in March after the new year in a school which is offering English and computer skills... it is a very long course, starting from primary one education to secondary three, a total of nine years' study.” (57.48)

Wing-han's contradictory thoughts and behaviour with regard to the outcomes of learning and her decision to participate in continuous learning may explain that she was actually and unconsciously believing and embracing the culture and values of continuous learning and the needs of knowledge and qualification in Hong Kong. Although Wing-han said she did not believe in education in the interview, in fact her learning behaviour shows that her attitudes and values have changed and she associates more of her future self with learning and knowledge.

In fact, the two not-for-profit organisations that offered English and computer courses to Wing-han during her early settlement in Hong Kong were the two most well-known and popular not-for-profit organisations in Hong Kong. These two organisations have a long history of servicing local communities and especially the disadvantaged; one is Catholic Church-based and the other was founded by labour unions. The aim of these two not-for-profit organisations is to provide a learning opportunity to empower and improve the grassroots standard of living and enhance participants' social mobility. The courses offered by these two organisations are not only affordable to the disadvantaged but also carefully designed to offer bespoke courses to meet the disadvantaged learning needs, for example offering primary level of education for the new Chinese immigrants who have no English language background. Wing-han was satisfied with the learning experience and outcomes from the courses offered by these two, though she claimed the learning hasn't made any change to her life.

Although Wing-han acknowledges only a few economic-related learning outcomes and benefits derived from her not-for-profit education experience, some unrealised

outcomes and benefits of learning are found through her narrative life story. Among all these non-economic wider benefits, her participation in not-for-profit education gives her hope. Hope was important for her to sustain her life in Hong Kong at the time she was living alone struggling with her adverse and depressed life course and personal sufferings. This may also explain why she has planned to enrol in more courses to learn while she claimed she is an unbeliever in education. Wing-han said:

“I want to learn more things, because I want... hmm... I want to learn from the beginning. I didn't have a dream before, but now I have a dream. I hope in the coming few years, (I can) save some more money, I want to start a bar! I would like to learn some more English, something which can really help me.”
(44.04)

Sandy's Experience and Her Perceived Benefits of Not-for-profit Education

Sandy has placed very high ratings on her learning experience of not-for-profit education in Hong Kong. Her highly satisfied learning experience was maybe because of her own positive personal attitude, high locus of control character, contrasting poor childhood school experience in China as well as the different perceptions of the social, economic and cultural situations between mainland China and Hong Kong.

Although Sandy's first learning experience was as a beautician offered by the beauty shop where she was working, this has helped her to gain necessary job skills and knowledge. Sandy found her later two subsidised retraining programme experiences run by not-for-profit organisations more rewarding and enjoyable. Sandy claimed that she plans to enrol in more not-for-profit organisations' courses whenever they are available and convenient for her. Sandy especially appreciates the subsidised nature of

the training programmes as she claimed that she wasn't able to afford to pay to learn. She also appreciates much of the job support follow-up services offered by the school:

“I participated in the vocational training programmes offered by the government because I need to face my living; I don't have money to spend and so I chose this kind of programme. I will choose those programmes which offer transportation and living subsidies and for which government provides subsidies and I can learn work skills. I found Hong Kong is very good in this; in 2007 I attended government (funded) programmes and I was very happy when I was learning. I felt the government (not-profit organisation) managed very well.” (52.25)

“I am very thankful, although I don't have any religious beliefs. I feel very appreciative of all the things that have happened to me. I came to Hong Kong, and at least my daughter (had the medical operations that she needed), I attended government (funded) training courses, and when I needed to work I went to search information from the government, search for courses that fit me, and they will try their best to arrange a job for me. Now they have very good job support follow-up services, and they will call you quite a lot and ask you in-depth questions to help you.” (1.06.13)

Sandy also claimed that the government funded programmes offered by not-for-profit organisations attract many immigrants like herself from different parts of China to join the courses which enables them to share and adapt to their lives in Hong Kong more easily. Sandy found that not-for-profit education has motivated her to learn and helped her to understand the culture and society of Hong Kong. Sandy has also met many new friends in the retraining course. She claimed she is not a retrogressive person as she is able to learn as other people do. She has recommended two of her newly migrated friends from China to join the training programmes.

“If I meet someone like me coming from mainland China, I recommend them to join a retraining programme and tell them it is very good – at least the

school will pay you money to learn and they will also arrange a job for you. Such kinds of thing don't happen in China... If I hadn't attended these retraining courses, I won't completely understand the systems of Hong Kong, the development and thoughts of the government, and the reason why the government treats its citizens so well.” (1.22.13)

Moreover, Sandy argued that one of the most important benefits of attending training courses were to teach her to think positively and to enable her to set goals and find the purpose of her life. She explained that many people have their goals in their mind but not many of them know them clearly.

“The not-for-profit courses have changed my self-value and self-concept as the knowledge and information taught in school are very positive and I also like positive thinking. In every learning course, there is always a compulsory session to teach us how to set personal aims and goals. It has helped us to realise our goals and it enables us to set plans to achieve them.” (1.23.37)

Sandy also said that her participation in the retraining programmes had improved her relationships with her family members. She explained that her family was feeling very happy and supportive when she told them she enrolled in the retraining programmes. Her family members felt more secure and confident for her future and her future employability. She said at least she showed them she was a progressive person and she brought them hope.

“My family felt very excited and happy when I told them I was studying. They would expect I will soon have a job and have income. They felt worried when I was unemployed but once I told them I was going to school, they realised I wanted to work and wanted to learn more. All the parents in this world want their children to be a success.” (1.26.01).

In fact, one of the purposes of the retraining programmes is to enable learners to transform or revamp their skills and knowledge for potential job opportunities. In Sandy's case, she received a private firm's training as a beautician once she started working in Hong Kong. After years of hard work, she found there was higher demand and better prospects for body massage in the market and so she joined the not-for-profit retraining programme to transform and obtain the qualification that she needed. Afterwards she participated in the second training course to learn beauty management as she thought she could start her own beauty business when the timing was right. She claimed that the retraining course not only enabled her to progress but also motivated her to achieve.

“Because of these government (funded) training programmes, I found myself enjoying learning in school in Hong Kong. It is because the teachers and staff are very friendly and helpful and they taught me a lot. All learners were very happy and gained knowledge, you will be very happy to take the initiative to learn... it is different in Hong Kong, teachers won't blame you. When you see the learning environment and atmosphere, you won't allow yourself to lag behind. Even if you are not interested to learn, you still have to achieve; it trained me and made me feel like that. It is a self-motivated learning and you won't be happy to score 60 marks, you have to score 80.” (1.09.30)

The training that Sandy received in Hong Kong has helped her to reinstate her self-confidence and uplifted the value of her own self. She said that the certificate and self-motivated learning and sense of achievement brought by the school had given her a 'very essential and initial taste of the rewards' and she wants lots more of it.

“I have a better sense of achievement and higher self-value after participating in learning. It is because I feel I have really learnt something useful for my living and there is a certificate to prove my learning, and it is the most valuable thing. I won't feel fruitful and satisfied with my life without these

certificates. I even feel I speak differently with other people after I have finished all these courses... I have much more confidence in myself. This kind of self-confidence cannot be given by other people.” (1.28.02)

To sum up Sandy's learning experiences, though the first learning offered by the company that she worked with trained her as a beautician it has also helped her to start working and settle down in Hong Kong. Sandy found her not-for-profit education more fruitful and it has had a big impact on her life in Hong Kong as a new Chinese immigrant. Sandy's not-for-profit retraining has enabled her not only to equip herself with the essential human capitals to transform her skills and knowledge (from working as a beautician to managing a beauty shop) but also made her ready for future career/business development. Through making new friends in school and her well preserved social networks, she has also accumulated some crucial social capitals and support that she desired, since Sandy has no primary family support in Hong Kong after the death of her husband. As a new immigrant from mainland China, the subsidised government not-for-profit retraining programmes and the follow-up support had enabled Sandy to adapt her life more quickly and smoothly in Hong Kong. Lastly, the achievements and rewards that she experienced and perceived in the not-for-profit training course together with her later work achievements assisted Sandy to build up a new self amid all the tragic life dramas which had happened to her. Not-for-profit education has also empowered Sandy and her disabled daughter to have a better position and opportunity to be included in the society of Hong Kong, whereas many new immigrants from mainland China are still negatively labelled and discriminated against.

7.4 Summary

In summary, it was found that the main reason and motivation for them to participate was the subsidised nature of courses and the job skills and knowledge-related curricula. For new immigrants from China who have limited resources and knowledge of the education market, not-for-profit education offers a secure and low-cost educational opportunity for them to transform and obtain relevant job skills and qualifications to join and compete in the labour market. Moreover, the acquisition of basic skills and knowledge and qualifications also helped to uplift disadvantaged immigrant learners' self-confidence and self-value and changed their self-concept. Instead of job-related training courses, basic English and computer skills are the two most popular courses as the new immigrants had very rare chances to learn English and computer skills in China back in the 1990s.

In addition, the subsidised nature and the wider benefits gained through participation in not-for-profit education has motivated and increased disadvantaged new immigrant learners' interest to keep on learning. In fact, to the new Chinese immigrant learners, not-for-profit education has not only fulfilled their learning needs in terms of learning new job skills and acquiring new knowledge, but also offered some kind of personal identity-related benefits, for example disadvantaged learners were taught to make personal plans and develop their own goals which often helped to provide direction and hope for their future. This was believed to be important to them.

Although there is limited data to represent and explain the causal relationship between not-for-profit education and the transformation of a learner's capital, it is believed the overall effects of the gains in capital are important for the disadvantaged new

immigrants from mainland China in settling in to the new environment in Hong Kong. For example, they were able to adapt to learn and communicate using the local language and some basic English, understand the local culture and values, and meet some new friends.

PART III A CONCLUDING DISCUSSION

The final part of this thesis, based on the analysis and the results discussed and reported in Part II, aims to provide a cross group comparison and conclusion of the findings of the different disadvantaged learner groups' wider benefits of not-for-profit education. The objectives of the cross group examination and comparison are to demonstrate how the wide variety of not-for-profit education in Hong Kong offered different kinds of benefits to different types of disadvantaged learners with different backgrounds and with different learning needs. In addition, it also aims to address and discuss the implications to the education and manpower policies and the future research potential on the benefits of not-for-profit education.

Chapter 8 starts with discussion on the attributes of the disadvantaged learners' backgrounds and the perceived wider benefits of not-for-profit learning. It is followed by detailed comparisons and discussions on the wider benefits of learning and disadvantaged learner's capital within and among different learning groups. Discussions and comparisons on the benefits of not-for-profit education and the learner surplus among different disadvantaged learner groups are also explored. The implications of the research findings and results are discussed at the end of this chapter.

Following the discussions in Chapter 8, Chapter 9 starts with discussion on the policy implications and a short review on the limitations of the research. Moreover, questions for future research are suggested and discussed. The closing comments are presented at the end to address the overall contributions of the research and the future outlook and development of not-for-profit education in Hong Kong.

CHAPTER EIGHT

CROSS GROUP COMPARISON OF THE WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION

8.1 Attributes of the Learners' Backgrounds and the Perceived Wider Benefits of Learning

From the study of wider benefits of not-for-profit education for disadvantaged learners in Hong Kong, it has been found that the benefits achieved are multi-dimensional and the causes are complicated. The expected and achieved learning benefits greatly depend on the attributes of the learner's background, their motivation and reason, and their expectation to join not-for-profit education. Based on the study of disadvantaged learners' life stories in Hong Kong, it was found that the diverse attributes of the learners' backgrounds have different degrees of impact on their learning and their outcomes and benefits of learning. For example, learners' 'qualifications and certificates' and 'state of marriage' not only provide reason, motivation and reference for the learner to join and to select different not-for-profit education to study but they also affect the learner's engagement in and the results and outcomes of study. The following key words table (Table 8.1) summarises the reported and observed attributes of disadvantaged learners' backgrounds and illustrates the different degrees of impact that have affected the disadvantaged learners' not-for-profit education and the outcomes and benefits attained. The larger font size of the attributes shown in the key word table represents bigger impacts to the not-for-profit education and the outcomes and benefits attained. Moreover, these

attributes could result from the learner's past course of life or current status of living and they are inter-related and affected.

Types	Attributes
Personal Traits and Life Experience	Religious, beliefs, attitude & values , autistic, depression, stress, personal interest, language, self-confidence , self-esteem, health, plans and goals, locus of control, origin and ethnicity, migration , uncertainty avoidance, enjoyment & satisfaction, tragic incident, age , gender, stubbornness , open-mindedness, ignorance , self-criticism
Family	State of marriage , abuse and violence, widowed, number of children, children's education, children's dependency, parent(s) died, parents education, parents attitude, lone parent, broken family , siblings, culture and value, poverty , family supports
Learning and Education	Qualifications & certificate , accreditation, school experience, peer learning and relationship, teacher, school support, school curriculum, assessment, school results, literacy, learning needs , learning expectation, motivation to learn, keeping up with the times, course attended, cost & subsidisation , personal interest, learning opportunity, brainpower, bullying
Work and Economic Activeness	Skill level, income & standard of living , employment retraining, unemployment , part-time work, work at home, child labour, homemaker, competition from China , living environment, cost of living , social security welfare, retirement, discrimination
Friends and Social Networks	Communication & interpersonal skills, friends support , share of information, socialisation , talk and sharing
Civic Participation	Voluntary services , licences & certificates, uniform groups

Table 8.1: Attributes of the disadvantaged learners' backgrounds that have affected their not-for-profit education and the outcomes and benefits attained

8.2 Wider Benefits of Learning and Learners' Capital

The study of disadvantaged not-for-profit education in Hong Kong shows that the benefits of learning attained are multifaceted and are learner-group and course-attended specific. The types and strengths of benefits perceived are affected by many reasons, for example internal reasons such as attributes of the learner's background as discussed in the previous section, learner's motivations and perceptions of learning, and learner's psychological state, and external reasons such as the course attended, economic situation, policy and provision of not-for-profit education, political and social contexts. The following Table 8.2 summarises and shows the wider benefits of not-for-profit education achieved and perceived by the vulnerable disadvantaged learners in Hong Kong.

Table 8.2: The Wider Benefits of Not-for-profit education achieved by the disadvantaged learners in Hong Kong

	Not in Education, Employment, or Training Youth	Economically Marginalised	Older Adults	New Immigrants from mainland China
<i>Human Capital-Related Learning Benefits</i>	(1) Academic Qualifications	(1) Income and Standard of Living	(3) Knowledge and Skills	(1) Knowledge and Skills
	(2) Knowledge and Skills	(2) Certificates and Qualifications	(4) Job Opportunities	(2) Language and Culture
		(3) Job Skills and Job Mobility		(3) Certificates and Qualifications (4) Job Opportunities
<i>Identity Capital-Related Learning Benefits</i>	(3) Attitudes and Values/ Meaning and Purpose of Life	(4) Self-confidence and Life Satisfaction	(5) Motivate to Learn and Learning Needs	(5) Motivation to Learn and Self-confidence
	(4) Sense of Achievement/ Self-Confidence/ Understanding Self	(5) Keeping-up with the times and Brainpower	(6) Reduce Stress and Enjoyment	(6) Attitudes and Values
			(7) Plans and Goals (8) Open-mindedness	(7) Plans and Goals
<i>Social Capital-Related and Other Learning Benefits</i>	(5) Interpersonal and Communication Skills	(6) Friends and Social Networks	(1) Friends and Social Networks	(8) Friends and Social Networks
	(6) Friends and Social Networks	(7) Interpersonal and Communication Skills	(2) Civic Participation	(9) Family Relationship
	(7) Civic Participation	(8) Family Relationship		
	(8) Others: Health and Family Relationship	(9) Others: As a Model to Motivate Child Learning/ Plan for Retirement		

From the research results, it was found that different kinds of disadvantaged students derived different kinds of benefits with different strengths from their not-for-profit education. Figure 8.1 shows that the disadvantaged NEET youth learners achieved very highly in all three capitals. The total achieved capital gains are in fact highest for this group overall. Within the NEET youth group, learners perceived the highest gains in identity capital followed by human capital and social capital. The research results show that the primary benefits of NEET youth's not-for-profit education, for example the YiJin Programme and the Youth Pre-employment and Training Programme (YPTP), have empowered them through changes in personal attitude and self-value, and new meaning and purpose in life which encouraged them to make plans for their future. Moreover, NEET youth learners also benefited from gaining their desired academic qualifications and acquiring new knowledge and skills, making new friends and extending their social networks.

For the economically marginalised, Figure 8.1 shows that in terms of the strength and total gains of the three capitals, they are ranked second. The economically marginalised perceived highest in human capital were those who were able to transform their job skills and knowledge through different kinds of not-for-profit education, for example the Employment Retraining Board (ERB) retraining programmes and local community centre not-for-profit courses. Moreover, the economically marginalised also benefited from meeting new friends with similar economic status and backgrounds through not-for-profit education opportunities where it is social capital-related followed by some gains in identity capital in terms of (for example) improvement in self-confidence and life satisfaction and keeping up with the times.

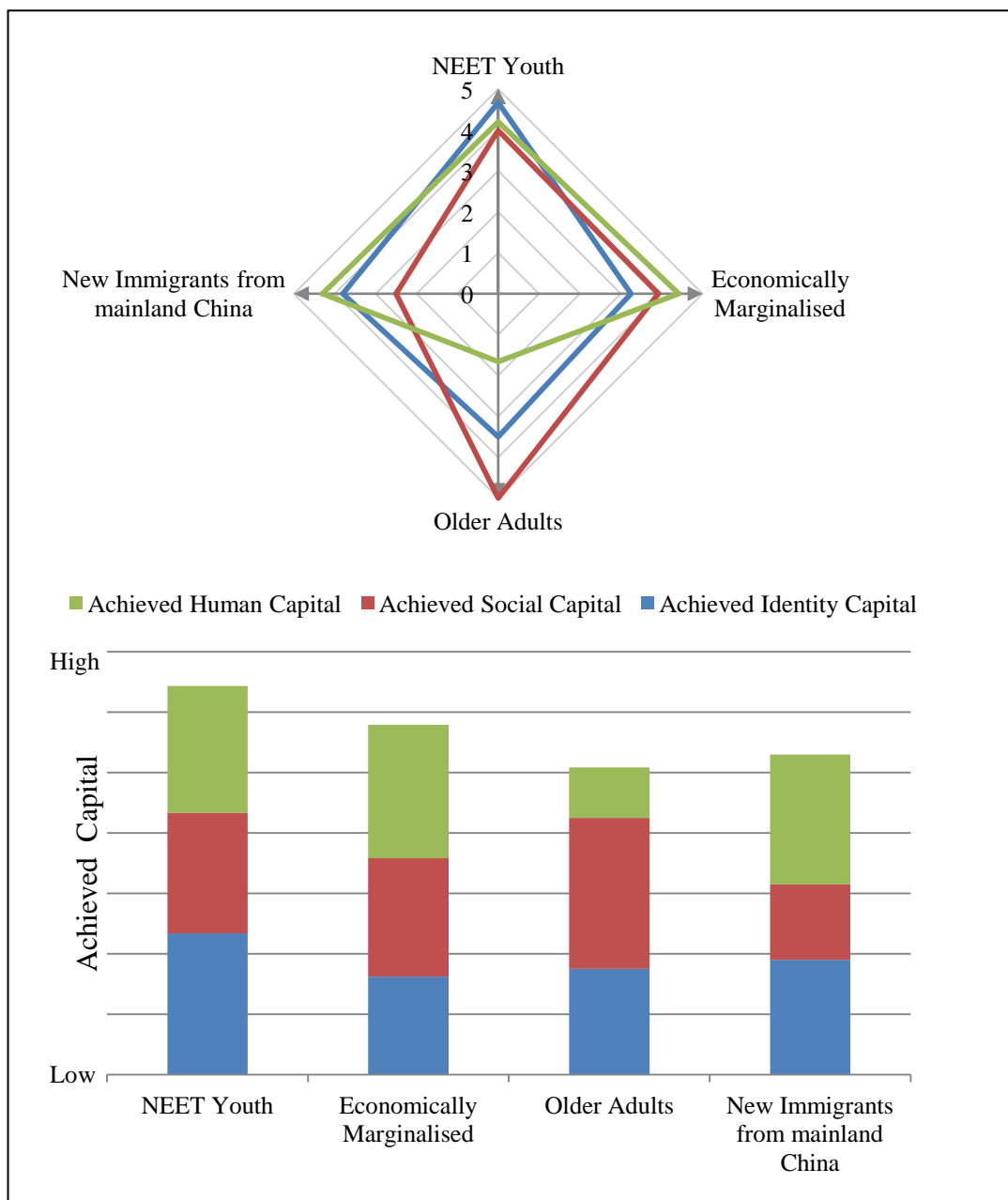


Figure 8.1: The achieved capital gains of the four disadvantaged learner groups in Hong Kong

For the older adult disadvantaged learners, Figure 8.1 shows that they achieved very little gain in human capital which resulted in it being lowest in the total capital gains among different learner groups. However, older adult disadvantaged learners showed they benefited from the highest gain in social capital amongst the rest of the learner groups where they were able to spend their retirement learning and socialising with the other older adult learners in the not-for-profit school. Some moderate identity

capital gain in terms of (for example) reduced stress, motivation to keep on learning and enjoyment of life were also found in the group.

Lastly, Figure 8.1 shows that the new immigrants from mainland China learners enjoy major gains in human capital-related benefits where they were able to learn new job skills and knowledge and acquire relevant qualifications and certificates for job and employment purposes and to adapt to the local language and culture. This has helped them to settle down in Hong Kong. Moreover, not-for-profit education was able to improve learners' identity capital in terms of assisting learners to make plans and goals and rethink the purpose of life, improve their self-concept, motivate themselves to keep on learning, and bring hopes to the disadvantaged immigrant learners. New Chinese immigrant learners were also able to make some new friends and extend their social networks through their participation in not-for-profit education where it is social capital-related. In addition, in considering the overall outcomes and benefits of the disadvantaged new immigrant from mainland China learners' not-for-profit education, it has helped them adapt to the new environment through enhancing and regenerating their cultural capital, which is specific to this group.

From the comparison of the different disadvantaged learners' wider benefits of not-for-profit education and the capital gains, it is interesting to see that different disadvantaged learner groups achieved different learning benefits with different capital gains. This also supports the argument that different learner's attributes and backgrounds and different learning needs and expectations on the learning outcomes affect the ultimate type, relative and scaled position of the perceived learning benefits. Table 8.3 summarised the disadvantaged learners' perceived capital gains from their not-for-profit education according to the type, relative and scaled position.

Table 8.3: The perceived capital gains by different disadvantaged learner groups in Hong Kong

Types of Gained Capital	Not in Education, Employment, or Training Youth	Economically Marginalised	Older Adults	New Immigrants from mainland China
Human Capital (Relative position/ Scaled position)	Quite important/ High	Most important/ Highest*	Least important/ Low	Most important/ High
Identity Capital (Relative position/ Scaled position)	Most important/ Highest*	Least important/ Middle-high	Quite important/ Middle-high	Quite important/ High
Social Capital (Relative position/ Scaled position)	Least important/ High	Quite important/ High	Most important/ Highest*	Least important/ Middle

Highest*: Highest capital gain among all the disadvantaged learner groups

Table 8.3 shows that different disadvantaged learners derive different kinds of benefits and capital gains from different not-for-profit education. The not in education, employment, or training youth disadvantaged learners perceived the highest gains in identity capital and the economically marginalised learners perceived the highest gains in human capital. The older adult disadvantaged learners perceived the highest gains in social capital and the new immigrants from mainland China found human capital gains most important.

From the results shown in Table 8.3, it can be inferred that for example 1) Different learner groups have different learning needs, different expectations of the learning outcomes, and different priorities which different not-for-profit education providers should carefully anticipate in order to fulfil the learner's demand in terms of curriculum design, teaching and learning activities, assessment, resources allocation, as well as in promotional and recruitment activity. For example, NEET youth reported they benefited most from their not-for-profit learning in identity capital, while most of the not-for-profit education providers considered and promoted human capital (such as qualifications and job skills) as the core benefits of their education programmes. 2) Although not-for-profit education is non-compulsory and voluntary, policymakers

may consider embedding certain kinds of social values and purpose in the education through the curriculum design and implementation, according to the needs and expectation of the learning benefits from the learner's perspective. For example, government could provide subsidised job skills or language training courses to help the new immigrants from mainland China settle down more easily and to feel included in a society where discrimination against the new migrants from China has worsened in the last few years.

8.3 Benefits of Learning and the Learner Surplus

Learner surplus is a newly developed concept suggested by this research to measure and to illustrate the unexpected learning benefits gained by different disadvantaged learners. The unexpected learning benefits or learner surplus are measured by comparing the expected learning outcomes with the achieved learning outcomes. For example, through their life story, disadvantaged learners' expected learning outcomes (before participating in and being influenced by not-for-profit education) are compared with the disadvantaged learners' reported and achieved learning outcomes after their not-for-profit education. It aims to show the availability and the level of the 'surprise factor' of the not-for-profit education and to measure how well not-for-profit education fulfilled the disadvantaged learners' expected learning outcomes. Moreover, the learner surplus has also provided an alternative angle of view to cross examine and explain the disadvantaged learners' motives and expectations to join not-for-profit education and how they related and affected the achieved learning outcomes. Since the notion of learner surplus has still not yet been fully explored, researched and discussed due to the limitation and the scope of the research, the following discussions aim to report and provide some of the observations and insights related to the unexpected learning benefits gained by disadvantaged learners in Hong Kong.

From the study of the disadvantaged learners' life stories in the research, it has been found that learners' expected benefits of learning before they join the not-for-profit education are often different to the achieved benefits after participation in and experience of the learning activity. Disadvantaged learners' expected benefits of learning are affected by many different personal backgrounds and attributes, while

achieved benefits are perceived and reported by the learner or observed by the researcher. The results of this research were that different vulnerable learner groups gained different levels of learner surplus in different capitals though individual learners within a particular learner group also varied and the results are shown in Figure 8.2.

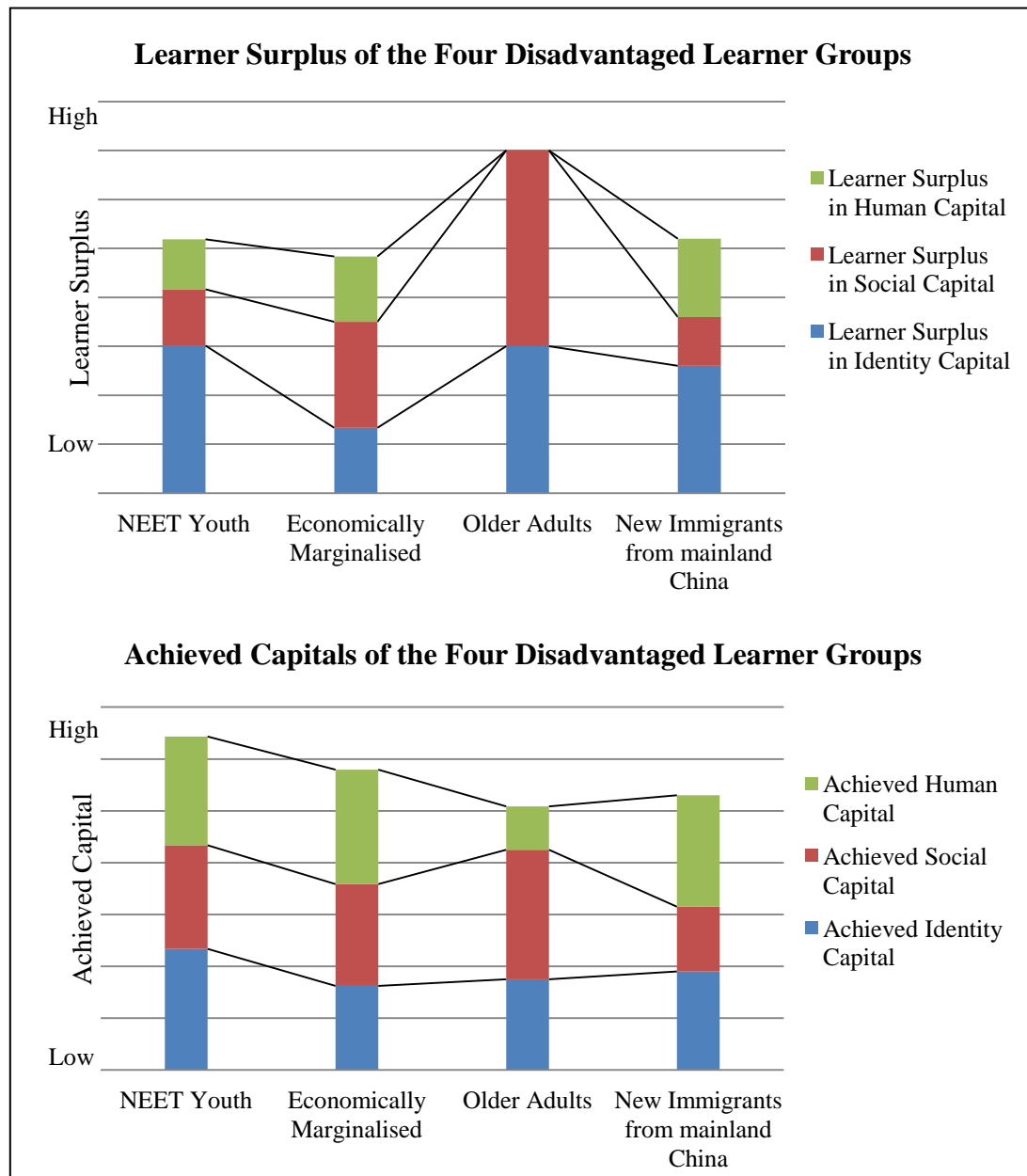


Figure 8.2: Learner surplus and achieved capital gains of the four different disadvantaged learner groups in Hong Kong

Figure 8.2 shows that the NEET youth disadvantaged learners group received similar levels of learner surplus gains in human and social capitals and highest learner surplus gain in identity capital; the total learner surplus for the NEET youth group was the around the same level of learner surplus gained by the new immigrants from mainland China learner group and higher than the economically marginalised learner group, while the total achieved capitals are the highest among all the four groups of disadvantaged learner. These results mean that the disadvantaged NEET youth learners were expecting a lot of benefits from their not-for-profit education and they were able to achieve and perceive high gains in benefits in terms of the three capitals. Moreover, the results show that the NEET youth disadvantaged learners have higher unexpected gains in identity capital, for example they have reported they have changed their personal attitudes and values toward education and society and found new meanings and purpose of life from their not-for-profit education experience.

For the economically marginalised learners group, they have experienced significant gains in learner surplus in social capital. This result explains that the economically disadvantaged learners were able to make new friends with similar backgrounds and they could share and support each other in different ways which they did not expect before they joined not-for-profit education. The learner surplus of human and identity capitals were moderate showing that the economically marginalised did not experience very high unexpected gains in these two capitals while the total achieved capitals gains is the second highest among all of the four disadvantaged learner groups.

The older adult disadvantaged learners experienced significantly the highest learner surplus amongst all different learner groups while they also experienced the lowest total achieved capital gains when compared with the other learner groups. Firstly, the

older adult learners achieved very little gains and no learner surplus in human capital. This shows the old adult learners were not driven by jobs and employment when they decided to join not-for-profit education and they had low expectations about gaining new skills for job and employment purposes. Moreover, the disadvantaged older adult learners reported they achieved significant gains and highest learner surplus in social capital which shows the adult learners were surprised and found making and socialising with new friends in school and participating in different kinds of social activities valuable and enjoyable to their older adult life. The older adults were also amazed how their not-for-profit education and exposure opened their minds and reduced their stubbornness which shows up in the high learner surplus and moderate achieved gains in identity capital.

Lastly, the disadvantaged new immigrants from mainland China learners experienced the second highest in total learner surplus while the total achieved capitals is the second lowest among all the four disadvantaged learner groups. Moreover, the high gains in achieved capital and moderate gains in learner surplus in human capital shows that new Chinese immigrant learners perceived and treasured that they have learnt some useful job skills and knowledge and adapted to the local language and culture through their not-for-profit education which helped them to settle in Hong Kong and it was outside their expectation. In addition, in terms of the high level of learner surplus and moderate level of achieved capital gain in identity capital, not-for-profit education has also taught the new immigrant learners to plan for their future, enhance their self-concept, and empowered and brought them hopes which surprised them and was valued by them.

8.4 Implications of and Discussion about the Research Findings

8.4.1 Personal Attributes and Life-changing Incidents

Schuller et al. (2004) claim that learning is a process whereby learners build up their assets in the shape of different capitals and then benefit from the returns on their investment in education in terms of different types of outcomes and benefits, and these outcomes and benefits themselves feed back into or even constitute the capitals. Although Schuller et al. explain the interactions between capitals and learning benefits, this research offers some detailed empirical accounts on what and how the learner's personal factors contributed and affected to the success of the accumulation of capitals and benefits. The results of this research have found that the outcomes and benefits of not-for-profit education are significantly varied in terms of the strengths, the types, the nature, the extents and continuances, the impacts, and the side-effects, and are affected by the individual learners' personal backgrounds and demographic attributes, psychological states, motivation and expectation to participate in learning. For example, a disadvantaged older female adult learner perceived her participation in not-for-profit education as part of her retirement life because the not-for-profit school was her daily primary socialisation venue, while another older adult learner saw not-for-profit learning as an opportunity to learn some new job skills to make her ready for retirement. A male NEET youth learner found not-for-profit education activities opened his eyes to the world and changed the meaning and values of his life forever, while another young lady learner found not-for-profit is a compulsory game for her promotion and career development. An unemployed woman treasured the experience and found her not-for-profit employment retraining gave her a close friend and a shoulder to share her difficult life, while an unemployed man found the employment

retraining saved him from poverty. Although the research attempts to generalise and report the findings in four disadvantaged learner groups learnt from the individual life stories, it has found that individual learner's personal factors could have significant influence on the learning outcomes and the capital gain even disadvantaged learners shared some common attributes within a particular learner group. Despite the 'capital and capabilities' related personal factors that have been suggested by Schuller et al., this research found that some specific life-changing incidents and personal factors such as traumatic experiences, accident and disability, bereavement, emotional and psychological states, and ability to recover from traumas would also affect the participation and achievement in not-for-profit education.

8.4.2 Presumptions and Expectations on the Learning Outcomes and Benefits

The research results also show that disadvantaged learners' presumptions and expectations on the learning outcomes and benefits also played an important role in affecting the interactions between the capitals and capabilities and the learning benefits and outcomes. In fact, from the study of the disadvantaged life stories interviews and the reported learning benefits, the expected learning outcomes and benefits of disadvantaged learners as well as their motives and willingness to learn, have greatly affected and determined the deployment of the capitals in their not-for-profit learning which in turn affected and possibly limited the gains of the learning benefits and outcomes. Disadvantaged learners tended to deploy only those capitals and capabilities needed to achieve their expected learning benefits and outcomes. For example, a life story of an economically marginalised disadvantaged learner showed that he expected only to gain some useful job skills and knowledge from his not-for-profit learning when he decided to join the not-for-profit education whereas he did not

expect he would be empowered further because of the social interactions in the class, and so he did not participate and showed no interest in any social activities or in making new friends in school. Throughout the life story interviews, it is not difficult to find that disadvantaged learners would quickly and directly recall and report those learning benefits and outcomes that have been expected by them, and most of the disadvantaged learners were not able to realise other 'wider' benefits of learning gained from their not-for-profit education where they did not expect to gain from their not-for-profit learning. Though through deeper and longer life story interview and self-reflection processes, disadvantaged learners were able to discover and realise more unexpected but fulfilled wider learning benefits and outcomes; and these unexpected learning outcomes and benefits are defined as 'learner surplus' in the research. The phenomenon of self-fulfilling prophecy - where disadvantaged would only recall the learning benefits and outcomes that they expected and fulfilled - were easily observed among different disadvantaged learners life stories in Hong Kong. In addition, discoveries and realisations of 'wider' benefits of learning were also dependent on the number of courses that the disadvantaged learners took and on how keen the disadvantaged learners keep on participate continuous learning and their beliefs and perceptions on the value and benefits of not-for-profit education.

Despite disadvantaged learners tending to report the learning benefits and outcomes that they have expected and fulfilled, learner surpluses were also found in all four learner groups and in all the disadvantaged learner cases, though different learner groups and different learners perceived different types and different degrees of learner surpluses. To the not-for-profit education providers, it may imply that they need to articulate and promote more in detail the potential wider benefits of learning in order

to attract more disadvantaged people to join their learning courses and to maximise the utility and benefits of the provision of not-for-profit learning.

8.4.3 Negative Impacts and Influences

This research has acquired ample evidence and examples to support Schuller et al.'s (2004) claims that effective learning activity enables learners' capital to grow and to be mobilised and the learner capitals are made by a collection of different changing and dynamic learner capabilities. For example, disadvantaged older adult learners reported they were able to use their handicrafts and Chinese calligraphy skills and knowledge that they learned from the not-for-profit school to make some gifts and send them to other disadvantaged elderly such as those hospitalised or living in elderly homes, and in return it has opened their minds and reduced their stubbornness and made their lives more enjoyable and satisfactory; a disadvantaged NEET youth was stimulated and motivated by his not-for-profit education, and became an inventor and social entrepreneur, manufacturing printers for blind people, and he won several international awards and enhanced his self-confidence, self-concept and life values. However, some disadvantaged learners also reported, despite their gains in capitals and capabilities through their active participations of not-for-profit education, they experienced different difficulties in managing their learning and in balancing their study and work life, which caused some negative influences and impacts on their lives. For example, damaging family relationships and social life, stress and depression because of the pressure from learning, and health issues were also heard from the disadvantaged learners' life stories. The damaging effects are worth investigating in future research, although for many of the disadvantaged learners in Hong Kong the

learning benefits outweighed the potential harms or negative effects because of the Hong Kong Chinese dominated social and cultural situation.

8.4.4 Joint Learning Outcomes and Social Outcomes

The capital and capability model of Schuller et al. (2004) reminds the researcher of the possible interactions between different outcomes and joint outcomes are likely. This research in addition has found that some joint learning outcomes and benefits derived from the disadvantaged learners' not-for-profit learning not only benefited the disadvantaged students but also contributed at a social level. For example, when considering all the outcomes and benefits of not-for-profit education for the disadvantaged new immigrants from mainland China, it was found that the new immigrants benefited from 'cultural capital transformations' where it not only helped them to settle in Hong Kong but also reduced the increasing conflicts between the local Hong Kong people and the mainland Chinese immigrants and promoted social harmony; for most of the disadvantaged NEET youth, it was found that the main and combined benefit of their not-for-profit education was to open up their minds and views of the world and to change their attitudes and beliefs about themselves which also enhanced their social mobility and fed the increasing demand for a highly skilled labour force in Hong Kong; for the vulnerable older adults, not-for-profit education has offered them with a better and happier retirement life and reduced the feeling of alienation and isolation when family support and care are no longer available. It also reduced government spending on medical care for the retired due to lack of family support. For the economically disadvantaged, not-for-profit education has offered them an alternative to transform their skills and provide them with better competitive

power in the labour market, and has reduced the increasing pressures and demands on social welfare, as well as enhancing social stability.

The joint and social outcomes drawn from the research show that disadvantaged not-for-profit learning in Hong Kong seems to provide a wide variety of positive social outcomes which benefit the society as a whole. However more detailed quantitative data to support and triangulate the elementary observations from this research is crucial. In addition, further research is also needed to study the possible private and social cost and consequences of the provision of this kind of so-called alternative informal learning after the Educational Reform in Hong Kong started in 2000.

8.4.5 Chinese Cultural Aspiration Towards Not-For-Profit Education and Learning

As discussed in Chapter One regarding Chinese culture and the demand of not-for-profit education, since education qualifications and achievements are deemed to be one of the crucial aspects to define a person's success in Hong Kong, nearly all the disadvantaged learners in this research said that they were happy and proud to pick up learning again, and found their not-for-profit school learning fruitful. In fact, provisions of not-for-profit education as an informal second-chance education opportunity under the current education system has fulfilled the increasing needs and demands of further education for many of the disadvantaged learners where before further education was difficult and inaccessible. Although this research was not designed to compare the cultural factors and their impact on the East and West education systems, nearly all of the disadvantaged learners in Hong Kong praised highly and appreciated their not-for-profit education experience as they found their

second chance education precious. The highly subsidised and flexible nature of not-for-profit education in fact has provided the disadvantaged in Hong Kong with a rare opportunity to fulfil their dream to go back to school to learn, in a society where education and qualifications are crucial to the disadvantaged learners' self-esteem and self-confidence under traditional Chinese Confucian values.

8.4.6 Implications for using the Conceptual Framework of Wider Benefits of Learning in the Hong Kong Context

This research is structured, conducted, and analysed with reference to the conceptual framework of wider benefits of learning developed by Schuller et al. (2004) which is based principally on research conducted in Europe and North America. Schuller et al.'s conceptual framework aims to study and explain how the learner's learning and education experiences influence the learner's complex capabilities and capitals building and accumulation process. Since the conceptual framework was developed mainly through using outcomes, data, and resources from the European and American education systems which operate under mainstream Western philosophies, values and beliefs, this section discusses the possible implications of adapting the framework to study the wider benefits of learning for the disadvantaged learners in the Hong Kong context.

Traditionally, one would think that there is little connection between the conceptual framework and the Confucian approach to education which has dominated in China. Confucianism holds that developing a person's virtues and morality is the foundation of a person's life and underpins all later acquiring of knowledge and skills. In fact, Confucius believes virtues and morality development (eg filial piety, respect,

faithfulness, love, and benevolence) are more important than the learning of knowledge and skills, and he demands that a student learn how to become a righteous man before he allows him to acquire knowledge. (Analects of Confucius, 475BC - 221BC)

子曰：「弟子，入則孝，出則弟，謹而信，汎愛眾，而親仁。行有餘力，則以學文。」《論語，學而》

Rather than emphasise virtue and moral development, Schuller et al.'s framework privileges 'capitals'. The framework measures benefits, rewards, gains, achievement and accumulation rather than virtues and morality. It tries to measure and compare the educational effects and impacts to the learner's past, present, and future life while Chinese philosophy believes virtues and moral behaviour are the foundation of whole-person development. While Schuller et al.'s framework can be seen as an utilitarian approach which attempts to assess, analyse, compare, and quantify the education received and the benefits gained, the benefits suggested by the Chinese traditional philosophy of virtues and morality are intrinsic in nature, vague in definition, subjective, unmeasurable, and often inaccessible to the researcher.

However, despite this apparent contradiction, it was not as difficult to apply Chinese traditional philosophy of virtues and morality to concept of capitals as one might think. Being colonised by the British for more than 156 years until 1997, Hong Kong's education system was modelled on Great Britain and many of its values were transmitted through its institutions. In addition, the tension between Confucian values and Schuller et al.'s 'capitals' may not be as strong as seems at first sight. For example, social and identity capitals can be interpreted as being about personal growth and not just utilitarianism. It could be argued that traditional Chinese

philosophies have been incorporated into the more Western values of capital accumulation.

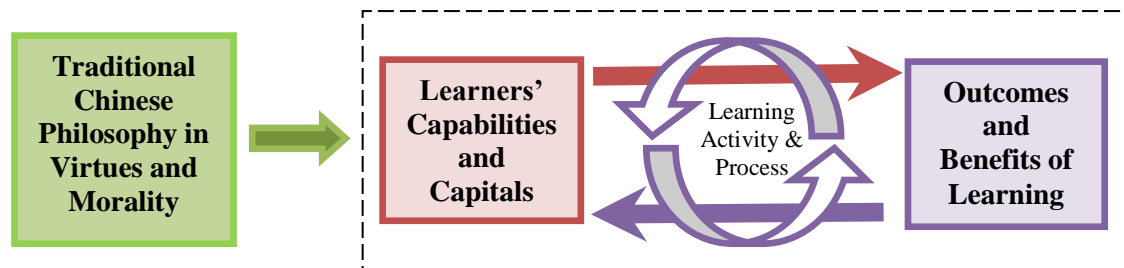


Figure 8.3: The original 'Learner's capabilities and capitals and the outcomes and benefits of learning model' (from Figure 2.7) and the 'Traditional Chinese philosophies in virtues and morality' (Source: This research)

There are likely to be further challenges, though, in applying the framework, as Hong Kong moves into a new era. Hong Kong has experienced an unprecedented and dramatic political and economic transformation and a growing cultural confrontation due to the transition of power from Britain to China in 1997. The transition from the Western system of capitalism to the Chinese social capitalist ideology has in fact frustrated many locally born Hong Kong people and creates an uncertain and unstable social system which is causing great concern. This may well change the nature of the 'capitals' which education can foster and which are valued.

To summarise, this research into the wider benefits of not-for-profit learning for disadvantaged learners in Hong Kong has shown that different learning outcomes and benefits have been derived by the various disadvantaged learner groups because of their diverse capitals and capabilities which are influenced and affected by the learner's background and attributes, as well as their personal life-changing incidents. Moreover, learner surpluses are commonly found across different learner groups and vary in different learners' cases due to diverse disadvantaged learners' personal factors and attributes, motivation to learn, and the expectation of the learning outcomes and benefits. Life-story inquiries are deemed to be the vital approach in investigating the interrelationships between disadvantaged learners' personal factors, attributes, capital and capabilities, and their learning outcomes and benefits. Although this research was designed to investigate the positive learning outcomes and effects for disadvantaged learners in Hong Kong, negative impacts and influences to the disadvantaged learners were also reported. In addition, positive joint-learning outcomes and benefits were noted both for individual learners and at a social level. However, further investigation is needed to support the findings and to investigate the possible negative private and social impacts and outcomes. However, since Chinese culture, which is dominant in Hong Kong society, places great emphasis on the importance of education, disadvantaged learners are prepared to accept any negative impacts and influences brought about by participation in not-for-profit education, as this education crucially provides them with the means to repair and regenerate their self-esteem and confidence. Lastly, the unique historical, political and economic background and cultural circumstances of Hong Kong, as well as the inherited traditional Chinese philosophy, have to be addressed when using Schuller et al.'s conceptual framework to investigate the learning benefits in Hong Kong.

CHAPTER NINE

POLICY IMPLICATIONS AND THE FUTURE RESEARCH IN WIDER BENEFITS OF NOT-FOR-PROFIT EDUCATION

9.1 Policy Implications

Learning from the life stories of the disadvantaged learners, it is found that provision of not-for-profit education is particularly effective because it is funded through government subsidy and charity and is therefore offered at lower cost than private provision, and is therefore more accessible to the vulnerable poor. Moreover, it is not government-provided, so participants in not-for-profit education who have had a bad experience of government education feel they have a second chance and less stress from it. In addition, disadvantaged learners claim that since not-for-profit education providers tend to be able to offer more flexible provisions, this helps those who have different family backgrounds and personal backgrounds to take part in the programmes. Because of the above reasons, this research suggests not-for-profit education should continue to be funded and even extended – particularly because it is a last resort for many disadvantaged learners. Moreover, it should be recognised that the benefits are multi-dimensional and success should not be measured in terms of simple outcome measures, for example number of student enrolments, number of courses offered, number of graduates, and completion rates. Not-for-profit education providers should be aware that students derive different kinds of benefits, and providers, for greater effectiveness, may need to ensure that they are maximising the benefits for particular learner groups when they plan and deliver the learning activities.

The results of this research and other previous research show that adult lifelong-based not-for-profit education has very high potential to offer different kinds of benefits to different students, especially to disadvantaged learners, for different social, cultural, economic and political reasons. However, policymakers, as well as the general public still appear not to be persuaded of the benefits of systematic and large-scale not-for-profit education. In this section, this research tries to discuss and propose to the policymakers the possibility of enhancing and enlarging the provision of not-for-profit education in Hong Kong as well as showing how it could maximise the benefits of not-for-profit education economically and socially.

9.1.1 The Need to Include Not-for-profit Education in the Qualifications Recognition System and Individual Learning Accounts (ILA)

Chapter Eight concludes and discusses the types, varieties, and dimensions of the wider benefits and outcomes of not-for-profit education for the different types of disadvantaged learners in Hong Kong. The chapter also deals with the increasing need and demand for the further education of disadvantaged learners, due to the rapidly changing social and economic environments, within the context of traditional Chinese culture, which places enormous importance on educational qualifications and achievement. Moreover, the research has also found that the diverse learning outcomes and benefits brought about by not-for-profit learning were not limited to the learner's personal level but also extended to the social level, where positive outcomes were noted. In addition, the research results also show that without proper promotion and articulation of the wider benefits of not-for-profit learning, disadvantaged learners were not able to expect and realise the potential wider benefits which are hidden in the learning process.

In order to encourage and attract more disadvantaged to come back to school to learn and to maximise the potential benefits of not-for-profit learning in different dimensions and levels, the HKSAR Government should consider including not-for-profit education in the qualifications recognition systems and should imitate the initiative by European countries to set up Individual Learning Accounts (ILA) systems. This research suggests that the Hong Kong Qualifications Framework (HKQF) and its Award Title Scheme (ATS) and Use of Credit (QF Credit) should extend to cover all the not-for-profit courses and training for the sake of better utilisation of social resources and social benefits. In fact, since 2008, the Education Bureau of the HKSAR Government has collaborated with the Scottish Credit and Qualifications Framework, and has established and launched the HKQF, and the newly developed ATS and QF Credit has just started in 2014. At the moment, HKQF only accepts and recognises some of the few award-bearing programmes offered by the not-for-profit education providers, for example Foundation Certificate and Diploma courses, and for most of the programmes and courses they are not still not yet covered by the HKQF which has no plan to include them in the qualifications system. In fact, recognition of not-for-profit education could provide different levels of benefits to the individual, organisations, and society as a whole. For instance, the OECD (2010) believes recognition of non-formal and informal learning would enhance participation and generate at least four different types of benefit:

- Economic benefits, by reducing the direct and opportunity costs of formal learning and allowing human capital to be used more productively;
- Educational benefits, that can underpin lifelong learning and career development;

- Social benefits, by improving equity and strengthening access to both further education and the labour market, for disadvantaged groups, disaffected youth and older workers;
- Psychological benefits, by making individuals more aware of their capabilities and validating their worth.

In terms of the social cost and benefits considerations as discussed in Chapter Eight, it is believed that recognition of not-for-profit education in Hong Kong will definitely at least help to reduce the social cost and government expenditure spent on disadvantaged citizens, for example health care, social welfare and housing, and to uplift the productivity and competitiveness of the economy. Though the additional values and gains generated through the widening recognition of not-for-profit education may mean possible private losses in for-profit education, for example loss in turnover as a result of the drop in student enrolments, improved economic productivity and enhanced global competitiveness resulting from improved human capital are crucial for the sustainable success of the knowledge-based economy in Hong Kong especially at a time when global competition, for example competition from Singapore, South Korea and mainland China, are becoming much keener than ever before.

Although enhancement of human capital and improvement of global competitiveness cannot be achieved in a short period of time, it is believed that to include and recognise the outcomes and qualifications of not-for-profit education in the education system would attract some economically inactive disadvantaged people, for example the so-called hidden NEET youth, the long-term unemployed and those preferring to stay on social welfare, and the early retired due to loss of their jobs, to participate in

learning as their efforts and time spent on not-for-profit education would be recognised and so they may have higher motivation and interest to participate in learning. Improved and extended lifelong and lifewide not-for-profit education however requires better and more flexible and comprehensive quality assurance systems to ensure its quality and credibility to the public, especially to employers.

In addition, along with the newly launched ‘Use of Credit’ (QF Credit) systems, the HKSAR Government should also refer to the experience of the ‘Skills Accounts’ in England and the Scottish and Welsh ‘Individual Learning Accounts’, to initiate an Individual Learning Accounts (ILA) policy and mechanism to help students record and mobilise their learning credits during their life and to promote lateral as well as vertical progression. Also by drawing from the UK and other EU countries’ experience on the ILA (European Centre for the Development of Vocational Training 2009, p. 44), the ILA can:

- widen participation in adult learning by increasing interest and uptake;
- introduce new learners to adult learning and provide an opportunity for those who have not recently participated in learning to do so;
- encourage more learning progression;
- encourage individuals to invest in their own learning;
- prioritise the learning needs of certain groups of learners; and
- support the development of quality learning providers.

It is believed that if the HKSAR government adopted the ILA systems, it would not only change the general public’s perception of the reliability and credibility of these ‘non-formal/informal’ types of disadvantaged education but may also raise other ‘advantaged/normal’ citizens’ interest to participate in lifelong learning.

9.1.2 The Need to Rebalance Educational Resources

As discussed in the previous analysis chapters, due to a rapidly changing economy and the increasing global competition, the labour forces in Hong Kong, especially the low-skilled disadvantaged group, need to be revitalised in order to sustain the competitiveness of economy. Increased income and life chance inequalities also mean unfair educational opportunities distributed across different life stages and across different social groups. Chapter Eight also reports that diverse joint learning outcomes and benefits in different dimensions and different levels have been achieved through the provision of not-for-profit education to vulnerable people.

In addition, to include not-for-profit education in the qualifications framework means new capital investments are required in improving and assuring the quality of education and higher routine spending on running better education programmes, for example better qualified teachers, better learning facilities and materials, continuous professional staff training and development, which is rather difficult for most of the not-for-profit education providers. For all these reasons, the HKSAR government's budgets on education need to be rethought and restructured. Schuller and Watsons (2009) argues resources for education should be rebalanced to reflect the increasing demands of lifelong learning which requires public agreement on the criteria for fair and effective allocation of resources for learning across the life course. In fact, some threatening and imminent social and economic changes, for example ageing population, deteriorating income inequalities and poverty problem, increasing direct competition and economic influences from mainland China, rapid technological change, global economic integration, and non-sustainable living patterns, challenge and require policymakers to review and reconsider where, when and how the educational resources should be spent. It is believed that traditional philosophy and

beliefs about heavy spending on formal compulsory education may no longer be appropriate or can be seen as negligent, unfair and/or risky; and so careful investigation and research into the cost and benefit of different types of learning and education should not be ignored. (Schuller and Watsons (2009) estimated and suggested the current spending on education in the UK based on the four age groups, ie up to 25, 25-50, 50-75, 75+ should be reallocated from 86:11:2.5:0.5 to 80:15:4:1 by 2020, that is at least 20% of educational resources should be spent on 25+).

9.1.3 The Need for a New Governing Body: Lifelong Learning Board

As discussed in the analysis chapters and in the concluding chapter, due to the increasing demand for not-for-profit education, the provision of not-for-profit education needs to be flexible and tailored to different learner groups with different backgrounds and attributes, in order to maximise learning outcomes and benefits. However, providers of not-for-profit education are hugely diverse because of their history and background, availability of resources, and the aims and purposes of education provision, as well as their strategies and responses to the market demand. Moreover, in order to effectively promote and implement the policy recommendations as suggested in 9.1.1, i.e. the need to include not-for-profit education in the qualifications recognition system and to set up individual learning accounts, and in 9.1.2, i.e. the need to rebalance educational resources, a new governing body is suggested to coordinate and to administrate the scattered not-for-profit education providers' voices and interests and to address the needs of the marginalised disadvantaged.

In fact, provision of not-for-profit education in Hong Kong is shared by a group of diverse institutes and organisations, for example voluntary organisations, cultural institutions, local community centres, religious organisations, labour unions, schools, colleges, universities, NGOs, semi-government organisations, formed under legislation and handled by government departments. While the HKSAR Government Education Bureau oversees the whole education system in Hong Kong, not-for-profit education is supervised and governed by different organisations and establishments. Besides, the YiJin programme which mainly targets disadvantaged NEET youth is run by different higher education institutes and universities and is governed by The Federation for Continuing Education in Tertiary Institutions (FCE), the Employment Retraining Board (ERB) governs different employment retraining programmes run by different not-for-profit organisations, the HKSAR Government Labour Department runs its own Youth Employment and Training Programmes (YETP) including different apprenticeship programmes, the Vocational Training Council (VTC) offers different levels of certificate and diplomas for vocationally related courses targeting young adult learners, and The Hong Kong Council of Social Service (HKCSS) coordinates and directs its agency members (social service organisations) to offer different kinds of not-for-profit education programmes. In this lack of collaborative efforts and coordination among education providers, the provisions and the future of not-for-profit education are basically directed by the sources of funds that are mainly from the government subsidies and benevolence from different social voluntary organisations. The problem is that without public and stakeholders' participation and voices to govern the operations, results, performances and future directions of the not-for-profit education, the effectiveness, credibility, benefits and the future success of not-for-profit education cannot be improved and maximised. In fact, disadvantaged

learners in this research said that they think there should be more resources, more help, more promotions, more advertisements, more encouragement and motivation, and more emphasis and understanding by the public, as well as more recognisability in the qualifications framework for not-for-profit education. Due to concerns not only for the benefits of disadvantaged learners but also for the sustainability of economic development as a result of the availability of high quality human capital, this research suggests the HKSAR government should set up a new governing body – Lifelong Learning Board – formed by a group of society-wide stakeholders to work closely with the Education Bureau to plan, to advise, to coordinate, and to oversee all post-compulsory education in Hong Kong. Since not-for-profit education in Hong Kong is the major component of lifelong learning, the interest and the future of not-for-profit education will depend on the success of the Lifelong Learning Board to:

- a) Participate in the government's long-term education and manpower development;
- b) Encourage and assist all lifelong learning programmes to be included in the Hong Kong Qualifications Framework and the credit system;
- c) Develop an 'Individual Learning Accounts' system in Hong Kong;
- d) Work closely with the Education Bureau to formulate a new education budget that addresses the social needs of lifelong learning;
- e) Promote the concept of lifelong learning to different learners, employers, institutes and communities;
- f) Improve and assure quality lifelong education through raising workforce performance and improving management skills;
- g) Encourage collaboration among education providers and support innovation and educational research and development in lifelong learning;

- h) Govern and support evaluation of organisational performance and emphasise accountability;
- i) Compare and report on lifelong learning development in Hong Kong with reference to different international comparators and standards, for example OECD indicators, European Lifelong Learning Indicators (ELLI), Social Return on Investment (SROI);
- j) Suggest and construct a universal curriculum and learning outcome framework to underpin the needs of economic and social development in Hong Kong.

9.2 The Limitations of the Research

This research is inevitably small-scale and explorative, but it also has a number of other limitations which need to be considered.

Firstly, this research was designed to investigate a problem in several areas where literature reviews from previous research were limited. This created a number of difficulties. It was hard to draw a line to describe and to define the types of not-for-profit education in Hong Kong. Because there are no clear boundaries as to what could be included, it is likely that key areas and forms of not-for-profit education have been missed out. These other types of not-for-profit education may bring about different kinds of benefits and capitals which have not been considered here.

Secondly, because little is known about the number of people engaged in not-for-profit education, we do not know how typical the accounts provided here are. In addition, because respondents were approached on a snowball basis, it may be that they are not even representative of the groups to which they have been assigned. Also, the use of in-depth interviews meant that the number of respondents is quite small. Due to limited time and resources this research has only managed to produce 23 narrative life stories to answer the research questions.

Thirdly, the research has relied entirely on life story interviews and researcher notes. The narratives provided by the disadvantaged learners are self-constructed without any other third parties or stakeholders to validate or to provide another angle of the interpretation of the disadvantaged learning experience and benefits. The research conclusions and recommendations drawn from the disadvantaged learner's life stories might have been more robust if their versions could be corroborated by accounts from

teachers, schoolmates, family members and friends etc. Such triangulation was unfortunately not possible for this project because of time constraints.

It is also possible that the research results and the policy implications and recommendations could also be affected and manipulated by the potential biases in interpretation of the disadvantaged life stories - as well as the role of the researcher himself and his interaction with informants. In particular, the researcher's previous teacher-student relationship with some of the disadvantaged NEET youth research participants may have affected the expression, and the content of the narrative life stories collected. However, while life story interview and life story writing were the only approach adopted to probe, analyse, and interpret the learning benefits of the disadvantaged in Hong Kong, the researcher has attempted to conduct the research diligently and with integrity.

It is to be hoped that further research will build on this explorative study and address some of these limitations.

9.3 Questions for Future Research

This research is one of the few studies of wider benefits of learning that build on specific learner groups, specific education providers, and specific geographic and social contexts. In fact, it was constructed based on three social phenomena observed by the researcher: rising income inequality and poverty problems, rapid development of alternative education pathways after Hong Kong returned to China in 1997, and the increasing number of disadvantaged people participating in continued education, some of whom were able to transform their lives after finishing their studies.

There are a couple of interesting areas and questions that could be answered in future research.

Firstly, this research has been focused on the four major disadvantaged groups in Hong Kong, ie disadvantaged NEET youth, economically marginalised, vulnerable older adults and deprived new immigrants from mainland China. However, no attempt has been made so far to investigate how the disadvantaged ethnic minorities, for example Nepalese, Indian and Pakistani, and disabled people benefit from their not-for-profit education. Since Hong Kong was a British colony, some of these Nepalese, Indians and Pakistanis and their families were sent to work and live in Hong Kong. Though they have been living in Hong Kong for several generations, discrimination against their ethnic origin still occurs and are easily found. For disabled people, though Hong Kong education and social policies follow an inclusive approach, inequality can still be found, for example in the workplace and in terms of social mobility.

Moreover, although discrimination against gender is illegal, the unconscious traditional Chinese values and perceptions that see women as second to men still remain in many parts of the social structure and also because of the different roles and identities of women in the family and in society, certain kinds of prejudice against women still exist. In this research, women have already been found to more easily fall into the disadvantaged category, for example because of poor education backgrounds compared with men, less working opportunities and experience, divorces and single mum circumstances. For this reason, it would be interesting to see how different types of not-for-profit education help and transform disadvantaged women learners' lives.

In addition, in investigating the 'wider' benefits of learning in this research and based on 'economic welfare' concepts, the idea of 'learner surplus' is introduced and applied to explore and explain the 'unexpected benefit gains' in not-for-profit education. Future research to explore the implications and applications of learner surplus, for example should the education providers absorb or create learner surplus and what does learner surplus mean to them; how does learner surplus influence and affect learners' motivation and choice of future education; what are the implications and interpretations of learner surplus to measure social benefits and the return of education to the policymakers' perspective, could be interesting.

9.4 Closing Comments

The reason to choose this topic and area of study is to explore the merit of not-for-profit education in transforming disadvantaged learners' lives in Hong Kong. This research on the four different disadvantaged learner groups also adds a new dimension – particular groups of learner who benefit from a particular kind of education provider in a particular geographical and social context – in the knowledge of benefits and outcomes of learning. Moreover, this research also finds using a qualitative narrative life story approach to explore and explain the causal relationship between learning and benefits and outcomes of learning appropriate, and interactivity between learner capital and capability also appropriate. In addition, the research uses a life story inquiry method to analyse the individual learner's perceptions of the benefits of their not-for-profit education which suggests that in fact learners perceived differently before and after their learning and so the idea of learner surplus is developed to present the learners' unexpected gains. Future research on the implications and applications of the learner surplus is also possible.

Furthermore, this research suggests policymakers should make not-for-profit education recognisable and included in the Hong Kong qualifications framework and considers developing Individual Learning Accounts following the success of the UK and EU experiences. Educational resources should also be rebalanced to reflect the growing needs of lifelong learning. A new governing body, a Lifelong Learning Board, should also be introduced to coordinate and govern lifelong learning in Hong Kong through which the flexibility of not-for-profit education needs to be addressed and carefully preserved.

Although it seems that this research has proven the importance and positive contribution of not-for-profit education for vulnerable people in Hong Kong in different ways, it is believed that it would be extremely difficult to persuade policymakers to develop corresponding policies to address the needs of not-for-profit education. Firstly, the influence of government policy, especially in Hong Kong, where the decision of education policy is under a semi-democratic political system and the provision of education for the disadvantaged is not the mainstream culture as many people think the education losers and failures deserve to embrace their poor life as they did not work hard for their studies when they had a chance; even the disadvantaged learners often put the blame on themselves. Moreover, many people in Hong Kong wrongly perceive not-for-profit education as just a kind of social welfare and they fail to see the wider benefits derived from this kind of learning.

Without ample quantitative and qualitative evidence to support the existence of wider benefits of not-for-profit education and without accurate understanding and knowledge of the existing problems and deficiencies of the education system in Hong Kong, and under the traditional Chinese culture and values where meritocracy and educational success are the only measures of a person's achievement, the benefits of not-for-profit education would not be fully recognised and utilised though most of the disadvantaged learners will still both treasure and rate it highly.

BIBLIOGRAPHY

- AAC&U. 2011. *The LEAP vision for learning: outcomes, practices, impact, and employers' views*. Washington DC: The Association of American Colleges and Universities.
- Aaronson, D. 1997. Sibling estimates of neighbourhood effects In: Brooks-Gunn, J., Duncan, G. and Aber, L., eds., *Neighbourhood poverty: Policy implications in studying neighbourhoods* New York: Russell Sage Foundation, pp. 80-93.
- Adam, S. 2004. *Using learning outcomes: A consideration of the nature, role, application and implications for European education of employing 'learning outcomes' at the local, national and international levels*. University of Westminster.
- Allais, S. 2012. Claims vs. practicalities: lessons about using learning outcomes. *Journal of Education and Work*. 25(3), pp. 331-354.
- An, C.B., Haveman, R. and Wolfe, B. 1993. Teen out-of-wedlock births and welfare receipt: the role of childhood events and economic circumstances. *Review of Economics and Statistics*. 75(2), pp. 195-208.
- Analects of Confucius*. 475BC - 221BC.
- Angrist, J.D. and Lavy, V. 1996. *The effect of teen childbearing and single parenthood on childhood disabilities and progress in school*. NBER Working Paper 5807, Cambridge: National Bureau of Economic Research.
- Assister, A. 1996. *Enlightened women: modernist feminism in a feminist age*. London: Routledge.
- Balatti, J., Black, S. and Falk, I. 2006. *Reframing adult literacy and numeracy course outcomes: a social capital perspective*. Adelaide: NCVET.
- Bannister, P., Burman, E., Parker, I., Taylor, M. and Tindall, C. 1994. *Qualitative research methods in psychology: A research guide*. Buckingham: Open University Press.
- Baron, S., Field, J. and Schuller, T. eds. 2000. *Social capital: critical perspectives*. Oxford University Press.
- Becker, G.S. 1964. *Human capital: A theoretical and empirical analysis*. New York: Columbia University Press.
- Behrman, J.R. and Stacey, N. eds. 1997. *The social benefits of education*. Ann Arbor: University of Michigan Press.
- Bertaux, D. and Kohli, M. 1984. The life story approach: a continental view. *Annual Reviews*. 10, pp. 215-237.

- Bertelsmann Stiftung. 2010. *Making Lifelong Learning Tangible! The ELLI Index Europe 2010*. Gutersloh: Bertelsmann Stiftung.
- BIS. 2012a. *Learning and wellbeing trajectories among older adults in England*. UK: Department for Business, Innovation & Skills.
- BIS. 2012b. *Evidence of the wider benefits of family learning: A scoping review* UK: Department for Business, Innovation & Skills.
- BIS. 2012c. *Review and update of research into the wider benefits of adult learning*. UK: Department for Business, Innovation & Skills.
- BIS. 2013a. *The impact of further education learning*. UK: Department for Business, Innovation & Skills.
- BIS. 2013b. *The economic and social benefits associated with further education and skills: Learning for those not in employment*. UK: Department for Business, Innovation & Skills.
- Blau, D. 1999. Effect of income on child development. *Review of Economics and Statistics*. 81(2), pp. 261-276.
- Bohlinger, S. 2012. Qualifications frameworks and learning outcomes: challenges for Europe's lifelong learning area. *Journal of Education and Work*. 25(3), pp. 279-297.
- Borland, K. 1991. "That's not what I said": interpretive conflict in oral narrative research In: Cluck, S.B. and Patai, D., eds., *Women's words: the feminist practice of oral history*. New York: Routledge.
- Bourdieu, P. 1977. Cultural Reproduction and Social Reproduction In: Karabel, J. and Halsey, A.H., eds., *Power and Ideology in Education*. Oxford: Oxford University Press, pp. 487-510.
- Brenton, M. 1985. *The Voluntary Sector in British Social Services*. Harlow, England: Longman.
- Brooks-Gunn, J., Duncan, G., Klebanov, P. and Sealand, N. 1993. Do neighbourhoods influence child and adolescent development? *American Journal of Sociology*. 99(2), pp. 353-395.
- Bynner, J., McIntosh, S., Vignoles, A., Dearden, L., Reed, H. and Reenen, J.V. 2001. *Improving adult basic skills: Benefits to the individual and to society*. UK: Department for Education and Employment.
- Byrne, J. 2006. Interview Schedule: Qualitative Enquiry. [Online], Available at: <http://interviewschedule.blogspot.co.uk/> [Accessed: 11 September 2010].
- Canadian Council on Learning. 2010. *The 2010 Composite Learning Index: Five years of measuring Canada's progress in lifelong learning*. Ottawa: Canadian Council of Learning.

- Case, A. and Katz, L. 1991. *The company you keep: the effects of family and neighbourhood on disadvantaged youths* NBER Working Paper 3705, Cambridge: National Bureau of Economic Research.
- CDELL. 2007. *The teaching, learning and assessment of generic employability skills*. Centre for Developing and Evaluating Lifelong Learning, University of Nottingham; South West Skills and Learning Intelligence Module, University of Exeter.
- Central Intelligence Agency. 2012. *The World Fact Book*. [Online], Available at: <https://www.cia.gov/library/publications/the-world-factbook/rankorder/2004rank.html?countryname=Hong%20Kong&countrycode=hk®ionCode=eas&rank=14#hk> [Accessed: 1 February 2013].
- Central Intelligence Agency. 2013. *The World Fact Book*. [Online], Available at: <https://www.cia.gov/library/publications/the-world-factbook/rankorder/2004rank.html?countryname=Hong%20Kong&countrycode=hk®ionCode=eas&rank=14#hk> [Accessed: 1 February 2013].
- CfPS. 2011. *Measuring what matters: a guide for overview and scrutiny committees about using 'social return on investment' to measure social value*, UK: Centre for Public Scrutiny, Cabinet Office.
- Chan, S.K. 1999. *Distinction between continuing education and vocational education: some trends in the education of adults in Hong Kong*. In: ALA National Conference, 1999 *Crossing Thresholds: Adult Learning in Times of Community Transition*.
- Chase, S.E. 1995. *Taking narrative seriously: consequences for method and theory in interview studies* In: Josselson, R. and Lieblich, A., eds., *Interpreting experience: the narrative study of lives*. London: Sage Publications Ltd., pp. 1-26.
- Chase-Lansdale, L.P. and Gordon, R.A. 1996. *Economic hardship and the development of five- and six-year-olds: neighbourhood and regional perspectives*. *Child Development*. 67(6), pp. 3338-3367.
- Cheng, K. 1998. *The Education System* In: Postiglione, G. and Lee, W., eds., *Schooling in Hong Kong (Organisation, teaching and social context)*. Hong Kong: Hong Kong University Press.
- Cheung, K. 2006. *Recent continuing education policies in Hong Kong: A focus on short-term performance through inducements*. *International Educational Journal*. 7(7), pp. 992-1006.
- Clark, R. 1992. *Neighbourhood effects on dropping out among teenage boys* Urban Institute Working Paper PSC-DSC-UI-13, Washington: Urban Institute.
- Clough, P. and Nutbrown, C. 2002. *A students' guide to methodology: justifying enquiry*.

- Communities Scotland. 2006. Literature review of the outcomes of community learning and development. Edinburgh: Communities Scotland.
- Conlisk, J. 1971. A bit of evidence on the income-education-ability interrelation. *Journal of Human Resources*. 6(3), pp. 358-362.
- Corman, H. 1986. The demand for education for home production. *Economic Inquiry*. 24(2), pp. 213-230.
- Crane, J. 1991. The epidemic theory of ghettos and neighbourhood effects on dropping out and teenage childbearing. *American Journal of Sociology*. 96(5), pp. 1226-1259.
- Datcher, L. 1982. Effects of community and family background on achievement. *The Review of Economics and Statistics*. 64(1), pp. 32-41.
- Delors et al. 1996. *Learning: The Treasure Within*. Report to UNESCO of the International Commission on Education for the Twenty-first Century. Paris: UNESCO.
- Desjardins, R. and Schuller, T. 2006. Understanding the social outcomes of learning In: OECD, ed. *Measuring the effects of education on health and civic engagement: proceedings of the Copenhagen symposium*. Paris: OECD.
- Duncan, G. 1994. Families and neighbours as sources of disadvantage in the schooling decisions of white and black adolescents. *American Journal of Education*. 103(1), pp. 20-53.
- Duncan, G., Connell, J.P. and Klebanov, P. 1997. Conceptual and methodological issues in estimating causal effects of neighbourhoods and family conditions on individual development In: Brooks-Gunn, J., Duncan, G. and Aber, L., eds., *Neighbourhood poverty: context and consequences for children*. New York: Russell Sage Foundation, pp. 219-250.
- Edwards, L.N. and Grossman, M. 1979. The relationship between children's health and intellectual development In: Mushkin, S. and Dunlop, D., eds., *Health: What is it worth? Measures of health benefits*. Elmsford, New York: Pergamon Press, pp. 273-314.
- Employees Retraining Board. 2012. 2011-2012 Annual Report. Hong Kong: Employees Retraining Board.
- European Centre for the Development of Vocational Training. 2009. *Individual learning accounts*. Luxembourg: European Centre for the Development of Vocational Training.
- Feldman, J., Makuc, D., Kleinman, J. and Cornoni-Huntley, J. 1989. National trends in educational differentials in mortality. *American Journal of Epidemiology*. 129(5), pp. 919-933.

- Field, J. 2005. *Social capital and lifelong learning*. Bristol: Policy Press.
- Flax, J. 1990. *Thinking fragments*. Berkeley: University of California Press.
- Freeman, R.B. 1997. Working for nothing: the supply of volunteer labour. *Journal of Labour Economics*. 15(1), pp. 140-166.
- Glewwe, P. 1999. Why does mother's schooling raise child health in developing countries? Evidence from Morocco. *Journal of Human Resources*. 34(1), pp. 124-159.
- Goodley, D. 2004. *Researching life stories : method, theory and analyses in a biographical age*. London: RoutledgeFalmer.
- Goodley, D., Lawthorn, R., Clough, P. and Moore, M. 2004. *Researching life stories: method, theory and analyses in a biographical age*. London: RoutledgeFalmer.
- Goodley, D., Lawthorn, R., Tindall, C., Tobbell, J. and Wetherell, M. 2002. *Understanding people: qualitative methods*. Oxford: Alden Press.
- Grossman, M. and Jacobowitz, S. 1981. Variations in infant mortality rates among counties in the United States: The roles of public policies and programs. *Demography*. 18(4), pp. 695-713.
- Grossman, M. and Joyce, T. 1989. Socio-economic status and health: A personal research perspective In: Bunker, J., Gomby, D. and Kehrer, B., eds., *Pathways to health: The role of social factors*. Menlo Park: Henry J. Kaiser Foundation.
- Gubrium, J.F. and Holstein, J.A. 1995. Biographical work and new ethnography In: Josselson, R. and Lieblich, A., eds., *Interpreting experience: the narrative study of lives*. London: Sage Publications.
- Hammond, C. and Feinstein, L. 2005. The effects of adult learning on self-efficacy. *London Review of Education*. 3(3), pp. 265-287.
- Hansen, W.L. 1963. Total and private rates of return to investment in schooling. *Journal of Political Economy*. 71(2), pp. 128-140.
- Haveman, R. and Wolfe, B. 1984. Schooling and economic well-being: the role of non-market effects. *Journal of Human Resources*. 19(3), pp. 377-407.
- Haveman, R., Wolfe, B. and Spaulding, J. 1991. Childhood events and circumstances influencing high school completion. *Demography*. 28(1), pp. 133-157.
- HKCSS. 2012. *The Annual Report 2012*. Hong Kong: Hong Kong Council of Social Service.
- HKCSS. 2013. *Youth employment and social mobility*. In: Hong Kong, Hong Kong Council of Social Service.

- HKSAR Government. 2000. Reform Proposals for the Education System in Hong Kong, Hong Kong: Hong Kong Special Administrative Region Government.
- HKSAR Government. 2009. Hong Kong Annual Digest of Statistics 2009, Hong Kong: Hong Kong Special Administration Region Government.
- HKSAR Government. 2011. Hong Kong Statistics 2011, Hong Kong: Hong Kong Special Administrative Region Government.
- HKSAR Government. 2012a. Hong Kong Annual Digest of Statistics 2012, Hong Kong: Hong Kong Special Administration Region Government.
- HKSAR Government. 2012b. Understanding non-engaged youths in Hong Kong: A mixed method approach, Hong Kong: The Hong Kong University of Science and Technology.
- HKSAR Government. 2013a. The Budget 2012-2013, Hong Kong: Hong Kong Special Administrative Region Government.
- HKSAR Government. 2013b. Hong Kong Annual Digest of Statistics 2013, Hong Kong: Hong Kong Special Administration Region Government.
- HKSAR Government. 2013c. Hong Kong Poverty Situation Report 2012, Hong Kong: Hong Kong Special Administrative Region Government.
- Hodgkinson, V. and Weitzman, M. 1988. Giving and volunteering in the United States: Findings from a national survey. Washington: Independent Sector.
- Hong Kong Tourism Board. 2012. Hong Kong: The Facts. Tourism, Hong Kong: Information Services Department, Hong Kong Special Administrative Region Government.
- Hudson, L. and Andersson, D. 2006. Understanding the social outcomes of learning In: OECD, ed. Measuring the effects of education on health and civic engagement: proceedings of the Copenhagen symposium. Paris: OECD.
- Janmaat, J.G. and Green, A. 2013. Skills inequality, adult learning and social cohesion in the United Kingdom. *British Journal of Educational Studies*. 61(1), pp. 7-24.
- Josselson, R. 1995. Imagining the real: empathy, narrative, and the dialogic self In: Josselson, R. and Lieblich, A., eds., *Interpreting experience: the narrative study of lives*. London: Sage Publications Ltd., pp. 27-44.
- Kendall, J. and Knapp, M. 1996. *The Voluntary Sector in the UK*. Manchester: Manchester University Press.

- Kendall, J. and Knapp, M. 1997. The United Kingdom In: Salamon, L. and Anheier, H., eds., *Defining the Nonprofit Sector: A Cross-National Analysis*. Manchester: Manchester University Press.
- Kenkel, D. 1991. Health behaviour, health knowledge, and schooling. *Journal of Political Economy*. 99(2), pp. 287-305.
- Kennedy, P. 2002. Learning cultures and learning styles - myth-understandings about adult (Hong Kong) Chinese learners. *International Journal of Lifelong Education*. 21(5), pp. 430-445.
- King, E. and Hill, M.A. eds. 1993. *Women's education in developing countries*. Baltimore: John Hopkins University Press.
- Lam, D. and Duryea, S. 1999. Effects of schooling on fertility, labour supply, and investments in children, with evidence from Brazil. *Journal of Human Resources*. 34(1), pp. 160-192.
- Lam, W. and Perry, J. 2000. The Role of the Nonprofit Sector in Hong Kong's Development. *Voluntas: International Journal of Voluntary and Nonprofit Organizations*. 11(4), pp. 355-373.
- Larson, C. 1997. Representing the subject: problems in personal narrative inquiry. *Qualitative Studies in Education*. 10(4), pp. 455-470.
- Lau, S. (2013) 'Mainland Chinese migrants since 1997 now make up 10pc of Hong Kong population', *South China Morning Post*, 21 March 2013,
- Lee, E.W.Y. 2005. Nonprofit Development in Hong Kong: The Case of a Statist-Corporatist Regime. *Voluntas: International Journal of Voluntary and Nonprofit Organizations*. 16(1), pp. 51-68.
- Lee, L.F. 1982. Health and wage: A simultaneous equation model with multiple discrete indicators. *International Economic Review*. 23(1), pp. 199-221.
- Lillard, D. 1993. Neighbourhood effects on educational attainment. CEH Working Paper, NY, Ithaca: Cornell University.
- Mainguet, C. and Baye, A. 2006. Understanding the social outcomes of learning In: OECD, ed. *Measuring the effects of education on health and civic engagement: proceedings of the Copenhagen symposium*. Paris: OECD.
- Manski, C., Sandefur, G., McLanahan, S. and Powers, D. 1992. Alternative estimates of the effect of family structure during adolescence on high school graduation. *Journal of the American Statistical Association*. 87(417), pp. 25-37.
- Marks, G., Flemin, N., Long, M. and McMillan, J. 2000. *Patterns of Participation in Year 12 and Higher Education in Australia: Trends and Issues*. 17, Australian Council for Educational Research.

- Mayer, S. 2003. What is a "Disadvantaged Group"? Minneapolis: Effective Communities Project.
- McMahon, W. 1997. Conceptual framework for measuring the total social and private benefits of education. *International Journal of Educational Research*. 27(6), pp. 453-481.
- Michael, R.T. 1982. Measuring non-monetary benefits of education: A survey In: McMahon, W. and Geske, T., eds., *Financing education: overcoming inefficiency and inequity*. Urbana: University of Illinois Press.
- Mincer, J. 1962. On-the-job training: costs, returns, and some implications. *Journal of Political Economy*. 70(5), pp. 50-79.
- Miners, N. 1991. *The Government and Politics of Hong Kong*. 5th ed., Hong Kong: Oxford University Press.
- Mishler, E.G. 1986. *Research interviewing : context and narrative*. Cambridge, Mass.: Harvard University Press.
- Murnane, R., J. 1981. New evidence on the relationship between mother's education and children's cognitive skills. *Economics of Education Review*. 1(2), pp. 245-252.
- NIACE Dysgu Cymru. 2008. *The wider benefits of adult learning*. Cardiff: National Institute of Adult Continuing Education, Welsh Assembly Government.
- Ochs, E. and Capps, L. 2001. *Living narrative: creating lives in everyday storytelling*. Cambridge, MA: Harvard University Press.
- OECD. 2001. *The well-being of nations: The role of human and social capital*. Paris: OECD.
- OECD. 2006. *Measuring the effects on education on health and civic engagement: proceedings of the Copenhagen symposium*. Paris: OECD.
- OECD. 2010. *Recognition of non-formal and informal learning: pointers for policy development*. Paris: OECD, Directorate for Education, Education and Training Policy Division.
- OECD. 2012. *PISA 2012 Results*. [Online], Available at: <http://www.oecd.org/pisa/keyfindings/pisa-2012-results.htm> [Accessed: 1 February 2014].
- Ogbu, J.U. 1992. Understanding cultural diversity and learning. *Educational Researcher*. 21, pp. 5-14.
- Plotnick, R. and Hoffman, S. 1999. The effect of neighbourhood characteristics on young adult outcomes: alternative estimates. *Social Science Quarterly*. 80(1), pp. 1-18.

- Plummer, K. 2001. Documents of life 2 : an invitation to a critical humanism. 2nd ed., London: SAGE.
- Polanyi, L. 1985. Telling the American story: A structural and cultural analysis of conversational storytelling. Norwood, NJ: Ablex.
- Polkinghorne, D.E. 1995. Narrative configuration in qualitative analysis In: Hatch, J.A. and Wisniewski, R., eds., Life history and narrative. London: Falmer Press.
- Putnam, R. 1993. Making democracy work. Princeton University Press.
- Ren, Y. 1997. NGO's in Hong Kong: The present and the future. *Journal of Contemporary China*. 6(449-460).
- Rizzo, J. and Zeckhauser, R. 1992. Advertising and the price, quantity, and quality of primary care physician services. *Journal of Human Resources*. 27(3), pp. 381-421.
- Roberts, B. 2002. Biographical research. Understanding social research. Buckingham: Open University Press.
- Ross, S. and Gray, J. 2005. Transitions and Re-engagement through Second Chance Education. *The Australian Educational Researcher*. 32(3), pp. 103-140.
- Salamon, L.M. and Anheier, H.K. 1997. Defining the nonprofit sector : a cross-national analysis. Johns Hopkins nonprofit sector series. Manchester: Manchester University Press.
- Salamon, L.M., Anheier, H.K., List, R., Toepler, S. and Sokolowski, S.W. 1999. Global civil society: Dimensions of the non-profit sector. Baltimore: Johns Hopkins University.
- Schuller, T., Bynner, J., Green, A., Blackwell, L., Hammond, C., Preston, J. and Gough, M. 2001. Modelling and measuring the wider benefits of learning: a synthesis. London: Centre for Research on the Wider Benefits of Learning, Institute of Education.
- Schuller, T., Preston, J., Hammond, C., Brassett-Grundy, A. and Bynner, J. 2004. The benefits of learning: the impact of education on health, family life, and social capital. London: Routledge.
- Schuller, T. and Watson, D. 2009. Learning through life: inquiry into the future for lifelong learning. Leicester: National Institute of Adult Continuing Education.
- Schultz, T.P. 1994. Human capital, family planning and their effects on population growth. *The American Economic Review*. 84(2), pp. 255-260.

- Schultz, T.W. 1961. Investment in human capital. *American Economic Review*. 51(1), pp. 1-17.
- Schutze, F. 1980. *Prozesstrukturen des Lebensablaufs*. pp. 67-156.
- Shi, L. 2008. Rural migrant workers in China: scenario, challenges and public policy. Working Paper No.89, Geneva: Policy Integration and Statistics Department, International Labour Organisation.
- Stanley, L. 1994. Sister under skin? Oral histories and auto/biographies. *Oral History*. 22(2), pp. 88-89.
- Steinberg, L., Dornbusch, S.M. and Brown, B.B. 1992. Ethnic differences in adolescent achievement. *American Psychologist*. 47, pp. 723-729.
- Strauss, J. 1990. Households, communities, and preschool children's nutrition outcomes: evidence from rural Cote d'Ivoire. *Economic Development and Cultural Change*. 38(2), pp. 231-261.
- Strauss, J., Gertler, P., Rahman, O. and Fox, K. 1993. Gender and life cycle differentials in the patterns and determinants of adult health. *Journal of Human Resources*. 28(4), pp. 791-837.
- Sturman, A. 1985. Immigrant Australians and Education. *Australian Educational Review*. 22.
- Taylor, R. 1994. Report on the school of professional and continuing education. Hong Kong: The University of Hong Kong.
- The Scottish Government. 2008. Building connections, getting involved: Measuring social capital outcomes of community learning and development. Edinburgh: The Scottish Government.
- The World Bank. 2012. EdStats Dashboards. [Online], Available at: http://datatopics.worldbank.org/education/wDashboard/tbl_index.aspx [Accessed: 1 February 2014].
- The Young Foundation. 2012. A framework of outcomes for young people. UK: The Young Foundation.
- Thoman, D., Strauss, J. and Henriques, M. 1991. How does mother's education affect child height? *Journal of Human Resources*. 26(2), pp. 183-211.
- Tweed, R.G. and Lehman, D.R. 2002. Learning considered within a cultural context: Confucian and Socratic approaches. *American Psychologist*. 57, pp. 89-99.
- UNESCO. 2011. Education: Enrolment. [Online], Available at: <http://data.uis.unesco.org/Index.aspx?queryid=128> [Accessed: 1 February 2014].

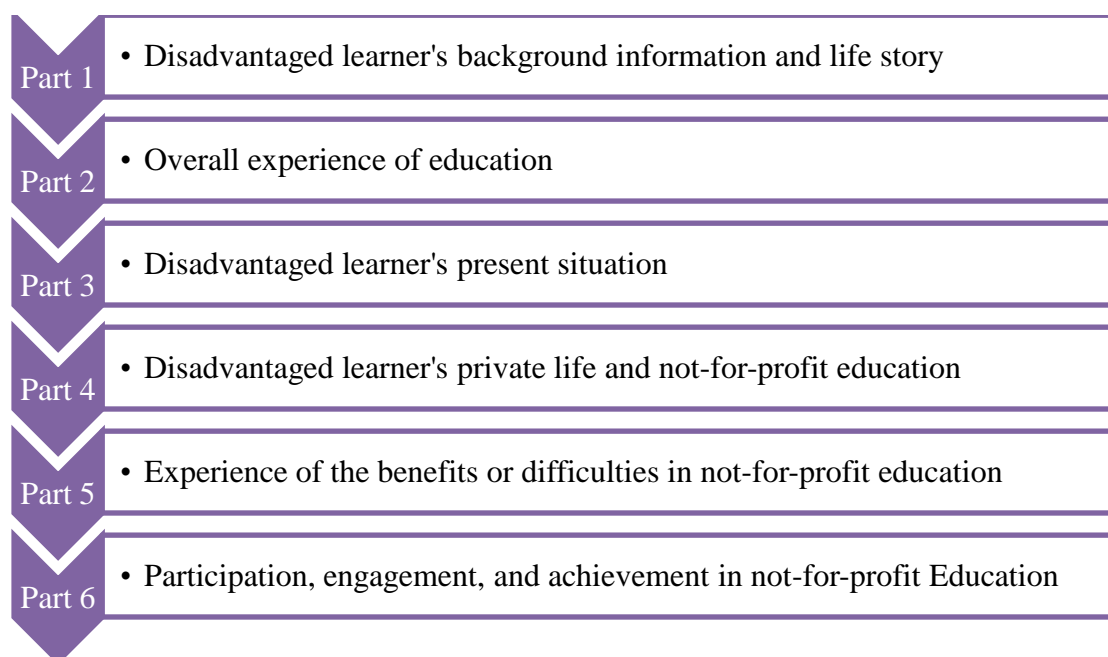
- Van de Werfhorst, H.G. 2010. Cultural capital: strengths, weaknesses and two advancements. *British Journal of Sociology of Education*. 31(2), p. 157.
- Watson, J. 2012. Profitable portfolio: capital that counts in higher education. *British Journal of Sociology of Education*. 34(3), pp. 412-430.
- Weedon, C. 1987. *Feminist practice and poststructuralist theory*. Oxford: Basil Blackwell.
- Werquin, P. 2012. The missing link to connect education and employment: recognition of non-formal and informal learning outcomes. *Journal of Education and Work*. 25(3), pp. 259-278.
- Wilding, P. 1997. Social Policy and Social Development in Hong Kong. *Asian Journal of Public Administration*. 19(2), pp. 244-275.
- Wolfe, B. and Haveman, R. 2001. Accounting for the social and non-market benefits of education. Institute for Research on Poverty, University of Wisconsin System.
- Wolfe, B. and Zuvekas, S. 1997. Nonmarket outcomes of schooling. *International Journal of Educational Research*. 27(6), pp. 491-502.
- Wong, E.O.W. 2005. Operationalization of strategic change in continuing education. *International Journal of Educational Management*. 19(5), pp. 383-395.
- Wozniak, G. 1987. Human capital, information, and the early adoption of new technology. *Journal of Human Resources*. 22(1), pp. 101-112.
- Young, E.C.M. 2008. Continuing education in a lifelong learning society - the Hong Kong model. *International Journal of Lifelong Education*. 27(5), pp. 525-533.

APPENDIX I: SEMI-STRUCTURED LIFE STORY INTERVIEW SCHEDULE

Study of the Wider Benefits of Not-for-profit Education for the Disadvantaged Learners in Hong Kong

Semi-Structured Life Story Interview Schedule

This semi-structured life story interview comprises six parts of questions. Questions will ONLY be asked if the life story told by the disadvantaged learner did not cover the information required.



Reference: Byrne, J. (2006)

Part 1 – Disadvantaged learner’s background information and life story

Q1. Can you tell me about yourself and your life story?

Prompts: invite interviewee’s life stories, age, work, family, partner, friends, interests and hobbies, social activities, health, religious, beliefs, values, characters, personality, psychological status, burdens, difficulties, pains, duties, worries, hopes, plans, etc.

Part 2 – Overall experience of education

Q2. What was your experience of education?

Prompts: Interviewee’s parents education background? It includes all kinds of education experience. How comfortable or uncomfortable was it as an experience? How taxing or demanding was it? How pleasurable or painful was it? How positive or negative was it? Overall experience of education

Q3. What did you gain/loss from education?

Prompts: Did you gain/loss a little or a lot? Did you gain/lose in terms of your thinking? Your feelings? Your behaviours? Spiritually? Mentally? In what ways did you gain/lose?

Q4. Was there any particular incident in your education which you saw as a 'turning point' or affect you significantly?

Prompts: What happened? Who did what? What did it mean? What effect did it have? Why was it a turning point, or positive/negative event?

Part 3 - Disadvantaged learner's present situation

Q5a. Compare with your life today, what was your pre-not-for-profit education world like?

Prompts: How were you feeling? How were you coping? How were you behaving? What was the quality of your life like? etc.

Q5b. What was your immediate post- not-for-profit education world like, and how did it differ from the previous reality?

Prompts: How did you feel, cope or behave that was different or better? In what way(s) was the quality of your life improved?

Q6a. How happy were you before not-for-profit education?

Prompts: How much pressure did you have in your life? How much displeasure, or unpleasantness, did you have in your life? How satisfied were you with your life?

Q6b. How happy are you now, having completed your not-for-profit education?

Prompts: How much pleasure do you experience in your life? Any new pleasures? How much displeasure/ unpleasantness do you experience in your life? Any eliminated displeasures/ unpleasantness? How satisfied are you overall?

Q7a. How contented or discontented were you before not-for-profit education?

Prompts: Did you think your life was pretty comfortable and pleasant? Did you count your 'blessings', no matter how limited? Or did you lament the restrictions, frustrations or difficulties in your life? Did you trim your desires to fit what was possible, or did you have goals that could hardly be reached?

Q7b. How contented or discontented are you now, after completing not-for-profit education?

Prompts: Have you become more contented? Have you eliminated some discontents? Have you any notable discontents left? Do you count your blessings more than you did before NPE? Do you now trim your desires to what seems achievable?

Q8a. How much 'dignity' did you experience before entering not-for-profit education?

Prompts: Did you possess some degree of choice and control over your life? Did your life seem worthwhile? Did you experience equality in your relationships?

Q8b. How much ‘dignity’ do you experience in your life today, after not-for-profit education?

Prompts: Do you possess some degree of choice and control over your life? Do you distinguish between what can and what cannot be controlled? Does your life seem more or less worthwhile? Do you have a sense of purpose in your life? Do you experience greater equality in your relationships?

Q9a. What was your view of your ‘self’ before not-for-profit education?

Prompts: How did you feel about yourself? How did you act towards yourself? How did you cope with yourself? etc.

Q9b. What was your view of your ‘self’ after not-for-profit education?

Prompts: How did you feel about yourself that was different or better? What was different about how you thought about yourself? Etc.

Part 4 – Disadvantaged learner’s private life and not-for-profit education

Q10a. How did other people relate to you before your not-for-profit education?

Prompts: Did people generally like you or ‘esteem’ you? Were they drawn to you? Did they avoid you? Did significant others treat you with dignity and respect?

Q10b. How do other people relate to you now that you have completed your not-for-profit education?

Prompts: Do you experience being liked more, less or about the same? Have any new people been drawn to you? Do people avoid you more, or less, or about the same? Do significant others treat you with more dignity and respect than before, or less, or about the same?

Q11a. How much meaningful activity did you have in your life before your not-for-profit education?

Prompts: List the types of personally meaningful activity you had in your life. Examples: Family activities; meetings with friends; work/career; church or club activities; education or leisure; etc.

Q11b. How much meaningful activity do you now have in your life, since completing not-for-profit education?

Prompts: List the types of personally meaningful activity you have in your life. Examples: Family activities; meetings with friends; work/career; church or club activities; education or leisure; etc.

Q12a. Were you in employment/self-employment/homemaker-role before enrolling not-for-profit education?

Prompts: Yes or no? Type of work? Happy with your job/role? Happy with your income? Level of stress? Happy with relationships at work? And so on. If unemployed, how did you cope with this situation? How were you affected: emotionally? Behaviourally? Intellectually? Financially? Socially? etc.

Q12b. Are you now in employment/self-employment/homemaker-role, in your post- not-for-profit education world?

Prompts: Yes or no? Type of work? Happy with your job/role? Happy with your income? Level of stress? Happy with relationships at work? And so on. If unemployed, how are you coping with this situation? How are you affected: emotionally? Behaviourally? Intellectually? Financially? Socially? etc.

Part 5 – Experience of the benefits or weakness of not-for-profit education

Q13. What do you see as the main gains of not-for-profit education for you?

Prompts: Emotionally? Practically? Intellectually? Spiritually? In relationships? At home? At work? etc.

Q14. In your view, what were the ‘active ingredients’ in your not-for-profit education?

Prompts: What did your teacher/schoolmates/course/school do? say? or give? that made the difference to your ‘improvement’?

Q15. What did you do during not-for-profit education that could account for your positive outcome?

Prompts: What did you change? Give up? Take up, start or adjust? In terms of thinking? Feeling? Behaving? Relating? Do you think you could have done this without teacher /schoolmates/ course/ school’s help?

Q16. Can you remember any words, phrases, statements, beliefs or attitudes that you learned from your not-for-profit education?

Prompts: Advice or guidance? Comments or statements? Funny images? Memorable ideas that have stayed with you?

Part 6 – Participation, engagement, and achievement in not-for-profit education

Q17. What actually happened during your not-for-profit education?

Prompts: What was your learning about? What did it involve? What actually was it ‘constructed from’? What are the participation, engagement, and achievement like?

Q18. What could your teacher/course/school have done differently, or additionally, in order to make your experience of not-for-profit education better than it was?

Prompts: In terms of their actions and behaviours? Their words? Their attitude towards you or your learning? Their ‘way of being’? The way they related to you? Their learning facilities? Their curriculum? Teaching and learning? How to make it better? And so on.

APPENDIX II: SAMPLE DATA ANALYSIS

Summary of the Wider Benefits of Not-for-profit Learning for the Older Adults Disadvantaged Learners

Disadvantaged Older Adult Learners (<i>Not-for-profit Education Attended</i>)	Capitals and Perceived Benefits of Not-for-profit Education							
	Social Capital		Human Capital		Identity Capital			
	(1) Friends and Social Networks	(2) Civic Participation	(3) Knowledge and Skills	(4) Job Opportunity	(5) Motivate to Learn and Learning Needs	(6) Reduce Stress and Enjoyment	(7) Plans and Goals	(8) Open-mindedness
Mary (<i>ERB, Community Centre, Religious Group</i>)	G(Q)	G	G(Q)	G(Q)	G	G	G(Q)	G(Q)
Kwai-fun (<i>ERB, Community Centre, Religious Group, Elderly College</i>)	G	G(Q)	G(Q)		G	G		
Lai-kuen (<i>ERB, Community Centre, Religious Group</i>)	G	G(Q)	G	G	G(Q)	G(Q)		

1. Mary

Mary was born in 1957 in a big family with seven children in Macau. Her mum was a nurse and was originated from Shanghai and moved to the Portuguese colonised Macau to escape from the Chinese civil war. Mary's Portuguese father was a soldier and was sent by the government to defence in Macau, he worked as a policeman and sailor after he left his army services. Mary's parents met and married in Macau and gave birth of all their children there during 1940s and 50s. Since the family poverty and poor economic situations after war time, Mary's childhood was very difficult where she was like a wild kid dressed without proper clothing and shoes, ate poor food, and always slept in cold bed. Since Mary's father was always away home and only sent very little money back home once a year, her family relied on the government to provide some very basic food for them to survive. Mary's father was a bad drunk with poor tempers where he always beat her and her sisters which it caused Mary afraid of him a lot. Mary did not like her Portuguese father and since her father backed to Portugal after her mother died, she did not contact him anymore. Mary received very little education and she started working in a cloth factory when she was still very young. Later she changed her job and worked in the newly opened famous casino in Macau. Because for her family background, Mary grown-up with very strong and rebellious characters and since she was a mix with young beautiful face, she did not worked very hard in the casino and spent most of her time playing around with different people. She married her 35 years old husband from Hong Kong when she was only 19 and gave birth of their twin daughters in the same year. After she married she moved to live in Hong Kong. However, Mary's husband died in cancer when she was only at her 30. Since then Mary turned to become very difficult and she needed to work very hard for different part-time jobs to sustain her family and her children's life. Mary married her second husband and gave birth to her son but her second marriage has only lasted for 9 years where she said she was always argued and fought with her second husband and maintained very bad relationship with mother-in-law. After the end-up of her second marriage and since her two daughters finished education and started working, Mary started joining and kept-on learning in different not-for-profit education programmes to enhance her skills and qualifications, and to learn new interest and knowledge. The ERB employment retraining had provided Mary the skills and the certificate, and opened the job opportunity to her to work a part-time house cleaner in the last few years. Mary has also joined different interest related course such as different cooking courses, sewing and tailoring, Chinese calligraphy, drawing, Chinese language, computer skills etc. Moreover Mary has also routinely participated different volunteer works and social services in different not-for-profit organisations. Mary had suffered an unexpected horrible mental collapse and serious depression few years ago and it nearly cost her life. After her quick and sudden recovery she participated more not-for-profit learning and social services as she believed it can keep her occupied and busy socialise, and to expand her life principles and wisdoms. Mary was satisfied and happy with her life now as her twin daughters have worked in a very good job and both of them have married; Mary was also very enjoy the very good relationship with her two son-in-laws. However, Mary found her poor education, ignorant, and stubborn character have not helped her 17 years old son's to learn and develop as she had badly spoiled him and caused him a lot of personal problems where she has worried a lot.

<i>Benefits of learning</i>	<i>Evidence</i>	<i>Types</i>
Open one's mind New knowledge Principles of life Different benefits for different learners	<p>"I think learning means knowledge; I now know more new things and it has definitely helped me in different dimensions. It helps me to learn and understand the principles of life and helps me to absorb more diverse new knowledge through stronger brainpower. More study definitely helps me as I will gain knowledge and it is important to me as I like to advance myself. Everyone pursues different things and different knowledge, and if someone can benefit from their continuous study, then they should go for it." (35.16)</p> <p>"My learning helps me to learn the principles of life and I won't be that stubborn and unreasonable... When I was young, I was narrow-minded and very stubborn. I never took others' feelings into my consideration, I just did what I liked, and I was a barbaric and unreasonable person. Even my ex-husband said my character was very wild and irrational. It may have been because no one taught me when I was a child and I did not study much; I was very rude, and I did not know how to negotiate and express myself slowly, I was an impulsive and impatient person." (37.55)</p>	<p>Knowledge and Skills</p> <p>Open-mindedness</p>
Qualification, social-exclusions Pursue of dreams and hopes	<p>"After I divorced, I needed to increase my value. When I went for a job interview, they asked for my qualifications. I have only primary education qualifications and the employer thought I was not suitable for the job. I did not have even Form 3 or 4 (Year 10 or 11) qualifications and I did not have any chance at all to work at even much lower levels of job. If I had qualifications, I could increase my value and I could do the things I like. I want to be a cook and I want to publish my own cookbook, but I can't do it now. Since I want to achieve my dream, I will carry on my studies." (42.45)</p>	<p>Qualifications</p> <p>Job Opportunities</p> <p>Hopes</p>
Learning to become independent Bring hopes and better future	<p>"I really treasure my opportunity to study and learn now. In fact, I know nothing and I need to rely on other people, I need to ask them for help. I hope through my learning I can be more independent and so I do not need to rely on others. I hope my life could be better and so I will have no regrets. I have already passed half of my life and I hope another half of my life will be better." (44.07)</p>	<p>Plans & Goals</p>
Redeem of the deficiencies in education	<p>"A lot of women like me at my age did not have a chance to receive education when they were young. I have more than 20 classmates and most of us are illiterate. So I wish not-for-profit organisations or the government could provide us with more learning opportunities so that we can</p>	<p>Learning Needs</p>

	redeem our deficiencies in education. It would be great and I wish those people like me who have only primary qualification could have a path to study and advance themselves.” (45.25)	
Low self-esteem due to poor education qualification	“Government should promote and let more people know about the opportunities to study. There are a lot of people like me, for example people without qualifications, and they don’t dare to tell other people that they do not have qualifications as they don’t want to lose face and are afraid that other people will look down on them.” (45.51)	Learning Needs Motivate to learn
Demand of learning Subsidise could encourage people to learn	“I reckon there are a lot of people of my age who would really like to learn. However, since it is costly to study a course and many of them could not afford to pay, they decided not to go for learning. If the government could subsidise us to learn, I think there would be a lot more people studying, and it would benefit a lot more people. If the government could subsidise learning, it would not be necessary for the learner to achieve a very high qualification but it would be good enough for them to complete a secondary qualification. Many courses need to be paid for and many people choose not to go for study. How could they pay the fees especially when it is so difficult to earn their living at the moment?” (46.35)	Learning Needs
Meeting many new friends in class Happy to talk and share But all are different	“I have many friends in school and I associate very well with all of them because I like to talk and be sociable. I am a very simple-minded woman and I like to talk and share my happy things and the things I know with other people. When I was attending a Chinese and Western cooking course for a month, I met 25 new classmates and they were all different. When I joined a homecare assistants course, I met another group of people, and again everyone was different. I have a couple of very good friends in school and we talk and laugh a lot, and so I am very happy and enjoy my life” (01.10.34)	Friends and social networks
Not able to teach and communicate with her son Blamed on lack of education when she was young	“If I were a well educated person, and if I know more knowledge, I may know how to teach my son. Now it is very difficult to teach him, he has his own world, he can’t communicate with us.” (50.35) “I have wasted a lot of opportunities, I should have someone remind me and I will pay lot more efforts to study, I am a kind of person like to study... I liked to play around and when I was young I played a lot and I did not grasp the opportunity to study... but now since I have these opportunities to learn different things, I will go to learn.” (43.22)	Blames

<p>Mary blamed her dad did not allow her to study and it had affected her life and her future</p>	<p>“You please allow me to say that. When I was young, my dad did not allow me to study and so I did not like my dad; it is because education is very important, study can help my future and help to learn life principles. My mum always emphasised we need to become a reasonable person and follow all the principles of life. She always told my dad to give more patience to teach us and should not beat us like a mad cow. Everyone has different values and understandings of life but I think study can definitely help my life, at least if I had a chance to study I can understand more.” (36.22)</p>	
---	--	--

2. Kwai-fun

Kwai-fun was born and grown-up in Guangzhou China until she married her husband who is from Hong Kong when she was 26 years old. Kwai-fun was born in 1953 right after Chinese civil war and the declaration the state of The People’s Republic of China in 1949. Kwai-fun’s father was a Chinese medicine doctor and her mum was a clothing factory worker, and she has seven siblings living in a middle income family. When Kwai-fun was 13 years old and at her primary four studies, the Chinese “Great Proletarian Cultural Revolution” had kicked off in 1966,. All schools were banned and closed during the revolution period and she was asked to jump studied in a secondary school after schooling were reopened in 1968. After Kwai-fun finished her higher secondary school studies, she was sent to a remote village to do pig farming and construction works in 1975 under the Chinese Communist Party’s “Up to the Mountains and Down to the Countryside Movement”; Kwai-fun later returned home in Guangzhou in 1979 and reclaimed back her citizenship through her mum’s network. At the “proper marriage” age of 26, Kwai-fun was introduced to see her present husband who was from Hong Kong and also looked for marriage at his age of 33. Kwai-fun has only seen her husband for four times in China and though she has not really known her husband well, she married him. Kwai-fun’s application of family reunion and migration was granted after seven years long of waiting; she moved and settled in Hong Kong in 1986. After Kwai-fun settled in Hong Kong, she was introduced to work in an electronic factory and within a year she gave birth of her first daughter when she was 33 years old. Kwai-fun gave birth of her another daughter and a son in the following 3 years and she stopped working and stayed at home looking after of her children. To sustain a larger family and without Kwai-fun’s contribution of income, Kwai-fun’s husband needed to work two jobs to earn enough income for the family. Kwai-fun and her family had been allocated to a public rented housing in a newly developed rural town and swapped to a bigger flat in the same area later on when their children getting older. After Kwai-fun husband laid-off by his working clothing factory due to the production lines moved to China and left him unemployed at his age of 55, Kwai-fun’s family had to rely on the Comprehensive Social Security Assistance (CSSA) Scheme to sustain their livings. Kwai-fun found her experience receiving social security from the government was not pleasant; she was under tremendous pressures and looked down by other peoples. Kwai-fun and her husband had tried to find jobs and get back to work but failed since nearly all the factory works had been relocated

to China and they were discriminated by the employer against their age and left them disappointed. Kwai-fun and her husband remained as a long term unemployed until all of their children started working, they have decided to retire. After Kwai-fun's children started working, she joins different not-for-profit training and interest related courses, and spent some times on volunteer social services, where she found it enjoyable and highly commented.

<i>Benefits of learning</i>	<i>Evidence</i>	<i>Types</i>
Kill the boredom	"After my children had grown up, I felt bored at home and I was thinking to find a job but my husband did not agree as he already had two jobs and he thought that if I went to work I would not be able to take care of our young son, and so I joined a short homecare assistant course offered by a not-for-profit organisation." (49.22)	Friends and social networks
Express self and release stress	"I had learnt and knew how to write Chinese calligraphy when I was in school but I didn't practise it for decades; now I started to write it again and I felt good. It had helped me to express myself and release my stress." (48.19)	Reduce Stress and Enjoyment
Subsidised courses encourages participation	"This not-for-profit secondary school is also an Elderly College and I learnt Taichi Rouli ball there. They charged us a token HK\$20 which is very cheap. You can't learn anything in any school for just HK\$20. I learnt about computers, photography and Chinese calligraphy there and they all cost me only HK\$20 each!" (56.10)	Motivation to learn
Social networks and friendship Kill time Reduce stresses	"I simply want to learn something, firstly so I can gain some new knowledge, and also so that I can meet some new friends; it helps to kill time. I didn't need to spend the whole day sitting at home watching TV or cleaning my home like the others did. I can go outside and be in touch with other people and talk to them; it helped to reduce my pressure." (57.05)	Knowledge Friends Reduce Stresses
Volunteer services leads to learning and social gathering	"It felt excellent to learn and socialise with friends in the Elderly College. Sometimes we also do volunteer service and help out in a (Buddhist) monastery which is associated with the college. We go every Monday and Thursday, sometimes learning and practising Chinese calligraphy. When it was near to the Chinese Lunar New Year we learnt to make Chinese handicrafts, and we also learnt to make desserts and cooked food together. When we finished cooking, we gathered together to enjoy our meal there in the monastery." (01.04.35)	Civic participation
Meeting new friends and provide a platform to talk	"I am very satisfied with my present learning. I took part not only because it is free-of-charge, but at least I can learn something and I can meet some friends, different types of	(1) Friends and social networks

and share Avoid social isolation	friends. Although we are all elderly at least we can talk about anything we like and it is much better than just staying at home. Though I enjoy talking at home, and still do so though not with my husband, I need to wait for my children to come back to talk with me. These young people, even when they come back home, they won't talk much with me – they just spend time on their computers.” (01.11.40)	
Subsidised courses Learning materials Motivation to learn	“I don't think anything needs to improve. If it was for profit, it wouldn't be possible to charge so little. But in not-for-profit schools all the teachers are volunteers; they all have full-time school teacher backgrounds; they don't charge anything and they spend their own leisure time teaching us. They print and provide us with all the learning materials, and books are also available. Lecture notes are printed for us in class, and they clearly list all the procedures; it is very good. In the photography class, they took us outside. We took photos by ourselves and submitted them to our teacher for comments. Many people joined the class, more than 60 of us, and we filled up a big coach. We received certificates every year and if the results were outstanding they would give us a trophy and a prize. It is true!” (01.13.32)	Motivate to learn
Job Opportunity is not possible	“I awarded the course certificate but I found it useless. The school didn't assign me a job, they only introduced me a one-off task and afterwards I need to look for a job by myself.” (50.25)	Blames

3. Lai-kuen

Lai-kuen was 59 years old and retired when the interview was conducted. She was born in a large family, she has 5 siblings and she is the oldest one. Her father has no stable work and her mum was selling used flour bags in a wet market earning low income. Due to the poverty of her family, Lai-kuen was sent to live with her grandmother and she needed to spend long hours every day working and helping her mum in the wet market and taking care of the family. Lai-kuen was asked to terminate her primary school study to taking care of her new born brother in her grandmother's home. Left school without qualification, Lai-kuen worked in a factory making gloves and was earning piece-work wages. Though Lai-kuen has spent two years studying at night school but she failed to gain any qualification due to the distractions of her boyfriend, the man who she married at her age of 26. Lai-kuen gave birth of her 5 children and moved to a public rented housing in a remote rural town; Lai-kuen spent most of her time stayed at home taking care of her children. Lai-kuen's husband was a part-time electrical worker worked in different construction sites and in order to help earning better family incomes, Lai-kuen needed to work at home making clothes for factory. When Lai-kuen's children getting older, she started going back to work and worked in a shop in a primary school and changed to

work in a carpet factory afterwards. However, due to her husband's cancer, Lai-kuen has to quit her full-time job and taking care of him. When Lai-kuen's husband died within two years after diagnosis of cancer, the life of her and her five still in school children became very difficult and they have to rely on the Comprehensive Social Security Assistance (CSSA) to help them. After Lai-kuen's children started working, she worked again in an architecture company as an office assistant till she retired in 2005. After she retired at the age of 54, she was recruited by a not-for-profit education to start employee retraining programme in 2006. She had participated the Home Care Assistant course and was able to work for several on-going referral jobs for months. Moreover, Lai-kuen also joined different interest related course and volunteer services in different not-for-profit organisations. Lai-kuen found her learning interesting and the skills learnt practical. As all the Lai-kuen children already left home and have their own life, Lai-kuen found she has all the freedoms to do what she wants to do, for example, go for learning and travelling. Lai-kuen was especially enjoy learning as she can meet new friends, expand her social networks, learn more new knowledge, and feeling of satisfaction when she found her skills and volunteer services can help those people in needs. In addition, Lai-kuen's not-for-profit learning also extended her participations in different civic activities such as charity walk, elderly home visit, and volunteer in monastery.

<i>Benefits of learning</i>	<i>Evidence</i>	<i>Types</i>
Job skills and knowledge	"I knew nothing before I joined the class; now I know different and better methods and procedures to do a job, and I have learned how to save time and gain better results after I studied in school." (22.10)	Knowledge and Skills
Proud Self-esteem	"I was very proud of my Chinese typing skills that I learnt from the not-for-profit course as I found my daughter can only type English and she was not able to type Chinese characters using a computer. I found I was stronger than her and I felt very happy because of this." (11.02)	Skills Proud & Self-esteem
Life satisfaction Helping the others	"I felt very happy when I can share my knowledge and skill with the others." (25.24)	Life satisfaction
Helping the others Learning can brought	"Now I have all my freedom and I want a happy life. I can go to learn the things that I have never experienced before... I have no family burdens to stop me to learn now." (10.50)	Civic participation
	"I felt very happy to learn and provide social volunteer services in the not-for-profit organisation in the last few years... I feel very happy and at peace when I can learn and help others. When I found my handicraft skills that I learnt in school and the gifts that I made can	

happiness	make other disadvantaged people happy, I feel very good.” (13.38) “I went to learn as I wanted to help others, not just to get a job.” (25.10)	
Friends and networking	“In fact, the ERB has helped a lot of people. I know a few friends who are still working now; they have done their homecare assistant jobs for several years, which is very good, right? And they have kept very good relationships with their employers.” (11.15)	Job Opportunity
Satisfaction through sharing	“I am a quiet, stubborn and introverted person... but I met new friends in school and we organised social gatherings where we can talk and we can share our life experience and support each other; I feel happy about it.” (22.40)	Friends and social networks

APPENDIX III: SAMPLE PARTICIPATION INFORMATION SHEET AND CONSENT FORM

Research Project:

The Wider Benefits of Not-for-profit Education in Hong Kong

Participant Information Sheet

You are being invited to take part in a research study. Before you decide it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully. Talk to others about the study if you wish.

What is the purpose of the research?

The research seeks to identify and evaluate the individual and social benefits of non-profit education in Hong Kong. The research also aims to demonstrate and review factors that influence participation, engagement and achievement in non-profit education and identify interventions that are likely to improve participation, engagement and achievement.

Who is the researcher?

My name is Patrick Yun and I am undertaking this educational research as part of my PhD study at Cardiff University. Two senior research professors in the Cardiff School of Social Sciences supervise me and the research has been approved by the Cardiff University School of Social Sciences Ethics Committee.

Why have I been chosen?

I am asking for volunteers who have been studying in non-profit education as they have first hand experience and benefit from the non-profit education.

What do I have to do?

I would like you to take part in an interview. I will talk to you about your biography, your education experience, your life priorities, the experience and benefits of non-profit education, and any possible factors that may affect your participation, engagement and achievement in non-profit education. The interview will be audiotaped so that I have a record of what was said. You may also be asked to complete some questionnaires that I am developing for use later in the study.

What will happen to the information that I give?

The transcript of the interview and any questionnaires will only be accessible to me, and will be kept securely, in strict accordance with the data protection act. They will not be used for any other purpose. An analysis of the information will form part of my report at the end of the study and will be published in academic journals. You are welcome to see a copy of the articles prior to publication.

Will my taking part be confidential?

You can give as much or as little information as you wish. No one will be named or identifiable in any way in the reports of the study.

What if I wish to withdraw?

Your participation is entirely voluntary and you can withdraw at any time you wish, without giving a reason.

Contact Information

If you would like further information about the research, please do not hesitate to contact me at the following:

Researcher: Patrick Yun
Telephone: 9346 4666 (HK) / +44 7925136802 (UK)
Email: yunpp@cardiff.ac.uk
Mail: Cardiff University
Cardiff School of Social Sciences
Glamorgan Building
King Edward VII Avenue
Cardiff, CF10 3WT, United Kingdom

Research Supervisor: Professor Sally Power
Telephone: +44 29208 74738 (UK)
Email: powers3@cardiff.ac.uk
Mail: Cardiff University
Cardiff School of Social Sciences
Glamorgan Building
King Edward VII Avenue
Cardiff, CF10 3WT, United Kingdom

Consent Form

The Wider Benefits of Not-for-profit Education in Hong Kong

Name of Researcher: Patrick Yun

	Please initial
1. I confirm that I have read and understood the information sheet (Version I: 1June 2009) for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.	
2. I understand that my participation is voluntary and that I am free to withdraw at any time, without giving a reason.	
3. I agree to take part in the study.	

Name of participant

Date

Signature

Name of person taking consent

Date

Signature

Two copies: 1 for participant and 1 for research file.

APPENDIX IV: DISADVANTAGED LEARNERS' LIFE STORIES

Two Disadvantaged NEET Youth Life Stories

In the Chapter 4 the benefits of not-for-profit education for the NEET youth learner group have been analysed and discussed. In this section, two NEET youth life stories were selected and studied in detail to show how not-for-profit education influenced and changed their lives in different ways. In the first life story, Gary is a typical disadvantaged NEET youth who was penalised because of his deficit in academic qualification and was not able to fit into the labour market. Gary has poor education and learning experience in his secondary school education and he felt that the Hong Kong education system was not fair and not able to take care of the non-achiever. Though Gary was performing outstandingly in the extra-curriculum activities, for example he was good in sport and was a leader in a uniformed group, due to lacked of 'relevant' academic qualification he was not able to find a proper job after a long search and he had to work temporarily as a coolie in the airport. Gary gave up his coolie work in the airport later on and joined his second not-for-profit education and thought it would help him to find a better job in the government. Although he is still not able to find a job at the time of interview, Gary feels he has been empowered and has better opportunity and confidence in his future.

In the second life story, although Yash grew up in a middle-class family and his family was able to fulfil all his material needs, due to his poor academic results and his personal behaviour problems as well as his later incompatible UK education qualifications, Yash failed to make any progress and became a NEET youth for around a year. The two not-for-profit education courses that Yash chose to receive

during his NEET stage has transformed him totally and he is able to work and serve as a front-line police officer, something that he longed for. Yash's life story is selected to show how not-for-profit education turned around and transformed his NEET youth life.

Gary's Life Story

Gary was a 22-year-old young man at the time of interview. He grew up in a large lower income family with his grandparents, parents, and four elder sisters. Gary was the youngest. Gary's parents were migrants from mainland China and they had only primary education attainment. Gary has a strong character, and his straightforward and frank personal traits contributed to his success in a voluntary uniform group. However, the same strong character also caused him to become cynical and indignant towards the education and social systems and ultimately affected his learning and resulted in his failure in academic achievement.

The education experience of Gary was not a pleasant one. Although Gary says two of his sisters helped and advised him to study as his parents were not able to help, his education experience and achievement was not good. Due to his poor primary education results, he was allocated to a lowest rank Band Five secondary school to study. He then managed to change to a better rank secondary school to study though he still was not able to perform well in the new school. Gary joined and was an active member of 'Hong Kong Road Safety Control', a popular uniform group like the Scout Association commonly found in many secondary schools in Hong Kong. Gary still proudly served and showed his enjoyment as a leader in the voluntary group at the time of interview. He treasured and enjoyed life in the voluntary uniform group as he

claimed that he could gain many important life lessons and support from the senior group members and feel the sense of belonging. However, Gary's secondary education was a complete failure amid his triumph in his voluntary uniform group services. He claimed he was interested and doing very well in his early secondary studies in the three science subjects, ie Physics, Chemistry, and Biology, but hated and failed in general subjects such as Chinese Language, English Language and Mathematics which made him feel it was unfair and he became fed up with learning. He said he had literally given up in his last two years of secondary school to reflect his grievances about the unfair education system that emphasised only the general subjects. He badly failed in all the subjects in the Hong Kong Certificate of Education Examination as a result of his attitude and perceptions regarding the ideology of education and the social system.

Gary's dream was to become an ambulance assistant or to work in the civil service. After he had failed in the public examination his dream was basically shattered. Not being able to progress further in education and work and without much choice available to him, Gary enrolled in a one year non-accredited course offered by a secondary school run by a not-for-profit organisation to study sport and leisure activity management. He joined the course because he was attracted by an advertisement which claimed that graduates from the course could join the fire department as an ambulance assistant. Although Gary said that the year-long course was a waste of time and money and it wasn't able to give him the proper accredited qualification that he desired, Gary later in the interview acknowledged that in fact he had learnt a lot of skills that have helped him in his work and life. Having completed his study of the sport and activity management course and the internship service, Gary left college and started working in an airfreight centre in the airport as a logistics

assistant which was physically demanding work. After nine months of hardship working as an underpaid logistics worker, with his family's support Gary decided to go back to college to study to advance himself and hoped to change his life. He enrolled in his second not-for-profit programme, Project Yi Jin, which offered him an equivalent qualification to the Hong Kong Certificate of Education Examination so that he could apply for work in the civil service. However, after graduating from the Project Yi Jin programme in 2008, Gary had attempted three times to apply for a police job but with no success because of his failings in the physical tests for different reasons. He was preparing for his fourth trial application and in the meanwhile he maintained his livelihood by working as a part-time outdoor activity trainer. Gary expressed that though he was not able to work in his dream job at the moment, he very much enjoyed his life as he could have more time to do what he wanted to do and thought he would not be free once he started working full-time. As a beneficiary of not-for-profit education, Gary stated that he will go back to college and join continuous learning once he has started working and is earning money.

Gary's Experience and His Perceived Benefits of Not-for-profit Education

Gary has fairly different experiences and comments on his two not-for-profit educations. This may be due to his background of extensive engagements and achievements in the voluntary uniform group which offered Gary advantages such as leadership, training, communication, socialising, and team work. In Gary's first not-for-profit education experience, although he found he did not fully satisfy the study as it did not provide further progression towards his academic aims and career development, he later admitted that in fact the course had offered him some useful

skills, knowledge and exposures that helped him in his later work as an outdoor activity trainer and a sport referee. He claimed that all these skills and knowledge and exposures were practical and were not able to be learned from a college textbook. He especially enjoyed and appreciated his not-for-profit education associated internship experience with the Handball Association of Hong Kong which provided him with some valuable real experience working with difficult people. This unforgettable internship experience also brought Gary a chance to see what a real working life and society actually looks like outside the protective college environment and gave him a big insight into his failures in life.

Gary's second not-for-profit education experience with the Project Yi Jin programme was a pleasant experience and it fulfilled what Gary longed for – an equivalent academic qualification to the Hong Kong Certificate of Education Examination which allowed him to apply for government disciplined services jobs. Moreover, as a returned student after his nine months' full-time work experience, he found that Project Yi Jin had changed his view of his life and his way of thinking. Gary was in particular in favour of the Communication Skills module which he claimed had changed him a lot as it has taught him how to think, how to understand himself and other people, and how to develop and plan for his future. He also said the teacher of the module was very friendly and helpful. Gary still finds the skills he learnt from the module useful in his daily life.

To sum up Gary's wider benefits of learning in his two not-for-profit education experiences, it is not difficult to find that in fact Gary, similar to many NEET youths, had not much choice available for him to make necessary progress in terms of education and employment development. Gary's first sport and leisure management study in fact could be seen as functioning as a safe haven for him after his dramatic

shock of failing in the public examinations. The second decision to quit his job, return to college and join the not-for-profit education however was a carefully considered move for Gary. Both of the two not-for-profit educations were initiated and intended simply to repair impaired academic qualifications and to teach new skills and knowledge. However, some more important gains such as changes in values and attitudes towards life, work, and learning, and help to realise and understand the real social-economic culture and values outside the traditional protective college environment were noticed in Gary's life story. In fact both the not-for-profit courses could be seen as important buffers for Gary's disadvantaged youth life which had allowed and encouraged him to rethink, readjust, and reposition himself to fit into the crude social-economic realities. Gary's difficult and failing life events and hardship had triggered him to go back college to learn and the last resort form of not-for-profit education had acted as active catalysts to help him stimulate and transform his life. With more positive and active values and attitudes towards life and the future, better life goals and plans, together with the gained academic qualifications, Gary found hope and felt more secure about his future, and his life became more enjoyable.

According to the 'conceptualisation of wider benefits of learning' framework suggested by Schuller et al. (2004) to study Gary's gained learning benefits brought by his not-for-profit education, Figure 9.1 shows that Gary has gained the qualifications, knowledge and skills that he expected from his not-for-profit education. Moreover, Gary has earned tremendous gains in self-concept, motivation to learn, attitudes and values which he did not expect before he participated in his not-for-profit education. Gary has also reported his not-for-profit education enjoyable and helpful for him to make personal plans and goals for his future which is what he expected from his not-for-profit education. Above all, the achieved learning outcomes

from Gary's two not-for-profit education courses exceeded his initial desires and expected learning outcomes.

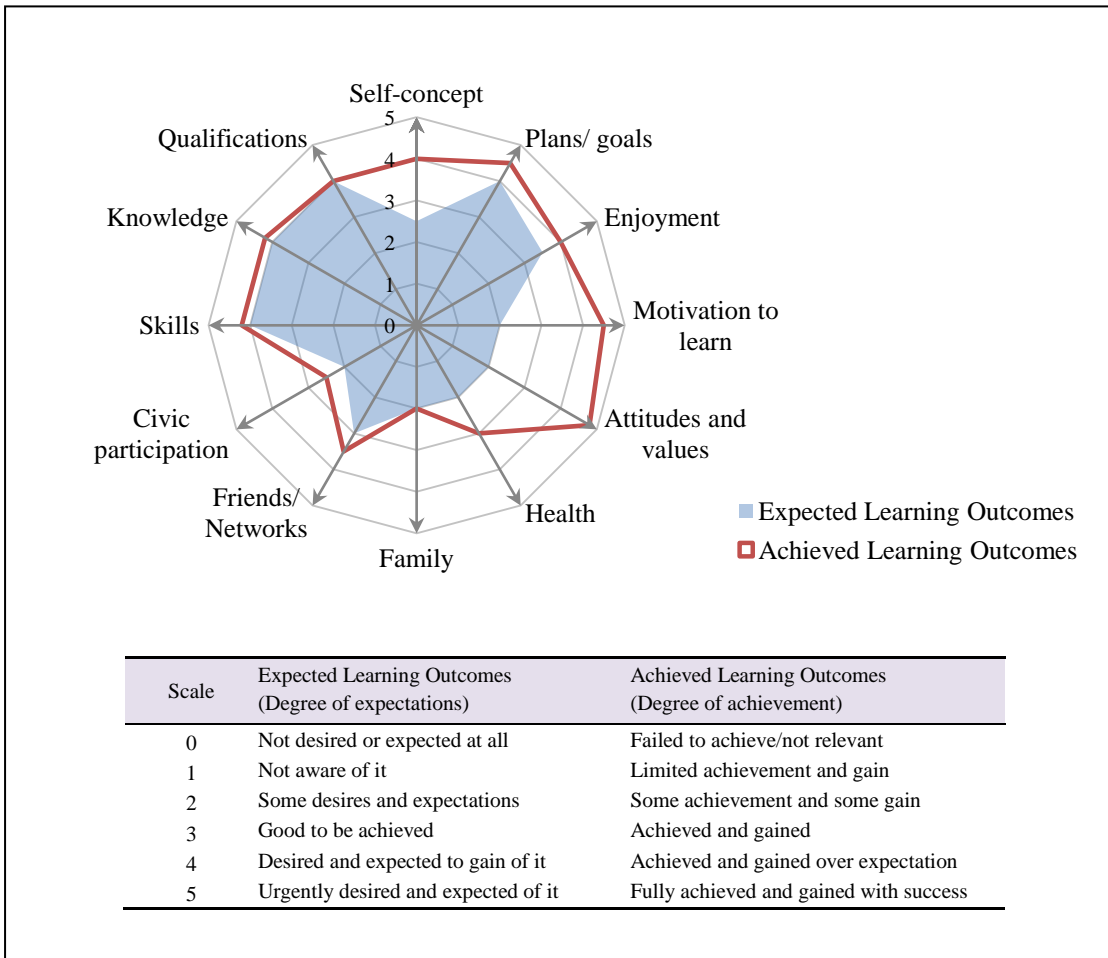


Figure 9.1: The expected and achieved learning outcomes of Gary's not-for-profit education experience

Moreover, in terms of the different capital gains influenced by Gary's not-for-profit education, Figure 9.2 shows that Gary has achieved significant gains in all his three capitals while the unexpected gain (learner surplus) is highest in identity capital followed by social and human capitals. Similar high unexpected gain (learner surplus) in identity capital in Gary's case is also found in the NEET youth learners group which shows that NEET youth perceived that not-for-profit education has provided them with some very high and surprising gains in identity capital (for example, self-confidence, meaning and purpose of life) where they did not expect before they

participated in the not-for-profit education. Only a few learner surpluses or unexpected gains in human capital were found in Gary's case which shows that the academic qualifications and knowledge and skills that Gary acquired from his not-for-profit education have met his expectations.

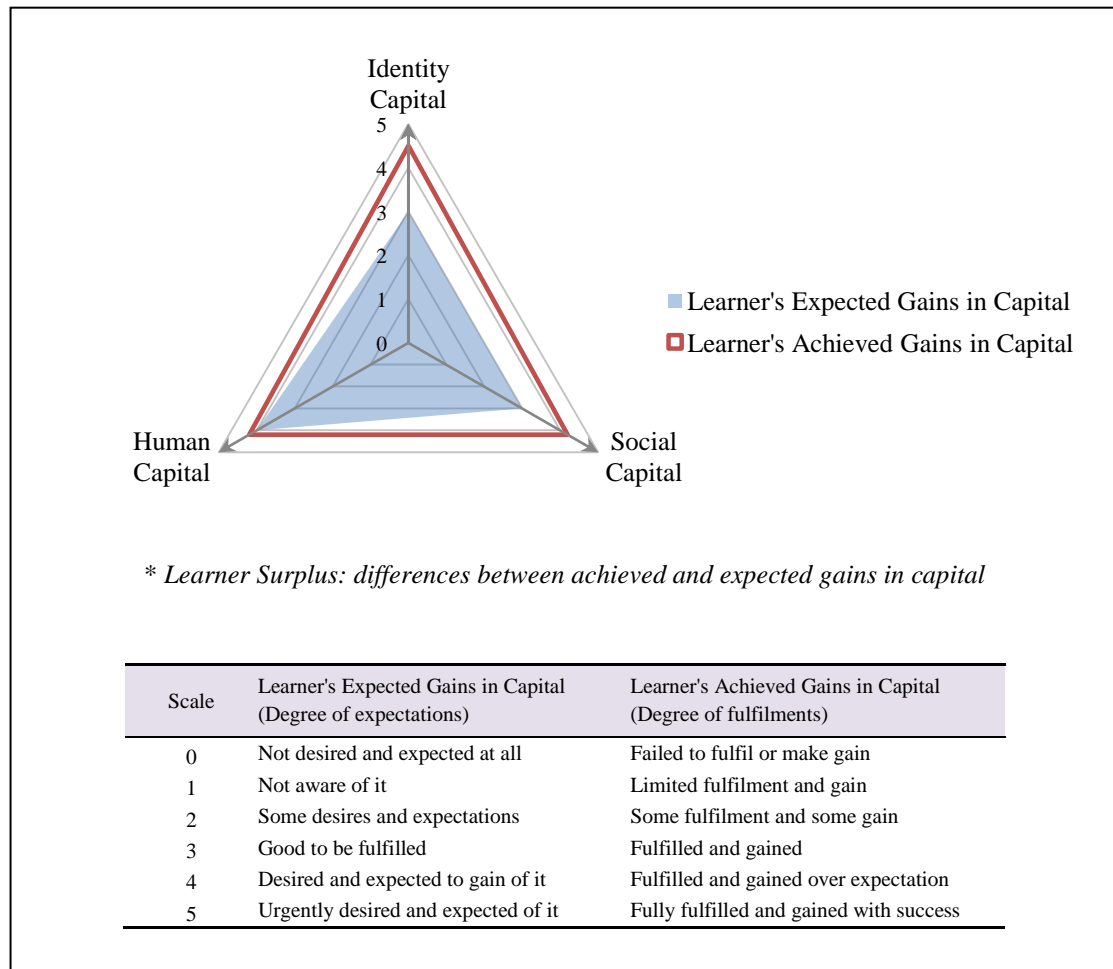


Figure 9.2: The expected and achieved gains in capital and the learning surplus of Gary's not-for-profit education experience

Yash's Life Story

Yash is a good looking, modernly dressed and fit young man. He was 26 years old at the time of interview. He has served in the police force as a front-line police officer for around two years. Yash grew up in a middle-class family, he has two elder sisters and he has never had to worry about any material needs. However, he also claimed because of his family's affluent status and his parents' preference for a male child, he became a badly spoiled child, especially spoiled by his mother. His dream was to become a fireman as he thought a fireman's work demanded less work pressure, offered a stable good income and provided long holidays, and he would be entitled to a good civil service retirement package.

Yash found no sense of achievement in his college education experience. He performed poorly when he was studying in his primary school. He said he was lazy and hated study. Because of his mum's working connections, he was able to transfer and study in a 'Band One' secondary school, one of the best schools according to the school ranking system in Hong Kong. However it made Yash's school experience even worse as he didn't manage to follow the required level of study and nearly gave up any attempt to learn. It took Yash five years to complete his first three years' study in his secondary school and since he performed so badly, he wasn't allowed to continue his study. Yash's family then sent him abroad to the United Kingdom to continue his college studies and hoped to give him a chance to change. In fact, Yash's family saw the change was all-important because Yash was so badly behaved in his adolescent life in Hong Kong with all sorts of behavioural problems such as smoking, drinking, fighting, gang activities, and even not going back home. However, the plan to change Yash through sending him to the United Kingdom to study was wrong and it failed. Yash claimed that he hadn't learnt many things from his three years' study in

England but again took up drinking, smoking, and even the use of illegal drugs in his boarding school. He barely obtained his General Certificate of Secondary Education (GCSE) qualifications and returned to Hong Kong though his parents wanted him to stay and study in university in the United Kingdom which he found he was not able to do. Back home in Hong Kong, Yash found his GCSE qualifications gained from the United Kingdom weren't accredited under the Hong Kong qualification system and he was not able to progress to any study or apply for his dream uniformed civil service job. He was disappointed, frustrated, and once again felt at a loss.

At the age of 18, Yash realised because of his inadequate qualifications he was not able to progress further academically and so join the uniformed civil services that he dreamed of, and so with limited choices Yash enrolled in a youth pre-employment not-for-profit education programme. The subsidised nature of the 'Youth Pre-employment Training Programme' (YPTP) was designed to target NEET youth like Yash and aimed to make them ready for employment and help them to explore life. It was funded and coordinated by the government and run by not-for-profit organisations. YPTP is a combined activity and skill-based training programme aiming to provide learners with different life exposures which are not commonly found in traditional school learning. Through diverse life-challenging activities and skill-based training such as outdoor adventure activities, work skills and knowledge training, and soft skills teaching like communication and teamwork-building workshops, the YPTP stimulates and motivates learners to move on and advance their future. According to Yash, YPTP was a life-changing learning experience for him although he did not think it worked well for other learners because of the subsidised nature. Yash claimed one of the activity instructors on the YPTP has transformed his life totally and suddenly. He was motivated and started to learn different skills and

knowledge and acquire different certificates and licences to prove his capabilities in outdoor activities – for instance, hiking, camping, canoeing, lifeguarding, rock climbing, rope net climbing and war games. Most importantly Yash discovered and reclaimed his direction and purpose in life. He subsequently followed and worked with this life-changing activity instructor as an assistant coach to lead YPTP activities and teach students for several years before he worked in different jobs.

After the three years' learn-and-work experience with his life-changing YPTP instructor, Yash tried out and worked in different jobs in hotels, club houses and gym centres as an activity assistant. His dream to become a uniformed officer never ceased and it drove him to study at night after his daytime job for another not-for-profit programme – Project Yi Jin. It took Yash two years to complete his part-time Project Yi Jin but it offered him an equivalent academic qualification to the Hong Kong Certificate of Education Examination which enabled him to apply for uniformed civil service jobs. With all these certificates and licences gained through his YPTP learning, his outdoor coaching experience, and his subsequent Project Yi Jin qualification, Yash has finally been accepted and now works in the police force.

Yash found he is a 'lucky one' as he thought he was able, through the two not-for-profit education programmes, to transform himself from a no qualifications and inability to study disadvantaged and marginalised youth to what he has achieved as a police constable so far. He is satisfied with his life now and plans to get married and have children in the coming years. He also expressed that his dream to become a fireman is still in his mind as he realised that a fireman's work could be more simple and suitable for him than a policeman's , and he will keep pursuing it.

Yash's Experience and His Perceived Benefits of Not-for-profit Education

Yash had two not-for-profit education experiences and he found that they were both life-changing for him. He claimed that he was a rare beneficiary of not-for-profit education and he believes his transformation brought by the government's effort to help young people was exceptionally successful. Yash argued that his first not-for-profit education, YPTP, was not able to help the majority of the disadvantaged youth learners due to its heavily subsidised nature, but Yash found the course was literally a turning point in his whole life.

Yash's YPTP not-for-profit education through his adventure instructor has brought him new meaning and purpose in life. Though the YPTP course has not provided him with big improvements or advantages in terms of human capital gains such as academic qualifications and work skills and knowledge, the activity and the people of the course itself influenced Yash to transform. The YPTP triggered and motivated Yash to explore his future and extended the full potential of Yash's life. Yash's subsequent accumulation of different licences and certificates and his working experience also led him to progress further and offered him essential social mobility.

Yash's second not-for-profit education experience – Project Yi Jin – on the other hand, offered him the academic qualifications that he longed for. He reckoned that basic academic qualifications are crucial nowadays in Hong Kong society and Project Yi Jin could offer him the fundamental academic qualifications that he needed to apply for civil service jobs.

Based on Yash's not-for-profit education experiences and the learning outcomes gained, some would suggest the not-for-profit education for NEET Youth in Hong Kong, specifically the two government initiated youth employment and academic

bridging/buffering programmes – YPTP and Project Yi Jin – were great successes. In fact, Yash initially did not expect to gain many benefits from his YPTP learning and was suspicious of the usefulness of the course when he joined. He joined the course because he had nothing to do after returning from the United Kingdom, and was encouraged by his mother. However, the transformations and impacts on Yash's life were tremendous and crucial, and probably life saving.

On the whole, the primary learning benefit of Yash's not-for-profit education was to empower him to develop his own future. The YPTP course and the hiking instructor that Yash met made him waken from his lost world. The success of wakening and empowering had motivated and enabled him to develop personal goals and broadened his potential to pursue his desired future. It could also be seen as a deep and long-lasting effect of change to Yash's attitudes and values as well as the later alterations to his behaviour. Moreover and notably, it has also changed Yash's beliefs towards education and training from his laidback learning attitudes and behaviour during his primary and secondary school studies to his own decision to rejoin the Project Yi Jin programme. The subsequent wider learning outcomes because of his attitude and value change prompted by the education empowerment were also significant. Yash was able to stop or reduce some of his health-damaging behaviour such as illegal drug use and a drinking problem. Moreover, outside his expectations, Yash participated heavily in civic activities such as teaching in the YPTP youth training programme and offering outdoor training to help other disadvantaged people. All these exposures, work experiences, and network building and connections had not only provided job and life security to Yash but also offered him mobility for his career and life development.

Although Yash asserted that he is a ‘lucky one’, in fact his luck did not come from nowhere. Yash’s initial intention to improve his human capital – qualifications and skills – had led him to gain and charge the other two important capitals, the identity and social capitals. In fact, in Yash’s young adult situation and his NEET status, it seems the repair and reinforcement of his identity capital in terms of personality empowerment was crucial and a higher priority than the other needs of capital gain. The not-for-profit education fitted well at the right time in providing and fulfilling the personality empowerment and self-confidence building that Yash lacked and did not even realise he lacked. Certainly, other personal factors, such as Yash’s good looks, fitness, highly flexible, strong and adaptable personality, friendly and helpful attitudes, optimistic view of life, family financial support, and his strong desire and determination to pursue his dream career, also contributed to the success of his career development and life advancement.

With reference to the ‘conceptualisation of wider benefits of learning’ framework suggested by Schuller et al. (2004) to study the learning benefits gained by Yash through his not-for-profit education, Figure 9.3 shows that Yash has gained the qualifications, knowledge and skills that he had expected from his not-for-profit education. Moreover, Yash has earned tremendous gains in such as self-concept, plans and goals, motivation to learn, attitudes and values, health and civic participation which he did not expect before he participated in his not-for-profit education. Yash has also reported his not-for-profit education experience to have been enjoyable and he has been able to make some friends and build his social networks in the not-for-profit college. Above all, Figure 9.3 shows that the achieved learning outcomes from Yash’s two not-for-profit educations well exceeded his initial desired and expected learning outcomes.

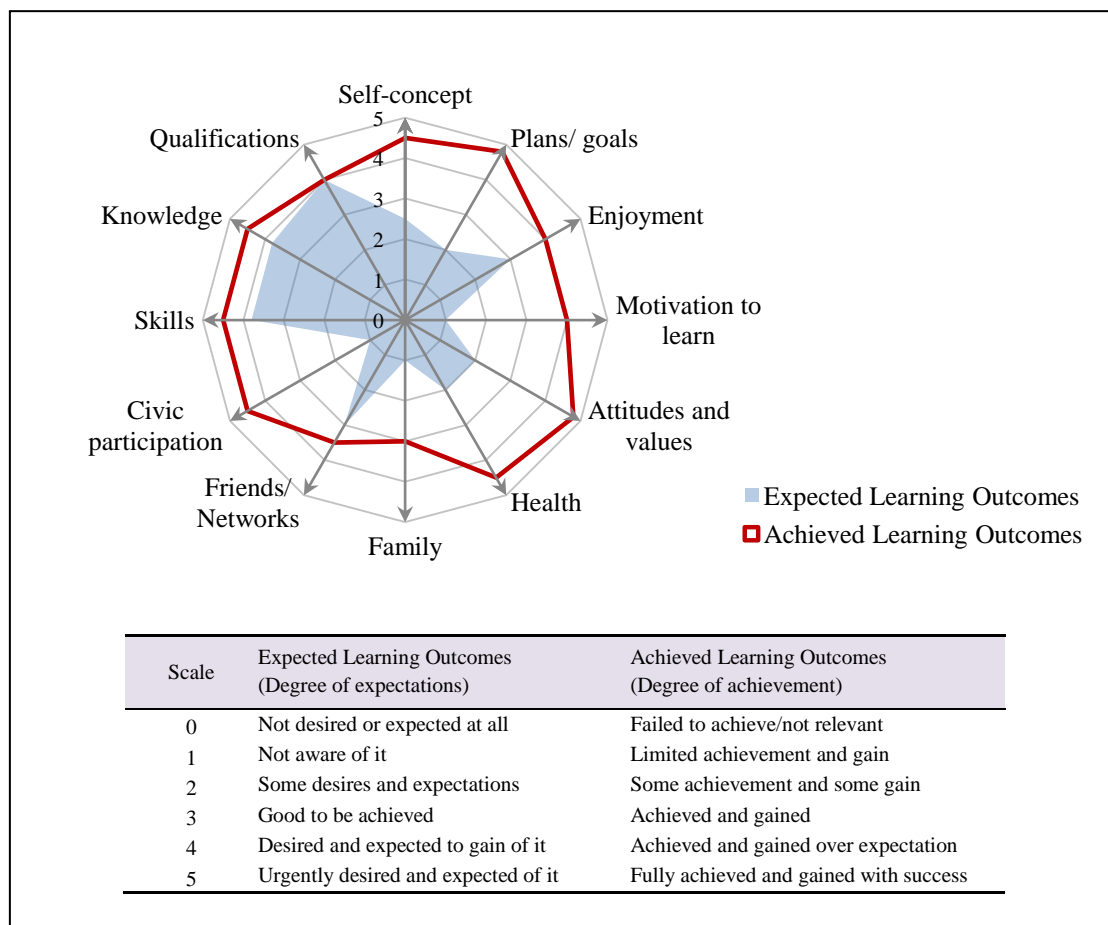


Figure 9.3: The expected and achieved learning outcomes of Yash's not-for-profit education experience

Moreover, in terms of the capital gains influenced by Yash’s not-for-profit education experience, Figure 9.4 shows that Yash has achieved significant capital gains in all his three capitals while the unexpected gain (learner surplus) is highest in identity capital where the human and social capitals shared similar low levels of learners surplus or unexpected gains. The small learner surplus or unexpected gain in human and social capitals means that the human and social capitals-related learning benefits gains achieved by Yash brought by his not-for-profit education have met his expectations.

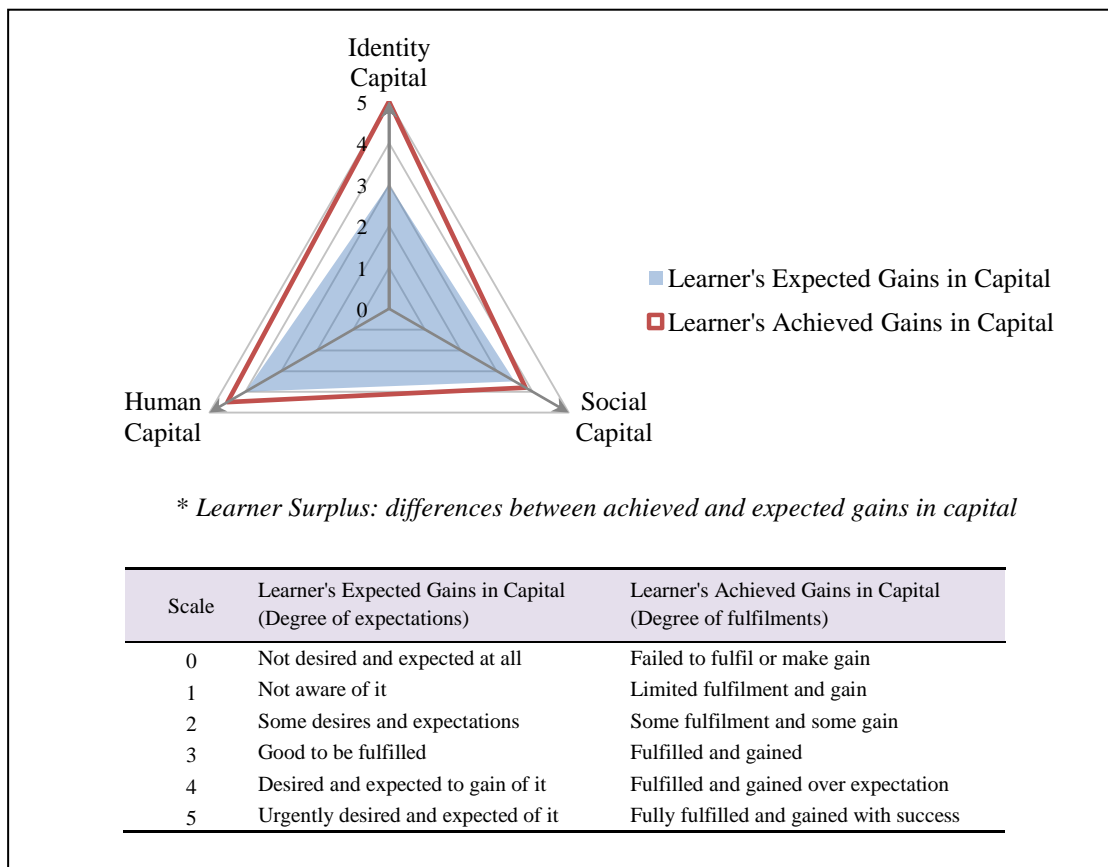


Figure 9.4: The expected and achieved gains in capital and the learner surplus of Yash’s not-for-profit education experience

Two Disadvantaged Economically Marginalised Learners' Life Stories

In the first disadvantaged economically marginalised learner Miranda's life story, it was evidenced that not-for-profit education had helped Miranda to transform her job skills and gain the important certification and qualifications for her to rejoin the labour market. The not-for-profit education that Miranda received has also helped her to regain her lost confidence and recover her self-value. It also helped to extend Miranda's social networks and make her life more meaningful and enjoyable. In the second disadvantaged learner Jane's life story, the not-for-profit education that she has experienced has helped her to ease her unhappy married life, build her own friendships and social networks, keep herself up-to-date and maintain her brainpower, and allowed her to sustain her own living by working in different part-time jobs.

Miranda's Life Story

Miranda was born into a big family with eight children and her father died when she was a child. To lessen the family burden, Miranda started working in a factory making clothes after she finished her primary school studies in the 1970s. Miranda enrolled and studied at night secondary schools and spent 10 years completing and obtaining secondary education qualifications. Miranda said her night school studies were long – she spent three years in government night secondary school, two years in English grammar school, and five years in comprehensive secondary night school before she had obtained her secondary qualifications. Miranda said although she likes to study, she wasn't able to achieve very high academic results and qualifications. After 10

years' working in the factory, Miranda changed her job and worked as a shipping clerk in 1980 until the company closed down in 2008 because of the impact of the global financial crisis. Miranda said she had spent a total of 28 years of service in the same company doing the same job and had completely neglected the outside world. After she had been laid off and became unemployed, Miranda worked in different jobs as temporary sports clothes promoter, customer service assistant in a property management company, merchandiser, and as a retreat centre assistant at the time when the interview was conducted. Miranda recalled one of her grim experiences during the transition from unemployment to her present job was that she was discriminated against because of her age by a group of young colleagues and she had to resign from the job as merchandiser when she thought it was an excellent opportunity for her to start her career again.

Miranda's family life was also challenging and not happy at all and she claimed it led her to the edge of mental breakdown and prolonged health problems. Miranda's first daughter was diagnosed with leukaemia after she was born and died after 10 years of long and painful treatment. Miranda divorced her husband after she found her husband stole her money from the bank and had affairs with other women though she had tried very hard to rescue the relationship and her marriage. Because of these traumas in her family and personal lives, Miranda endured serious depression and suffered from severe tinnitus and insomnia problems.

Despite all these dramas and during Miranda's unemployment, she attended different not-for-profit education programmes hoping to change her life. Miranda claimed the Employees Retraining Board security guard programmes had greatly helped her to settle into a new job in a property estate office right after the course, although she also complained that the take-home salary was far too low when compared with the

income that she used to have. Miranda's not-for-profit education also offered her opportunities to meet some new friends and expand her social network, and more importantly it had helped her to regain some of her lost confidence and self-value. Miranda also attended other not-for-profit courses such as Chinese typing, Mandarin, English, and other interest-related courses, for example cooking. Miranda found all these courses enjoyable and practical in both her work and personal life.

Miranda actively participated in her local Catholic Church volunteer services and worked full-time in a church retreat centre as an assistant. Since Miranda's younger child left home to study at university and she lost her mother and her elder sister, Miranda has lived alone in public rented housing.

Miranda's Experience and Her Perceived Benefits of Not-for-profit Education

Miranda has appreciated and rated highly all her not-for-profit education experiences and opportunities. Miranda said she was able to meet some new friends with different backgrounds and with different interests in the not-for-profit education organisation and she very much enjoyed studying with them together as she felt she was being accepted and belonged to the group. Though Miranda was proud of her 10 years of effort spent in her secondary night schools which were also run by different not-for-profit organisations, she was especially pleased with her Employees Retraining Board training experiences which Miranda believed saved her from unemployment and offered her a job right after her studies. In fact, Miranda was shocked and desperate when she was laid off after working in the same shipping company for a very long period of time. When she was suddenly forced to accept the dramatic changes in her life which left her financially unsupported in her early 50s as a single parent, she

reckoned she needed to transform her skills and gain some relevant and up-to-date qualifications and certificates to support her job hunt. Although in the beginning Miranda in fact had some reservations and questioned the applicability of the government subsidised scheme run by the not-for-profit ERB retraining programmes, since she found that she would not lose out on anything as it was free-of-charge and she could even receive a daily subsidy from the government, she enrolled and tried out the course. While it seems there were different reasons to motivate and support Miranda to seek help through joining retraining programmes during her anxious and agonising unemployed life, for example the subsidised nature of the course, word-of-mouth, and government active promotions etc., in fact Miranda's past successful experience and achievement of her not-for-profit secondary night schools made her believe that education can change one's life, and so it played an important role in supporting her to rejoin learning programmes to transform herself.

As illustrated in Figure 9.5, Miranda expected and hoped that she could gain some relevant skills and knowledge and obtain related qualifications and certificates from her not-for-profit retraining in order to help her to rejoin the labour market. Miranda has achieved what she expected and the achieved learning outcomes exceeded her expectations in terms of the gains in qualifications and certification.

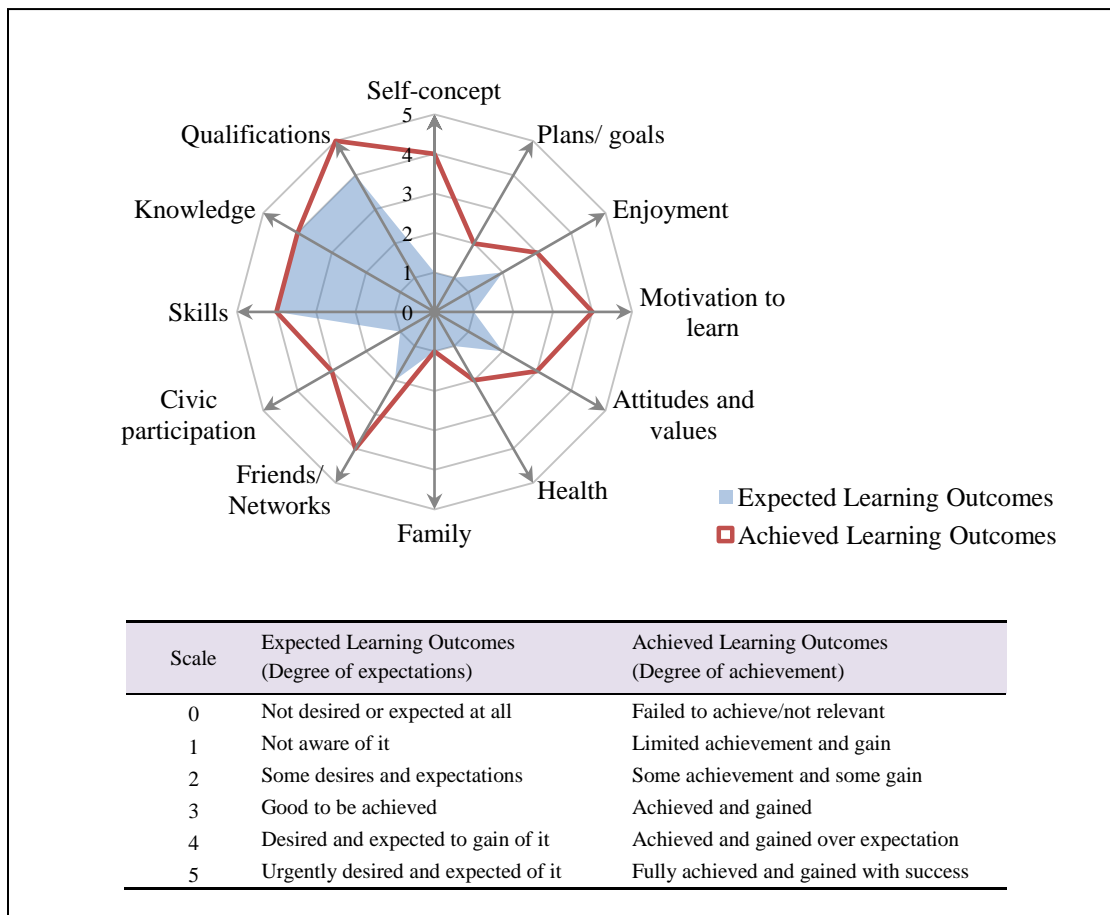


Figure 9.5: The expected and achieved learning outcomes of Miranda's not-for-profit education experience

Moreover, Figure 9.5 also shows that through Miranda's participation in not-for-profit education, she was able to achieve some significant gains in friends, social networks and civic participation. Since Miranda was a single mum living alone at home, she could find some sense of belonging only by actively joining church volunteer services and lead in different service groups in the community. Her not-for-profit education provided her with essential skills, for instance Chinese typing, computer skills, interpersonal skills etc. that had helped her to serve in the church and brought her more new friends from the school and extended her social networks. In addition, Figure 9.5 also illustrates and explains that thanks to Miranda's early years of secondary night school education achievements and the recent benefits gained from

her ERB employment retraining, the not-for-profit education had in fact sustained Miranda to construct and preserve a positive self through the continuous build up of her self-confidence and the realisation and reinstatement of her self-value. Her recurring positive beliefs in education and training also reinforced her motivation and participation in continuous learning and this was important to both Miranda’s present and future working and personal lives.

Figure 9.6, on the other hand, shows Miranda’s different gains in capital and the learner surplus gained through her not-for-profit education. It was no surprise, as discussed and illustrated, that Miranda perceived and benefited from significant learning gains and benefits in the human and social capitals.

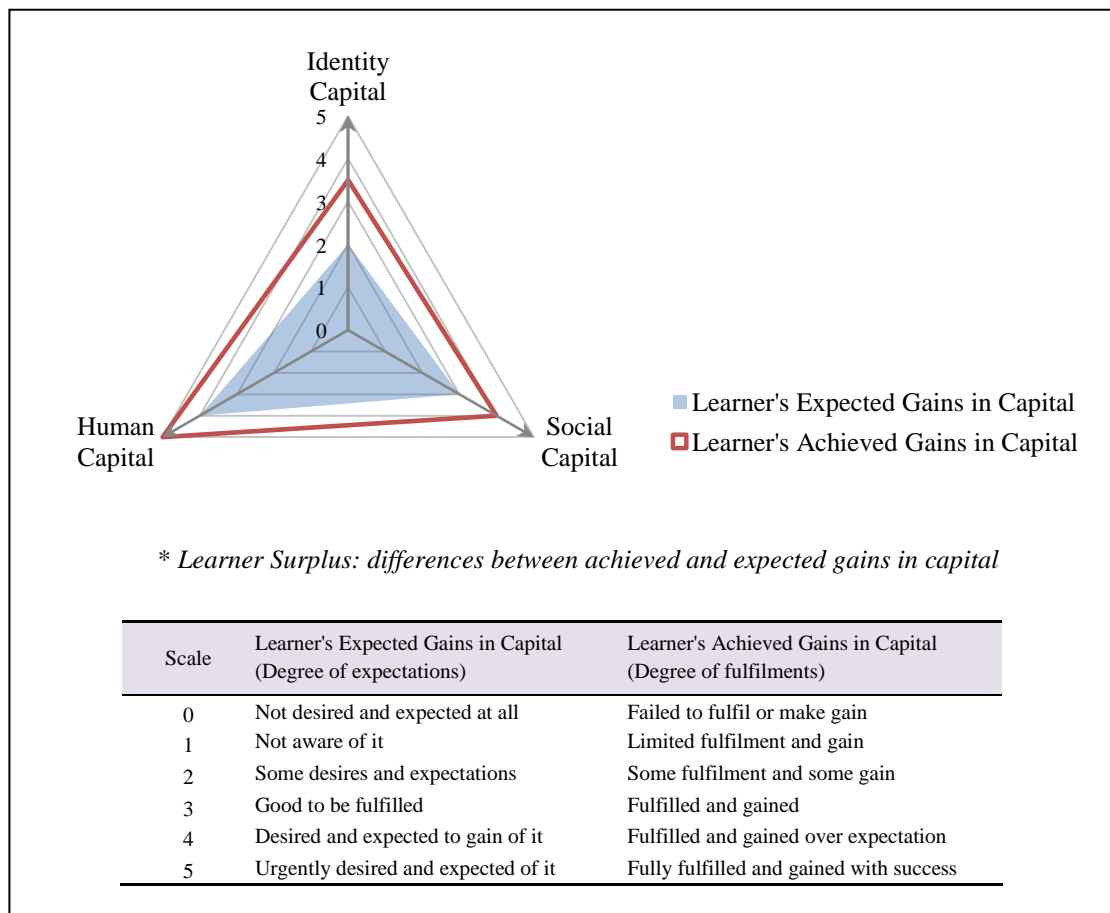


Figure 9.6: The expected and achieved gains in capital and the learning surplus of Miranda's not-for-profit education experience

Moreover, Figure 9.6 also shows that Miranda was able to gain and experience higher learner surplus in terms of identity capital. This explained that Miranda was not intending to join the education and training for personal self-improvement but expected to improve her skills and qualifications in order to find a new job. It also shows and explains that the unexpected identity capital gains were both the means and the ends of the gains of the two other capitals. For example, the qualifications and certificates (human capital) that were gained through Miranda's not-for-profit education had helped her to settle down in a new job and allowed her to meet new friends and extended her social networks (social capital) and it also reduced Miranda's feeling of isolation and repaired her self-confidence and increased self-value (identity capital). The improved identity capital in return has then enhanced and motivated Miranda to continue participating in not-for-profit education.

Jane's Life Story

Jane was born in a family with four daughters of which she was the second. Her father died early when she was still in her primary school and since then she had had to work full-time to sustain her family and complete her secondary education qualification through night school studies. After Jane married and gave birth to her two sons, her family moved to a rural new town (because of the public housing allocation) where factory jobs were not available and she became a full-time housewife staying at home looking after her two children. Jane had placed high hopes and expectations on her two sons in their academic development and achievement as Jane had not had an opportunity to study and so she wanted her sons to be successful and not follow her fate. Jane said that her marriage was a total disaster as her husband changed totally after marrying her and was not willing to communicate with her or

take care of her. Jane's husband was physically abusive and mistreated her and her two sons though violence rarely happened. When Jane's older son started secondary school, she started work in a nearby supermarket as a cashier. When her colleagues and her sister-in-law realised she had secondary education qualifications, Jane was encouraged to find a better job and started working part-time as a supply teacher in nursery and as an examination assistant in the local Examination Board. Jane continued to participate and learn in different not-for-profit courses such as children's primary school curriculum (when her two boys were still young), dancing, computer skills, languages, Chinese calligraphy, painting, singing etc. In fact, Jane said that she has enrolled for nearly all the not-for-profit courses that she could afford and she found it allowed her to expand her social networks and learn from new friends. Since Jane's husband retired early several years ago and left her as the only breadwinner of the family and although Jane has her two sons willing to support her life, Jane insisted on continuing to work in part-time jobs to sustain herself as she did not want to give her two sons too much financial burden and limit their development. Since Jane's part-time work in the local Examination Board has been significantly cut back due to the Board's recent manpower restructuring, without any retirement funds saved and protection plan available to her, Jane felt worried about her future as her mortgage payments had still not been paid up and she was not sure her husband's pension funds were enough for them or even available to her.

Jane's Experience and Her Perceived Benefits of Not-for-profit Education

Jane is an active participant in not-for-profit education. She claimed she joined nearly all the courses that are available to her. She was satisfied with all her learning

experiences and she was especially pleased with her English conversation course that had helped her to communicate with the British examiners when she was working in the local Examination Board. Moreover, she enjoyed learning and in some cases teaching different interest-related courses where she could meet new friends and develop her social networks. In fact, the reasons and motivations for Jane to participate in not-for-profit education were leisure and psychological pressures. Jane was able to fulfil her learning needs which she had not been able to pick up when she was young and also she could get away from home and find joy and peace in the not-for-profit classroom.

As shown in Figure 9.7, Jane has gained significant benefits in friends and social networks and contributed more in civic participation from her not-for-profit education. Moreover, amid Jane's tragic marriage, she could find her own values and confidence when she was involved in her studies and social services in the local community centre. Thanks to the dancing and the other leisure-related courses, Jane also found herself physically and mentally much healthier and more flexible than the same age group of people. Besides, in terms of the benefits gained for improving family relationships, although Jane's husband opposed her learning and participation in the local not-for-profit community centre, Jane was able to use the computer skills learnt in school to communicate every day with her two sons who had left home which Jane appreciated very much. However, though Jane found and was grateful for the skills and knowledge learnt from her not-for-profit education, she was sorry that it did not lead her to any qualifications or certificates that could help her to improve her income and standard of living.

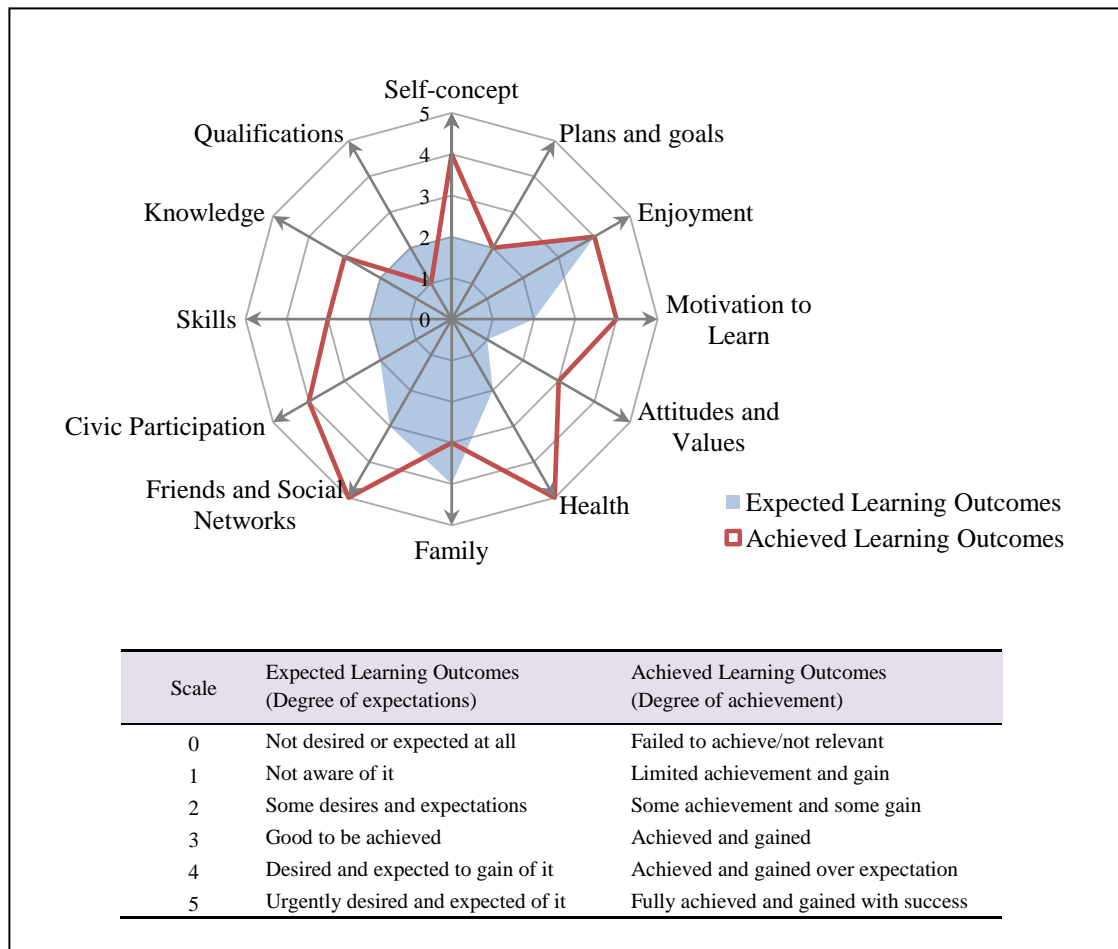


Figure 9.7: The expected and achieved learning outcomes of Jane's not-for-profit education experience

In reviewing the capital gains from Jane's not-for-profit education, Figure 9.8 shows that Jane expected and was able to achieve higher gains in social capital. Although Jane did not expect to gain as much in human capital as she expected in identity capital, she was able to fulfil and gain the same levels of benefits in both those capitals. The high learner surplus gain in human capital also shows that Jane's intentions and motivations to participate in not-for-profit education were to enlarge her social networks and make life more enjoyable and she did not expect to gain much benefits for her work and income from her study. But to Jane's surprise the qualifications that she gained from her not-for-profit education had helped her to work in a couple of good income part-time jobs.

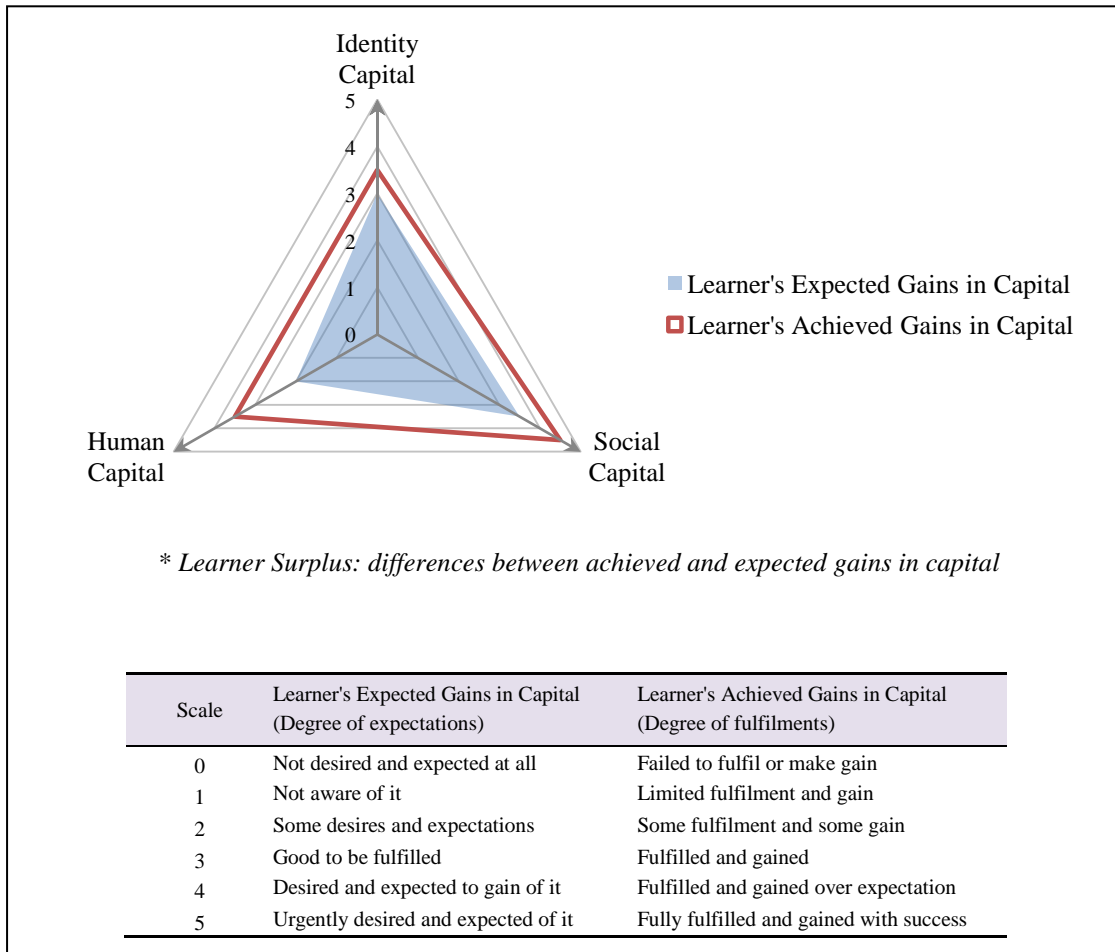


Figure 9.8: The expected and achieved gains in capital and the learner surplus of Jane's not-for-profit education experience

Two Disadvantaged Older Adult Learners' Life Stories

In the first disadvantaged learner's life story, Mary's, it was evidenced that the not-for-profit education had helped Mary to find the friendship and social support that she needed, and reconstructed the self-esteem and self-value that she unconsciously desired. Mary blamed her father and her childhood background for not having had a chance to study when she was young and it made her suffer in different ways, for example poverty, lack of qualifications, not knowing the rules of life, barbaric and narrow-minded personal character, poor inter-relationships with her family and friends, and not able to teach and communicate with her son.

In the second disadvantaged learner's life story, Kwai-fun's, the not-for-profit education that she has experienced has helped her to reduce and relieve her stress when her family was relying on social security welfare and she felt she was looked down upon and discriminated against by other people. The not-for-profit education has not only offered Kwai-fun opportunities to meet new friends and extended her social networks, but also led her to participate actively in different social volunteer services which has helped her to ease her boredom and found her a new meaning of life through sharing her skills to help other people in need.

Mary's Life Story

Mary was born in Macau in 1957 into a big family with seven children. Her mum was a nurse, originated from Shanghai and moved in the 40s to the Portuguese colony of Macau to escape from the Chinese Civil War. Mary's Portuguese father was a soldier

and was sent by the government to defend Macau. He worked as a policeman and sailor after he left the army. Mary's parents met and married in Macau and all their children were born there during the 1940s and 50s. Due to the family's poverty and the poor economic situation after the war, Mary's childhood was very difficult; she was like a wild kid dressed without proper clothing and shoes, ate poor food, and always slept in a cold bed. Since Mary's father was always away from home and only sent very little money back once a year, her family relied on the government to provide some very basic food for them to survive. Mary's father was a bad drunk with a poor temper. He beat her and her sisters which caused Mary to be afraid of him. Mary did not like her Portuguese father and after her father returned to Portugal when her mother died she did not contact him.

“You please allow me to say that. When I was young, my dad did not allow me to study and so I did not like my dad; it is because education is very important, study can help my future and help me to learn the rules of life. My mum always emphasised we need to become reasonable people and follow all the rules of life. She always told my dad to have more patience to teach us and he should not beat us like a mad cow. Everyone has different values and understanding of life but I think study can definitely help my life, at least if I have a chance to study I can understand more.” (36.22)

Mary received very little education and she started working in a clothing factory when she was still very young. Later she changed her job and worked in the newly opened renowned casino, Casino Lisboa, in Macau. Because of her family background, Mary grew up with a very strong and rebellious character and since she was a Chinese-Portuguese mix with a young and beautiful face, she did not work very hard in the casino and spent most of her time playing around with different people and did not take up any education opportunities.

“I have wasted a lot of opportunities, I should have had someone to remind me and I would have paid a lot more effort and attention to study, I am the kind of person who likes to study... but I liked to play around and when I was young I played a lot and I did not grasp the opportunity to study.” (43.22)

Mary married her 35-year-old husband from Hong Kong when she was only 19 and gave birth to their twin daughters in the same year. After she married she moved to live in Hong Kong. However, Mary’s husband died of cancer when she was only 30. After that Mary’s life became very difficult and she needed to work very hard for different low-pay part-time jobs to sustain her family and her children’s lives.

Mary married her second husband and gave birth to a son but her second marriage only lasted nine years and she always argued and fought with her second husband and maintained a very bad relationship with her mother-in-law.

After the break-up of her second marriage and since her two daughters had finished their education and started working, Mary started joining different not-for-profit education programmes to enhance her skills and qualifications, and to learn new interests and knowledge. The ERB employment retraining had provided Mary with the skills and the certificates that opened some job opportunities to her and she worked as a part-time home cleaner for a few years before she retired. Mary also joined different interest-related courses such as cooking, sewing and tailoring, Chinese calligraphy, drawing, Chinese language, computer skills etc. Moreover, Mary also regularly participated in different volunteer work and social services in different not-for-profit organisations. Mary suffered an unexpected horrible mental collapse and serious depression a few years ago and it nearly cost her her life. After her quick and sudden recovery she decided to participate in more not-for-profit education and

social services as she believed it could keep her fully occupied, busy socialising with other people and helping her to understand more rules and wisdom of life.

Mary is satisfied and happy with her life now as her twin daughters married and worked in very good jobs and Mary has also maintained enjoyable and very good relationships with her two sons-in-law. However, Mary found her poor education, ignorance and stubborn character did not help her to teach and communicate with her seventeen year old son. Mary felt guilty that she had badly spoiled her only son and caused him a lot of personal problems which made her worry a lot.

“If I were a well educated person, and if I had more knowledge, I may know how to teach my son. Now it is very difficult to teach him; he has his own world and we can’t communicate with him any more.” (50.35)

Mary’s Experience and Her Perceived Benefits of Not-for-profit Education

Mary has rated highly and commented on her not-for-profit education experiences. The most remarkable and treasured benefits that Mary perceived were that she was able to make new friends and expand her social networks through her not-for-profit education and her active participation in local voluntary social services. All these perceived benefits have not only enhanced and transformed Mary’s stubborn personal character but also opened up a new chapter in her life and made her feel satisfied with her enjoyable retirement life.

Figure 9.9 explains the learning benefits that Mary expected to achieve and her perceived actual gained benefits. In fact, Mary primarily expected and hoped that she could meet some new friends and make her life more enjoyable. She also thought she could learn some new knowledge and new skills which would make her stay mentally

healthy by participating in not-for-profit education. To Mary’s surprise, she has achieved what she had expected and the achieved learning outcomes well exceeded her expectations in terms of the gains in civic participation, friends and social networks, life enjoyment, motivation to learn, and attitudes and values change. However, Mary found her not-for-profit education did not help to improve her relationship with her younger son.

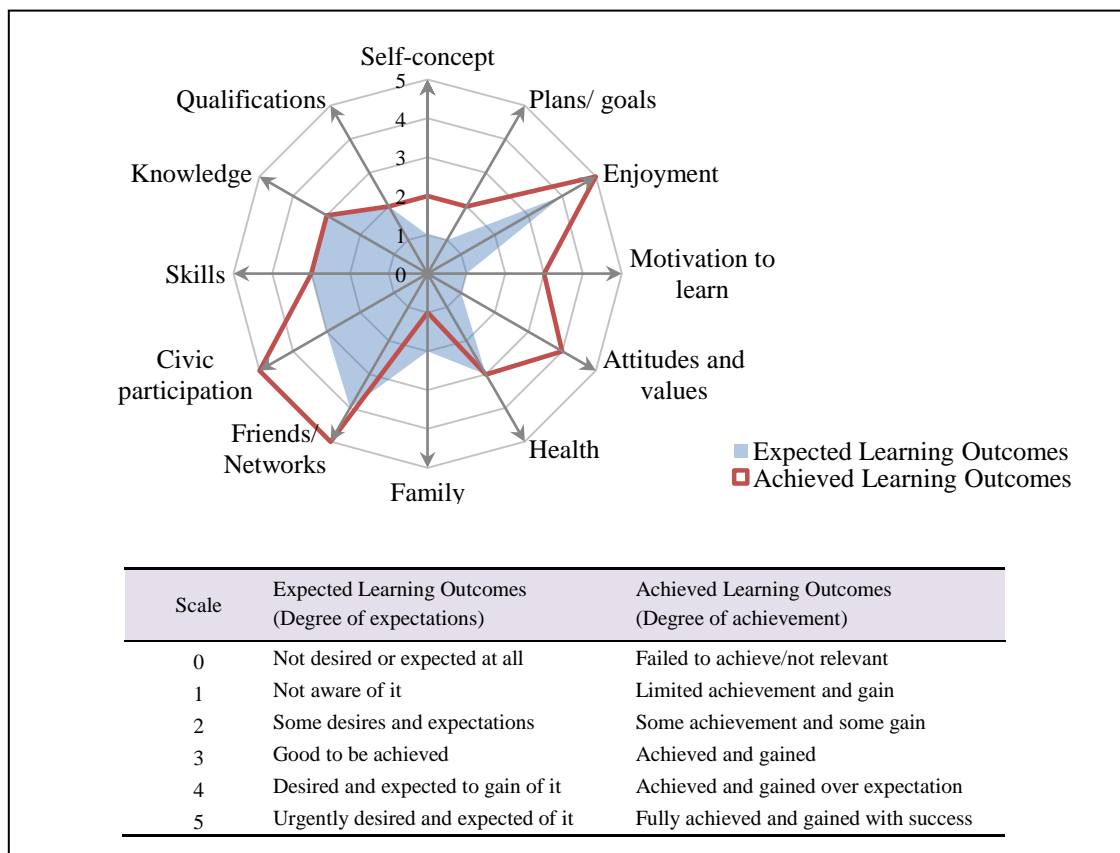


Figure 9.9: The expected and achieved learning outcomes of Mary's not-for-profit education experience

Figure 9.10 shows Mary’s different gains in capital and the learner surplus gained through her not-for-profit education. It was no surprise that Mary perceived and benefited only limited gains and benefits in terms of human capital as it was not her main motive for joining not-for-profit study. However, Figure 6.4 shows that Mary was able to gain and experience significant learner surplus in terms of social and

identity capital: viz. friends and social networks, civic participation, enjoyment and personal attitudes and values changed. She had not expected this before she joined not-for-profit education.

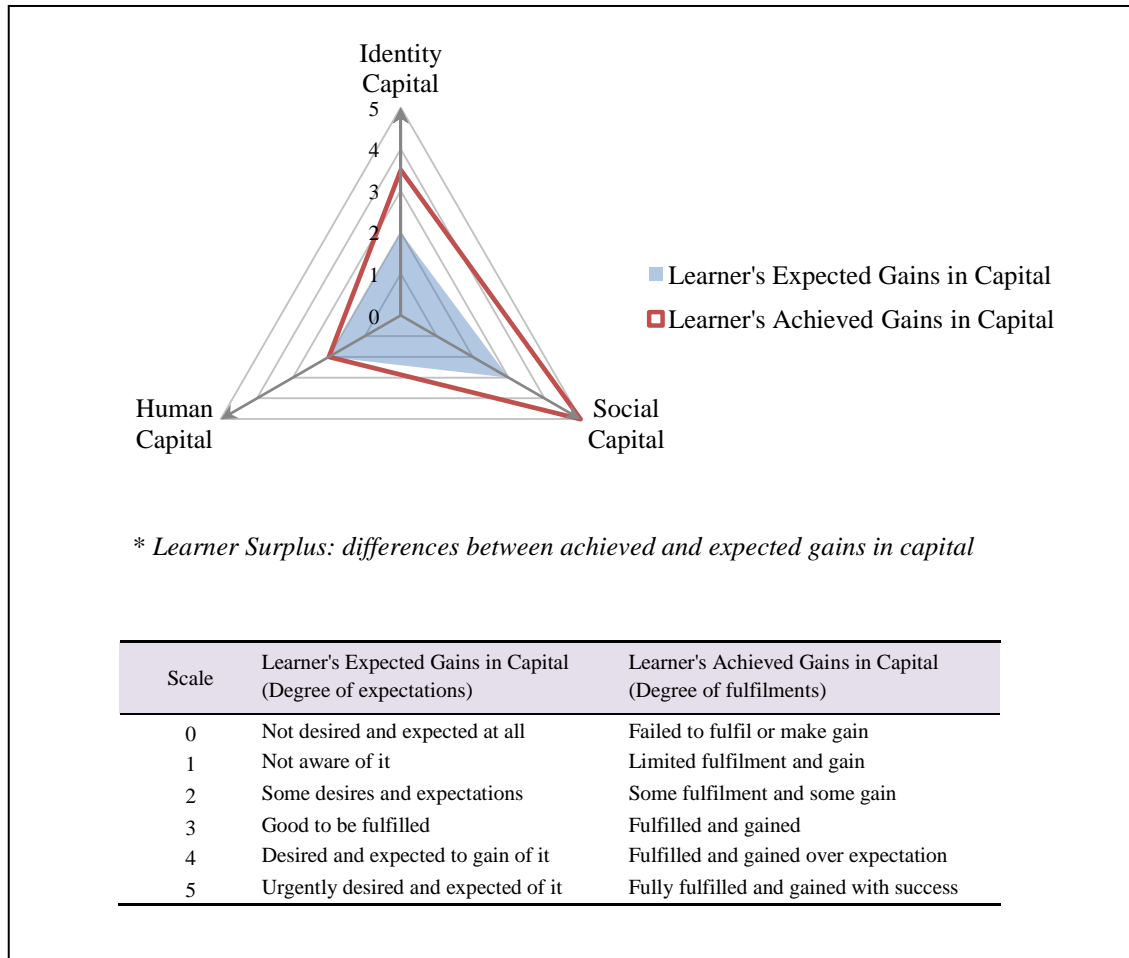


Figure 9.10: The expected and achieved gains in capital and the learning surplus of Mary's not-for-profit education experience

Kwai-fun's Life Story

Kwai-fun was born and grew up in Guangzhou, China until when she was 26 years old she married her husband who was from Hong Kong. Kwai-fun was born in 1953 soon after the Chinese Civil War and the declaration of The People's Republic of China in 1949. She has seven siblings, her father was a Chinese medicine doctor and her mum was a clothing factory worker. When Kwai-fun was 13 years old and at her primary school studies, the Chinese 'Great Proletarian Cultural Revolution' started in 1966. All schools were banned and closed during the revolution and she was asked to study in a secondary school after schooling was allowed and schools reopened in 1968. After Kwai-fun finished her higher secondary school studies in 1975, she was sent to a remote village to do pig farming and construction work under the new social movement, 'Up to the Mountains and Down to the Countryside', launched by the Chinese Communist Party. Kwai-fun later returned home to Guangzhou in 1979 and reclaimed her citizenship through her mum's private network.

At the 'proper marriage age' of twenty-six years old, Kwai-fun was introduced to her husband who was also looking for a marriage at his age of thirty-three years. Kwai-fun had only seen her husband four times in China and though she did not really know her husband well, she married him. Kwai-fun's application for family reunion and migration was granted after seven years of waiting; she moved to and settled in Hong Kong in 1986 where she was introduced to work in an electronics factory. Within a year, at 33, she gave birth to her first daughter. Kwai-fun gave birth to another daughter and a son in the coming three years and she stopped working and stayed at home looking after her children. To sustain a larger family and without Kwai-fun's contribution to the family income, Kwai-fun's husband worked in two jobs to earn enough for the family. After several years of waiting, public rented housing in a

newly developed rural town was allocated to Kwai-fun's family and they moved to a bigger flat after her children got older.

When the production lines of Kwai-fun's husband's clothing factory moved to China, Kwai-fun's husband was left unemployed at the age of fifty-five and Kwai-fun's family had to rely on social security welfare, the Comprehensive Social Security Assistance Scheme, to sustain their living. Kwai-fun found her experience of receiving social security from the government stressful and not pleasant. She was under tremendous pressure as she perceived she was looked down upon and discriminated against by other people and she needed to conform and work for compulsory social work orders. Although Kwai-fun and her husband tried very hard to get back to work, they failed since nearly all the factory work had been relocated to China and they were also discriminated against by prospective employers because of their age. Kwai-fun and her husband remained long-term unemployed until all their children started working and they decided to retire.

Kwai-fun joined different not-for-profit training and interest-related courses after all her children started earning and when she was free from compulsory social work order. She also spent plenty of her leisure time in local community voluntary social services, which she found enjoyable and highly rewarding.

Kwai-fun's Experience and Her Perceived Benefits of Not-for-profit Education

Kwai-fun received and experienced different types of not-for-profit education and she found not all of it useful. She criticised the government-subsidised courses run by not-for-profit organisations for employment retraining as being useless and they did not

help her to find a job and improve her income and standard of living. However, Kwai-fun has highly appreciated her community-based interest-related not-for-profit courses that she took after she formally retired. Kwai-fun found her not-for-profit education made her retirement life more enjoyable and fruitful as she was able to make new friends and participate in different social activities and voluntary services. Moreover, Kwai-fun found not-for-profit education and the new knowledge learnt in school had helped her to reduce some stress and improve her self-esteem. Lastly, Kwai-fun has also highly rated the low-cost and highly subsidised nature of not-for-profit education and courses; she found these courses affordable and good value.

As shown in Figure 9.11, Kwai-fun has achieved and gained significant learning benefits in terms of friends and social networks and participation in civic activities. Kwai-fun believes her not-for-profit education makes her retirement life enjoyable and meaningful. Figure 9.11 also shows that although Kwai-fun had attended the employment retraining courses and been awarded the relevant qualifications and certificates, she found her learning was useless as she was not able to find a job after her learning. In fact, Kwai-fun has already given up all the job skills and qualifications for related-learning opportunities but is actively involved in interest-related courses such as photography, Chinese calligraphy, handicrafts, and cooking etc. which she enjoys as she can socialise with others from the same age group.

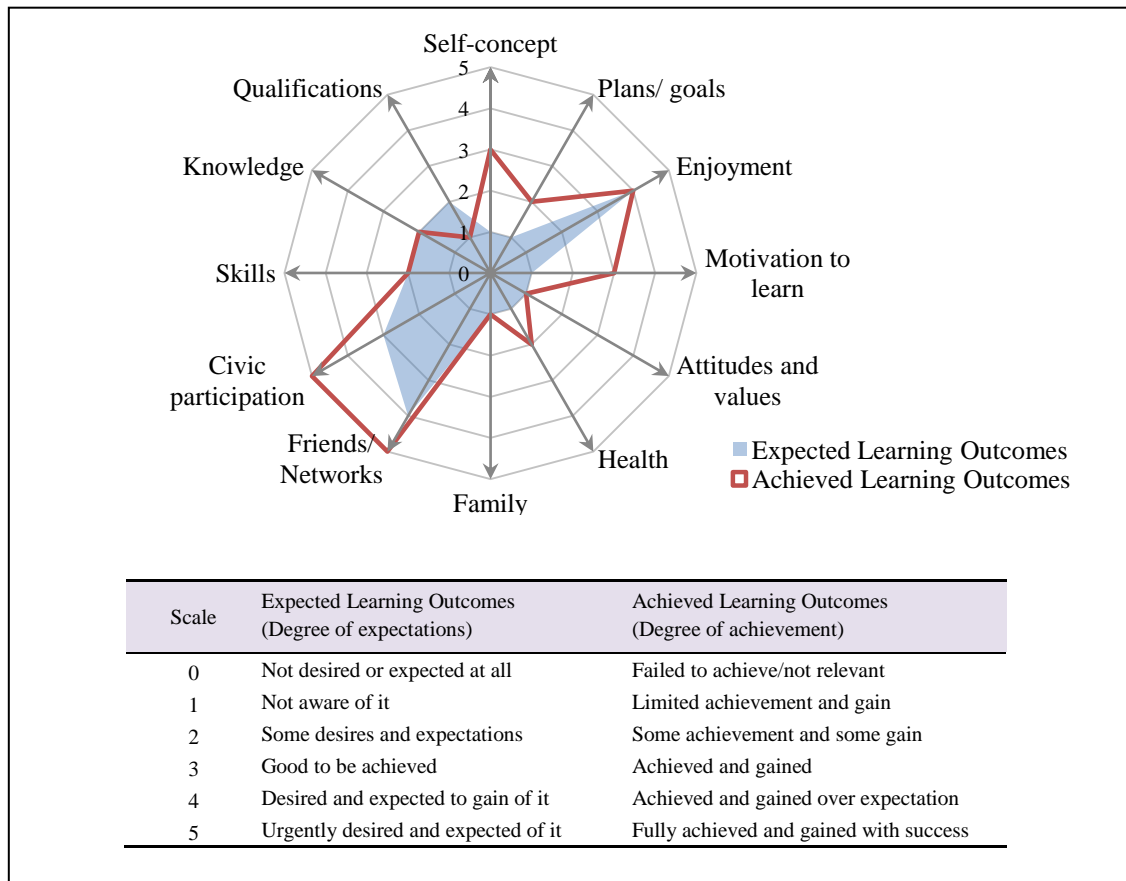


Figure 9.11: The expected and achieved learning outcomes of Kwai-fun's not-for-profit education experience

In reviewing the capital gains of Kwai-fun's not-for-profit education, Figure 9.12 shows that Kwai-fun expected and achieved enormous gains in benefits and learner surplus in social capital, ie friends, social networks, and civic participation. Although Kwai-fun did not expect to gain as much identity capital as social capital, to her surprise she was able to fulfil and gain some learning benefits and learner surplus in identity capital such as a reduction in her stress and uplift of her self-esteem.

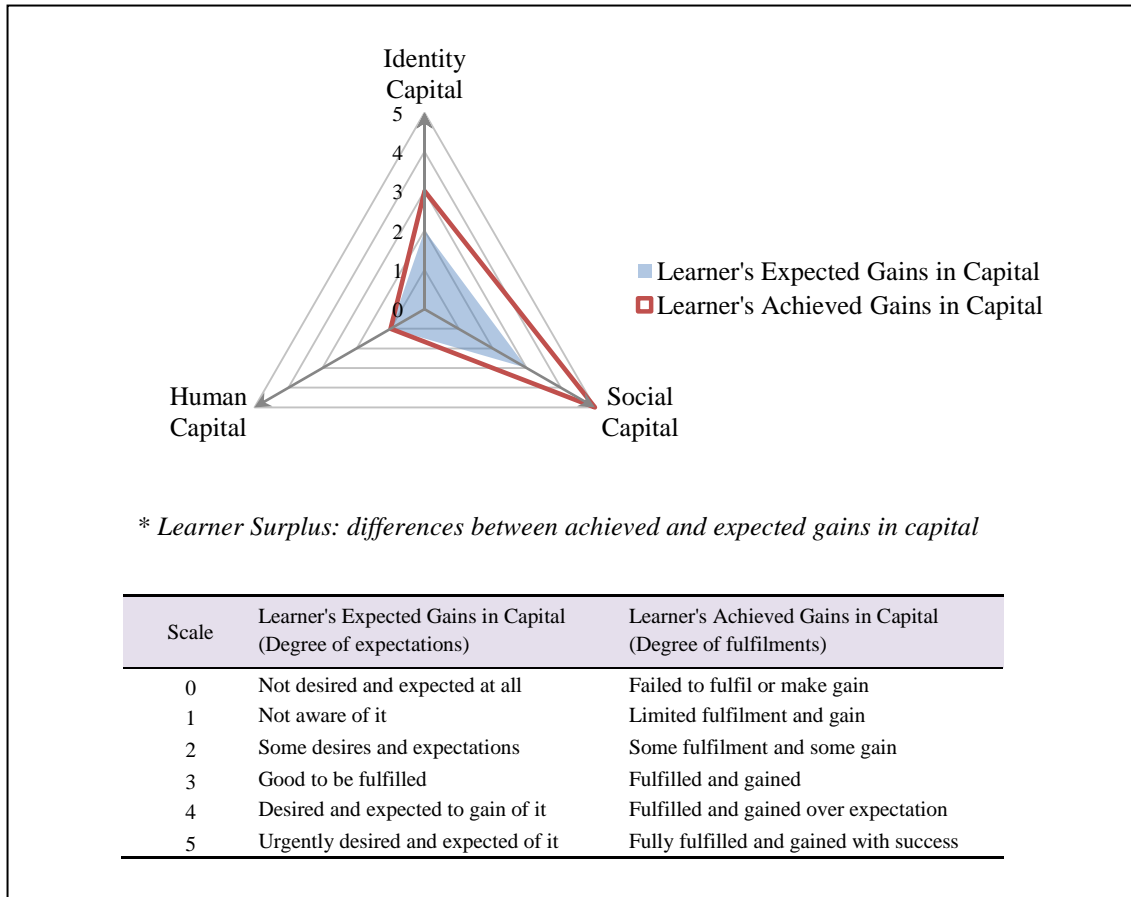


Figure 9.12: The expected and achieved gains in capital and the learner surplus of Kwai-fun's not-for-profit education experience

Two Disadvantaged New Immigrants from mainland China Learners' Life Stories

With regard to the two disadvantaged new Chinese immigrant learners' life stories, in the first case Wing-han is a non-believer in education due to her poor childhood learning experience and she found not-for-profit education and education that she had received in Hong Kong was not able to help her much amid her tragic life experience and severe depression problem. She perceived the continuing nature of not-for-profit education as a lifestyle that many other people in Hong Kong take part in and so she had to follow and deal with it as well. In contrast, in the second case although Sandy had also been badly affected and struggled a lot during the course of her tragic life in Hong Kong, she perceived her not-for-profit education as fruitful and successful and it has brought her a lot of real gains and transformed her life.

Wing-han's Life Story

Background and Life Story of Wing-han

Wing-han, aged 33 at the time of interview, describes herself as a divorced new immigrant with a mainland Chinese background. She speaks in very strong mainland Chinese-accented Cantonese. She looks shy, fragile, small and gloomy.

Wing-han was born in a remote village in the mountainous area of Hunan Province. Because of her impoverished village family background, Wing-han had no chance for school education until she followed her divorced mum who moved to Changsha, the

provincial capital of Hunan. At around 10 years old, Wing-han started her first school and she managed to finish her primary education at around 16 which is much behind the majority of students in China. She dropped school after she finished her primary studies and started working for her aunt in a small commuter guest house near one of the major railway stations in Changsha.

In 1995, after working for nearly a year in the busy commuter guest house, Wing-han met and decided to follow one of her fellow villagers. Later she claimed she was lured by him, and moved to Zhuhai in Guangdong province for a ‘better paying job’. Zhuhai, five hundred miles away from Changsha, is one of the five Special Economic Zones in south-east China and close to Hong Kong and Macau which provided tremendous opportunities for entrepreneurs and businesses during the 1980s and 90s (See Figure 9.13).

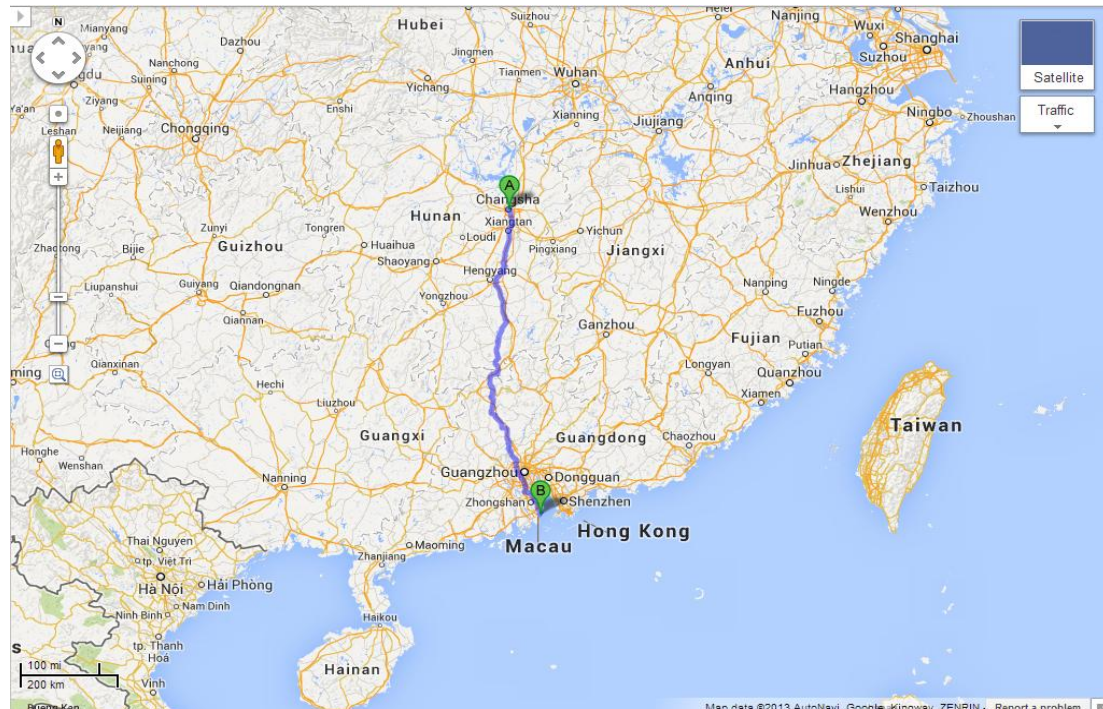


Figure 9.13: Map showing Wing-han’s migration from Changsha, Hunan (A) to Zhuhai, Guangdong (B), finally settling down in Hong Kong

In fact, the so-called ‘better paying job’ that Wing-han’s fellow villager arranged for her was to work in a ‘local hair salon’ as a sex worker and all the money that she earned at that time went to her pimp fellow villager. ‘Gone north for a hair wash’ – frequent cross-border Hong Kong working class men seeking and paying for young female villagers for cheap sex services in the Guangdong area – was popular at that time along with the fast growing economic development brought by the Hong Kong affluent business firms, even though sex trading activities are not permitted under communist-ruled China. In fact, most sex workers are migrants from different deprived provinces in China, part of the estimated 150 to 200 million people who have left China’s countryside in search of better paying jobs in China’s cities (Shi 2008). Though Wing-han recalled that her sex-working life in Zhuhai was due to her simple mindedness and credulous personal character, she also blamed herself and admitted that her vanity and curiosity about the affluent big glamorous city life in Guangdong paid the price.

Despite all the hardships and language difficulties in Zhuhai, Wing-han met her Hong Kong triad gang background husband-to-be in the barber shop where she worked as her husband was one of the regular customers in the shop. While Wing-han emphasised that she had never provided any ‘barber services’ to her husband when she was working in the barber shop, they got married after cohabiting together for around three years. At the end of 2000, after two years of marriage, Wing-han was happily enjoying her first pregnancy but it sadly ended up in an ectopic pregnancy and she loss one of her fallopian tubes as a result.

In 2004, after waiting for five years for settlement in Hong Kong, Wing-han finally got a ‘One-way Permit’ from the Chinese government allowing her to leave mainland China and permanently settle in Hong Kong. At the end of the same year, Wing-han’s

second tragic miscarriage caused the loss of her second and last fallopian tube. After the two dreadful miscarriages and her permanent loss of fertility, Wing-han fell into a deep and serious depression with huge emotional problems and it disastrously affected her ten-year-long relationship with her husband; Wing-han divorced her husband in August 2010. To maintain herself, Wing-han applied for subsidised public housing and in the meantime she lived in a flat rented and paid for by her ex-husband. She also made her living by working as an assistant in a small business and relied on her monthly maintenance payments and utility bills paid by her ex-husband.

One of Wing-han's dreams was to own and run a bar in Hong Kong as she claimed that she had some very good and long memories with her ex-husband doing this though she was not an alcohol drinker. Without any strong family bonds or social network support in Hong Kong, she spent most of her time staying at home watching television. Wing-han now plans to continue her learning of computer skills and English language as she realised and claimed that she is still basically interested in IT, even though she is illiterate in English, and it is not possible for her to survive in Hong Kong after her divorce without these skills. Figure 9.14 summarises the timeline and illustrates the life-changing incidents / events of Wing-han's life story.

Summary of the Timeline of Wing-han's Life Story

<u>Year</u>	<u>Age</u>	<u>Key Life Events</u> (* <i>Life changing incidents/events</i>)
1979	0	Born in remote mountain village in China
	10	Parents divorced, moved to provincial capital city of Changsha with her remarried mother <i>* Started school at the age of ten years old</i>
	15-16	Finished primary education at age of sixteen and started working in a small guest house in a train station
1995	16	Moved to the south-eastern coastal city of Zhuhai, one of the Special Economic Zones of China <i>* Worked as a sex worker</i>
1996 (April)		Met her husband in China at the sex working place
1998 (Late)	20	<i>* Married to her husband who is from Hong Kong</i>
2000 (Late)		First pregnancy but ended up with an ectopic pregnancy, miscarriage, and loss of one of her fallopian tubes
2004 (Early)	25	Second pregnancy, but again ended up with an ectopic pregnancy and lost her fertility <i>* Serious depression problem due to her two miscarriages and infertility; marriage problems started.</i>
2004 (August)		<i>* 'One-way Permit' approved and migrated to Hong Kong</i> Started working in different jobs: <ul style="list-style-type: none"> • Part-time cashier in a supermarket (9 months) • Shop Assistant (3 years) • Cashier in supermarket (1 year) • Warehouse assistant (8 months)
2008-2010	29	Attended computer and English language courses offered and held by not-for-profit organisations
2010 (August)	31	<i>* Divorced with prolonged serious depression problem</i> Living alone in a flat rented by her ex-husband in Hong Kong

Figure 9.14: Summary of the Timeline of Wing-han's Life Story

Causes of the Disadvantaged Status of Wing-han

Wing-han's female immigrant identity and status, her mainland Chinese background and her subsequent tragic life experience have jeopardised Wing-han's social and economic status and her future opportunities in Hong Kong. The level of human capitals that she preserves can hardly fulfil the basic prerequisites for a working class job in Hong Kong. Wing-han's human capitals are limited by her low and non-accredited education qualifications, lack of work-related skills and training, poor mastery of the Cantonese and English languages, and lack of relevant working experience.

Wing-han's serious depression and marriage problems badly affected her work and study which further affected her opportunity to learn and advance herself:

"Because of the conflicts with my husband... since the rowing was so aggressive it had basically affected and involved all the family members. It just seems the end of the world. I can't go to school, I have no mood to learn, even have no mood to work." (39.10)

In addition, Wing-han suffers immense disadvantage from her language background and abilities. She speaks very strong Hunan-accented Cantonese and her Chinese immigrant background can be easily identified when she speaks. Wing-han may probably already be excluded from many work and social opportunities because of her accent. Notably, not able to speak and communicate using simple English has further limited Wing-han's opportunity to advance herself in the very competitive and demanding job market in Hong Kong.

"I have absolutely no idea of the English language, I know they are just alphabetical but I know nothing about the meaning of it... When I was working as a cashier in a supermarket, I even didn't know how to count 1-100 in English. To be honest I was quite ashamed as I really know nothing about English and often there were some English-speaking foreign customers visiting the store..." (41.15)

Besides, the new Chinese female immigrant identity and status borne by Wing-han, which is widely negatively perceived and labelled as slacker by Hong Kong society, also does not help Wing-han to build constructive and positive self-concepts and develop life plans and goals. These socially constructed and discriminatory identities and status may even perhaps persecute Wing-han for the rest of her life since the

incompetent human capitals and underprivileged language capabilities suffered by her are unlikely to be changed or improved.

The award of the 'One-way Permit' allowed Wing-han to have the right of abode in Hong Kong but it also means that she has to live far away from her home town in Hunan, China. The difficulty of lacking family and friends' social network supports became much more obvious after Wing-han divorced her husband whom she had relied on for 10 years. Wing-han lived alone in a flat rented by her ex-husband and she claimed she has only very little contact with her mother-in-law. She also seldom liaised with her co-workers and fellow villagers; most of the time Wing-han stayed at home watching TV or sleeping. Wing-han said that because of her perceived miserable background and life experiences, she has reservations about making new friends and stopped seeing almost all her old friends. She was afraid of people asking about her background which would bring back all her painful memories.

"I don't know how to say, I am a bit scared, I'm afraid when I go out or a friend asks about me, or just like what we are doing now, talking with you face-to-face, I am very scared of these things (talking with people about myself). That's why when I came to see you today, I told myself that oh no, I am going to die now. I have already kept telling myself to control myself (emotional mood, crying), but I found I cannot control myself." (52.15)

Wing-han's self-criticism which leads to her unsociable attitude not only continuously affects the development of her self-esteem but also becomes a major stumbling block to improve her level of social capital.

Another reason that hinders Wing-han's ability to socialise with her friends and meet new friends is her inability to input Chinese characters using a computer or a mobile phone. Social networking through Internet platforms such as QQ (one of the most

popular social networking media in mainland China) or MSN, via a computer or mobile gadgets, are common and popular in Hong Kong. Wing-han said that she can only use a computer writing pad to write and input Chinese characters but is not able to type Chinese characters using a computer keyboard. Using a computer writing pad to input Chinese characters means she has to put up with a much slower, more difficult and very inconvenient way to input Chinese characters which hampers Wing-han's interest and ability to socialise. It is not difficult to understand why Wing-han, and so many other disadvantaged people in Hong Kong, are not able to communicate effectively since Chinese typing, unlike English typing, requires senders of Chinese messages to possess very good command of and a sound understanding of the structure of individual Chinese characters. It is rather difficult for many disadvantaged (even for the well-educated) to master. Besides, it also requires senders to choose, adapt and learn a set of rules of input method and it requires tremendous time and effort to memorise and practice before they can communicate effectively. Because of all these barriers to communication in Chinese using technology, Wing-han claimed she remains as an old style person who still prefers to use a printed dictionary to learn new words or use traditional phone calls to contact friends. Failing to effectively network with friends and not able to improve her social capital means Wing-han limited and finally lost her opportunity to acquire updated information and gain new knowledge which was needed to be included and accepted in the knowledge-based society of Hong Kong.

It also demonstrated how Wing-han's non-achieved state of human capital and her damaged identity capital affected her state of social capital. Wing-han's story also evidenced what Schuller et al. (2004) suggested; the three capitals intersect and affect

each other and many of the learning outcomes are a combination of two or all three of these capitals.

Wing-han's Perceived Benefits of Not-for-profit Education

In fact, the provision of the education programmes and courses by the not-for-profit organisations in Hong Kong and the opportunity for Wing-han to advance herself and to allow her to fulfil her dream means a lot to Wing-han, and so it does to many new Chinese immigrants. It not only provides a channel for upward social mobility allowing new immigrants to transform themselves and be included in the fast-paced economy and society of Hong Kong, but it also fulfils some of the disadvantaged immigrant learner's psychological needs in hopes and dreams. Although other wider benefits of not-for-profit education are not obvious in the Wing-han case, the light of hope for the future brought by not-for-profit education is bright enough to show the important value and benefits for the isolated and marginalised Chinese immigrants in Hong Kong (Chapter 7 has provided the detailed descriptive analysis of the wider benefits of learning experienced by Wing-han).

Based on Schuller et al. (2004) 'conceptualisation of wider benefits of learning' framework, Figure 9.15 summarises and explains the learning benefits that Wing-han expected to achieve and the benefits that she has achieved. In fact, Wing-han primarily expected and hoped that she could learn some new skills and knowledge and possibly achieve some qualifications and make her life more enjoyable. She also thought that learning some new knowledge and new skills would make her plans and goals possible. Though the not-for-profit education has brought her some new skills and knowledge, for example basic English and numerical skills, it has not brought her

the qualifications and certificate that she expected. The not-for-profit education has also influenced and motivated her to keep on learning and changed some of her attitudes and values towards education and her self-concept.

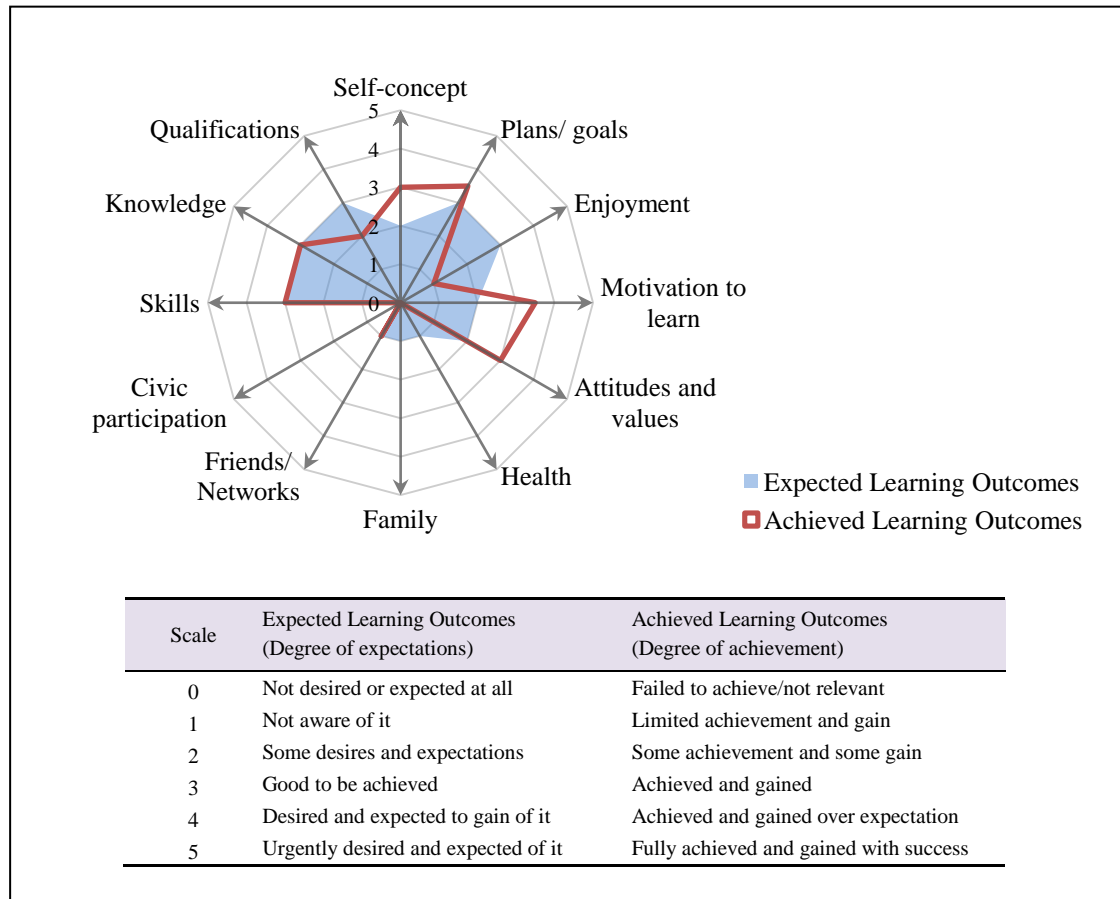


Figure 9.15: The expected and achieved learning outcomes of Wing-han’s not-for-profit education experience

Figure 9.16 shows Wing-han’s different gains in capital and the learner surplus gained through her not-for-profit education. It is found that Wing-han has achieved higher gains in human and identity capitals and the achieved human capital has matched with Wing-han’s expectations. Besides, Wing-han perceived only little gain and benefit in terms of social capital where meeting new friends was not her main motive for joining not-for-profit study and she was suffering from a serious depression problem. However, Figure 9.16 shows that Wing-han was able to gain and experience some

significant unexpected learning benefits (learner surplus) in identity capital gains: viz. self-concept associated with continued learning, attitudes and values changed and hopes were built up.

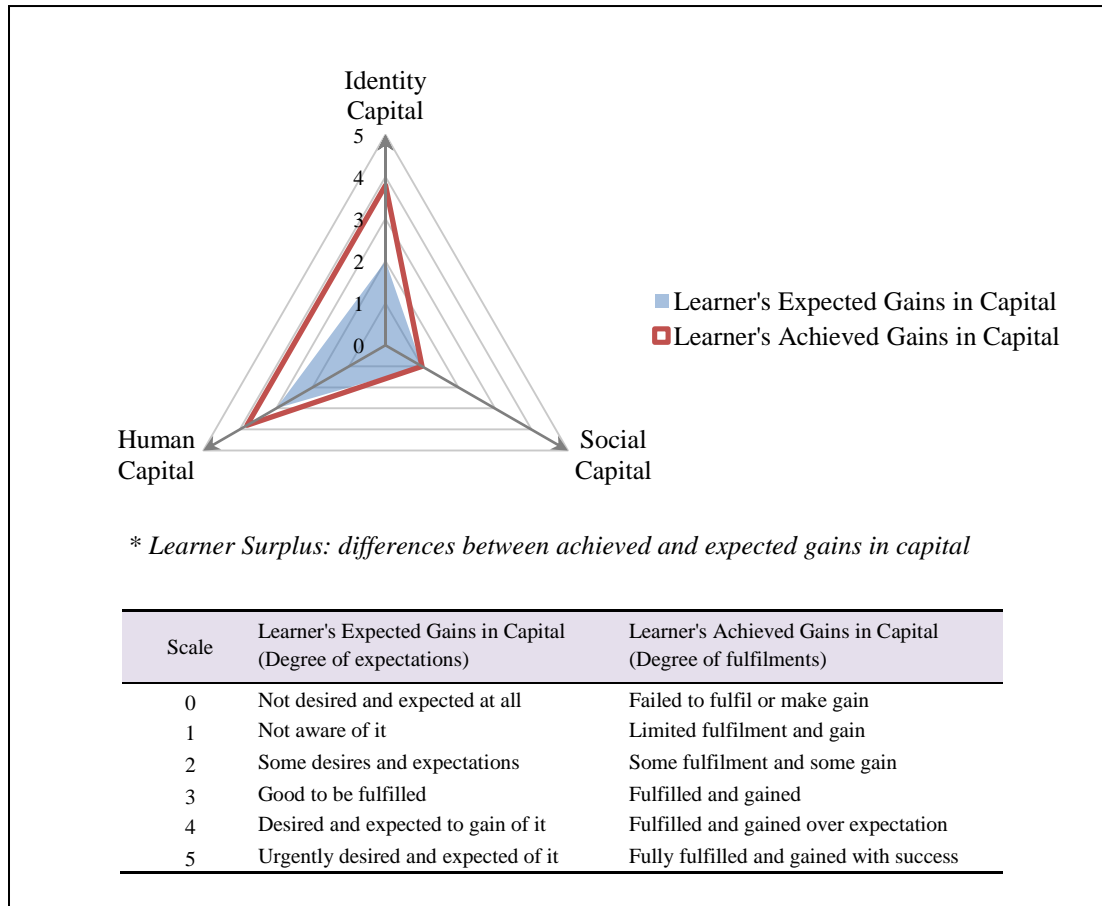


Figure 9.16: The expected and achieved gains in capital and the learning surplus of Wing-han's not-for-profit education experience

Sandy's Life Story

Background and Life Story of Sandy

Sandy originated from Guizhou, China and was in her late thirties when the interview was conducted. She is an immigrant from China and chose to settle down in Hong Kong in 2004 to obtain better medical treatment for her disabled daughter. She is a single mum, living with her 11-year-old seriously mentally and physically disabled daughter in a tiny 150 square foot one-bedroom flat in an old and deprived district in Hong Kong.

Sandy spent her childhood in her working class family and was educated in China. She hated school and performed poorly because she was afraid of the fierce and tough school teachers. She received junior secondary school education and spent three years training as a kindergarten teacher in the Chinese state's mid-level professional education system. She worked for two years as a kindergarten teacher after graduation from the training school before she moved on and left home, moving to Guangzhou. Sandy had an unhappy childhood and poor family experiences due to the split-up of her parents; she had to separate from her brother and live with her aunt's family when she was nine years old. She later also suffered violence from her stepmother.

At the age of 23, Sandy moved to Guangzhou with her cousin through an opportunity for a vocational training programme offered by the state's education bureau. She met and married her husband who originated from Hong Kong and was 13 years older than her. Afterwards she worked and lived in Guangzhou. The reason for Sandy leaving Guizhou and moving to Guangzhou was to escape from the abuse by her bad-

tempered boyfriend and her hope to gain a better living under the newly opened-up Chinese economy during the 1990s. Guangzhou is the capital of Guangdong province in south-east China and is one of the richest, biggest and fastest developing coastal cities. Compared with Sandy's hometown of Guizhou which is located in the middle of China and is approximately 625 miles away from Guangzhou, Guangzhou offers a much better standard of living and diversity of life thanks to the Chinese state's open-door economic policy (Figure 9.17). However, since people in Guizhou speak south-western Mandarin while Cantonese is the local language in Guangzhou along with all the social and cultural differences, Sandy found it difficult to adapt to her new life there. Sandy still speaks Cantonese with a very strong Mandarin accent today and she could easily be identified as an immigrant from China.



Figure 9.17: Map showing Sandy moved from Guizhou (A) to Guangzhou (B) and finally settled down in Hong Kong

In her later days in Guangzhou, Sandy worked and helped to manage her husband's family business and she married her husband from Hong Kong when she was 27 years old. Within a year of their marriage Sandy gave birth to their daughter. Their happy

family life didn't last long and turned sour when her husband's family business closed down in Guangzhou and her daughter was diagnosed as mentally and physically disabled. Because of her daughter's serious illness, Sandy stopped everything and spent all her time travelling with her disabled daughter to different well-known hospitals across the country in the hope of better treatment. When their money ran out Sandy realised that Hong Kong had the specialised hearing operations that her daughter urgently needed and the operation costs could be covered by an NGO's trust fund. She decided to leave China and migrated to Hong Kong. Sandy started to learn and worked as a beautician once she got her permanent right of abode in Hong Kong and she was promoted to assistant manager afterwards in a beauty shop after years of hard work, while her husband stayed at home looking after their seriously disabled daughter.

However, shockingly and tragically, Sandy's husband died suddenly in 2009 in his bed at home in his late forties when Sandy was working at the beauty shop. It left Sandy and her seriously disabled daughter living alone in Hong Kong without close family support. It also caused Sandy an immediate financial burden as she had to quit her job and stay at home looking after her daughter. Figure 9.18 summarises the timeline of Sandy's life story.

Summary of the Timeline of Sandy's Life Story

<u>Year</u>	<u>Age</u>	<u>Key Life Events</u> (* <i>Life changing incidents/events</i>)
1971	0	Born in Guizhou, China Hated school and underperformed due to fear of fierce and tough school teachers Sandy claimed her family were not able to support her education
	9	Parents divorced, was separated from her younger brother and lived with her aunt's family
	12	Suffered from family violence brought on by her stepmother
	18	Completed junior secondary school and left school *Joined mid-level professional education training in China and trained as a kindergarten teacher
	21	Started working as a kindergarten teacher in a private enterprise earning non-competitive under paid salary
	23+	*Joined a vocational training course in Guizhou China and moved to Guangzhou with her cousin to avoid abuse from her boyfriend and for a better standard of living and wages
	25-26	Met her now-deceased husband Worked for her husband's family business
	27+	Married Her husband's business closed down Gave birth to her daughter and the whole family was very happy * Her daughter was diagnosed as suffering from mental and physical disabilities at around six months old due to incomplete brain development. It changed Sandy's life completely
Late 2004		Relied on her husband's family to pay the medical expenses * The whole family migrated to Hong Kong at her daughter's age of five years old. The decision to move to Hong Kong was due to an opportunity for treatment of her daughter's hearing problem in Hong Kong * Obtained a permanent Hong Kong Identity card in August 2005 and started to learn as a beautician in a beauty shop and earned quite a good salary
2007		* Joined the government-funded Employees Retraining Programme to learn to be a licensed body massager Worked as a body massager in the beauty shop with satisfactory results and promoted as an assistant manager in the company
2008		Sandy's husband stopped working and spent his time taking care of their daughter
2009		* Sandy's husband died suddenly in his bed at home Sandy had to stop working and stayed home to look after her daughter which created financial problems Sandy started calling on her clients' homes to offer beauty services to sustain her living. She also used her mum's retirement funds to buy a computer to advance herself and invest in the stock market With her brother's financial help, Sandy is now planning to start her own beauty shop business

Figure 9.18: Summary of the Timeline of Sandy's Life Story

Causes of the Disadvantaged Status of Sandy

Sandy is an extraordinarily positive and very strong person. Although she has experienced two unusually tragic life events, her daughter's serious mental and physical disability and the sudden death of her husband, Sandy is still able to remain steadfast and committed to embrace her challenging future. In addition, as an immigrant her background from China doesn't help her either. Her negatively labelled immigrant identity, lack of sound education and recognised qualifications, strong Mandarin accent, lack of close family support, and burdens on income have further given her life in Hong Kong an extra burden.

Sandy's positive and fighting life attitudes are not coming from nowhere. Sandy is a committed, confident, very hardworking, flexible and optimistic person. She likes to learn new things whenever she sees there is a need and a gap for herself. She is able to review and reflect on herself so as to understand other people's life experience. It helps her to identify new directions and opportunities, and make plans for her future. She is also very independent and courageous. She explores whatever opportunities turn up for her and she is happy and good in communicating and sharing with her family and friends.

After Sandy obtained her permanent residency in Hong Kong, she quickly opened herself up to learn as a beautician and later on enrolled in two government funded not-for-profit organisations' retraining programmes. These two not-for-profit retraining programmes not only enabled Sandy to adapt to her new life in Hong Kong in an easier and faster way but also brought her many unexpected learning benefits. Moreover, Sandy's hardworking attitude as a beautician has gained her tremendous knowledge and skills, and a good reputation in the industry. The education that Sandy

received further led to her successful working experiences in Hong Kong and has helped her to face and sustain her life in Hong Kong amid her tragic life experience and has equipped her for future challenges.

Sandy's Perceived Benefits of Not-for-profit Education

According to Schuller et al. (2004) 'conceptualisation of wider benefits of learning' framework, Figure 9.19 explains the learning benefits that Sandy expected to achieve and the benefits that she has achieved. Similar to Wing-han, Sandy primarily expected and hoped that she could learn some new knowledge and new skills and possibly achieve some qualifications which could help her to achieve her plans and goals. Moreover, Sandy also expected to meet new friends at school and find her life more fruitful and enjoyable. To Sandy's surprise, she has not only achieved what she had expected, but the achieved learning outcomes well exceeded her expectations in terms of the gains in family, self-concept, motivation to learn, and attitudes and values. The overall gained benefits of learning were high.

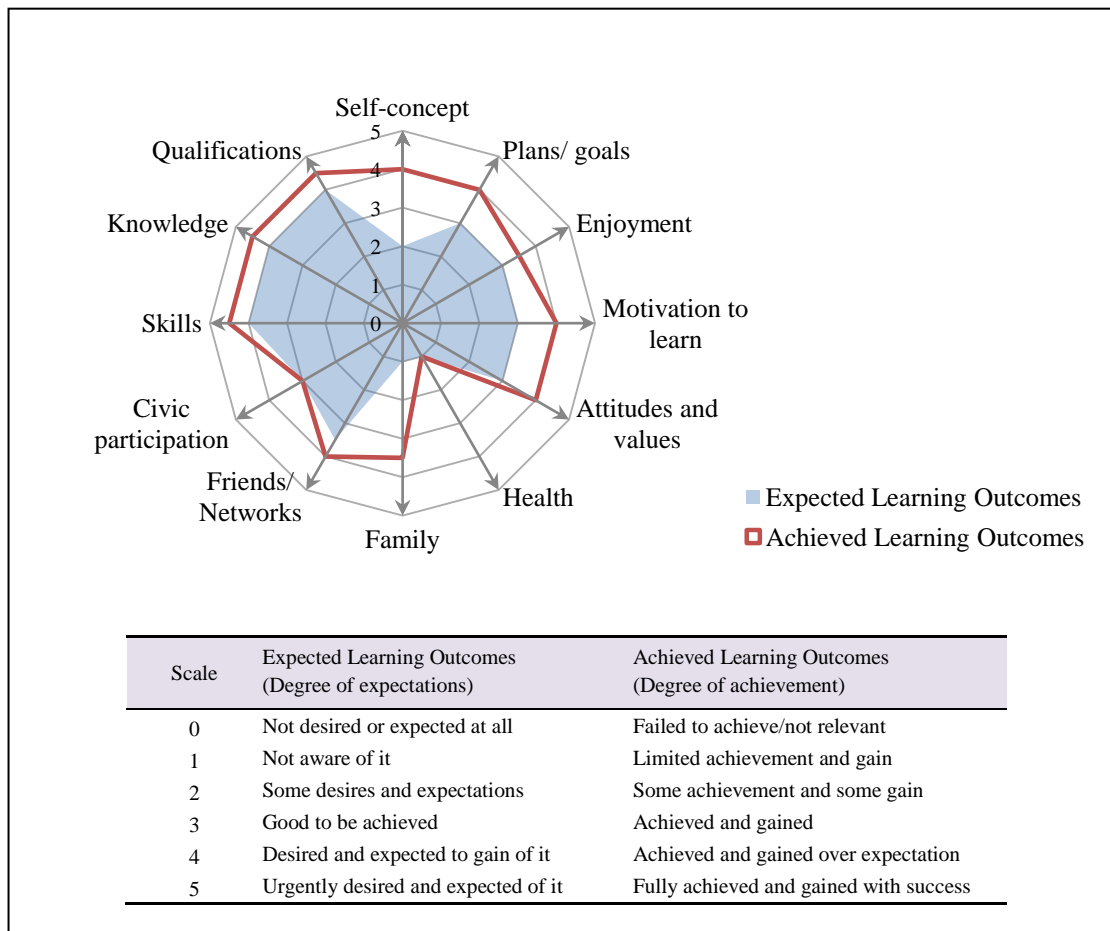


Figure 9.19: The expected and achieved learning outcomes of Sandy’s not-for-profit education experience

Figure 9.20 shows Sandy’s different gains in capital and the learner surplus gained through her not-for-profit education. It is interesting to see Sandy has achieved all her expected gains in capital and the levels of overall gain in all of the three capitals are strong and high. Moreover, Sandy’s not-for-profit education experience shows she is able to gain significant unexpected learning benefits (learner surplus) in identity capital (Self-concept Enhancement and adapt to the Local Culture and Values) and social capital (Friends and Social Networks and Family Relationship). Some learner surplus was also found in human capital (Skills and Knowledge, and Qualifications).

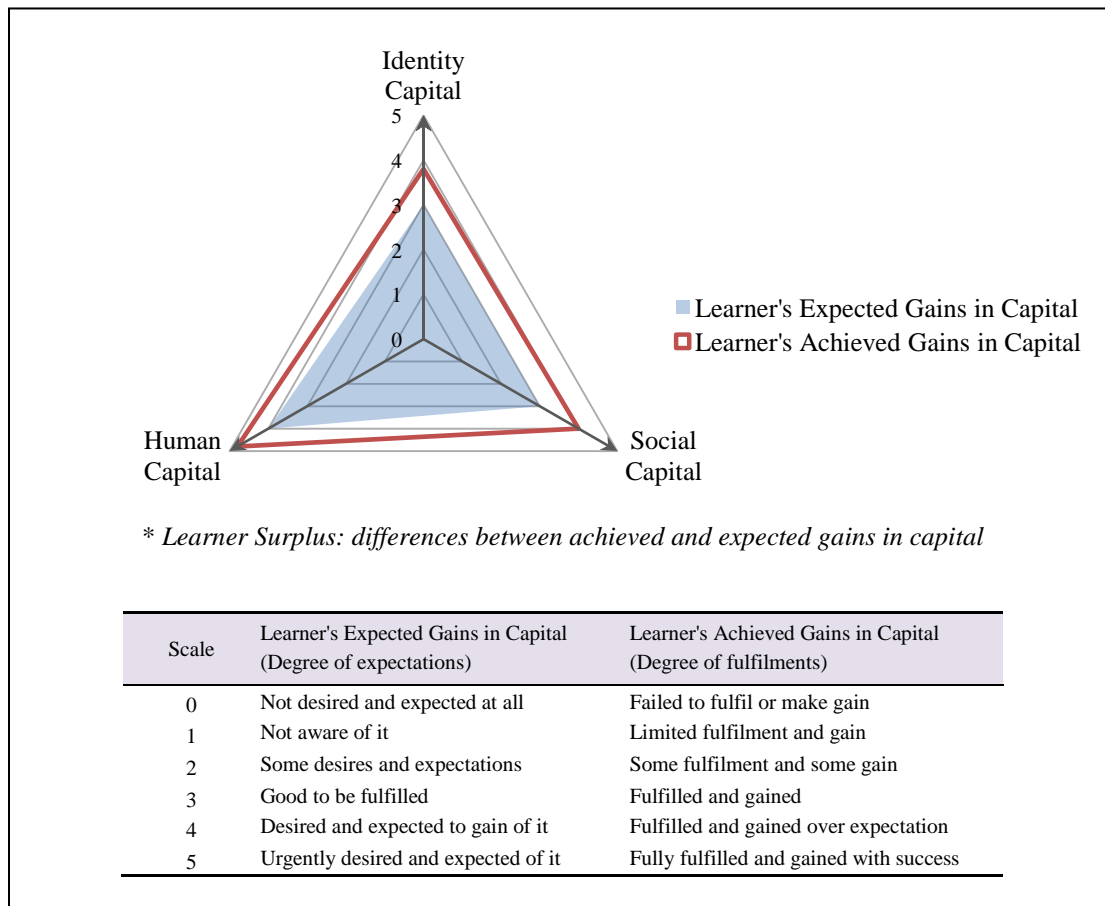


Figure 9.20: The expected and fulfilled gains in capital and the learning surplus of Sandy's not-for-profit education experience

Comparison of the Two Disadvantaged New Immigrants from mainland China's Wider Benefits of Not-for-profit Education

From the study of the two new Chinese immigrants' life stories of Wing-han and Sandy, it is interesting to see how the two disadvantaged immigrant learners perceived differently the benefits received from their not-for-profit education experience. In terms of the types of benefits and the levels and strength of benefits and learner surplus gains, Sandy has achieved far more than Wing-han. Though it is not hard to understand that the perceived learning benefits were influenced and

affected by both of the learners' backgrounds and the education that the learner received, explanations of the causal relationship however are complicated.

Wing-han showed she is a pessimistic person while on the contrary Sandy showed she possesses an optimistic view of her life; though both of them suffered from some very poor afflictions in their different life courses. Both of them still spoke in very strong dialect-accented Cantonese at the time of interview and experienced the same economic transformations and social changes in China. Both ultimately settled down alone in Hong Kong as new immigrants. However, Sandy showed she had a higher ability to achieve upward mobility and to advance herself to a better life situation through not-for-profit education but this was not found in Wing-han's situation. Though Wing-han did not appreciate much of her not-for-profit education experience nor realise the benefits acquired, she has found hope for herself. Wing-han believes continuous not-for-profit education could possibly help her to achieve her dream one day. Figure 9.21 shows that both Wing-han and Sandy benefited from and achieved some successes in human capital-related benefits such as gaining new skills, acquiring new knowledge, and gaining qualifications. Moreover, they also managed to make some identity capital-related benefits, for example learning to make personal plans and goals, motivation to keep on learning, increased self-confidence and self-value, and changed their attitudes and values towards life and education. Moreover, Sandy showed significant gains in benefits and learner surplus in her friends and social networks and family as well as her self-concept. However, in terms of the types of benefits and strength and levels of gains in benefits, Wing-han has earned far less than Sandy and in some aspects (Qualifications and Enjoyment) her achieved learning outcomes failed to match her expectations.

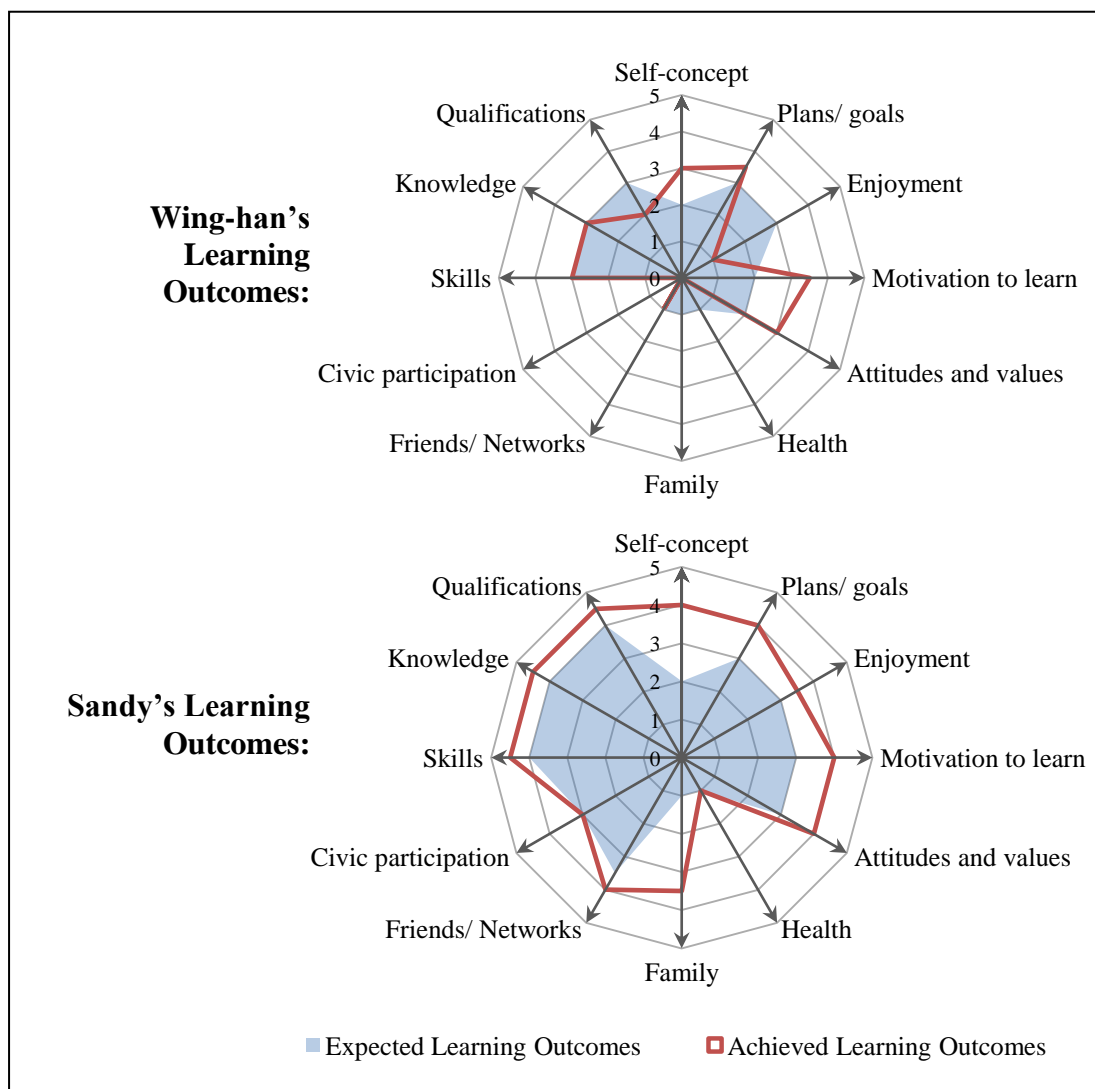


Figure 9.21: Comparison of the wider benefits of not-for-profit education of disadvantaged new immigrant from mainland China learners of Wing-han and Sandy

Figure 9.22 also shows that Sandy has achieved higher and wider gains in all three capitals than Wing-han. Sandy has also been able to achieve some learner surplus in all capitals while Wing-han has only achieved some learner surplus in identity capital and very little learner surplus in human capital and she has perceived no learner surplus in social capital. It shows Wing-han, unlike Sandy, was not impressed by her not-for-profit education. Both Wing-han and Sandy expected and achieved higher gains in human capital which reflects that their initial motivation and reason to join not-for-profit education was for job and economic purposes.

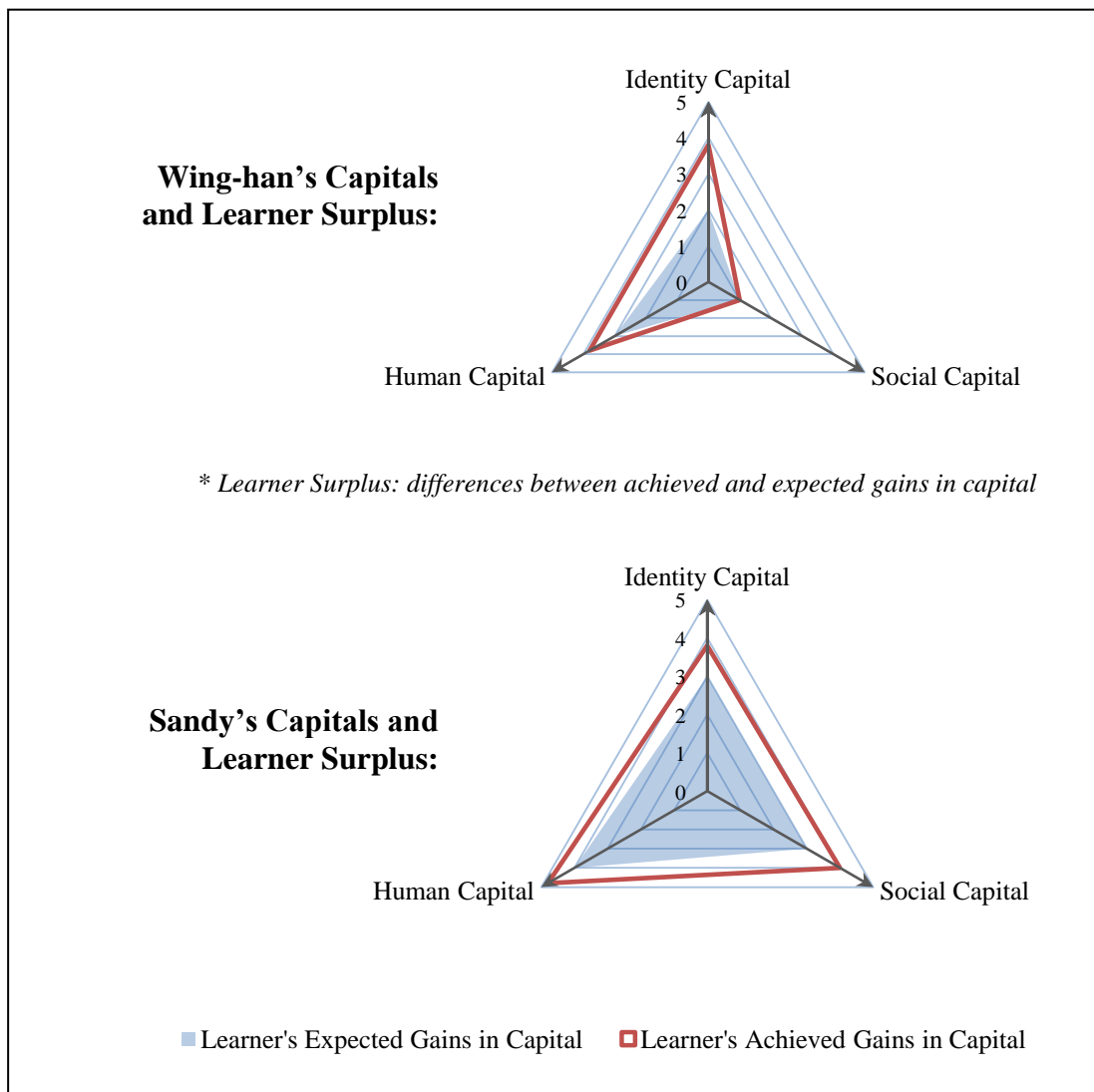


Figure 9.22: Comparison of the expected and achieved gains in capital and the learner surplus of Wing-han and Sandy's not-for-profit education

From the comparisons of the benefits of learning and the capitals gained by the disadvantaged new immigrants from mainland China, it has been shown that the disadvantaged learners' perception of and attitudes to learning and their expected outcomes of learning have a significant impact on the benefits that they achieved. Although the data collected from the two life stories were not meant to explain and represent all the causal relationships between learners' background attributes, the influence of not-for-profit education, and the learning benefits, some common benefits of not-for-profit learning were found. For example, not-for-profit education provided basic skills and knowledge, such as basic language skills and job skills,

which is believed important for them to adapt to the new environment and settle down in Hong Kong. Moreover, through participation in not-for-profit education and the interaction and socialisation with other disadvantaged learners with different backgrounds, there was an opportunity for the disadvantaged immigrant to learn and understand the local culture and values which it is believed important for them to be included in society. In addition, not-for-profit education has channelled hopes in the future to the disadvantaged and vulnerable immigrant learners which is believed to be important when the disadvantaged new immigrants were isolated and without close family and friends to support them in Hong Kong.