香港教師中心

　　香港教師中心（教師中心）是根據1984年教育統籌委員會《第一號報告書》的建議，由 1987 年開始籌備，至 1989 年 6 月 10 日於北角百福道四號正式成立。為進一步提升服務質素及切合發展需要，教師中心已於 2006 年遷往教育局九龍塘教育服務中心。

　　教師中心成立的目標是不斷促進教師的專業發展和在職培訓，並為他們提供一個富鼓勵性、中立及沒有階級觀念的環境，使他們更能團結一致，發揮專業精神。教師中心致力為教師提供互相切磋和交流經驗的機會，推動課程發展，鼓勵教師設計及試用新教材和教學法，向業內人士、團體發放教育資訊和宣傳教育理念，並配合教師興趣，組織各類社交與文娛活動。

　　教師中心不單為教師而設，也由教師管理，他們可以通過三層管理架構參與教師中心的管理工作。這管理架構包括諮詢管理委員會（諮管會）、常務委員會（常委會）和六個工作小組，負責教師中心的決策、監察和執行教師中心的不同工作及活動。

　　諮管會的工作主要是決定教師中心的策略和監察它的運作。諮管會由 72 名委員組成，其中 35 位由教育團體提名及選出，35 位由教師提名及選出，另外兩位由教育局常任秘書長委任。

　　常委會是諮管會的行政機構，與教師中心的日常運作和活動有密切的關係。常委會的主席和兩位副主席由諮管會的主席和兩位副主席兼任，其他成員包括 10 位由諮管會提名及選出的諮管會委員，以及兩位由教育局常任秘書長委任的代表。

　　常委會之下設有工作小組，負責教師中心內不同範疇的工作，包括專業發展小組、出版小組、活動小組、教育研究小組、章程及會籍小組和推廣小組。

　　教師中心除了主辦各類型活動外，亦經常與本港教育團體合作，籌辦推動教育專業的活動，並會因應需要，贊助這些團體舉辦活動，以及為有關活動提供所需的場地和器材。教師中心設有學科團體綜合辦事處，以支援學科團體策劃活動和處理會務。此外，教師中心內有電腦、消閒雜誌、議事區、休憩區及專題展板等，為教師提供所需的服務。

Hong Kong Teachers' Centre

Hong Kong Teachers' Centre (HKTC) was formally established at 4 Pak Fuk Road in North Point on 10 June 1989 after two years' preparation in accordance with the recommendation of the Education Commission Report No. 1 published in 1984. In order to enhance its service quality and to strengthen its development, HKTC was relocated to the Education Bureau Kowloon Tong Education Services Centre in 2006.

HKTC aims to promote continuing professional development and training as well as to foster a greater sense of unity and professionalism among teachers in an encouraging, neutral and non-hierarchical environment. Specific objectives of HKTC include providing opportunities for teachers to interact and collaborate, promoting curriculum development, encouraging teachers to come up with innovative teaching aids and approaches, disseminating education-related news and ideas to education professionals and organisations as well as organising social and recreational activities to cater for the diverse needs and interests of teachers.

HKTC was set up for and managed by teachers through a three-tier organisational structure, comprising an Advisory Management Committee (AMC), a Standing Committee (SC) and six Sub-committees, that is responsible for policy-making, monitoring and implementation of various duties and activities.

The AMC is a policy-making and monitoring body with a total of 72 members, with 35 nominated and elected by education organisations, 35 nominated and elected by teachers as well as 2 appointed by the Permanent Secretary for Education.

The SC, which serves as the executive arm of the AMC, handles the day-to-day functioning of HKTC and the running of activities. It is composed of the Chairperson and 2 Vice-chairpersons of the AMC, 10 elected AMC members and the 2 appointed representatives of the Permanent Secretary for Education.

The six Sub-committees, namely Professional Development, Publication, Activities, Educational Research, Constitution & Membership and Promotion, are working groups under the SC and all are responsible for specific areas of work of HKTC.

Apart from organising events and activities for teachers on its own, HKTC often joins hands with or, if necessary, subsidises various local education organisations to arrange activities that facilitate the continuing professional development of teachers on its well-equipped premises. At HKTC, there is also the Subject-related Organisation Office for relevant organisations to work in. Last but not least, HKTC contains PC workstations, leisure magazines, sharing corners, resting areas, display-boards, etc for teachers' use.

香 港 教 師 中 心 學 報
Hong Kong Teachers' Centre Journal

　　《香港教師中心學報》（《學報》）乃香港教師中心一年一度出版的學術性刊物，內容以教育研究、教育行動研究及教學經驗分享為主。《學報》的投稿者多來自本港及海外的教師、師訓機構的導師、教育研究人員及學者。《學報》主要分發給本港各幼稚園、小學、中學及大專院校，而公眾人士亦可到教師中心網頁（www.edb.gov.hk/hktc/journal）閱覽《學報》電子版。

　　以下為《學報》之顧問及編輯委員名單。

　　The Hong Kong Teachers' Centre Journal (HKTC Journal) is an annual refereed publication of the HKTC. It publishes articles on areas pertaining to educational research, action research and teaching practice in schools. Our contributors include school teachers, teacher educators and academics researching on education from Hong Kong and other places. The HKTC Journal will be distributed to kindergartens, primary and secondary schools and universities in Hong Kong. Its electronic version can also be accessed from the HKTC website (www.edb.gov.hk/hktc/journal).

　　The advisors and editorial committee members are listed as follows.

顧問團（Board of Advisors）

主 編 序
Foreword

　　今期學報的主題為「教育規劃與教學實踐——回歸後教育政策檢視與前瞻」，除了得到不少學者和教師就這個主題應邀投稿外，亦有其他熱心的教育同工提交寶貴的研究或分享文章。有關文稿經過嚴謹的評審後，共有九篇文章獲得通過並收錄於今期學報。

　　第一部分針對今期主題的文章共有三篇，內容包括：在香港推行十五年免費教育的困境與出路、廿一世紀的香港高等教育、香港小學小班的教學實踐。三篇文章都能就着各個不同學習階段所面對的現況和困難作出深入客觀分析，值得教師和教育決策者參考。

　　第二部分關於理論及政策評論的文章亦有三篇，內容包括：香港中學推行小班教學的現狀及啟示、初任校長實踐學習型組織的挑戰、多元視角下的遊學意義。教師及校長都可以就着文章內容作出反思，並且探索改善校內管理及教學質素的方法。

　　第三部分是教育實踐與經驗分享，有三篇文章。內容包括：以個案研究分析香港小學的教育改革與學校領導的歷程、香港學校生命教育的教學與評估、支援學校應用知識管理的香港經驗。它們都對改善學校行政和課程規劃提供詳細描述，有助讀者理解推行教育改革時需要關注和克服的地方。

　　最後，要衷心感謝為今期學報擔任評審的教育同工，當中包括：王秉豪博士、申龐得玲博士、朱啟榮博士、何景安先生、李子建教授、李偉雄先生、李輝博士、冼權鋒教授、林偉業博士、胡少偉博士、袁國明先生、麥謝巧玲女士、馮文正先生、馮潔皓教授、雷其昌先生、趙淑媚博士、蔡若蓮博士、鄧國俊博士、鄭晚莊女士及簡加言博士。學報能順利出版，實有賴眾多評審員於百忙中抽空幫助，以專業的態度評審各篇文章。

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《香港教師中心學報》主編

楊沛銘

二零一四年十二月

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Implementing 15-year free education in Hong Kong: Dilemmas and practical solutions

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Abstract

15-year free education has been implemented in Macau and some parts of Mainland China in recent decade. In light of the implementations, local early childhood educators and experts have since been debating whether Hong Kong should follow suit to offer the 3 years of early childhood education (ECE) for free on top of the existing 12-year free education. With reference to the policy implementation and outcomes in Macau and Mainland China, as well as the ECE context in Hong Kong, this paper seeks to (1) delineate the dilemmas in the debate about 15-year free education in Hong Kong; and (2) suggest how free ECE could be offered in a context-appropriate manner. We will discuss the issues based on the "3A1S" theoretical framework, which looks into the affordability, accessibility, accountability, and sustainability of ECE. Practical solutions for settling the ceaseless debate about 15-year free education in Hong Kong will also be proposed.

Keywords

15-year free education, Hong Kong early childhood education, dilemmas in education policy

The Hong Kong government launched the Pre-primary Education Voucher Scheme (PEVS) in 2007 with an aim to enhance and assure the accessibility, affordability, and accountability of early childhood education (ECE) in Hong Kong. The policy, however, has been criticized by both educators and the public for not responding to the appeal for providing 15-year free education (3-year free kindergarten education in addition to 12 years of free primary and secondary education), which the Macau government has started offering since 2007 (Fung & Lam, 2012). In this connection, the PEVS is argued to be an inadequate and backward move by the government. Aggravating the public's dissatisfaction and the tension of the debate is the implementation of other 15-year free education policies in some provinces of Mainland China. Against this background, the public call to expand the existing 12-year free education framework in Hong Kong to include ECE persists (Legislative Council, 2010). Although the current-term Chief Executive (CE) of Hong Kong, Mr. Leung Chun-ying, made the launch of this 15-year free education policy one of his policy agendas when he ran for CE in 2012, the major arguments against this proposed policy center on the feasibility and credibility of offering free ECE when the structural and contextual factors of ECE in Hong Kong are taken into account. Li (2012, 2012.6.22), for instance, argued that offering authentic free kindergarten education in Hong Kong would in fact threaten the accountability and quality of kindergarten education on the whole. The Committee on Free Kindergarten Education was set up in 2013 in an attempt to resolve the debate and plan a sustainable policy that can reconcile different views in this issue, but discussions and debates regarding how the 15-year free education policy could be implemented in a contextually appropriate manner remain inconclusive thus far. Educational policymaking should be a rational evidence-based process that begins with an identified problem and ends with a contextualized policy for solving the problem. This paper is thus dedicated to providing a clearer picture of the ECE context in Hong Kong and delineating the dilemmas in this ceaseless debate, in an attempt to offer insights into solutions that could possibly reconcile the debate without forfeiting the quality of our ECE in the near future.

1. Debating on the ECE voucher in Hong Kong

The ECE system in Hong Kong has been regarded as being entirely private, publicly underfinanced and bureaucratically neglected (Li, Wang, & Fong, in press). Since the Colonial era, all the kindergartens in Hong Kong have been run by non-profit-making organizations and private bodies, which are registered with and supervised by the Education Bureau (EDB). Since there is no public kindergarten in Hong Kong, public funding for ECE was so minimal that the sector was once depicted as the Cinderella of our education system that was ill-treated and neglected by the government (Rao & Li, 2009). The meager attention and public resources have resulted in the widely disparate quality of ECE provision in Hong Kong over the years.

A breakthrough occurred in 2007 when the Hong Kong government launched the PEVS to alleviate the financial burden of parents and to enhance the quality of kindergarten education. Instead of directly funding kindergarten establishments, vouchers are given to parents of children who are permanent residents of Hong Kong. To date, the value of the voucher was $16,800 per student per annum in the 2012/13 school year, and parents from low-income families are also eligible to apply for means-tested financial assistance from the Social Welfare Department to help cover the outstanding tuition fee and miscellaneous expenses incurred (Legislative Council, 2013). Nevertheless, the PEVS imposed five criteria on the eligibility of kindergartens to receive government subsidy: (1) the tuition fee per annum must not exceed $24,000 (half-day) or $48,000 (full-day) per student; (2) kindergartens must undergo Quality Reviews, both self-evaluation and external review conducted by the Education Bureau; (3) operational and financial transparency must be maintained; (4) teachers serving in the kindergartens must hold at least a Certificate in Early Childhood Education; and (5) kindergartens must offer local curriculum which is in line with the Guide to the Pre-primary Curriculum (GPC) (Curriculum Development Council, 2006). Kindergartens that cannot fulfill the criteria could continue to operate as private independent kindergartens. As of 2011, about 80% of the kindergartens in Hong Kong had joined the PEVS and about 85% of kindergarten-aged children have benefited from the Scheme (Legislative Council, 2011). Taken together, the voucher system generated $2 billion of benefits for a total of 120,000 young children in the 2010/11 school year (Legislative Council, 2013).

Striving to enhance the quality of kindergarten education service in Hong Kong, the PEVS aims to increase investment and enhance quality in ECE. The public, on the other hand, question whether offering a direct subsidy to kindergarten parents through the PEVS was an effective means to improve the quality of ECE. Fung and Lam (2008) analyzed the context of ECE in Hong Kong and agreed that PEVS could be a strategic means to improve the quality of early education by making use of market forces to strengthen parents' voice and choice. They, however, argued that enhancing parental influences on the pedagogical autonomy of kindergartens could have an adverse impact on the program quality and urged for a direct subsidy to fund the operation of kindergartens. Nevertheless, Li, Wong, and Wang (2010) found that most of the parents reported in the survey that the PEVS had eased their financial burden (75%) and helped enhance the quality of kindergartens (61%), and most of the principals reported that the PEVS had increased the competition (77%). In this connection, the PEVS could promote the accessibility, affordability, and accountability of kindergarten education in Hong Kong.

The market mechanism and private provision of ECE in Hong Kong have guaranteed unrestricted school choices for the parents of young children. The PEVS has further empowered parents to choose a school for their children by offering them direct fee

subsidies. In light of the market force, it was expected that the more credible PEVS-eligible kindergartens could attract more parents to enroll their children, and therefore more vouchers could be collected and cashed by the chosen kindergartens for teachers' professional development and enhancement of their services. This, in turn, could push kindergartens to monitor and improve their education quality in order to attract more vouchers, i.e. monetary resources, for sustaining the kindergartens. The question then might be the discrepancies between parents' desirable type of ECE and what the private kindergarten sector should provide according to the GPC (Fung & Lam, 2011). While the PEVS-eligible kindergartens are supposed to offer curricula that promote children's holistic development, they have to satisfy parents' demands for academic-oriented curricula in preparation for their children's primary school admission and education in the long run. The tension results in the provision of many developmentally inappropriate and academic-oriented ECE curricula by the PEVS-eligible kindergartens. That said, pressure cast by parental choices of kindergarten may not necessarily enhance the quality of ECE (Fung & Lam, 2012).

Still, we tend to believe that giving kindergartens the autonomy to develop their own curriculum and implement their own monitoring system under the PEVS is constructive in the long run. It helps retain the uniqueness of each kindergarten and the variety of kindergartens in the market for parents to choose from, and this could eventually help improve the overall quality of ECE in Hong Kong, indirectly.

It is noteworthy that the key focus of the party that urges for free ECE is affordability rather than quality. Although it has certainly relieved the financial pressure parents bear for their children to receive kindergarten education, the PEVS was criticized for not making ECE completely free to the young children from low-income families. Some needy families had to pay extra school fee that could not be covered by the voucher. The government is very responsive and has revised the ceiling of the voucher and increased the voucher value to $20,010 for the 2014/15 school year. The financial burden on low-income families will be further relieved. However, the PEVS is bound to affect the income allocation of the richer and poorer families differently due to the income gap and the divergent valuation of education between the two groups. Li, Wong, and Wang (2010) found that the richer parents tended to spend the savings from the voucher scheme on interest classes and other educational purposes for their children, whereas the poorer parents would rather use the savings for family expenses instead of education. Hence to ensure that all children, regardless of socioeconomic backgrounds, could receive quality ECE, a motion was raised in the Legislative Council (2011) to urge the government to provide 15-year free education.

2. Defining 15-year free education with empirical evidence

Since 2011, the Hong Kong Professional Teachers' Union (PTU), the Striving for 15-year Free Education Union, and like-minded scholars have coalesced into allies to fight for 15-year free education. They appealed through language and symbols perpetrated by the media to build audience receptivity to the concept of "15-year free education", a political spectacle produced intentionally to sell their movement to the public. They repeatedly advocated that this free policy could solve all the development problems faced by kindergartens, enhance teachers' remuneration, and establish a professional training system so as to raise the overall quality of ECE in Hong Kong (Li et al., in press). In this way, they successfully primed the public to believe that the policy is not only the sound bite, but also the panacea to solving all the problems in our ECE arena. However, the empirical articles collected in a recent special issue have jointly proved that the problems they listed in the appeal for free education could not be resolved simply by the means of providing 15-year free education (Li et al., in press). Instead, we consider the political spectacle of 15-year free education a man-made illusion. The real landscape of our kindergarten education is way more complex than what has been portrayed by the supporters of 15-year free education. That being said, this section will attempt to clarify the illusion by addressing two sets of questions with reference to empirical evidence: (1) what is the real meaning of free education? Does it mean that everything should be free and free to every child? (2) How can free education be offered in Hong Kong? Should the government pay the rent and teacher salaries for the kindergarten owners? If so, should the government pocket all the profit? In that case, why don't we transform private kindergartens into public ones? Unless all these questions are appropriately addressed, we will not be able to arrive at a credible and contextualized solution for implementing free ECE, and therefore, 15-year free education in Hong Kong.

The definition of 15-year free education could be derived from the Chinese contexts that have implemented such a policy. To this end, we invited Chinese scholars to evaluate the implementation of 15-year free education in Greater China and edited a special issue for the *International Journal of Chinese Education* (Li et al., in press). In the special issue, Lau, Li, and Leung (in press) explored the perceived impacts of this policy on the affordability, accessibility, and accountability of ECE in Macau. They found that only the public kindergartens were free to the eligible young children, and the parents who were enjoying free education further demanded for more subsidies from the government to make extra-curricular activities complimentary. In addition, it is very interesting to find that some private kindergartens that did not join the free education school system and charged very high tuition fees were much more attractive to parents than the free public kindergartens did. The parents interviewed by Lau et al. (in press) preferred those expensive private kindergartens to the free public ones, as they were more concerned about the quality.

In a similar vein, Cai and Hai (in press) analyzed the case of Ningshan County in Shaanxi Province, and found that the 15-year free education policy was, in fact, not literally free and not applicable to all children. Only public kindergartens delivered free education to a limited number of young children, whereas most of the kindergartens were privately-run and the tuition fees they charged were very high for the local standard of living. Again, they questioned whether the policy was suitable for the local economic and social contexts, and suggested the local government to consider more feasible and sustainable solutions.

Li and Wang (in press) conducted an online research to analyze the affordability, accessibility, accountability and sustainability ("3A1S") of the 15-year free education policies in four counties of western China. They found that the "free" education policies, which were neither "all kids free" nor "all fees free", could only make ECE affordable, to a limited extent. Other problems in terms of accessibility, accountability and sustainability were primarily left unaddressed. They also pointed out that the policies were unlikely to be sustainable as the public funding entirely relied on the local coal economy and fiscal investment at the county level.

All the above studies unanimously concluded that the 15-year free education policies implemented in different parts of the Great China region were mainly delivered by public kindergartens and schools. Children enrolled in private kindergartens and schools still had to pay for tuition fees since these educational establishments only received partial subsidies from the governments. More importantly, it is noteworthy that in most of the cases in Mainland China, free education only means free of tuition fee for children enrolled in public kindergartens, but three other types of fees are still incurred, namely, the fees for registration, learning materials, and healthcare. In other words, the implemented 15-year free education policies do not guarantee authentic free education to all children. Is this what we want in Hong Kong?

Besides, the above studies found that the government funding strategies differed between public and private kindergartens in Mainland China and Macau. More commitment was made to financing public kindergartens, which were limited in quantity and/or quality. Private kindergartens were either neglected or were only partially subsidized by the governments. This enlarged the gap between what young children enrolled in public and private kindergartens would receive. The public-private divide in education policy risks perpetuating educational inequalities in many parts of Mainland China and deserves our attention. As for the Hong Kong context, in the absence of public kindergartens to deliver free ECE, government subsidies therefore will be supporting private kindergartens. Given the market-driven nature of our ECE services, offering full and direct funding support to private organizations will bring to the surface a host of dilemmas, which will be further analyzed in the following sections.

3. Understanding the dilemmas with the "3A1S" framework

Many practical but very critical dilemmas need to be resolved to deliver the kind of free ECE expected by the public in Hong Kong. The first critical one is whether kindergarten education should be made *free for all*, which is about the problem of affordability. As a consequence of implementing the PEVS, the affordability of ECE is no longer a problem in Hong Kong. All the needy families and their children can get ECE for free. So, the questions might be: Is free ECE for all desirable? In particular, should taxpayers pay for the early education of children whose families can afford the cost of high-quality private programs? Will free ECE help achieve the ultimate purposes of education - to nurture human capabilities for our future society? What are the purposes of kindergarten education? All these questions have not been thoroughly addressed and would demand future inquiries and debates.

The second dilemma is whether and how the government can completely pay the rent for every kindergarten - the problems of affordability and accountability. We believe that having the government pay rent for all the kindergartens is not a justifiable policy, as some establishments actually own the properties. They do not need and do not deserve this kind of governmental support (Li, 2012). So to speak, if the government pays for the rental, it will mean that the educational resources that should be shared by middle- to low-income families will then be transferred to the kindergarten owners, property developers and property owners. This will not help to solve parent's affordability problem, but will make kindergarten owners free-riders.

The third critical challenge is how to establish a feasible school place allocation system to achieve educational equality, which is per se, an accessibility problem of ECE. If children are enrolled simply based on neighborhood and personal interest in a free ECE system, there will likely be an inflation of the housing prices in affluent areas with elite kindergartens (e.g. Kowloon Tong), as parents attempt to move to these areas to be qualified for admission to the best possible kindergartens. Property developers and owners, rather than children, will benefit from this allocation, and the disparity between noble and ordinary kindergartens as well as that between the rich and the poor will continue to grow. Random assignment of kindergarten places is not a solution either, as it is infeasible to expect children to travel across districts for school (Li, 2012).

The fourth dilemma is how to avoid two trade-offs caused by the so-called free education, which will ultimately affect the affordability and accountability of this policy. The most remarkable trade-off is that between affordability and accountability (Li, 2012), as the government will provide full financial support regardless of school quality. We can then foresee that kindergartens can simply sit back and pocket the money whether they are

doing anything to improve their education services or not. Adding to the problem is the fact that the government can do little to eliminate any of the kindergartens when they are not running well since they are privately owned. Without the ability to hold kindergartens accountable, the efficiency of governmental input will become a major concern. Devising ways to tackle this accountability problem would be time-consuming, yet imperative (Fong, in press). Another trade-off is that between affordability and quality (Li, 2012). Quality comes with competition and providing full and direct subsidy to kindergartens is merely a backward move. As kindergartens and the teachers involved are guaranteed to receive sufficient financial resources for operation without undergoing any competition, there is then no longer any incentive to strive for improvement. With two of the major stakeholders' voices muffled (i.e., the parents will not have a say because they are not paying for their children's education, and the government will not have any means to monitor the private schools), there is neither motivation nor competition over student enrolment. Not to mention quality education for children, which will accordingly tend toward an increasingly uniform mediocrity. Whether the kindergarten is good or not will no longer matters and consequently, the education quality will deteriorate.

The fifth dilemma is also about the accountability - whether the governmental subsidy should go to parents or to kindergartens, which might be the tangible difference between 15-year free education and the PEVS. If the direct subsidy goes to kindergartens, the abovementioned four dilemmas will be valid and the quality and accountability of kindergarten education will be sacrificed. If the direct subsidy goes to parents, the four dilemmas will not be valid as parents can then make good use of their choices to promote competition among kindergartens, and accordingly, enhance the quality and accountability of ECE. The virtues of the PEVS are its flexibility, which allows kindergartens to enjoy the autonomy in curriculum development and mode of operation; and its ability to enable needy children to receive free kindergarten education.

The last dilemma is whether 15-year free education policy is financially sustainable in Hong Kong. Implementing such a policy requires strong financial support. All governments have to thoroughly calculate the sustainability of its new free education policy. Otherwise, the fiscal deficit will make the policy impossible to sustain. For instance, Li and Wang (in press) found that the 15-year "free" education policies in the four Chinese counties were heavily dependent on the local coal economy. The skyrocketing coal price in the last decade has brought these governments enormous revenue. To make full use of the financial surplus, these county governments made a politically right and professionally manageable decision - implementing 15-year "free" education. However, it has not sufficiently attended to the problem of sustainability. A prolonged plunge in China's coal prices has created risks for the economy of these counties. As one of these four counties is now suffering from fiscal deficit, the sustainability of their free ECE is thus doubtful in the long run.

4. Searching for the practical solutions

Fong (in press) took a closer look at the online community of Hong Kong to understand how the supporting and opposing parties have persisted in achieving 15-year free education. She found that both parties proposed an increase of the existing voucher value and a voucher that could sufficiently cover the tuition fee of full-day kindergarten programs. Both have called for the establishment of subsidy schemes to support teachers' professional development and school development, as well as a teacher remuneration scale to enhance the quality of services and teachers' working conditions. The supporters demanded additional administrative support whereas the opposing party suggested a reduction of administrative procedures. Hence, Fong concluded that the two parties in the debate shared the same set of goals - equal accessibility to all children and enhanced supports for teachers and education services. The only difference between the solutions proposed by the two parties might be whether the subsidy should go to parents or to kindergartens. In this connection, compromise between the two parties is possible and feasible. As highlighted earlier, direct subsidy to kindergartens will lead to all the abovementioned dilemmas. That being said, the final solution should be and could only be subsidizing parents with a modified voucher. Accordingly, the Chief Executive claimed, in his Policy Address in 2014, to modify the voucher to move toward the aim of providing 15-year free education and better quality of kindergarten education. More specifically, he proposed to:

(1) increase the value of PEVS by $2,500 per year in the 2014/15 and 2015/16 school years. In other words, the voucher subsidy would be adjusted to $20,010 per student per annum (pspa) in the 2014/15 school year and $22,510 pspa in the 2015/16 school year, respectively. This will further alleviate the financial burden in respect of kindergarten education on parents and relieve the pressure on kindergartens in meeting the expenses, such as teachers' salary, staffing and operating expenditure (including rental).

(2) adjust the fee thresholds for the kindergartens under the PEVS. In the 2013/14 school year, the fee thresholds are $26,260 and $52,520 for half-day (HD) and whole-day (WD) kindergarten places respectively. The thresholds for HD and WD kindergarten classes would be adjusted to $30,020 and $60,400 respectively in the 2014/15 school year, and $33,700 and $67,540 respectively in the 2015/16 school year. In accordance with the established mechanism, the fee threshold for HD kindergarten classes under the PEVS is set at 1.5 times of the voucher subsidy, while the fee threshold for WD kindergarten classes would be 2 times of that for HD kindergarten classes.

(3) lift the fee remission ceiling to offer greater assistance to needy families to better facilitate their children's access to quality kindergarten education. The fee remission ceiling under the Kindergarten and Child Care Centre Fee Remission Scheme (KCCCFRS) will be lifted from the weighted average fees of PEVS kindergartens to the 75th percentile of the school fees of the respective kindergartens to provide greater assistance to needy families in opening the doors to quality KG education for their children.

(4) provide course fee reimbursement for principals and teachers serving in PEVS kindergartens to pursue relevant and approved courses in the 2012/13 and 2013/14 school years; and

(5) study how to practicably implement free kindergarten education, and will make recommendations within 2015.

We believe that these short-term measures are workable and appropriate in the Hong Kong context. First, the PEVS could equally allocate public money among all the eligible young children in Hong Kong, allowing low-income families access to almost-free ECE, while affluent families can continue to pay for more prestigious ECE provisions. Although high-socioeconomic status families are eligible to receive ECE for free if they send their children to PEVS-eligible kindergartens, they prefer to pay more for better ECE in reality, which complies with the principle of cost sharing and compensation. Moreover, the cap (thresholds) on the level of school fees charged by the PEVS-eligible kindergartens has served to bar out the more expensive kindergartens from receiving public resources. It is also noteworthy that the fee thresholds have been raised in the Policy Address 2014 to give parents more choices, which guarantees that the public money will go to the middle-to low-income families rather than the high-socioeconomic status ones. All these measures advocate the principle of helping the poor. But these are short-term measures. What is the long-term solution?

Before proposing the long-term and ultimate solution, we need to reiterate the "3A1S" framework that Li et al. (in press) have used to evaluate all the ECE policies, namely, accessibility, affordability, accountability, and sustainability. Accessibility means every young child can easily attend a nearby kindergarten. Affordability means every family can easily afford the fees of the chosen kindergarten, and some fee exemptions could be offered to the needy families. In terms of accountability, every kindergarten, be it non-profit-making or for-profit, the extra fiscal input provided by the policy should be accountable to the government for improving education quality. As for sustainability, the policy should be financially sustainable and continuously affordable to the government. In our perspective, a modified voucher could best meet the goal of achieving accessibility,

affordability, accountability, and sustainability of our ECE. With the following modifications, the PEVS could achieve the target of implementing free ECE, as the scheme can then address all of the abovementioned dilemmas, and allow half of the young children population in Hong Kong to receive free ECE (Li, 2012). To these ends, we proposed the following modifications of the PEVS:

(1) Increase the value of the PEVS, annually and gradually, to the level of 50th (2017-2018) or even 75th (2019-2020) percentile of the tuition fees of the non-profit-making kindergartens. Accordingly, 50% to 75% of the eligible young children will enjoy free kindergarten education through the modified voucher.

(2) Launch the full-day voucher for families with both parents working and would therefore need whole day ECE. All the applications should be reviewed and approved by the educational authorities. Meanwhile, more full-day places should be launched gradually.

(3) Simplify the procedures of voucher claiming. Eliminate the need for parents to apply for the voucher, and kindergarten can simply reimburse the money directly from EDB after collecting all the students' identification information.

(4) Cancel the restrictions on the eligibility of the PEVS and allow for-profit kindergartens to receive it. As long as the school fee is acceptable, the quality is good (judged by Quality Review), and the finance is thoroughly transparent, they can also receive governmental subsidy through the voucher scheme. In this manner, more families can benefit from the voucher scheme.

(5) Establish a suitable mechanism for regular review of the fee thresholds to take into account factors other than changes in the cost of living, to build in flexibility and to enhance the sector responsiveness to changes in circumstances. This will allow kindergartens more room to increase their tuition fees to cover teacher salaries, rental and other operating expenses, instead of passing the additional costs onto parents.

(6) Establish a scientific rental reimbursement system to subsidize the rental expenses of non-profit-making kindergartens. This system should monitor the ongoing changes in school rentals annually and the reimbursement should reflect the changes. But support for the rental and teacher salaries of for-profit kindergartens is not needed.

(7) Establish a school-based development fund to sponsor all the activities for school development and set up a teacher professional development fund for all the teachers. These funds could be operated as an earmarked Continuing Education Fund so that all the in-service teachers can apply for funding support to pursue degree or professional studies every 5 years. This initiative will definitely enhance the professionalism of kindergarten teachers in Hong Kong.

(8) Develop and launch the teacher qualification allowance, which could be paid monthly to those teaching in voucher-eligible kindergartens, by the government according to each registered teacher's qualification and performance. This policy has been well implemented in Macau, and will improve the treatment and qualifications of kindergarten teachers without unduly burdening school owners or parents (for details, see Li, 2012.6.22).

We strongly believe that the above recommendations can help achieve an equilibrium among the affordability, accessibility, accountability, and sustainability of ECE, as well as satisfying all the stakeholders in our ECE context. Prolonged disputes construct nothing, but stagnation or even deterioration. Decades of research have told us that investing wisely in ECE is one of the keys that can equip our children for the multitudes of life challenges ahead. The question is, however, are we allocating our resources to children's future or simply to ECE establishments for their survival so none of them will have to step out of the market?

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如何在香港推行 15 年免費教育：困境與出路

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摘要

澳門及中國內地某些地區已經陸續推行了 15 年免費教育，香港幼兒教育工作者和專家近年來也在激烈辯論應否在港實施同樣政策。本文在參照澳門及中國內地有關政策的基礎上，對香港現行學前教育學券制的情況及其推行 15 年免費教育進行了文獻分析，並運用「3A1S」的理論框架（即「可支付性，可進入性，可問責性和可持續性」）對實施免費教育所需面對的困境進行了詳細分析。據此，本文提出了切合香港實際需要、切實可行推行 15 年免費教育的解決方案。

Hong Kong higher education in the 21st century

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Abstract

Higher education, which comprises public and private universities together with self-financed community colleges, is an important component of the education in Hong Kong. Comprehensive reviews and reforms on higher education have been carried out in Hong Kong since the 1990s when it witnessed the processes of both quantitative expansion and qualitative consolidation, which led to several significant changes facing the higher education system. Some of the most remarkable issues include the institutionalization of quality assurance mechanisms, the reorientation of the government-university relationship, the growth of private higher education institutions, and the internationalization of higher education to cater for Hong Kong's strong intention to become a regional education hub. Examining the major developments of higher education in Hong Kong in the twenty-first century, this article analyzes the ways higher education has been transformed by the aforementioned four trends.

1. Introduction

Hong Kong is not immune from a global trend of higher education reform which aims at improving the quality of education and maintaining its relevance to socio-economic needs in the age of globalization when market forces and competitions are the core values. Globalization has been considered a strong rationale for restructuring the existing higher

education sector with the injection of new ideas of governance and management, which adhere to the business-oriented culture and practices prevailing in the private sector in response to the deep influence of public sector reforms spreading. The image of being ivory tower can no longer be sustained for universities as they are expected to make more contributions to research and development in order to enhance their international ranking and reputation.

The development of higher education has aroused widespread concerns among stakeholders of the sector, including university leaders, academics and students. Various stakeholders have made their voices heard concerning the changing environment facing higher education in recent years when there has been ever growing social expectation on education outcomes by admitting more students on one hand and by producing a larger pool of well-educated and skilled manpower for socio-economic needs on the other. While universities are supposed to be more adaptive (Sporn, 1999), enterprise-oriented (Marginson & Considine, 2000) and entrepreneurial (Clark, 1998, 2004), both Lucas (1996) and Readings (1998) warn against a crisis looming to the higher education sector for universities have been under growing political pressure for reform in face of more acute competition for public or government resources which have become more limited as a consequence of more stringent budgetary control. In fact, as what Kennedy (1997) suggests, universities are controversial places, and they have drawn intense public scrutiny on their obligations and duties in order to regain public trust. Under this circumstance, academics' work turns out to be more demanding for they have to teach, publish, serve, and even risk change.

For higher education, many changes have been observed in the sector since the 1990s when it witnessed the process of massification or the rapid expansion of higher education with a significant increase in the numbers of both students and degree-awarding higher education institutions. This article analyzes the ways higher education has been transformed by identifying major issues facing higher education that are affecting the development of higher education in Hong Kong. These issues include the institutionalization of quality assurance mechanisms, the reorientation of the government-university relationship, the growth of private higher education institutions, and the internationalization of higher education to cater for Hong Kong's strong intention to become a regional education hub. There are four sections following this introductory section. The article commences by an analysis of the policy context of higher education in Hong Kong since the 1990s. The next section examines major issues facing higher education in Hong Kong. The penultimate section discusses major trends shaping the development of higher education in Hong Kong. The final section concludes the discussion.

2. Policy context

Globalization has significant impacts on how higher education to evolve and transform. Closely associated with higher education is the cluster of aims, values and general ideas, including the pursuit of truth and objective knowledge, research, liberal education, institutional autonomy, academic freedom, a neutral and open forum for debate, rationality, the development of the students' critical abilities, autonomy, and character formation, the provision of a critical centre within society, and the preservation of society's intellectual culture (Barnett, 1990). The university is a place of teaching universal knowledge where persons of broad knowledge, critical intelligence, moral decency, and social sensitivity are produced (Newman, 1996). It is expected to serve as the protecting power of all knowledge and science, fact and principle, inquiry and discovery, and also experiment and speculation. Modern universities have been developed following the Humboldtian model in Germany with more emphasis placed on science, research, graduate instruction, and the freedom of professors and students (Kerr, 2001). They have to strive not only for survival but also performance and resources for their sustainable development. In the age of supercomplexity, universities no longer monopolize the production of knowledge, but they continue to be a major producer of new frameworks for understanding through more vibrant research activities. What universities do is to prepare the students to cope with the world of supercomplexity, which is partly a result of globalization and the information technology revolution, with the qualities of self-reliance, adaptability and flexibility. Moreover, universities need to reconsider its enlightenment role in advancing the level of general understanding in society. It is a must for universities to adapt to new demands which would require radical changes in management and leadership (Barnett, 2000a, 2000b). Moreover, universities should ensure different views, ideas, and voices to be exposed to wider audiences (Barnett, 1997).

The impact of globalization on the policy context of higher education has been widely attended. Globalization refers to a set of processes leading to a rapid integration of the world into one economic space through increased international trade and the internationalization of production and commodity culture with the laissez-faire principle (Bottery, 2000; Stromquist & Monkman, 2000). It is closely associated with neoliberalism which "sees the market as the most effective way of determining production and satisfying people's needs" (Stromquist, 2003, p. 25). According to Carnoy (2000), the relationship between globalization and educational change can be revealed not only from the expansion of higher education to cope with economic restructuring but also from the strong emphasis on the quality of education which is translated into quantifiable and measurable performance indicators to be compared at the international level. Certain reforms of higher education are finance-driven as universities are allowed more flexibility and autonomy in exchange for greater accountability. Higher education is not surprisingly

subject to financial constraints as a consequence of the shift towards neoliberalism and the rise of economic globalization (Bottery, 2000; Schugurensky, 2003). In this global context, universities are linked to the market and become more customer-oriented. They are under greater pressure to produce consumer satisfaction with an emphasis on market-oriented effectiveness. The role of university management has been strengthened with the cultivation of entrepreneurial culture within universities. The adoption of quality assurance and performance indicators comes with competition among universities for revenues and resources and the application of business principles and practices in university administration (Currie & Newson, 1998; Peters, Marshall, & Fitzsimons, 2000; Stromquist, 2003; Stromquist & Monkman, 2000; Taylor, Rizvi, Lingard, & Henry, 1997). Putting this global context to Hong Kong's higher education, performance indicators have become more important when the allocation of public funding is not only based on student enrollments but also the competition for performance-based research funds. The General Research Fund under the Research Grants Council, which is part of the University Grants Committee (UGC), is a competitive funding scheme that enables academics to compete for research funds based on their own track records and the originality, merit, contribution and significance of their research projects. The overall successful rate of applications to General Research Fund between 2008 and 2012 was around 30-40 percent. For instance, in 2011-12, when a total of HK$557.5 million were allocated, the success rate was 31 percent, which is 10 percent lower than 2008-09 when HK$512.5 were allocated (Research Grants Council of Hong Kong, 2012). Moreover, there is the Research Assessment Exercise (RAE), which was first conducted in 1993-94, to assess the research output performance of the UGC-funded institutions. The proportion of the active researchers at each cost centre is treated as a factor in determining the allocation of research funding for the next triennium. The second round of RAE was conducted in 1996 and the third in 1999. The fourth round was carried out in 2006 when the UGC decided to have the exercise undertaken at six-year intervals instead of three years after the third RAE in 1999. The RAE in 2006 served as the basis for distributing of block grants for research among the eight UGC-funded institutions in the triennium of 2008-11 (University Grants Committee [UGC], 2004). The fifth round of RAE has been scheduled in the academic year 2014-15.

Apart from the development of performance-based funding mechanisms in the higher education sector, universities have to cope with the influence of managerial globalization which refers to the professionalization of management in tandem with the adoption of the more directive and assertive management style commonly found in the private sector. More professional managers are expected to play a more important role to lead universities and also to learn from other countries or institutions for the best practices of management (Bottery, 2000). Under the pressure for being more efficient, universities like other public sector institutions have to become more businesslike and incorporate good

practices of business management whilst professional managers should be innovative, dynamic, flexible, transparent, customer-centred, and strategic (Whitty, Power, & Halpin, 1998). Moreover, the language of efficiency, empowerment, rationality, and transparency dominates the ongoing processes of education reforms and restructuring in most parts of the world (Apple, 2001). Outcomes and outputs are measured against the goals, roles, and objectives set by universities and higher education institutions (Taylor, Rizvi, Lingard, & Henry, 1997). The notion of "fitness for purpose" has been emphasized for higher education in Hong Kong. For university governance and management systems, it is necessary to strike a balance between individual ability, institutional excellence, and adequate resources (UGC, 2002). While universities have to comply with the principle of public accountability, the collegial forms of decision-making have been considered an obstacle to managerial rationalities (Bok, 2003).

The higher education sector in Hong Kong has similarly experienced rapid expansion and also more keen competition for funding, students, and academics since the 1990s. These changes also gave rise to the introduction of quality assurance systems with certain key performance indicators on teaching, research, and management (Postiglione, 1996). Performance-based funding mechanisms were introduced to boost the research performance among the UGC-funded institutions. These policy initiatives were made to ensure the universities to be more efficient, more accountable to the public, more cost-effective, and more responsive to socio-economic needs (Schugurensky, 2003). Changes like the development of Hong Kong as a regional education hub, the admission of a larger number of non-local students, and the restructuring of the university academic and curriculum structures are bringing many changes to higher education practitioners and stakeholders (Postiglione, 2002). Moreover, there are also widespread concerns about preserving the core values of academic freedom, institutional autonomy and internationalism (Postiglione, 1997).

As discussed earlier, the policy context of higher education is influenced by globalization, which points to the rise of neoliberalism with the supremacy of market forces. This also denotes a reorientation of the relationship between universities and government for the latter is not a service provider but a service purchaser to allocate resources according to the former's performance and achievements which are demonstrated through various quality indicators on the teaching, research and management aspects. With a strong emphasis on market competition among institutions, the notion of "quality" is understood from the educational and business perspectives. In order to maximize the value for money and improve cost-effectiveness and market relevance, the higher education sector is subject to much closer external scrutiny under the government's funding body or the UGC, which performs its role as a service purchaser to ensure the quality of service providers. In addition, with the rise of managerialism, collegiality has

gradually been taken over by corporate rationality in the decision-making processes in universities (Schugurensky, 2003).

3. Major issues of higher education

In this policy context, certain issues facing the higher education sector in Hong Kong have emerged and become dominant in the twenty-first century. These issues include the institutionalization of quality assurance mechanisms, the reorientation of the government-university relationship, the growth of private higher education institutions, and the internationalization of higher education to cater for Hong Kong's strong intention to become a regional education hub. This section examines these issues and their impacts on higher education development.

3.1 Institutionalization of quality assurance

The UGC defines quality assurance as "the maintenance of the highest possible standards, both in teaching and learning and in research, which are commensurating with an institution's agreed role and mission" (UGC, 2002, p. 18). Universities are responsible for upholding the quality of education and research in order to maintain their competitiveness in the global market competition in higher education. Meanwhile the UGC has introduced and managed a series of quality assurance mechanisms covering three major areas of higher education institutions, namely research, teaching and learning, and management. As mentioned in the previous section, the allocation of research funds is subject to performance-based assessments and competitions. Apart from assessing the research performance, several reviews on the teaching and learning quality assurance processes and the institutional management were carried out. Teaching and Learning Quality Process Reviews (TLQPR) were carried out twice in 1995-97 and 2001-03. The objectives of TLQPR were to focus attention on teaching and learning, to assist institutions to improve their teaching and learning quality, and to enable the UGC and the institutions to discharge their obligation to be accountable for quality (UGC, 1999).

Furthermore, Management Review (MR) was conducted in 1998-99 by the UGC to ensure individual institutions having the capacity and effective processes to manage devolved funds and resources to achieve their aims and objectives in face of financial reduction of 10 percent of the higher education budget between 1999 and 2001 (French, 1999, January). MR was aimed to support the institutions in enhancing the quality of management, to discharge the UGC's accountability for ensuring that devolved funds and resources are managed appropriately, and to enhance the effectiveness of institutions' internal resource allocation, planning and financial processes. The review was also aimed to promote the sharing of experiences and best practices by the institutions in the areas of internal resource of allocation, planning and financial processes relative to the institutions' academic plans and objectives.

In 2007, the Quality Assurance Council (QAC) was set up as a semi-autonomous non-statutory body under the aegis of the UGC to carry out external quality audits targeting on the quality of teaching and learning in place of TLQPRs. The first audit was carried out on a four-year cycle between 2008 and 2011. The main objective of QAC audits is to assure the quality of student learning in UGC-funded institutions and ensure the UGC-funded institutions can deliver on the promises they make in their mission statements in line with the notion of "fitness for purpose" especially in the area of teaching and learning. What the QAC concerns is about the quality of student learning rather than research and managerial activities, which are only covered in the audit when they affect the quality of teaching and learning (Quality Assurance Council, c. 2007). The audit reports on individual UGC-institutions were released between 2008 and 2011 whereas individual institutions' progress reports in response to the audit reports' recommendations were released between 2010 and 2013. The second round of QAC audits, which would be carried out over a two-year period, would focus on promoting the enhancement of teaching and learning, and on assessing the strengths and weaknesses of current academic practice. More attention would be given to institutional strategies and policies for global engagements on the ways how students can participate in an increasingly global community, together with more specific coverage of taught postgraduate programmes and research training programmes (Quality Assurance Council, c. 2011). These developments reveal an irreversible trend of institutionalizing performance-based assessments and quality assurance in the higher education sector. However, the imposition of these quality assurance mechanisms has been criticized as a means not to improve the quality of education but incur much greater pressure for academics and university managers to comply with numerous quantifiable performance indicators.

3.2 Reorientation of government-university relationship

The transition from quantitative expansion to qualitative consolidation since the 1990s has come with a more prominent role played by government in setting the direction of higher education development in Hong Kong. The UGC, as the government's funding body and also policy adviser on higher education, has put more pressure on universities to modify the governance and management systems in order to improve their accountability. For instance, the University of Hong Kong (HKU) was the first UGC-funded institution underwent the governance review in 2003. One of the most significant changes was that the faculty deans would no longer be elected by academics. Instead they would be appointed by the top management according to the vice-chancellor's recommendation (University of Hong Kong, 2003). This reflects the changing relationship between government and universities as the former has been more eager to look into higher education policy matters partly because of the policy to develop Hong Kong into a regional education hub. Furthermore, the rationale behind the government's more proactive role in higher education is to ensure the public money for higher education being

spent smartly and wisely, and the universities can serve the political, social and economic needs. Apart from this, a few controversial incidents have aroused widespread concerns over the changing government-university relationship over the first decade of the twenty-first century.

Since 1997, Hong Kong has been run according to the "one country, two systems" principle. According to the Basic Law of Hong Kong, all educational institutions, including universities and higher education institutions, should be allowed to preserve institutional autonomy and academic freedom (National People's Congress, 1990, Article 137). Inherited from the British model and tradition of higher education, both institutional autonomy and academic freedom remain the most sacred values upheld by the academic community in Hong Kong. Whether institutional autonomy and academic freedom can be preserved in Hong Kong has drawn widespread concerns after 1997, when there were a few incidents triggering controversies over political interference in academic work. The first of such incidents happened in 1999 when the opinion polls on the popularity of the government conducted by a HKU's research centre headed by Robert Chung were not welcomed by then Chief Executive Tung Chee-Hwa, whose aide paid a visit to HKU's vice-chancellor to seek for his promise for not proceeding to opinion polls targeting on the performance of the government. The incident was resulted in the resignation of the vice-chancellor and the removal of the aide of then Chief Executive. Moreover, the incident was considered an infringement of the core academic value of academic freedom in a sense that academics should bear zero tolerance over political intervention into research and teaching (Currie, Petersen, & Mok, 2006; Postiglione, 2002).

The second incident, which took place in 2002, is concerned about the merger plan between the Chinese University of Hong Kong (CUHK) and Hong Kong University of Science and Technology (HKUST) as put forward by the former Secretary for Education, Arthur Li, who served as CUHK's vice-chancellor in 1997-2002, to integrate the two universities into a strong comprehensive world-class university in Hong Kong. Nevertheless, due to the strong resistance of academics in both universities in response to the merger plan, the idea of having a merger between the two universities was not pursued in place of other viable initiatives of institutional collaboration and integration (UGC, 2004). The government subsequently proposed an idea of merging CUHK with Hong Kong Institute of Education (HKIEd) so as to strengthen the latter's research capacity and also its reputation. Rather than a merger, a deep collaboration approach was deemed more appropriate and thus adopted. As a consequence, both institutions engaged in offering some joint undergraduate programmes with an aim of improving the quality of teachers' training in Hong Kong. These two merger proposals were perceived as attempts by the government to intervene directly how certain universities should be run and to impose important policies with a top-down approach regardless key stakeholders' responses and

reactions. In short, what the government did turned out to be violating the principle of institutional autonomy.

The third incident happened in 2007 when the senior management of HKIEd, after the contract of its president Paul Morris was not renewed, disclosed that then Permanent Secretary for Education, Fanny Law, filed a complain to the institution against a few academics who critics and commentaries published in the local press had obstructed the smooth implementation of education reforms and policies. Moreover, Arthur Li was accused of posing a threat to the HKIEd's senior management on cutting the number of student enrollments if the merger plan with CUHK was not accepted. Meanwhile, the senior management was also asked to issue a statement condemning a group of surplus teachers and a teachers' union for protesting against the government's refusal to secure those surplus teachers' jobs in primary and secondary schools. In face of these controversies between government and HKIEd, then Chief Executive Donald Tsang appointed an independent commission to inquire into these allegations in relation to HKIEd in the same year. While the two allegations against Arthur Li and the government's improper interference with institutional autonomy of HKIEd were not established, the one against Fanny Law on her improper interference with academic freedom enjoyed by a few academics working in HKIEd was established (Yeung & Lee, 2007).

These incidents as mentioned above inevitably aroused widespread concerns, not only in the academic community but also the society, about the preservation of academic freedom and institutional autonomy by universities and higher education institutions. Meanwhile, the government's more proactive role in higher education development cannot be denied.

3.3 Growth of private higher education

The first decade of the twenty-first century witnessed the emergence and growth of private higher education in Hong Kong, which has long been dominated by the publicly-funded universities and higher education institutions. This is a result of a major policy shift to have a more diversified higher education system which is expected to comprise not only the UGC-funded institutions but also other private or self-financed higher education institutions with different strengths and specialties to cater for the ever growing demands for higher education in and out of Hong Kong, especially the Chinese mainland which is now a dominant source of non-local students for higher education in Hong Kong. It is believed that private higher education can not only diversify the sector but also provide more choices for students to choose from and also provide alternative pathways for students to receive higher education without relying overwhelmingly on the few UGC-funded institutions.

In line with the policy of encouraging more private higher education institutions or even universities to run in Hong Kong, a breakthrough development took place in 2008 when Shue Yan College was eventually granted the university status and formally upgraded to be the first private university. Other privately-run or self-financed local post-secondary colleges have planned to develop as private universities in the future, such as Chu Hai College of Higher Education, Hang Seng Management College, and the Caritas Francis Hsu College, which is run by the Catholic Diocese in Hong Kong. Some existing universities also involve in providing self-financed degree programmes. In 2012, Centennial College was set up by HKU to provide four-year self-financed degree programmes in humanities, social sciences and business studies to local and non-local students. In addition to these privately-run local higher education institutions, the government has also looked for renowned overseas universities to set up branch campuses in Hong Kong. For instances, the Savannah College of Art and Design (SCAD), which was founded in 1978 in the United States, set up its first Asian branch campus in Hong Kong in 2011 to offer undergraduate and postgraduate programmes in the field of art and design. Another example is drawn from the Booth School of Business of the University of Chicago, which has set up its first Asian branch campus in Singapore for 10 years, decided to move its Asian campus from Singapore to Hong Kong in 2014 to offer mainly taught postgraduate programmes in business management. The move implies that Hong Kong has much better competitive advantage than Singapore for the former's close proximity with the ever growing market of higher education in the Chinese mainland. The emergence of overseas universities' branch campuses in Hong Kong, to a certain extent, suggests the good potential for Hong Kong to be developed as a regional hub of higher education.

Apart from private universities, there has been also rapid development of community colleges which provide associate degree programmes for secondary school leavers since the early 2000s, when the government decided to ensure more opportunities of higher education by not expanding subsidized universities but by encouraging the private sector to run self-financed community colleges (Tung, 2001; Yung, 2002). While some of these self-financed community colleges are affiliated with the UGC-funded institutions, others are run by local charitable organizations like Tung Wah Group of Hospitals and Po Leung Kuk. It is not surprising to see competition between community colleges for student enrollments for they are market responsive by focusing on professional and vocational training programmes. In face of the rapid growth of such self-financed community colleges and associate degree programmes, the UGC recommended in its third major review of higher education in 2010, as what the UGC's higher education review in 2002 suggested, to set up a single oversight body such as Further Education Council to oversee the quality of the non-publicly funded higher education institutions, including self-financed community colleges (UGC, 2002). The UGC also expressed its concerns about the credibility of self-financed associate degree programmes for which a clear identity

and character should be constructed together with a more stringent quality assurance mechanism to strengthen the public confidence on the sector (UGC, 2010).

3.4 Internationalization for education hub

Internationalization is without doubt a popular issue widely discussed in many countries (De Wit, 2002; Knight, 2004). With reference to the higher education sector in Hong Kong, the concept of internationalization can be analyzed from two dimensions. On one hand, internationalization suggests a significant rise in the number of non-local or international students studying in Hong Kong's universities. In 2003-04, there were 2,871 non-local students enrolled in the UGC-funded institutions. This was about four percent of the overall student enrollment. In the academics years 2011-12 and 2012-13, the numbers of non-local students studying in the UGC-funded institutions increased to 10,770 and 13,661 respectively. There were in total around 14 percent of non-local students enrolled in the UGC-funded institutions in both academic years. There had been much more non-local students studying in Hong Kong's universities as the number of non-local students had grown fourfold from 2003 to 2013. Moreover, a majority of non-local students were originated from the Chinese mainland with a much higher percentage at over 80 percent as compared with those from other places in Asia or the rest of the world. In 2003-04, 2,536 students or about 88 percent of non-local students were from the Chinese mainland. Most of those mainland Chinese students enrolled in research postgraduate programmes (Trade Development Council, 2005). In both 2011-12 and 2012-13, slightly above 80 percent of non-local students were from the Chinese mainland which contrasts with around 12-15 percent from other places in Asia and 4-5 percent from the rest of the world (UGC, 2013, p. 82). These figures demonstrate that Hong Kong can attract a significantly large number of the mainland Chinese students to further their studies in Hong Kong's universities. Nevertheless, although there had been an increase in the number of non-local students from outside the Chinese mainland, there is still much room for the UGC-funded institutions to strike a better balance between the proportion of the mainland Chinese students and the ones from Asia and other parts of the world. A possible reason for more non-local students to study in Hong Kong's universities is that they are allowed to stay in Hong Kong for employment for one year after graduation (UGC, 2010).

On the other hand, internationalization means more than the recruitment of non-local or international students. It also refers to the integration of the universities in Hong Kong into an active network of relationships with international counterparts. One way to do is to demonstrate their "world-class" performance through international rankings. Certain universities in Hong Kong have been ranked high in several international league tables on higher education, including those compiled by Times Higher Education Supplement and Quacquarelli Symonds (QS). Some universities made use of their institutional reputation to explore their markets for higher education outside Hong Kong, especially in the

Chinese mainland. They have been exploring opportunities of having collaboration with the Chinese universities to jointly offer self-financed taught postgraduate programmes and courses in China (Trade Development Council, 2005). Local universities can also make use of their own institutions' international prestige and reputation to build up overseas partnership in offering programmes and in undertaking collaborative research projects.

Moreover, internationalization is a process for making Hong Kong a regional education hub, which has been a policy goal since the mid-2000s (Tung, 2004). The competitiveness of Hong Kong lies on the provision of high quality of higher education by a number of top quality or internationally recognized world-class universities to non-local students, who are attracted to come to study in the city. These non-local students can possibly become valuable talents to contribute to Hong Kong's long-term socio-economic development if they opt to work in the city after graduation. In this sense, the development of Hong Kong as a regional education hub as a goal of the internationalization of higher education policy is to create a large pool of local and non-local talents to keep the city on the track of sustainable development in the long run. Meanwhile, internationalization also implies a fundamental change of the character of higher education which is not just a public good to be guaranteed by the government but also a commodity for economic exchange as the cases shown in the United Kingdom, the United States, Australia, Canada and Singapore. This denotes the movements of some UGC-funded institutions to provide higher education outside Hong Kong like the case of CUHK which set up its first branch campus in Shenzhen in September 2014. Meanwhile, as mentioned earlier, there have been overseas renowned universities to come to Hong Kong like SCAD and Chicago's Booth School of Business, all of which may help boost the city's image of being a regional education hub in face of keen competition from other neighbouring countries like Singapore, Malaysia and the Chinese mainland, where they are also competing for more collaborations and partnerships with overseas world-class universities. However, one problem facing Hong Kong universities to be solved is to encourage not only the Chinese mainland students but also more students from Asian countries and other parts of the world to enable a greater diversity of nationalities and cultural backgrounds (UGC, 2010).

4. Discussion: Major trends of higher education

Having examined the major issues facing the higher education sector in Hong Kong, this section shifts its focus on generalizing the trends shaping the future of higher education. It argues that the role of government in the development of higher education in Hong Kong has become more important with special reference to the cultivation of world-class universities and the transformation of Hong Kong as a regional education hub.

Similar to other public services, higher education is undeniably under the strong influence of the notion of public accountability. Universities are under constant pressure to be more relevant and responsive to market needs. While institutional autonomy in making decisions on academic matters and resource allocation entitled to universities is largely respected, there has been stronger emphasis on the importance of external scrutiny in the forms of quality assurance and audits to be institutionalized in the higher education sector in line with such prevailing ideas as "value for money" and "fitness for purpose". Teaching, research and management have been regularly subject to the external scrutiny. The allocation of resources, especially those on research activities, has been pegged with the results of external audits as a means to stimulate better performance delivered by the publicly-funded universities.

Universities have been encouraged to use resources more prudently and also look for alternative non-government sources of revenues to "decentralize" the financial responsibilities of higher education which has long been shouldered by the government. For instance, the Matching Grant Scheme was introduced in 2003 to cultivate a culture of social donations for publicly-funded universities (Leung, 2003). The cost of higher education to be shared in the society by motivating the establishment of community colleges and self-financed higher education institutions to provide non-subsidized programmes. While the government takes a step back from financing higher education with an excuse of uncertainty in economic performance, it has strengthened its role through the UGC to scrutinize and evaluate the performance and quality of public universities in order to protect the public interest in higher education.

The universities in Hong Kong are at the crossroad between competition and collaboration. It is undeniable that universities are constantly competing with each other for famous and outstanding professors, talented students, research funds, international reputation, and social donations. While competition among universities is encouraged to stimulate institutional improvement, institutional collaboration is of equal importance to prevent unnecessary wastage of resources by eliminating and avoiding duplication of teaching and research efforts. Competition and collaboration are not mutually exclusive but they are complementary to each other to ensure a healthy development of higher education. It is especially true for Hong Kong where the higher education sector has long been suffering from the lack of collaboration that has resulted in unnecessary resource wastage. A two-pronged strategy of competition and collaboration among the universities should be adopted to ensure continuous self-improvement and more effective use of limited resources simultaneously.

Internationalization as a strategy leading to the making of Hong Kong as an education hub comprises core elements like exchanges of academics, students and knowledge across national boundaries, the recruitment of non-local or international students, the export of higher education by local institutions outside Hong Kong, and even the import of higher education from overseas universities in Hong Kong. Apart from getting more non-local students, especially those from the Chinese mainland, to study in Hong Kong, local universities have in recent years embarked on constructing collaborative relationships with the counterparts in the Chinese mainland in the forms of joint teaching and research projects as well as academic exchange programmes. A large number of the Chinese mainland students have been recruited to study in research and taught postgraduate programmes in Hong Kong's universities since the late 1990s. The Chinese mainland has become the most important market of higher education for the eight UGC-funded institutions. The opening of CUHK's branch campus in Shenzhen is an example to imitate and follow for exporting higher education from Hong Kong.

The trend of internationalization does bring about both opportunities and dangers to higher education sector in Hong Kong. Further expansion of higher education can be expected for an ever growing market of higher education in the hinterland, the Chinese mainland, where demands for world-class higher education, including publicly-funded undergraduate and research postgraduate programmes as well as self-financed taught postgraduate programmes run by UGC-funded institutions, would become more prominent. Nonetheless, in the meantime, the quality of higher education needs to be assessed and scrutinized with both internal and external audits to ensure the academic standards would not be compromised with an influx of non-local students. Moreover, more attention should also be paid on whether and how overseas institutions which set up their branch campuses in Hong Kong can survive on the self-sufficient basis in the long run for they can mainly rely on the tuition fees as their incomes. The challenge is how to increase the number of students who can afford over HK$250,000 or US$32,000 a year for tuition fees at SCAD as a big contrast to HK$42,000 or US$5,400 levied by the UGC-funded institutions. Even more critical issue facing the process of internationalizing higher education in Hong Kong is how to get in more non-local, non-Chinese mainland students to study in this emerging education hub. It is important to rectify the common impression that what has been achieved since the early twenty-first century in Hong Kong higher education is not about "mainlandization" or regionalization but genuinely internationalization.

5. Conclusion

Wang Gungwu, who served as HKU's Vice-Chancellor between 1986 and 1995, points out that there has been a general decline in the confidence of Asian universities for the past three decades. In the past, many believed that it was due to the lack of

funding and facilities which prevented universities for doing an excellent job. However, the focus has shifted to the inadequacies of university structures and on how to reform them in order to make sure of more efficient use of funds and facilities in order to make distinctive contributions and thus justify their existence. Although most universities aim at international excellence and reputation, they have met with frustration and have attributed this to the shortage of resources and also the lack of appreciation by their communities (Wang, 1992). In spite of these drawbacks facing most Asian universities, with no exception for the ones in Hong Kong, they are very much eager to strive for a world-class status as revealed from a series of international university rankings (Altbach, 2003). Clark (1998, 2004) suggests that the future of universities denotes the transformation towards the direction of "entrepreneurial universities". The meaning of "entrepreneurial" in the context of higher education indicates "the attitudes and procedures that most dependably lead to the modern self-reliant, self-steering university" (Clark, 2004, p. 7).

When most countries put a strong emphasis on the development of quality assurance system, the changing university-government relationship, and the policy and strategies of internationalization, these issues have also prevailed in Hong Kong over the past two decades since massification took place in the 1990s. While Hong Kong is striving to be a regional education hub, it is not immune from global practices adopted from the process of policy borrowing and learning. As what Currie (2004) addresses, if universities are going to be a model of institutions for the society, it is necessary to shore up democratic collegiality against the rush to managerialize the decision-making processes in universities. Moreover, there is a need for caution against picking up the latest management fad blindly without consideration about the unique context and nature of higher education. It is more important to uphold the core values of scholarly integrity and professional autonomy in face of greater pressure for public accountability.

In conclusion, the first decade of the twenty-first century witnessed several fundamental changes in Hong Kong higher education. New policies and practices related to quality assurance, university governance, funding mechanism, private universities, community colleges, and internationalization were introduced. These policies came with the implementation of the four-year first-degree academic system from 2012 (Education and Manpower Bureau, 2005). These policies and practices have been institutionalized in the higher education system which has turned out to be more entrepreneurial or managerialist-oriented and business-like. Meanwhile, there are uncertainties arising from the emergence and growth of private universities and the extent of internationalization being accomplished in Hong Kong that should deserve further research at least through the second and third decades of the twenty-first century.

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21 世紀香港高等教育

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摘要

高等教育是香港教育中相當重要的環節。香港的高等教育體系,包括資助大學、自負盈虧的私立大學及社區學院。1990 年代以來,香港的高等教育體系經歷了普及化和急速擴張的階段,以及提升和鞏固教育質素的發展過程。與此同時,香港的高等教育界亦要面對來自全面檢討和改革政策的變革和挑戰,為不同的持份者帶來前所未有的衝擊。這些變革包括:質素評鑑制度的確立和制度化、政府與大學關係的變化、私立高等院校的湧現,以及為配合香港發展成為教育樞紐而推行的高等教育國際化政策。本文檢視香港高等教育在 21 世紀的重要發展,並分析和討論上述四項重要變革對香港高等教育長遠發展所帶來的影響。

關鍵詞

高等教育,質素評鑑,國際化,政府與大學關係,私立大學

香港小學小班的教學實踐

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摘要

香港政府自 2009 年在小學推出小班教學政策，至 2013 年 9 月已有 344 所小學推行小班教學，不少學校已推廣至小學五年級。小班教學的成效如何？本文結合文獻對小班成效的綜述，透過對推行小班教學的兩所學校共 10 位教師進行焦點團體訪談，初步剖析香港小班教學政策下的教師教學實踐，並提出進一步調整或深化政策的意見和建議。

關鍵詞

小班教學，教學實踐，香港教育，教師發展

甲、小班教學政策的推行

　　順應香港出生率遞減，小學收生人數減少的趨勢，香港政府於 2007 年宣佈實施小班教學政策，自 2009-10 年度起，從小學一年級起，每班人數減至 25 人。對於小班教學政策下教師的教學實踐，香港政府沒有很明確地在其綱領性文件提出具體要求。而 Galton & Pell 針對 2004 年參與「小班教學先導計畫」的 37 所學校進行研究，並提出有效小班教學的六大核心原則，包括：（1）建立適切的教學目標；（2）運用多樣化的提問技巧；（3）鼓勵學生參與課堂活動；（4）安排小組活動促進學生互相協作；（5）給予學生回饋，幫助他們反思學習效能；和（6）使用有效「促進學習」的評估策略（Galton & Pell, 2009, pp. 5-6）。這六大原則一直被公認為香港教育局、師資培訓機構、學校和教師推動小班教學政策及檢視小班教學成效的主要框架。

對於小班教學政策是否能提升學習成績，世界各國的學者進行了眾多的研究和論證，但是都未能達到統一的說法。他們發現，除了班級規模之外，學生學習成績的高低還會受其他眾多因素影響，包括教學科目、學生程度、年齡和背景等（Blatchford, Bassett, & Goldstein, 2003）。但是不少學者都認為：實施小班能否帶來影響，要視乎教師是否有效地運用小班的優勢來提升教學實踐的品質（Blatchford et al., 2003）。要鼓勵教師善用小班環境的優勢，促進教師的專業發展是一個重要因素（Galton & Pell, 2009）。

為了促進小班教學政策的實施，香港教育局和各大學師資培訓機構在過去的五年內為教師提供了大量關於小班教學專業的培訓。小班政策推行至 2013 年 9 月，已有 344 所小學（約有七成公營小學）參加（Education Bureau, 2013），並推展小班教學至小學五年級。對於小班政策第一週期推行的成效，現在是時候進行探討和反思，以便提出將來調整或深化政策實施的意見和建議。

乙、小班環境下的教師教學實踐

縱覽世界各國關於小班成效的研究和討論，小班政策對教師實踐的影響主要體現在以下五方面：

一、小班教學提升學生的參與

在小班教學中，教師會更多使用小組活動（Harfitt, 2013），減少全班教學的時間（Blatchford, Goldstein, & Mortimore, 1998; Bascia & Faubert, 2012），分組時每組的人數更少，以增加合作的機會（Yeomans, 1987）。使用小組活動可以提升學生的參與和與他人互動的機會（Blatchford, Baines, Kutnick, & Martin, 2001; Hallinan & Sørensen, 1985），更多展示學生的作品（Blatchford, Russell, Bassett, Brown, & Martin, 2007）和使用更多正面的回饋。不但師生在課堂中互動的量和深度都有增加（Blatchford, 2003; Finn, Pannozzo, & Achilles, 2003; Hallinan & Sørensen, 1985; Özerk, 2001; Yeomans, 1987），師生在課堂以外的互動也會增多（Hallinan & Sørensen, 1985），而且互動方式更多樣和個人化。很自然地，教師和每個學生的關係會更緊密（Cakmak, 2009; Yeomans, 1987）。

二、小班教學讓教師教學更個別化

小班環境提供一個契機，讓教師實施個別化教學（Blatchford, 2003）。首先，教師能更深入瞭解每個學生及其需要（Bascia & Faubert, 2012; Cahen, Filby, McCutchen, & Kyle, 1983; Johnston & Davis, 1989; Robinson & Wittebols, 1986; Turner, 1990; Blatchford & Mortimore, 1994; Zahorik, 1999），更注重根據學生已有知識和學習需要確定教學目標（Galton & Pell, 2009）。在學習過程中，教師能更密切和近距離地監察學生的進度（Bosker, 1998; Cakmak, 2009），更細微地關注學生課堂行為，建立更良好的課堂氛圍（Yeomans, 1987），在互動中更多聆聽學生發言（Finn et al., 2003），更注重按照學生的需要安排提問層次和互動方式，並為學生提供更多個別化的支援（Blatchford, Moriarty, Edmonds, & Martin, 2002; Bascia & Faubert, 2012），包括拔尖和保底的工作。除了能更細微地照顧學生學習差異，教師也更關注和瞭解學生社交情意上的需要和狀態（Bascia & Faubert, 2012），並加以提升和發展。

三、小班教學讓教師教學策略更多樣化

由於人數少的班級活動空間相對增大，加上管理學生的難度降低，教師擁有更多自由度也更願意去選擇使用不同的教學策略（Pedder, 2006）。這些策略包括學生座位安排多樣化（Yeomans, 1987）、教室規則制定多樣化（Harfitt, 2013）、課堂活動多樣化（Cakmak, 2009; Cooper, 1989）、提問方式多樣化，評估手段多樣化（Cakmak, 2009）等。

除了教學策略更加豐富外，教師在小班環境下教學策略的使用可以更精細和有深度。例如提問技巧上，教師在小班教學中會使用更多開放式提問、挑戰性提問和追問，在提問學生後等待時間增長（Bourke, 1986; Hallinan & Sørensen, 1985; Harfitt, 2013），更鼓勵學生創新和批判性思維（Özerk, 2001）。而教師經常給予學生回饋（Harfitt, 2013），對學生的評估更直接、即時和準確（Cooper, 1989; Korostoff, 1998; Shapson, Wright, Eason, & Fitzgerald, 1980）。

四、小班教學增加教學時間和課程內容

由於小班的學生人數減少，教師用來組織學習、管理學生行為的時間和評估所需時間減少（Hallinan & Sørensen, 1985; Korostoff, 1998），教學速度更快，可用來教學的總時間因此增加（Zahorik, 1999），而備課時間更加充足（Din, 1999）。相對於大班而言，教師能

更深入教授基本內容，並擁有更多時間教授補充資料或增潤課程（Pate-Bain, Achilles, Boyd-Zaharias, & McKenna, 1992）。相應地，安排給學生的課業量也會增多（Bourke, 1986）。

五、小班教學提升教師士氣、改善教育生態

　　小班教學政策除了帶來以上教師教學實踐在總量（時間、頻率、密度）和質量（多樣化，深度、廣度和豐富度）都有改變外，其實也有可能帶來一種較人本化的學校管理模式和教學生態（章月鳳，2013a）。這種人本化的學校管理模式會讓教師對學生的態度更正面（Din, 1999），擁有更多自由度去選擇教學策略（Pedder, 2006），教學工作更有效率（Din, 1999），對教學的熱忱更高漲（Finn et al., 2003），以及更加喜歡教學工作（Blatchford et al., 2007）。

　　不過，在上述文獻中，探討小班教學政策在香港成效的研究卻不多。Galton & Pell（2009）研究的是香港 2009 年大規模推行小班教學政策之前的情況。而 Harfitt（2013）則探討個別中學教師實施小班教學的成效。其他研究也主要是針對個別學校情況的探討，未能反映小班教學在香港小學推行成效的整體狀況。

丙、研究方案

　　有鑑於此，本研究團隊正進行的研究項目旨在探討香港實施小班教學政策對香港小學教師教學實踐的影響。本文將彙報參與該項目的先導訪談的初步發現，探討兩所小學教師實施小班政策的教學實踐並對小班教學政策的成效及影響因素進行初步討論。之後根據該訪談的發現，再設計問卷全面瞭解香港小學教師小班教學實踐的整體狀況。

　　本先導訪談採用焦點團體訪談（Greenbaum, 1998）、方便抽樣的方法，對參與研究的兩所學校的教師進行訪談，以回答以下研究問題：

• 自實施小班教學政策以來，教師教學實踐是否有改變？
• 如有改變，是哪些改變？其改變的原因是什麼？

我們在 2013 年 12 月初對已推行小班教學的兩所屯門區的津貼小學（以下稱學校一和學校二）進行先導研究。每所學校各選五位教師參與訪談，其中包括一位中層管理教師（如教務主任）和四位任教不同科目的教師（中文、英文、數學、常識科各一位）。每次焦點團體訪談歷時約一個小時，問題主要圍繞上文提到的小班環境下教師實踐變遷的五個方面。之後，研究人員把訪談錄音完整謄寫成逐字稿，並採用內容分析法，從中抽取和上述研究問題相關的內容進行分類、編碼、分析及整合，得出以下研究結果。

丁、研究結果和討論

學校一在 2008 年 9 月在一年級推行小班教學，比政府的計畫提早一年。至 2013-14 學年全校每班都是 25 人左右。學校二則於 2009 年 9 月開始施行小班教學，到 2013-14 學年推行至五年級。表一總結了兩所學校 10 位教師訪談的初步結果：

表一　香港小班教學政策下的教師教學實踐

	學校一	學校二
小班教學校本政策	• 學校強調教師要運用 Galton & Pell 六個原則去優化課堂教學，提倡教師使用合作學習和探究學習	• 學校強調教師要運用 Galton & Pell 六個原則去優化課堂教學，提倡教師使用合作學習和三高課堂（「高動機，高展示，高參與」） • 語文科推行戲劇教學，數學和常識科推行探究學習
提升學生的參與	• 教師推行合作學習，通過多元化小組活動，增加學生參與 • 學校強調學生主導的探究式的學習方式 • 師生關係和生生關係都更加融洽	• 教師推行合作學習，通過多元化小組活動，增加學生參與 • 教師秉承學校的宗旨，追求「高動機，高展示，高參與」的課堂 • 學校提供多元化課外活動，增加學生參與和展示機會 • 師生關係和生生關係都更加融洽

表一 香港小班教學政策下的教師教學實踐（續）

	學校一	學校二
教學策略個別化	• 教師更深入瞭解每個學生及其需要 • 因為教育局對評估內容統一，教學內容沒有分層處理 • 分層的教學得益於同儕備課，比較容易施行，課堂提問針對不同學生需要設計問題和提問 • 教師雖然認同分層評估，但需要花更多時間設計分層評估工具；由於統考制度，學校政策未有推行分層評估 • 學校資源優先分配在保底班，保底力度大於拔尖力度	• 教師更深入瞭解每個學生及其需要 • 因為教育局對評估內容統一，教學內容沒有分層處理 • 提問方式針對不同學生的需要設計不同層次的問題和提問；活動安排也有考慮對學生學習的適切性 • 考慮到公平性原則，也沒有推行分層工作紙和分層評估 • 學校資源優先分配在保底班，保底力度大於拔尖力度
教學策略多樣化	• 注重設計不同的活動讓學生進行小組活動 • 課堂提問針對不同學生需要設計問題和提問	• 教師嘗試使用多種教學策略，針對不同學生的需要設計問題和提問 • 學校提供多元化課外活動，讓學生發展潛能，獲得成功感
增加教學時間和課程內容	• 學生行為問題減少，教師可用更多教學時間讓學生更深入地討論所教的課題，所以課程內容沒有增加 • 評估每一份課業時間減少，但對成績差的學生增加支援工作	• 更注重學生的參與，小班教學提供更多時間進行討論、彙報、回饋，很難再增加課程內容 • 更注重學生的學習過程及其評估，評估每一份課業的量減少，但是針對學習過程的評估工作增多
教師士氣和教育生態	• 小班教學對減輕他們的工作量沒有太大幫助，小班教學對教學的質素要求提高，增加了他們備課的工作量	• 小班教學對減輕他們的工作量沒有太大幫助，小班教學對教學的質素要求提高，增加了他們備課的工作量 • 小班教學還帶來許多校本特色的課外活動，也增加工作量

一、小班教學提升學生的參與

　　兩所學校的教師都認同，學生的參與程度能有所提升，是小班教學政策帶來的最大改變。兩所學校的小班教學政策都非常強調教師要提升學生的參與程度，並在全校各科推行合作學習和小組學習。在此校本政策影響下，教師都一致表示，他們更注重透過小組活動提供不同的機會讓學生參與課堂活動。有教師還提到，他們備課時會經常思考，如何按照學生不同的學習情況設計提問問題和安排活動。與此同時，教師發現學生較以

往更主動參與師生和生生互動，即使是學習專注能力差的學生，通過小組合作，學習參與度有所提高，違規行為亦自然減少。不過，因為缺少現成可用於小組合作的學習資料和工作紙，他們往往須要多花一些時間進行備課或改良教學資源。

二、小班政策對教學個別化的影響

　　對於是否有使用個別化分層教學，教師都表示他們更注重按照學生學習的不同情況，然後決定如何使用教學活動和分組合作，以強帶弱，讓學生都得到適當學習的機會。但教師使用的分組教學策略大多只停留在對學生口頭的提問、回饋或支援上，並沒有使用分層工作紙。原因除了是因為學校沒有硬性規定外，亦由於教師覺得設計分層工作紙需要花費較多時間，而且也需要事先取得家長的認同，因而減低使用意欲。另外，儘管學生的學習進度和成效不一樣，教師都覺得分層評估是很難在學校推行，因為所有學生最終都要一起面對中央考試制度。所以教師對學生個別化的處理主要集中在對成績差學生的保底支援和教學策略調整，而沒有系統地滲透至課程內容、課業安排和評估方式。

三、小班政策讓教師教學更多樣化

　　兩所學校的教師都表示，為了配合小班政策，自己會使用更多不同的教學策略。學校一提倡教師使用合作學習和探究學習。學校二則根據每科的特色提倡各科教師實施一些核心的教學策略，例如中英文科使用戲劇來教語言，數學和常識科則提倡探究學習，還要求各科教師在每一節課最初五分鐘利用暖身活動來提起學生的學習興趣，而結束時要總結該堂學生所學知識等。另外，學校二還為學生提供了豐富的課外活動，如藝墟等，讓學生擁有更多平台來發展自己的才能和獲取成功感。教師教學的多樣化還表現在使用更多方法去激勵學生，提問的方式和給予學生的回饋更加多樣化，更勇於嘗試不同的教學模式。

四、小班教學對課程內容和教學時間的影響

　　受到統考制度的影響，小班教學的推行，並沒有改變兩所學校對課程內容的要求，教師也不會教授學生更多的學習內容。而透過為學生提供更多參與的機會，教師更注重讓學生更加深入和細緻地學習課程內容，包括進行深入討論和給予及時回饋。

小班政策的實施並未能有效增加兩校教師的教學時間，減輕工作量。雖然，他們修改學生每一份課業的量減少了，但是其他工作量卻同時增加。首先，因為推行合作學習和同儕備課，用於參與備課會議和準備教學資料的時間大量增加；其次，學校加強對成績差學生的保底工作，所以需要使用更多時間和精力支援後進生；最後，學校提倡對學生學習成效的評估更加細緻，同一份課業的批改和回饋都更加精細，也需要花費教師不少時間。加上教師還需要同時背負大量其他教學工作以外的行政工作，包括當值、訓導或輔導等功能組別工作等，令小班政策帶來工作量的減少顯得微乎其微。

五、受到校內教育生態的影響

　　小班政策的推行未能減輕教師工作負擔，反而增加他們工作的複雜度，亦未能令教學工作效率有效提高。他們感到欣慰的是學校在注重學業成績的同時，也開始關心學生社交情意的發展和關愛校園的建設，而教師也對學生的態度更加正面。無奈的是教學和行政的工作壓力沒有相應減少，而學校過於細緻的規定有時也令教師覺得未能享受教學的自主權，只是跟著學校的指示去做。

戊、結論與啟示

　　由以上關於兩所小學的個案研究發現 Galton & Pell 提出的六個原則成為了學校制定校本小班教學政策的依據。六個原則的推行，讓教師更注重增加學生在課堂學與教的參與，更關注學生的學習情況和需要。他們在教學策略中運用更豐富和多樣化的教學策略，更及時和正面的評估和回饋，幫助學生學習和發展。但是由於學校校本小班政策的規定和考試制度的限制，教師在選擇學習內容和評估方式都未必能夠做到個別化教學或分層教學。雖然班級縮小似乎能讓教師減少評估的工作量，但在推行其他新型教學策略上卻需要花費更多的準備時間，以至於無法有效減輕教師的工作量。

　　另外，小班政策對於教師實踐影響的深度和廣度，視乎學校管理層所制定的校本小班政策對教師教學範式的導向。要讓小班教學政策順利推行並取得更好成效，需要學校校本政策的配合和行政管理的大力支援（Bascia & Faubert, 2012）。這也印證了張倩、周浩暉、李子建（2013）所講的，小班教學所處的學校情景關乎小班教學政策下教師實

踐的專業發展。相對而言，在實現了人本化管理的學校裡（章月鳳，2013b），教師專業自主權更得到尊重，協作精神更能得到發揮，小班環境的優勢才更有可能被善用，持續提升學與教的品質，創設共融關愛校園。

　　本次先導訪談初步證實了上述總結關於小班教學所影響的不同層面，它的結果將會是日後修訂問卷調查的根據。若條件允許，能收集到一些教師的課堂教學實踐片段，也會有助於進一步發掘小班教學的實施情況和深入探討小班政策對教師實踐的影響。

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Small Class Teaching practices in Hong Kong primary schools

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Abstract

Three hundred and forty four primary schools have introduced Small Class Teaching (SCT) into their classrooms since the adoption of this policy by the Hong Kong Government in 2009. Some of them even extended SCT up to primary five students. The article reports on a preliminary study about the impact of SCT by interviewing ten teachers in two primary schools about their teaching in small class setting. The conclusion is drawn together with suggestions and recommendations on further adjustment and implementation of the SCT policy.

Keywords

Small Class Teaching, teaching practice, Hong Kong education, teacher professional development

香港中學推行小班教學的現狀及啟示

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摘要
現時香港出生率大幅下降，引致縮班殺校問題，香港各界普遍認同小班教學是解決學校收生不足的長遠策略，為提升香港教育質素提供良好契機，以及是最能協助弱勢學生的策略。政府於 300 多間小學推行小班教學，許多中學也有小班教學的嘗試。本文報告「香港中學推行小班教學現狀及需要的問卷調查」及跟進訪談的調查結果，展示香港中學推行小班教學的現狀、意向、困難及需要，並探討小班教學在香港中學推廣的可行性。

關鍵詞
香港小班教學，中學小班教學的實踐，教育政策的研究

甲、研究背景

　　香港特別行政區政府於 2009-10 學年開始在小學分階段實施小班教學，到 2013-14 學年已擴展至小學五年級，至今超過七成的香港小學（共 334 所）已開展小班教學，當中很多教師都參加了小班教學專業發展課程和進修活動（葉建源、黎國燦，2012）。幾年以來，不少學校在實施小班教學和優化學與教的工作上已取得一些階段性成果。到 2015-16 學年，香港

首批在小班教學的學習環境下成長的學生將升讀中學，為了讓學生在小班學習環境及學習經驗上能順利銜接，探討香港中學應否推行小班教學的研究刻不容緩。Lai & Che（2011）指出，若能借用小學實施小班教學的經驗，中學實施小班教學的步伐也會較穩妥。但是，如何將香港的小班教學政策從小學過渡到中學的議題，仍需相關研究者持續的探討與貢獻（李子建，2012）。

在出生率下降的現實環境下，由 2013-14 學年開始，香港升讀中一的人口在未來四年急跌超過一萬，跌幅接近兩成，至 2017-18 學年適齡學生數目會再開始顯著回升，在幾年間將會回升至現有水平。學童人口大幅波動，對教育界造成極大震盪。就 2013-14 學年，若以每班派 34 人而言，將近有 160 班會被縮減，涉及數十間中學飽受縮班、甚至面對殺校的威脅，導致很多在職教師面臨失業，大批新入職的年輕教師及有志投身教育界的準教師就業艱難。若形容這為香港教育界的生態災難，絕不為過。香港教育界有建議小班教學是解決學校收生不足的長遠策略，為提升香港教育質素提供良好契機，以及是最能協助弱勢學生的策略。根據鄧耀南（2012），小班教學的精髓在於致力營造善待每一個學生及教師的課室學習環境，它能為體現人本精神及運用知識建構教學策略提供契機和促進性條件；在促進學生有效學習和為教師創造有利教學條件的同時，亦致力提升學業水準及收窄學生之間的差距（raise the bar and narrow the gap）；在改進學生的學習能力以至提升為未來生活作奮鬥的能量之餘，亦能培育孩子立志於提升生命的意義和素質等，以成就全人發展的需要（Blatchford, 2003；Fullan, 2009；Galton & Pell, 2009；Hopkins, 2008；Macbeath & Dempster, 2009；葉建源，2009）。

就目前而言，小班教學在中學的實施成效仍未有確切定論（Anderson, 2000; Hattie, 2005）。英國倫敦大學 Blatchford 教授及其研究隊伍在 2011 年發表的研究論文中，探討了中小學的班級規模對課堂互動和學生行為的影響，頗有參考價值。Blatchford 發現，不論在中學還是小學，隨著班級人數減少，不單教師對學生的個別照顧增多，師生間的積極互動也同時增加。相反地，隨著班級人數增加，學生在課堂的參與也會相對地減少，這對成績稍遜的中學生影響最大，假如一班學生人數由 15 人增加至 30 人，這些學生在學習上出現不專注的時間（time off-task）將增加一倍。因此 Blatchford 建議如果在中學實施小班教學，可優先照顧成績稍遜的學生（Blatchford, Bassett, & Brown, 2011）。然而，亦有研究發現小班教學對提升學業成就並不一定有顯著的成效（Brühwiler & Blatchford, 2011）。

中學小班教學的實施成效在學術界確實存在爭議，然而，某種形式的中學小班教學卻又勢在必行。正如現任香港特別行政區行政長官梁振英先生在早前的競選政綱已列明：「為紓緩部分學校在短期內收生不足的壓力，容許學校更大彈性決定初中班級人數，收生仍有困難的學校可以利用小班。」梁特首將中學小班教學在政策上傾斜於弱勢學校及先照顧弱勢學生，與美國教育研究協會的觀點相近。美國教育研究協會指出，假如資源緊拙，應集中協助最需要支援的學生（American Educational Research Association, 2003）。因此，針對中一人口暫時下降的問題，香港特別行政區教育局局長吳克儉亦公開表示以「1-1-1」與「2-1-1」減派方案進行中一派位[1]，即三年內暫時把中一每班派位人數逐步減至 31 或 30 人。雖然未來三年香港中一的班額正逐漸下降，但研究普遍認為，如果只減少每班人數，而在教與學上沒有相應的改變，小班教學所發揮的成效應該不大。正如 Hanushek（1999）所說，對教學影響最大的因素應該是教師質素，而不是每班學生人數。Blatchford（2003）亦指出，小班的好處是不會自然而然地產生的，為了給予學生更佳的個別化支援及更有效地運用其他教學環境（特別是小班學習環境下的有效小組活動），教師的專業培訓至為重要。專門研究小班教學的葉建源（2012）建議，好好利用人口下降這個契機提升本港教育質素，讓未來 10 年新畢業的準教師能夠順利入職，為教育界注入新血，避免教育專業出現斷層。

雖然已有不少研究顯示，小班教學在小學階段確實能推動教師的教學和改善學生的學業成就。但在中學階段，研究中學小班教學的文獻甚少（李子建，2012），而關於香港中學小班教學的研究亦是相當缺乏（Lai & Che, 2011），只曾有 Harfitt 在 2010 年在這方面的研究。Harfitt（2010）發現實施小班教學能為學生提供不一樣的學與教經驗。在小班課室，學生在課堂中擁有更多的互動及參與的機會。除學生之間有較佳的同儕關係及對學校社區有較強的歸屬感外，其研究亦發現任教小班的教師其焦慮程度亦較低。Harfitt 的研究結論提出教師專業發展的重要性，以確保能善用和擴大實施小班教學所帶來的契機。本研究旨在檢視香港中學推行小班教學的現況，為香港中學小班化提供實證的研究資料、觀點和建議，以及提出適時及具政策含義的措施。

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1 「1-1-1」方案：由2013-14 學年開始的第一年、第二年及第三年在每一班中一班級依次遞減一人；「2-1-1」方案：由 2013-14 學年開始的第一年在每一班中一班級減派兩人、第二年及第三年在每一班中一班級依次遞減一人。

乙、研究方法

本研究採用混合研究方法（mixed method, Creswell, 2011），於 2012 年 2 月至 3 月期間，在全港 544 間中學進行問卷調查[2]，旨在瞭解香港中學實施小班教學的整體趨勢和意向。於 2012 年 6 月至 7 月間，刻意抽樣（purposive sampling）三間不同類型學校（包括官立學校、津貼學校和直資學校）進行個案研究。選取這三類學校為代表的原因是因學校的資金來源不同，這或可能影響學校推行小班教學的規模和深度。香港的中小學大致可分為四種類型：官立學校、津貼學校、直資學校和私立學校，其中官立學校、直資學校和私立學校約佔學校總數的 20% 左右，而大部分的學校屬於津貼學校。津貼學校是由非牟利的民間辦學團體所營辦，它們使用政府資助的教育津貼辦學，提供小學 6 年、初中 3 年及高中 3 年的 12 年免費教育，主要經費來自政府按照所派學生的班額數量多寡來計算的撥款，並受政府「資助則例」的嚴格管理和約束，與官立學校同被視為「公營學校」。就直資學校而言，其來自政府的資源配置上最多只有官、津學校的三分之二，但它們除了可自行收取學費之外，在課程設置及收生方面亦享有較大的彈性。整體而言，直資學校所享有的資源相對地較官、津學校多一些。研究人員分別和各校負責小班教學統籌工作的教師進行訪談，以深入瞭解個案學校推行小班教學的現狀、困難和意向。調查所得的結果將有助為香港中學推行小班教學提出合適建議，並思考部署相關之支援工作。

丙、問卷調查

問卷（見附錄）共寄出 544 份，回收有效問卷為 206 份，問卷回收率為 38%。其中 83% 為津貼中學，11% 為直資中學，5% 為官立中學，1% 為私校；38% 為主要收取第一組別學生的學校，34% 為主要收取第二組別學生的學校，27% 為主要收取第三組別學生的學校[3]。從回收的 206 份有效問卷中，只有 3% 的中學從未實施過小班教學，而 97% 的中學（約 200 間）已有不同程度推行小班的做法和經驗。其中，只有 53% 的中學已制定與小班教學有關的校本政策。小班教學校本政策的制定代表學校對於小班教學的重視和常規化。

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2 只包括本地的主流學校：官立學校、津貼學校和直資學校，不包括國際學校。
3 有關學生組別劃分，概括而言，是香港教育局隔年按同一間小學小六畢業生的「中一入學前香港學科測驗」成績將未來兩個學年將派往中學的小學小六畢業生分為三個組別，第一組別學校學生的成績最好，而第三組別學校學生的成績最差。

　　關於小班教學推行的方式，10% 的中學表示正全校進行小班教學，而餘下 90% 的中學則在部分班級、部分科目或課程，或於部分時間進行小班教學。各校推行小班教學的原因，主要是提高學生的學習效能（86%），只有 17% 學校表示推行小班教學旨在關注學生全人發展。這與中學教學受考試制度影響而注重學生學習成績的現狀相吻合，因此，各校在小班教學中採用了按學生成績的高低來分班的情況。雖然有社會人士懷疑中學推行小班教學的主要原因是為了避免「縮班殺校」，但只有 9% 的中學表示推行小班是因為收生不足。由此可見，接受調查的中學對小班教學多持正面和積極態度，認為小班教學能為優化「學與教」提供契機和促進性的條件！

　　各校採用多種小班班級規模並存的形式。有些學校小班教學每班人數主要是 21-25 人（56%）或 15-20 人（53%）一班，還有 20% 的中學推行 15 人或以下的小班。而各校的小班教學已涉及各主要科目，包括英文（92%）、通識（72%）、中文（72%）和數學（63%），其中有 16% 的學校已在所有學科推行小班教學。英文科小班化程度較高，可能是由於近年政府在英文科投放的資源較多有關。

　　各校表示推行小班教學主要面對兩類困難，首先是和資源配套相關的困難，包括教師人數不足（64%）、教育經費不足（63%）和沒有足夠的校舍設施（例如課室）（52%）；其次是和教學支援相關的因素，包括缺乏受過小班教學培訓的教師（39%）和缺乏教學資源（38%）。61% 的中學表示進行小班教學的教師未曾接受過相關的培訓，所以要成功推行中學小班化，大量的師資培訓迫在眉睫。事實上，《香港小學小班教學終期研究報告》（Galton & Pell, 2009）指出，部分進行試驗小班教學教師的教學方法較單一，在小班上課卻無引入活動教學，形式恍如一般的「大班」授課，無助發揮小班優勢及成效。Galton 的研究亦明確指出，教師是小班教學成敗的關鍵人物，而影響教師表現最重要的因素是教師專業發展！由此可見，教師專業發展乃中學推行小班教學成效高低的關鍵所在。

　　雖然面臨以上種種困難，各校對於小班教學的成效是有目共睹的。小班教學能提高教學的效能（91%），包括提高學生的學習技巧（77%）和學習成績（76%）、減輕課堂管理壓力（60%）；其次是有助於發展學生的能力，包括提升學生的合作能力（57%）和培養學生良好學習習慣（51%）；只有 50% 的學校表示小班教學能解決收生不足的問題。這再一次表明

中學實施小班教學，不只為了保護教師的工作，更看重於小班教學能為提高教學效能所帶來的契機。

而到 2015 年 9 月，首批參與小班教學的小學畢業生將會升讀中學一年級。對於中學小班化的遠景，各校都拭目以待，當問及在此之前若有額外資源協助推行小班教學，全部中學都表示會嘗試小班教學。其中 50% 的中學更表示會在全校推行小班教學，其他中學則在部分班級、部分科目或課程，或於部分時間進行。由此可見，在香港中學實施小班教學的訴求在中學教育界已經深入民心，乃大勢所趨。

丁、個案研究

通過以上問卷調查，我們對於香港中學推行小班教學的現狀有初步的瞭解。參與問卷調查的學校中，有 27 間表示願意接受跟進訪談，研究員有目的地抽選其中三間不同類別的學校作為個案研究對象，深入瞭解小班教學在各校的實施情況。以下分別就三所個案學校推行小班教學的契機、目標、現狀、強弱及需要進行具體闡述和分析。

如表一所示，學校甲為一間第二組別的官立學校，開始推行小班教學已有 6 年經驗。得益於香港教育局給予中文中學專用於增潤英文科教學的撥款 300 萬，英文科組聘請一位編制以外的代課教師，在英文科推行小班教學 6 年，重點關注照顧學生的學習差異。雖然中文科和數學科也於部分年級推行小班，但礙於資源有限，故規模較小亦沒有常規化。學校乙為一間第二組別的津貼學校，已經推行小班教學十數年。該校整合每年所有可用來提升教學的資助（包括學校的發展津貼、科本的資源，如 2011 年通識科的啟動基金 50 萬等），分配給各個科組，由各科組決定如何利用所配資源，減少各班人數。學校丙為一間第三組別的直資學校，從新的教務主任 5 年前接任教務分配工作以來便開始推行小班教學。由於直資學校可以收取學費，該校便利用經費聘請額外教師、擴建校園，在各科各級都有推行小班教學。香港一般學校的教師編制為平均每班 1.5 位教師，而該校可以達到每班 2 位教師。由於該校具有基督教背景，校長是教育心理學專家，教務主任也曾修讀神學，所以非常注重教師和學生的生命教育，推行小班旨在促進學生的個人成長和全人發展，有別於學校甲和乙以提高學生學習成績為主的目標。

表一　個案學校推行小班教學的契機和目標

	學校甲	學校乙	學校丙
學校背景	屬於第二組別的官立學校；6 年小班經驗	屬於第二組別的津貼學校；10 多年小班經驗	屬於第三組別的直資基督教學校；5 年小班經驗
推行小班的契機	管理層認為小班比大班更有利於教師照顧個別差異；利用 300 萬資助聘請一位編制以外的教師，推行英文科小班（中文科和數學科有類似做法，但資源有限，規模較小）。	管理層認為小班比大班更有助於提升教與學，學校將有限的額外資源分配給各科組聘請編制以外的老師，儘量減少各班人數。	管理層重視生命教育，認為小班比大班更有利於加強師生關係；利用經費聘請額外教師及進行校園擴建，於各科各級都有推行小班。
推行目標	拔尖保底，增加師生在英語課堂的互動。	拔尖保底，減輕教師工作量，增加收生。	促進學生的個人成長和全人發展。

　　在分班模式上，三所學校的情況很類似。首先，各校都根據學生成績的高低進行分班，如表二所示，有些學校按各科成績高低分班（如學校甲和乙），另一些則按成績總分高低分班（如學校丙初中班別）。其次，各校每個年級中都有一班成績最好，學生人數比普通班多一些，而成績最差一班學生人數則少一些（學生通常還會有紀律或行為問題）。值得注意的是，由於資源比較多，學校丙於班級人數上能達到香港小學小班的人數標準（25 人左右），而學校甲和乙只能達到中班（30 人左右）的標準。

　　在教學模式上，學校甲和乙都進行分層課程，並對不同學生採用不同程度的考試卷，程度較高學生的考試卷和程度較低學生的考試卷相比，內容涵蓋範圍較大、題目數量較多、難度也更高。學校甲和乙在評估小班教學成效方面偏向用學生成績計算改善的幅度，但學校丙在這方面還未起步，教務主任認為不希望給教師太多的壓力。在教師所採取的教學方法上，各校都沒有向教師提出改變教學模式的要求和進行相關的監督，所以各校在促進小班教學的實施成效上，還沒有建立相關的質素保證機制。

表二　個案學校推行小班教學的現狀

	學校甲	學校乙	學校丙
分班標準及人數	主要按照成績分班分組，並參考平時紀律和行為表現，好班的人數較多；尤其注重中一和中四的資源投放，如：中一的好班達36-40人，其他三班分成四組（每組15-30人不等），每年按學科成績進行調整，同級同科組統一上課時間。	各科組按成績分班分組。初中：兩班分成三組（英文科資源多些，分成四組）；好班的人數較多，每年按學科成績進行調整，同級同科組統一上課時間；高中：在核心科目五班分成六個固定班（每班30-32人，中班模式），選修課亦實施小班教學。	由學校教務主任主要按成績統一分班，並參考心理輔導、紀律的表現。兩班分成三班（共90人，每班25-35人），好班的人數較多，按總成績每年調整。初中「一好、兩平均」；高中按每科成績分高中低，同級同科組統一上課時間。
小班中的教與學	英文科教師注重對課程、教材和評估的調整，但對教師教學模式的改變沒有清晰的要求，未對學生進行小組學習常規訓練。	各科教師進行分層課程（包括核心課程和增潤課程）和分層評估。但對教師教學模式的改變沒有清晰的要求，未對學生進行小組學習常規訓練。	嘗試通過同儕觀課建立教師協作文化，注重對教師的個別輔導。但對課程、教學模式和評估的改變沒有清晰要求。對學生紀律、常規和學習習慣進行訓練。
小班成效評估	注重每班學生成績排名提高的幅度，沒有進行個別教師教學成效的監督和評鑒。	注重每班學生成績提高的幅度，沒有進行個別教師教學成效的監督和評鑒。	運用學生問卷暸解整體教學成效以回饋教學，沒有進行個別教師教學成效的監督和評鑒。

　　綜觀各校推行小班教學的情況，各校均未能制定小班教學的校本政策，對小班教學理念和願景未有周密的思考和系統的策劃，導致小班教學的實施在很大程度上只局限於改變班級人數方面的多寡（量的改變），窒礙了小班教學的發揮及促進教與學的作用（質的提昇）。由於教師的工作量大（一般每週20多節），參加培訓的熱情不高，過去幾乎沒有參加過關於小班教學的培訓；而教育局對各校教師編制的死板規定，則成了各校不能增加教師人數以優化小班教學的最大瓶頸因素（鄭燕祥，2004年4月）。表三列出各校推行小班教學的強弱項及期望可獲得的支援。

表三　個案學校推行小班教學的強弱及需要分析

	學校甲	學校乙	學校丙
學校強項	教師有參加照顧差異的培訓，科本的教研活動較活躍。	尊重各科的專業判斷，允許各科彈性處理。	重視生命教育，對學生的關愛文化較強。
學校弱項	缺乏針對小班教學的校本政策，教師沒有參加過小班教學培訓。	缺乏針對小班教學的校本政策，只有小部分教師參加過小班教學培訓，教師參加培訓的熱情不高。	缺乏針對小班教學的校本政策，教師沒有參加過小班教學的培訓，教師隊伍年輕（尤其科主任），教學經驗淺。
支援及需要	需要專業支援和教師培訓，增加資源投入、教師數量及擴建校舍。	希望可獲得持續的資助，期望政府改變教師編制，增加教師數量。	讓教師編制更靈活，增加教師數量，減輕教師工作量，需要小班教學教師培訓。

戊、調查結論及啟示

　　我們通過此次問卷調查發現，小班教學深受中學管理層推崇。個案研究更發現，各類學校都認為小班比大班更能提高教學效能，照顧學生需要，從長遠看更有利於學生的全面發展，加上未來幾年香港中學入學人數急劇下降，在中學推行小班教育為大勢所趨，且勢在必行。雖然不少學校都各自爭取不同的資源和資助自行創造條件推行小班教學，但政府並沒有順應學校的需求而在香港中學實施小班教學政策，以利用小班優勢進一步優化教學效能，提高教育素質。政府現時為優化教與學所提供的各類資源，多屬短期性質並附帶許多行政要求，即使學校可利用這些資助暫時推行短期的小班教學，但離小班教學的恆常化和機構化還很遙遠。各類中學推行小班教學所面對的最大障礙，在於現行的教師編制下，令師生比例太高，教師工作量太大，教師缺乏空間和意願去參與小班教學的培訓和思考如何優化小班教與學，以致各類學校雖已具備小班教學的硬體和客觀條件，但卻缺乏發揮小班教學效能的教師專業知識和力量。要解決這個問題，香港政府首要理清小班教學政策的發展方向，不要白白放棄小學教育界在共同努力的付出下，於小班教學上所取得的階段性成果，理應加強在中學推行小班教學的力度，調整教師編制，降低每班的學生數目，以及儘快實施中學小班教學的政策。

特首梁振英表明，容許部份中學彈性推行小班教學，這是非常可取的政策性建議。香港教育界普遍期望新一屆政府可以儘快在中學推行小班教學，以解決小班教學在中小學銜接的問題。要成功推行中學小班教學，政府在資源配套上要有積極承擔，以減低師生比例，而關於小班教學的教師培訓也要從速進行，並提供持續的校本專業支援。小班教學在中學的實施，是順應學校教育發展的需要和趨勢、提升教學效能和質素的重要政策性舉措。

鳴謝

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附錄　香港小學推行小班教學現狀及需要的問卷調查

請在適用的空格上打✓或在橫線上填上答案。

甲部：學校背景

1. 貴校成立：　□ a. 少於 10 年　　□ b. 10 至 20 年　　□ c. 20 年以上

2. 貴校是屬於：□ a. 男校　　　　□ b. 女校　　　　□ c. 男女校

3. 貴校的宗教背景是：
   □ a. 沒有宗教　□ b. 佛教　　□ c. 基督教　　□ d. 天主教
   □ e. 回教　　　□ f. 道教　　□ g. 孔教　　　□ h. 其他：_____

4. 貴校是：　　□ a. 津貼　　□ b. 私立　　□ c. 官立　□ d. 直資

5. 貴校大部分小六畢業生會升讀以下哪一個組別的中學？
   □ a. 第一組別　　□ b. 第二組別　　□ c. 第三組別　　□ d. 其他：_____

乙部：小班教學推行情況及意願

6. 你認為以下哪些描述符合小班教學的定義：（可選擇多項）
   □ a. 班額人數減少至不多於廿七人　　□ b. 是提升教育質素的契機
   □ c. 解決「殺校」問題的策略　　　　□ d. 照顧學生差異的促進性條件
   □ e. 促進教師專業發展的機會　　　　□ f. 課室內人本精神的體現
   □ g. 為學校發展帶來契機　　　　　　□ h. 方便運用知識建構教學策略
   □ i. 為促進學生有效學習　　　　　　□ j. 方便運用促進學習的評估
   □ k. 為教師創造更豐富和有利於教學的條件
   □ l. 致力提升學業水準及收窄學生之間的差距
   □ m. 其他_____

7. 貴校推行小班教學的現狀是：（可選擇多項）
   □ a. 全校進行小班教學　　　　　　□ b. 部分班級進行小班教學
   □ c. 部分科目進行小班教學　　　　□ d. 課程部分時間進行小班教學
   □ e. 曾嘗試小班教學但現在已停止　□ f. 從未實施過小班教學
   （如果答案是 f，請跳到第 19 題）

8. 貴校開始推行小班教學的學年是（例如 2009-10 學年）：_____學年

9. 自 2009/10 學年開始，香港政府承諾於小學小一年級，開始分階段實施小班教學。貴校是否有參加香港政府的小班教學推展計畫？
   □ a. 是，時間為_____學年（例如 2009-10 學年）□ b. 否

10. 貴校是否已制定和小班教學有關的校本政策？　　　□ a. 是　　　□ b. 否
    （如果答案是 b，請跳到第 12 題）

11. 貴校關於小班教學的校本政策包括以下哪些項目？（可選擇多項）
    - ☐ a. 小班教學的長期目標　　　　☐ b. 小班教學的課程安排
    - ☐ c. 小班教學的分班方式　　　　☐ d. 小班教學的教學方法
    - ☐ e. 小班教學的評估策略　　　　☐ f. 小班教學成效的檢視機制
    - ☐ g. 小班教學的考績要求　　　　☐ h. 小班教學的科本處理
    - ☐ i. 小班教學的教師專業發展　　☐ j. 小班教學的學習圈
    - ☐ k. 其他_____

12. 貴校推行小班教學的原因是：（可選擇多項）
    - ☐ a. 收生不足　　　☐ b. 拔尖　　☐ c. 保底　　☐ d. 提高教師教學效能
    - ☐ e. 減輕教師工作量　　☐ f. 提高學生學習效能　　☐ g. 讓學生有全人發展
    - ☐ h. 其他_____

13. 貴校推行過的小班人數為：（可選擇多項）
    - ☐ a. 15 人以下　　☐ b. 15-20 人　　☐ c. 21-25 人　　☐ d. 26-30 人
    - ☐ f. 其他_____

14. 貴校哪些科目已實施小班教學？（可選擇多項）
    - ☐ a. 所有科目　☐ b. 中文　☐ c. 英文　☐ d. 數學　☐ e. 常識
    - ☐ f. 其他_____

15. 貴校小班教學分班的形式為：（可選擇多項）
    - ☐ a. 隨機分班　　☐ b. 按成績高低分班　　☐ c. 按教學語言分班
    - ☐ d. 按學生母語分班（例如華語、非華語）
    - ☐ e. 其他_____

16. 貴校有多少位教師正實施小班教學？
    - ☐ a. 全校教師　　　　　☐ b. 5 位以下　　　　☐ c. 5-10 位
    - ☐ d. 11-15 位　　　　　☐ e. 15 位以上

17. (1) 上述教師有否接受過關於小班教學的培訓？
    - ☐ a. 全部教師從未受訓　　　☐ b. 只有部分教師受訓
    - ☐ c. 全部教師都已受訓
    - （如果答案是 a，請跳到第 18 題）

    (2) 貴校教師接受培訓的時數及人數為：

接受培訓時數	人數
a. 少過 6 小時	
b. 6-20 小時	
c. 超過 20 小時	

（3）為貴校教師提供培訓的機構或人士有：（可選擇多項）
　　□ a. 教育局　　　　　　　　□ b. 大專院校（請註明）_____
　　□ c. 校內教師　　　　　　　□ d. 其他_____

（4）貴校教師曾經接受培訓的規模有：（可選擇多項）
　　□ a. 全體教師一起培訓　　　□ b. 個別教師參與培訓課程
　　□ c. 以科組為單位進行培訓　□ d. 其他_____

（5）貴校教師接受培訓的形式有：（可選擇多項）
　　□ a. 小班五星期進修課程　　□ b. 小班實踐社群計劃
　　□ c. 專題講座　　　　　　　□ d. 校內教師分享
　　□ e. 課研（如備課、觀課等）□ f. 工作坊
　　□ g. 學習圈　　　　　　　　□ h. 借調教師　　　□ i. 其他_____

18. 貴校實施小班教學對教師的教學期望是：（可選擇多項）
　　□ a. 沒有任何期望　　　　　□ b. 要多使用小組學習的方式
　　□ c. 要增強師生互動　　　　□ d. 要增強照顧個別學生的力度
　　□ e. 要對課程進行分層處理　□ f. 促進師生關系
　　□ g. 其他

19. 你認為下列哪個方案最能解決現時人口下降，部分學校收生不足的問題？
　　□ a. 殺校　　　　　□ b. 縮班　　　　　□ c. 小班　　　　　□ d. 其他_____

20. 貴校認為最理想的小班人數為：
　　□ a. 15 人以下　　□ b. 15-20 人　　□ c. 21-25 人　　□ d. 26-30 人
　　□ e. 31-35 人　　　□ f. 其他_____

21. 你認為實施小班教學的成效有：（可選擇多項）
　　□ a. 解決收生不足的問題　　　□ b. 有助於提高學生成績
　　□ c. 有助於培養學生良好學習習慣　□ d. 能提升學生學習技巧
　　□ e. 能提升學生社交能力　　　□ f. 讓學生提升合作能
　　□ g. 讓能減輕教師工作量　　　□ h. 能減輕教學難度
　　□ i. 能提高教師教學效能　　　□ j. 能增進教師間的教學合作
　　□ k. 能提升學校管理效能　　　□ l. 達至更健康的學校教學生態
　　□ m. 其他_____

22. 自 2009/10 學年開始，香港政府承諾於小學小一年級，開始分階段實施小班教學，推展至 2014/15 學年。如果在 2014/15 學年以後，
    (1) 仍有額外資源，貴校實施小班教學的意願是：（可選擇多項）
        ☐ a. 會在全校推行小班教學 ☐ b. 只在部分班級推行小班教學
        ☐ c. 只在部分科目推行小班教學 ☐ d. 只在課程部分時間推行小班教學
        ☐ e. 不會嘗試小班教學

    (2) 若沒有額外資源，貴校推行小班教學的意願是：（可選擇多項）
        ☐ a. 會在全校推行小班教學 ☐ b. 只在部分班級推行小班教學
        ☐ c. 只在部分科目推行小班教學 ☐ d. 只在課程部分時間推行小班教學
        ☐ e. 不會嘗試小班教學

23. 貴校推行小班教學所遇到的困難有：（可選擇多項）
    ☐ a. 與辦學團體政策不符 ☐ b. 與學校教育目標不符
    ☐ c. 教育經費不足 ☐ d. 教師人數不足
    ☐ e. 缺乏受過小班教學培訓的教師 ☐ f. 缺乏教學資源
    ☐ g. 學校的行政未能配合 ☐ h. 沒有足夠大的校舍
    ☐ i. 同工間（包括校長、教師）對小班教學缺乏共識
    ☐ j. 缺乏專業支援 ☐ k. 其他＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿

丙部： 小班教學模式、教學支援需要和跟進訪談

24. 貴校是否需要下列的支援以加強小班教學的推行？（可選擇多項）
    ☐ a. 提供關於小班教學策略的培訓 ☐ b. 協助編寫小班教學課程
    ☐ c. 提供關於小班教學評估的培訓 ☐ d. 到學校進行示範教學
    ☐ e. 提供關於小班教學提問技巧的培訓 ☐ f. 課研（包括觀課、評課等
    ☐ g. 建立校本小班政策的培訓 ☐ h. 甚麼支援也不需要
    ☐ i. 其他：（請註明）＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿

25. 我們將會對一些學校的教師進行跟進訪談，以便進一步瞭解小班教學模式及貴校對專業支援的需要和院校協作方式，貴校教師是否願意參加該跟進訪談？
    ☐ a. 願意（請寫下姓名和聯繫方式）
    姓名：＿＿＿＿＿＿＿＿＿＿＿＿＿ 學校：＿＿＿＿＿＿＿＿＿＿＿＿＿
    職務：＿＿＿＿＿＿＿＿＿＿＿＿＿ 電話：＿＿＿＿＿＿＿＿＿＿＿＿＿
    電郵：＿＿＿＿＿＿＿＿＿＿＿＿＿
    ☐ b. 不願意

～完～

The implementation of Small Class Teaching in Hong Kong secondary schools and its implications

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Abstract

Due to the demographic change, many people opined that Small Class Teaching (SCT) would be a long-term solution for the drastic secondary school enrolment decline. SCT has been officially adopted as an education policy since 2009/10 academic year by EDB and introduced in more than 300 primary schools. On the other hand, SCT has also been tried out in many secondary schools. This article reports a study in which a questionnaire survey was first used to obtain a whole picture of how SCT is used in Hong Kong secondary schools. In-depth case studies were then conducted to find out the implementation of SCT in great details. This study attempts to grasp the whole picture of how secondary schools in Hong Kong are using SCT, what challenges they are facing in introducing SCT and what strategies they use to tackle the problems. Implications on promoting SCT practices in secondary schools will be put forward, which may help inform the Government's future policy of SCT.

Keywords

變革與衝突：初任校長實踐學習型組織的挑戰

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摘要

自香港回歸以來，教育局推動了不同類型的改革措施，改革範疇從課程以至學校架構等，這對教師工作及其教學信念之影響尤深，然而改革卻未必能贏得校內所有教師之認同。作為學校領導，校長是帶領學校變革，落實教改措施的關鍵。近年適逢香港中小學面臨校長退休潮，學校領導之責落在眾多初任校長身上，亦為教改添加隱憂。

為瞭解初任校長帶領學校變革之困難，本文對學校變革的相關文獻作系統梳理與述評，並環繞學者 Senge 提出的學習型組織理論，討論其變革管理的主張與在校實踐的差距，從而揭示初任校長帶領變革的挑戰及潛在衝突，為未來各校討論建立學習型組織及學校變革提供更深入反思的平台。

關鍵詞

校長領導，學校變革，學習型組織，衝突管理

甲、前言

改變，是過去十五年香港教育統籌委員會（教統會）推動教改的原動力。2001 年，教統會提出「世界變了，教育制度非變不可！」（教育統籌委員會，2000）的口號，推出了不少政策，如推行校本管理、一筆過撥款、優化直資計劃等，讓學校變革與行政管理更具彈性，使之更能應對市場需求，而校長亦從以往行政架構中的學校管理者，漸漸過渡至領導學校管理，以至主導變革的領導角色（梁亦華，2014；教育署，2002）。

推動與管理變革的理論眾多，而管理學者 Senge 所提出的「第五項修練」（The Fifth Discipline）對教育改革管理的影響可謂極為深遠。Senge 變革理論提出各組織須轉型成學習型組織（learning organization），讓成員持續提升知識管理與運用能力的目標（Senge, 1990）。其後，Senge 出版《學習型學校》一書，進一步把其企業變革管理的主張引入學校組織，並加入不少應用案例（Senge, 2000）。Senge 第五項修練及學習型組織的主張，不止流行於世界各地，更成為了香港校長培訓、教師發展及其他不同教育政策的理念與培訓目標（Walker & Quong, 2005；教育局，2012，2013）。

然而，學校變革需要針對舊有制度的不同弊端，領導者往往要面對不同阻力，其中最大的挑戰可說是人際衝突管理。Nelson 等針對美國初任校長的質性訪談發現，人際關係問題是各段訪談所湧現的唯一共同主題（Nelson, Colina, & Boone, 2008），而澳洲（Wildy, Clarke, Styles, & Beycioglu, 2010）、土耳其（Wildy et al., 2010）、韓國（Kim & Parkay, 2004）、中國（朱廣清，2010）等地針對初任校長的研究亦有相同結果，可見校長能否化解校內各持分者的衝突，是他們推動學校變革成敗的最大挑戰之一。然而近年香港資深校長的流失率連年上升，據香港校長中心 2013 年的調查顯示，香港校長平均每年流失率約達 8% 至 10%（《文匯報》，2013.6.11），處理人際衝突和帶領學校變革之責任越來越多地落在初任校長身上。可是綜觀現時文獻，有關初任校長帶領學校變革及進行衝突管理之討論並不多。

為了瞭解初任校長所面對的挑戰，本文對學校變革的相關文獻作系統梳理與述評，並環繞 Senge 提出的學習型組織之應用及學校變革的潛在衝突作討論。本文並非旨在找出一套適合於所有學校的變革之法，而是希望透過結合實際環境的討論與理論剖析，為前線學校領導、

以至校長培訓政策之制訂者提供更深入反思的平台，優化政府及師資培訓機構對職前與在職校長的支援。

乙、學校變革的相關理論

成功的學校變革能提升教育質量，但在實踐中，學校變革往往並非一帆風順。對於領導者如何駕馭學校變革，不同學者所聚焦的議題均有不同。

第一類論點認為，變革之關鍵在於規章與體制。例如，Hargreaves（2003）強調決策體制的重要，讓教師在變革中共同協作和參與校務決策；Leithwood, Menzies, Jantzi, & Leithwood（1996）則強調學校領導應以集體決策的方式領導變革，而非由上而下地強勢推行，如此既能鼓勵員工針對系統而非局部作整體思考，亦能鼓勵員工自我超越，幫助團隊建立共同信念，這呼應了近年不少學者提出在校內分權式領導（distributed leadership），以及在校外從中央集權到校本管理，賦予校長辦學自主的教改主張（Griffith, 2004；Hallinger & Heck, 1998；張兆芹、盧乃桂、彭新強，2011）。然而，協作與集體決策需要團隊成員經歷長時間磨合，對彼此有一定了解與信任（Day, 2011），剛剛履職的初任校長卻未必符合這些條件。

第二類觀點認為，變革之關鍵在於領導者個人的行為與特質。例如，Sibley（1986）把組織文化視為變革的基礎，強調學校變革中領導者與下屬持有共同願景的重要性。故此，領導者能否引領下屬建立共同目標與價值觀，以及成員對組織是否有歸屬感，均是凝聚共同願景的先決條件。Beck & Murphy（1996）及 Leithwood & Jantzi（2006）同樣重視領導者的角色，但他們較強調良好同儕關係與宏觀的組織文化，認為學校領導者能否消弭個人與組織間的分歧，以及他們能否激勵教師及鞏固教師對組織的承諾，建立好團隊互信才是成功組織的先決條件。相對而言，Fullan（2001）更重視員工的心智及思考模式。他認為教師不止需要執行變革的能力，更要理解其推行原因。換言之，教師視野必須超越課堂教與學，要對學校系統作全面周詳的考慮。Fullan 並沒有否定建立信任或共同願景的重要性，但認為員工的認知模式要有所提升，才能改變其故有信念，在組織中建立共同目標或信任文化，以深化變革的影響力。

上述學者強調了共同願景、團隊學習、系統性思考等主張，那麼學校領導該如何促進學校變革？對此，學者 Senge 提出了「學習型組織」的概念，他審視成功變革的組織，提出員工須進行五項修練（參表一）。

表一　「學習型組織」五項修練（Senge, 1990）

修練項目	描述
自我超越（Personal Mastery）	是指員工會不斷挑戰自我潛能、清楚釐訂自我奮鬥目標，因而努力不懈，奮發進取
心智模式（Mental Models）	是指員工勇於表白個人對事物之假設、其行為背後之意義及個人價值取向
共同「願景」（Shared Vision）	是指員工對組織的投入及承諾，願為共同「願景」作出努力及貢獻
團隊學習（Team Learning）	是指員工發揮互補不足之餘，更能承眾智、集眾力，將集體智慧發揮得淋漓盡致，使各人從反思及回饋中與組織共同成長
系統思考（Systems Thinking）	是指員工做出決定或任何變動前，能對系統作全面周詳的考慮，而非片段地解決問題

Senge（1990）提出「學習型組織」的概念有一前設——「人們本質是好奇的，高超的學習者」（intrinsically inquisitive, masterful learner）（p. 1），而組織願意改變的兩大原動力在於恐懼（fear）與抱負（aspiration）（p. 57, p. 65）。故學習型組織的領導不應把下屬假設為「沒有權力、願景與無力主導變革力量」（p. 71）的被動改革對象，而應扮演管家（stewards）、導師（teacher）及幕後設計者（designer）的角色。領導的責任並非主導改革，而是建立一個讓所有人瞭解系統複雜性、組織正面對的挑戰，能持續發展並擁有共同願景與信念的組織。總括而言，領導者之素質對學校變革成敗有重要影響，而領導者與下屬的信念是成功變革管理的重要關鍵。成功推動變革的領導者應鼓勵下屬自我超越，進行團隊學習，以及鼓勵下屬發展適當認知與思考方式，凝聚團隊共識。

丙、學校變革的潛在衝突

上一部份闡述了成功學校變革的不同因素，但任何學校進行教育改革，也不能無視不同教育制度與學校背景脈絡的影響，便直接把外來的成功變革策略移植過來（Creemers, 1994;

Reynolds, Sammons, Stoll, Barber, & Hillman, 1996）。Senge 的學習型組織理論為變革管理提供了討論框架，但卻有批評指 Senge 及其他學者聚焦個人領導技巧的理論，較少考慮如何透過持份者落實變革（Caldwell, 2011）。此外，不少學者指出人們更願意留在舒適區（comfort zone），因循過往的成功經驗，不願意承擔風險（Fullan, 2001; Sackney & Walker, 2006），因此領導者與下屬對教改目標及其必要性的看法便會存在衝突。即或彼此能有共識，這也不代表雙方能消弭衝突，例如領導者與下屬對學校發展的目標有一致共識，卻對達成目標的手段，以及各個項目的緩急輕重有不同見解。這些滲合著共識的衝突又該如何解決？學界在討論校長如何領導學校變革的同時，實有了解衝突之不同層次及管理取向之必要。

就性質而言，衝突可分為由主事者人格、動機等個人因素引起的情感衝突（affective conflict），以及針對具體事項的實質性衝突（substantive conflict）（DeChurch & Marks, 2001）。由於本文之主題環繞學校變革，故針對衝突的討論將聚焦於後者。誠如上文所言，組織內的衝突不一定是雙方的完全對立，在分歧中亦可能存在著部份共識。隨共識之多寡，實質性衝突可分為目標分歧及焦點分歧兩類（Gorton & Alston, 2012），此亦是初任校長推動學校變革時所面對的主要衝突來源。

一、有待調和的目標分歧：危機感、歸屬感與變革需要
對每項政策而言，領導能否遊說各方達成變革的共識，是政策能否成功推動所不可或缺的重要一環（Goodin, Rein, & Moran, 2008），然而初任校長如要遊說各持份者支持學校變革，必先提出非變不可的理由。

為此，Senge 提出了兩個組織變革的原動力：「恐懼」與「抱負」。恐懼能帶來創造性張力（creative tension），讓人們面對現實，接受學校變革；而抱負則為團隊帶來持續追求卓越的原動力（Senge, 1990）。前者的關鍵在於員工的危機感，後者則在於員工對學校、以至工作的歸屬感，以及學校能否凝聚共同信念。學者 Irwin（2003）針對政策本身，亦提出相似觀點，認為政策主要取向有兩種：初任校長如要遊說各持份者支持學校變革，必先提出非變不可的理由。為此，學者指出了推行政策的兩種取向：（1）問題管理取向（pathology control approach），即政策針對處理過去或現在組織所遇到的具體困難，並作預防；（2）追求卓越取向（desirability striving approach），即政策是為了追求更卓越的質素，而非解決具體問題。

前者著眼於被動解難，後者則要求持份者主動迎接挑戰。Irwin 的著眼點與 Senge 不相同，但基本而言仍是透過增加員工對現狀的認知，以及形成自我超越的組織文化來作變革動力。可是在現實中，校長、高級教師及基層教師對現狀往往存在不同理解，組織身份亦有差異，往往為初任校長之遊說過程帶來挑戰。

在學校層面，校內教師的危機感與歸屬感並不一致，不易求取變革共識。Day 有關教師專業性的研究發現，學校高層需要面對校際競爭、收生不足等問題，而新聘的合約教師則因為工作不穩定及初任教職，危機意識較高，較願意時刻進修以增加職場競爭力，亦傾向支持學校變革。相對而言，入職五年以上，已獲終身教席者的危機意識最弱，其進修意欲相對較低，亦較欠缺變革誘因（Day, 1999）。此外，不少研究指出教師會環繞各學科建立專業身份，而各學科亦被賦予不同的社會地位。如一些社會地位較高的學科求過於供，該科教師的危機感便相對較少（Beijaard, 1995; Null, 2010）。誠如學者 Sibley 所言，成員對組織擁有歸屬感是凝聚共識、建立共同目標與價值觀的先決條件。那麼，教師背景的差異便構成了迴圈悖論：合約教師及過剩學科的教師工作較不穩定，有較高危機感和變革意願，卻缺少歸屬感來構建共同願景；長期聘任的教師有較大的歸屬感，更願意與學校組織建立共同信念，可是他們的危機感亦相對較低，歸屬感與危機感在現實環境不能共存，成為學校啟動變革的潛在阻力。

在理論層面，不少學者對 Senge「危機感帶來變革動力」的說法亦持保留態度。Hargreaves（2003）認為危機感源自競爭，而過度競爭會鼓勵教師各自將教學法隱藏起來，以保持自己的競爭優勢；Argyris & Schon（1996）認為在零和競爭（zero-sum game）的文化下，部份教師會隱藏意向及教學策略，以取得凌駕他人的權力；張兆芹、徐煒（2008）更指出，教師團隊可能會演變成惡性較量與對抗，破壞共同學習的信任與意願。從上可見，過度競爭可能演變成教師之間相互交流、建立學習型組織的一大障礙。可是，Senge 提出的學校變革是由學習帶動，而非領導者強勢推行，Senge 只期待通過統一持份者信念來凝聚團隊精神，建立歸屬感，進而期待團隊中各成員作無私奉獻，推動學校變革，對於個人與組織的目標分歧卻未有具體回應，更沒有詳細描述領導者該如何在競爭與團隊信任間取得平衡。

總括而言，不同職級與背景教師有不同程度的歸屬感與危機感，影響著他們對學校變革的支持程度。初任校長雖可鼓勵下屬自我超越，建立共同願景，但對一些已獲終身教席者或

任教強勢科目者，卻未必能產生預期影響效果。然而，校長純以競爭、營造恐懼與危機感來推動學校變革，亦不恰當。因過度競爭可能會影響各成員的合作意願，甚至產生惡性對抗等副作用。故此，初任校長在變革之初，要遊說不同背景的持份者支持變革方案，營造變革的迫切性，實非易事。

二、有待調和的焦點分歧：問責對象與變革方向

比起恐懼，Senge（1990）認為建立組織抱負以凝聚共同願景，是成功學校變革的最重要關鍵，因恐懼雖能帶來短期而劇烈的改變，抱負卻是持續學習與成長的動力。然而 Harvey & Green（1993）卻指出，不同持份者對「何謂優質教育」往往有不同理解，甚至同一人在不同時間內對教育的看法也不盡相同。在現實層面，學校需同時向官僚與市場問責，角色複雜，各持份者即使抱有同一抱負，其屬意之變革手段亦往往隨問責對象之不同而有不同焦點。

所謂官僚問責，是指學校要符合政府訂立的科層與規章制度等，通過管理與監督的品質監控，以保證學校教育符合社會需求（Darling-Hammond, 1989）；而市場問責則強調學校向教育消費者（學生與家長）提供證據證明教育效能（Leithwood & Earle, 2000），可是兩者焦點與願景往往有所不同，甚至互相衝突。例如後者注重「可測量的教育結果」，傾向片面追求考試分數與名校升學率，而扭曲其他非量化的教育目標（沈偉、盧乃桂，2011）。以香港教學語言政策為例，1998 年教育署推出《中學教學語言指引》文件，認為母語教學能促進學生學習，故強迫中學以廣東話教授初中課程，並接受署方監察。然而，學生及家長卻認為當今大學教育以英語為主導，藉以與國際性專業及學術體系接軌，因此會較重視學生於中學會考的英文科合格率與大學升學率（曾榮光，2006）。學校在官僚與市場問責兩者之間，應如何取得平衡？況且，「減低學生學習的語言障礙」與「滿足學生升學需要」均是無可置喙的價值取向，教師可能同時認同兩者之重要性，執行上卻有不同取捨。

要解決上述分歧，Gorton & Alston（2012）認為領導者可採取兩種策略：（1）容許各方獲得表達自己觀點與說服他人的機會，透過討論而凝聚共識；（2）準確理解各方期望後，對強勢意見作適當讓步，再把變革方向推廣成團隊的共同目標。對初任校長而言，前者著重協調，卻需要冗長的時間供各方討論，凝聚共識，此舉將大幅影響學校變革之速度；後者重取捨，能讓初任校長迅速推動學校變革，卻要求他們準確理解各持份者的期望，更要計算與之對抗的後果。這對於認受性尚待建立的初任校長而言，實有一定風險。

三、推動與落實變革的領導與管理能力

在變革理論中，Senge 強調引入心智模式、自我超越、系統思考等內在歸因，與儒家「行有不得，反求諸己」的文化傳統遙相呼應，但卻未有考慮信念以外，如校長能力或既有組織文化等因素。在推動與落實學校變革的過程中，這些往往成為學校衝突的來源。

如 Goodin 等（2008）所言：「政策制訂主要是能否成功遊說的問題」（Policy is mostly a matter of persuasion）（p. 6），推動者往往需要透過理論或經驗來遊說各持份者，爭取變革的認受性，凝造共識以避免衝突。可是欠缺實績支持下，初任校長只能依靠自身的個人魅力、權威或遊說技巧來推動改革，如此校長個人素質便顯得極為重要。然而，香港絕大部份校長均由副校長晉升（Kwan, 2009），Hartzell 等指出副校長工作以管理為主，他們專注於學生紀律與教師間人事管理，致力於維持學校穩定，而非激勵團隊，主動推動變革（Hartzell, Williams, & Nelson, 1995）。Harris 等的研究亦有相似結論，他們指出初任校長多從副校長晉升而來，他們擁有豐富的教學與行政經驗，卻慣於被動執行他人所訂下的課程或政策任務，本身卻未必有領導經驗，致使他們成為校長以後未必有足夠決心推行變革（Harris, Muijs, & Crawford, 2003）。從上可見，初任校長雖然對學校行政有豐富經驗，但卻未必具備推行學校變革所需的遊說能力，以往慣於追求穩定的副校長經驗亦可能影響初任校長堅持變革的決心。除個人遊說技巧與變革決心外，校長對下屬的洞察力亦十分重要。如 Gorton & Alston（2012）所言，初任校長需準確理解各持份者的期望，作出平衡以避免衝突。可是在華人社會，校長要了解下屬的真正想法並非易事。Hofstede（2001）針對世界各地文化差異的跨國研究指出，華人社會慣於避免衝突、講求面子與表面和諧，傾向隱藏自己真實情感與想法。華人教師不論往上還是同儕間溝通，往往只說好話，又或點到即止（Pye, 1981；張兆芹、徐煒，2008）。Triandis（1995）亦指出，中國人遇到衝突時，會傾向服從權威，採取忍讓態度，可是這種建基權威的表面和諧是不穩定的，及後衝突往往以不同形態再次出現（Gorton & Alston, 2012）。對初任校長而言，他們與團隊未建立足夠信任，華人社會注重表面和諧，以及對衝突的迴避態度，令他們難以真正瞭解下屬之心智模式，又或其願景與學校是否一致。

在實質事務上，如何落實變革措施亦是初任校長之重大挑戰。Macmillan 針對美國中學變革的研究指出，初任校長往往過於樂觀，雖勇於推動改革，卻欠明確目標和周詳考慮，低估實踐困難（Macmillan, 2000）。而澳洲、土耳其、韓國、中國、香港等地的研究進一步指

出，初任校長之主要挑戰在於財務管理（Kim & Parkay, 2004; Kwan & Walker, 2009; Wildy et al., 2010）、難以協調校內人事，以及與校外地方教育行政部門間的價值觀與利益衝突（Kim & Parkay, 2004；Nelson et al., 2008；Wildy et al., 2010；朱廣清，2010；姜濤、廖伯琴，2012）。換言之，即使初任校長有足夠領導能力激勵下屬，欠缺管理能力仍難以落實相關變革。

　　針對初任校長管理能力不足之原因，不同學者提出了各自觀點。Kwan & Walker（2009）指出，初任校長之財務管理能力不足，源於他們沒有接受相關的系統性培訓，以及一般校長不重視管理經驗的承傳，較少讓下屬涉足學校財政事宜，致使大部份初任校長只懂學校行政，而欠缺財務管理經驗；姜濤等則認為，初任校長未能化解持份者的衝突，除了自身協調與遊說能力有待改善外，與校長普遍只重變革本身，不重視如何使變革融入既有組織文化有莫大關係（姜濤、廖伯琴，2012）。姜濤等的主張並非只限於前線校長，亦包括學校變革理論的學者。張兆芹、徐煒（2008）的研究則聚焦於校長的項目分配與協調能力，指出學校變革成效不佳的原因之一在於項目太多，彼此與組織文化欠缺協調與連貫；如校長未能配合學校組織文化，便需要著力更新教師團隊的心智模式，把變革理念落實至日常運作之中，否則，固有的團隊精神反會讓成員建立抗拒變革的防禦機制，以維護本身「行之有效」的習慣或價值觀，進而成為變革阻力。可是，回顧 Senge 及眾多學者的變革管理理論，多重視領導者如何推動和鼓勵變革的開展，卻未有詳細考慮變革所需的管理能力、經驗與組織文化的連貫性。誠然，這些配合組織文化、經驗的承傳、項目分配與協調等與項目管理能力不能指引出成功的變革方向，但它們卻是化解潛在衝突，避免變革失敗的基礎。

　　總括而言，校長與教師並非截然不同的兩個群體，前者也是從基層教師晉升而來，而初任校長的價值觀及變革決心往往受到過去管理或教學的成功經驗所牽絆。此外，初任校長能否洞悉下屬想法，把變革理念融入既有組織文化中，構築共同願景？又或他們是否有足夠管理能力落實變革，對變革流程與過程中的潛在挑戰能有周詳考慮和準備？這些皆是初任校長落實學校變革，化解衝突所不得不考慮的問題。

丁、總結

Senge 的五項修練及「學習型組織」的概念，對學校變革管理極具參考價值，然而它針對私人企業之營運，而學校卻與私人企業有所不同。企業的最大目標在於盈利，組織只需向市場問責，而學校的目標則是育人為才，既要向市場（家長與學生）問責，也要兼顧行政、市場與自身專業的問責（Darling-Hammond, 2005），領導者與下屬間的目標與焦點分歧遠較私人企業複雜。

綜合而言，初任校長要建立學習型組織，推動學校變革，必先面對三個問題：（1）對內方面，初任校長該如何統合不同危機感與歸屬感的員工看法，建立共同信念與願景？（2）對外方面，初任校長該如何平衡政府、教師、家長、學生等不同持份者的價值觀，為組織確立明確的目標？（3）自身方面，初任校長應如何調節自身定位，裝備自己，完成從管理到領導的角色轉換？這些對校長培訓、學校領導與變革，均是極為重要的研究課題。

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Reform and conflict: The challenge of novice principals in the development of learning organization

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Abstract

Since 1997, Education Bureau of Hong Kong has launched the school reform measures in various aspects, from curriculum reform to school restructuring, which required a fundamental change in teachers' belief about teaching and learning. Yet, the reform may not reflect a common consensus among teachers and generates conflicts in school. The school principal plays a crucial role in the implementation of school reform. However, there is an expected wave of retirement among experienced principals. More novice principals thus need to take a leading role in driving school change and bring new uncertainties.

To understand the challenge of novice principals, this paper reviewed the literature on school reform and examined the potential conflict in the development of learning organization. The implementation gap between Senge's theory and practice were critically discussed in order to address the challenge of novice principals when driving new school change and provide a wider platform for discussion of school reform, as well as the development of learning organization in schools.

Keywords

principal leadership, school reform, learning organization, conflict management

遊於是乎始——多元視角下的遊學意義

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摘要

遊學是由來已久的跨文化現象，研究顯示它有助促進學習與增長歷練。考掘遊學的知識系譜，這個跨學科的概念可視為旅行的分類，蘊含旅遊學、教育學等不同學問元素。將遊學置於香港學校課程脈絡，它屬於全方位學習一環，扣連課程，而持分者在遊學的論述和參與各有其角色。本文嘗試從多元視角探討遊學的意義，首先概述其內涵及發展，然後討論當中的爭議與反思，進而提供建議，期望為遊學的理念與實踐帶來啟迪。

關鍵詞

遊學的意義，教育旅行，教育旅遊，全方位學習，跨文化現象

導言

2014 年 7 月，國家教育部（2014）公布《中小學學生赴境外研學旅行活動指南（試行）》，申明研學旅行需符合中、小學生的特點與需要，並豐富教育內容，可以選擇環保、科技、人文、自然、歷史、藝術、體育等主題。研學旅行即遊學，乃穿越古今的跨文化現象（郭少棠，2005；龔鵬程，2001）。考掘其知識系譜，遊學可視為旅行文化的一種概念，其歷史文化積澱豐厚，透現跨學科取向，蘊含旅遊學、教育學等不同學問元素。遊學在香港學校課程脈絡，屬於全方位學習一環，緊扣課程（全方位學習組，2003）。遊學的作用雖受質疑（林慧美，2013.12.13；陳莊，2013.11.28；斯人，2013.12.05；趙志成，2013.12.05），但研究證明它有

助促進學習與增長歷練（Cheng, 2009; Cheng & Ho, 2012; Wong, 2012）。本文嘗試從多元視角探討遊學的教育意義，首先概述其內涵，然後討論當中的爭議與反思，結合宏觀和微觀層面的分析，並以知識管理的觀點進行剖析，期望為遊學的理念與實踐提供思考方向。

遊學的語源與歷史文化傳統

考掘遊學的知識系譜，先要從語源梳理錯綜複雜的概念。郭少棠（2005）指出，要解讀中國旅行文化，需留意四個關鍵字：旅、行、遊（游）、觀，其中遊（游）字最富有構詞能力，以它為前綴或後綴，可組合 287 個跟旅行有關的詞語，而遊學歸入遊（游）字下「直接相關的詞匯——行動」類別，與遊歷、遊覽等詞語並列，可以視為旅行文化的概念。至於旅行和旅遊的關係，旅行的內涵較廣，因為「旅遊偏於遊玩，旅行包括旅遊，審美和功能目的都能包含在內，比旅遊的內涵稍寬」（李嵐，2013，頁 7）。由此可見，遊學、旅行和旅遊三者，互有關連。

漢語思想文化語境的「遊」和「游」，除了繁體和簡體之別，兩個概念各有不同。以中央研究院語言學研究所（2014）開發的「搜文解字」資料庫為例，遊字的解釋有二十項，而游字的解釋有九項，不過《玉書》指出「遊與游同」。將遊和學搭配一起，可以激發兩種概念的融通與轉化。至於如何實現遊和學並重、遊中有學、學中有遊的理想，正是下文探討的重點。

從文化比較的視角解讀，遊學是由來已久的跨文化現象，展現生命轉化的歷程（龔鵬程，2001）。根據瑞士學者卡爾·榮格（Carl Jung）為首的分析心理學觀點，旅行源自人類的集體潛意識，屬於原始意象；當人處於壓抑的環境，真實或夢中的旅行，都可以提供超越現狀的解放機會（Jung, Franz, & Freeman, 1964）。探尋歷史，遊學在中國的淵源，可追溯至春秋時代（前 770- 前 476），士人、僧侶、貴族子弟尋師求學、傳播思想（劉香民，2010）。歐洲方面，十八世紀的英國社會，興起一股赴歐洲大陸遊歷和學習的熱潮，稱作大陸遊學（Grand Tour），有助促進歐洲文化、藝術、科技等方面的發展，以及加強英國與歐洲大陸的聯繫（Sweet, 2012）。

遊學的跨學科取向

　　遊學是跨文化現象，也是跨學科概念。旅行與學習的關係密切，旅行可鼓勵學習，而學習需要可促成旅行（Falk, Ballantyne, Packer, & Benckendorff, 2012）。由於教育、旅行和旅遊互有連繫，所以英語文獻有「教育旅行」（Educational Travel）的說法（Metraux, 1956; Tarrant & Lyons, 2012），也有「教育旅遊」（Educational Tourism）的說法（Duhs, 2013; Ritchie, Carr, & Cooper, 2003），兩種概念的本質和論述接近。聯合國教科文組織於 1956 年出版第八卷第四期《國際社會科學季刊》，以「跨文化教育與教育旅行」為主題，「教育旅行」在這一期導論的解說如下：

> 「教育旅行包含兩個概念：教育意指知識的獲取，而旅行意指移動的過程。兩者分
> 　屬社會組織的不同範疇，合二為一則富有意義，亦在目前相當流行。」（筆者譯）
> （Metraux, 1956, p. 577）

從以上解釋可見，教育旅行蘊含知識和移動兩個重點，與漢語思想文化語境下遊和學扣連的傳統，語碼有別，卻互相契合。

　　遊學與旅遊在本質上，有相通之處。根據旅遊社會學的觀點，旅遊屬於社會行為，旅遊經驗基於遊客對於人物、地景、資訊等符號的收集與詮釋，其過程由社會建構，而遊客作為凝視主體，跟凝視對象存在複雜的權力關係，加上凝視過程的內涵不斷變化，形成旅遊經驗多元與流動的本質（Urry & Larson, 2011）。雖然遊學和尋常旅遊有異，而參與遊學的學生也不是普通遊客，可是旅遊經驗和遊學經驗的本質同樣多元與流動。基於多元與流動的本質，遊學潛藏各種構思和發展的可能方向，尚待探研。

　　遊學與閒暇活動，亦有關係。聯合國於 2010 年提出《世界青年行動綱領》，作為改善青年狀況的政策框架和建議，當中確立十五個優先關注的領域，「閒暇活動」是其中之一，又強調閒暇活動乃青年政策及服務重要一環，建議各地政府鼓勵青年參與旅遊活動（United Nations, 2010）。無論是設計或選擇閒暇活動，都可以考慮三個重要因素：尊重個人自主、配合人生歷程、平衡不同需要（林志德，2013）。在閒暇活動的整體概念之下，遊學的策劃和參與同樣需要深思熟慮。

香港脈絡下的遊學論述

　　儘管遊學牽涉的概念紛繁多姿，但是「遊學」一詞在香港使用普遍，分歧不大（香港旅遊業議會，2007；曾德成，2013；教育局，年份不詳 a，年份不詳 b）。遊學目的地可以是境內，也可以是境外。不過，遊學有時專指境外行程，例如香港旅遊業議會發出《經營遊學團守則（修訂版）》，列明該守則屬於「外遊旅行服務→旅行團」的指引分類，並就跨境交通、當地接團單位、寄住家庭等，詳列條文（香港旅遊業議會，2007）。又如教育局制訂《境外遊學活動指引》和《戶外活動指引》，都是持續修訂的指引，其中《戶外活動指引》有專門討論境外遊學的附錄（教育局，年份不詳 a）。香港脈絡下遊學的內涵，離不開這些由不同話語構成的社會文本。

　　關於「遊學團」與「境外遊學」的闡釋，可參閱香港旅遊業議會和教育局的文本。香港旅遊業議會（2007，頁 1）列明「遊學團」的條件包括：

（1）　團員對象主要為十八歲以下人士；及
（2）　活動內容主要為語言學習、教育活動、文化／學術／知識交流、技能訓練、生活體驗，或增廣見聞的戶外課堂／觀光活動等。

對於「境外遊學」，《境外遊學活動指引》申述如下：

　　「境外遊學活動是指由學校策劃、組織，並以校方委任領隊負責帶領學生到香港以外地區作探訪、交流、研習或服務等活動。」（教育局，年份不詳 b，頁 1）

上述民間和官方文本，展示遊學的多元內涵，為遊學的計劃和推行，提供建議。

　　遊學與學校課程的關係，相當密切。遊學考察屬於全方位學習經歷，扣連課程，引領學生成為終身學習者（全方位學習組，2003）。全方位學習的重點包括：

　　「全方位學習提供有助全人發展的學習機會。它讓學習者在真實環境中學習，以及體驗課堂所不能提供的學習經歷，尤其是德育及公民教育、體藝發展、與工作相關的經驗以及社會服務等。」（課程發展議會，2001，頁 84）

遊學作為全方位學習一環，體現學校課程的主導原則：「教導學生學會學習，促進他們獨立學習的能力，達到終身學習的目的，以全面提高教育質素」（課程發展議會，2001，頁9）。教育局前任總課程發展主任（全方位學習及圖書館）葉蔭榮總結香港的全方位學習有四項特色：學習為本、緊連課程、靈活性和全面性，並指出它以政策、理論、研究和實踐的連結及調節作為教育方針（葉蔭榮，2006）。同樣，遊學的持續發展，不可能單靠政策推動，需要結合理論、研究和實踐，以促進成效。

遊學的爭議與反思

2013 年，香港傳媒報導有幼稚園擬舉辦為期十天的美國親子遊學團（《香港經濟日報》，2013.11.23），引發遊學意義的討論（林慧美，2013.12.13；陳葒，2013.11.28；斯人，2013.12.05；趙志成，2013.12.05）。本文無意為幼稚園應否舉辦遊學團定讞，只想探尋圍繞遊學市場化和商品化、遊學空間的爭議，並以學與教的觀點作剖析。

關於遊學市場化和商品化的爭議，重點之一是遊學的教育價值。例如趙志成（2013.12.05）認為「境外遊學倍增，但是否具成本效益，有否實質學習效果，還是一種炫耀式的消費經歷，值得深思。」又如陳葒（2013.11.28）質疑「辦遊學團不一定為了學，甚至也不為了遊，很可能只是為了顯示自己高人一等和快人一步。」所謂遊學是消費經歷、炫耀手段的說法，與消費主義有關。

全球消費主義大行其道，市場思維和商業邏輯盛行，在地域發展、日常生活和教育，都帶來影響。地域發展方面，根據空間政治的觀點，在全球化地域競爭下，地域之間競相仿效成功經驗，生產被賦予特定意義的空間或景觀，例如：特色建築、節慶傳統、生活風俗等，以供各種用途及消費（王志弘，2011）。日常生活方面，哈佛大學教授米高・桑德爾（Michael Sandel）提出，社會眾多原本不屬於市場操控的生活領域，包括：家庭、教育、宗教、人際關係等，逐漸受市場的交換價值所支配，待價而沽（Sandel, 2012）。教育方面，恰巧哈佛大學的前任校長德瑞克・伯克（Derek Bok）早已承認大學教育存在商業化的危機，學術理想常會因為商業利益而犧牲，進修課程變成大學競相滿足學生欲望、增加收益的商品，而教育願景能否達成，取決於大學對使命和價值的守護（Bok, 2003）。

面對市場思維和商業邏輯帶來挑戰，無論大學教育還是遊學，同樣可能淪為消費經歷或炫耀手段。不過，正如我們不會輕言全盤否定大學教育的意義，有關遊學意義的討論亦應再三思量。

　　至於遊學空間的爭議，關注點之一是遊學場景的選取。例如林慧美（2013.12.13）質疑「人之初，近身的種種不優先學習，卻先要跑到老遠學異國風情？」又如斯人（2013.12.05）提出「與其用學習時間去滿世界晃蕩，還不如老老實實在學校裡用功，現在網絡無邊界，有什麼東西不能手到拿來？」所謂近身優先學習、網絡萬能的主張，源於對學習空間的理解。

　　遊學離不開空間移動，但其教育意義不可能僅由空間賦予。空間移動牽涉的場景固然重要，可是遊學的計劃構思、團隊組織、行程安排、導覽重點、評估設計等相關因素，都會影響學習效果。以香港本土情況為例，境外和境內遊學各具特色，中、小學在區本探究遊學方面積累不少成果（陳志華、盧爾君，2008）。學界以外的本土旅行，得力於民間旅行組織推動，更見百花齊放（郭志標，2013）。小如一所學校，亦可構思富有意義的學習經歷，例如有中、小學在校內舉行數學遊蹤，在走廊、禮堂、操場、天台等地方進行數學解難活動（鄧幹明、羅浩源、黃毅英，2006）。由此可見，場景並非遊學的全部，也不是教育意義的關鍵所在。

　　正如 Castells（1989）早已預告，流動空間的浮現取代地方空間的意義，將會成為社會趨勢。論者或會質疑，世界各地學習場景的資料，在網絡俯拾皆是，足不出戶，也可以在網絡上遊學。不過，網絡便捷，卻不可能完全取代真實的遊學經歷。科技發展使空間的內涵出現變化，導致虛擬和實體空間並存，但是兩者在閒暇生活具有互動的關係（Lawrence, 2003）。遊學的空間不限於行程涉足的地方，還可以包括出發前、後的學習及體會，例如：行前準備、學習成果分享、小組討論、網絡學習、個人反思等。處身真實環境，跟不同人物、地景互動的體驗，亦彌足珍貴。因此，遊學設計除了顧及場景以外，可以考慮為參與者提供不同時空的學習機會，使遊學經驗更為多元及立體。

　　要確切審視遊學的教育意義，不可能只停留在印象式評論的表層，應當建基於理論和研究。環顧香港關於遊學的學術研究，似乎集中探討參與學生的轉變（Cheng, 2009; Cheng & Ho, 2012; Wong, 2012）。Cheng（2009）的博士研究旨在分析香港中學生在中國連南瑤族自

治縣遊學及其前後的體驗，引證遊學有助學生獲得高階反思學習的機會，擴闊視野，學習與不同文化背景的人相處；發展多元化技能，如計劃未來、適應無法預知的事件、與別人合作解難等；比較當地人士與自己的生活，從中思考處境及相應行動；借鏡別人經歷，建立積極的人生態度（Cheng, 2009; Cheng & Ho, 2012）。另一方面，Wong（2012）的博士研究旨在探研香港中學生在中國內地不同地區遊學及其前後的體驗，發現遊學有助學生提高學習普通話的動機，而學生可從兩地比較中反思，有助增進對內地和香港文化的認識，並促進批判／明辨性思考能力。實證研究顯示，遊學對於促進學習與增長歷練具有一定作用。

　　要提高遊學的學習成效，除了理論和研究以外，評估是重要一環，而評估的對象包括課程與學生。課程評估方面，林德成（2013）指出香港課程改革以學生全人發展為重點，使學生參與不同形式活動的機會增加，而這些活動包含預期之外的學習成果，宜採用不受目標所限的評估模式，同時著眼於預期學習成果和預期之外的學習成果，以促進課程的成效。學生評估方面，Biggs & Tang（1998）解釋教師和學生對評估的觀點有別，形成教學和學習的不同序列，如圖一所示：

圖一　教學和學習的序列（Biggs & Tang, 1998, p. 453）
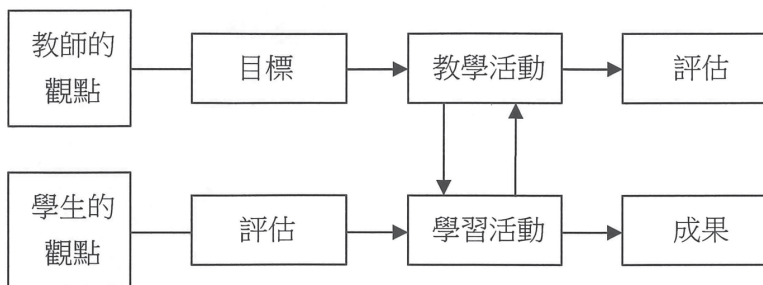
　　圖一表明學生對評估相當重視，學習活動及成果均取決於此。遊學作為一種學習方式，可以引入促進學習評估。要達到促進學習評估的目標，教師可以靈活採用合適的評估策略，例如：觀察、自我報告、學習日誌、學習合約、專題研習、學習檔案等，從而了解學生的表現，並顯示其學習成果（羅耀珍，2008）。

市民社會視角下的遊學

　　要較全面理解遊學在社會脈絡的內涵，可以借用 Janoski（1998）提出的「市民社會」（Civil Society）四重架構分析，當中包含國家、公共、市場與私人領域之間糾葛複雜的關係。學界對於「Civil Society」的解說莫衷一是，常見的漢譯有六種：文明社會、民間社會、政治社會、市民社會、公民社會和公共領域（李琪明，2001）。王紹光（1991）根據政治思想史的軌跡，指出「Civil Society」應譯為「市民社會」。市民社會的四重架構，如圖二所示：

圖二　市民社會概念圖（簡化自 Janoski, 1998, p. 13）
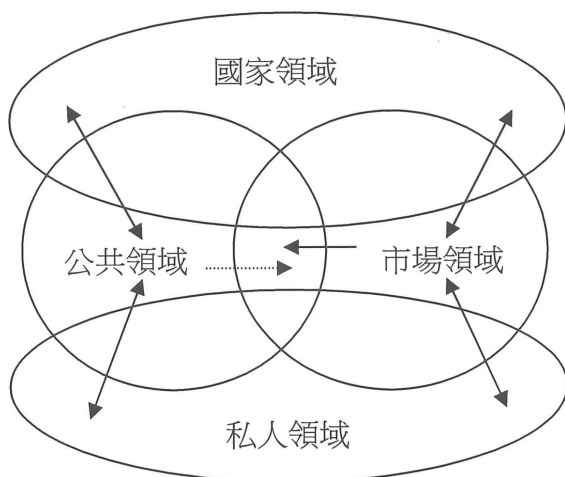
　　圖二展示的四重架構，可用以剖析遊學在香港社會脈絡發展的情況。各領域與遊學的關係，概述如下：

1. 於國家領域：相關部門及委員會，包括：民政事務局、教育局、公民教育委員會、青年事務委員會等，在不同層面參與遊學相關政策的制訂及執行，而相關單位更會舉辦或資助遊學活動。

2. 於公共領域：公益機構、志願團體、宗教組織、學校等，均可以因應各自條件及需要，舉辦不同主題、性質和內容的遊學。

3. 於市場領域：企業、工會、旅行社、學習中心等，都可以籌辦遊學，例如一些旅行社自行策劃或受委託舉辦遊學團。

4. 於私人領域：家庭、同儕等，都會影響學生在遊學的選擇及參與。例如有些學生較重視友儕關係，參與遊學活動前，會先與同儕商議，結伴同行。

上述市民社會包含的四個領域，並非各自獨立運作，而是互為影響的。舉例說，志願團體可以申請政府的資助，委託旅行社籌辦遊學，亦可安排合適活動，供參加者的家庭成員和同儕投入其中。這四個領域交織成一幅動態大圖像，引證遊學不僅涉及學校教育，而是與不同領域互有關連。同時，浮現一個有待深思的問題：在學習的前提下，如何協調各領域的角色及參與，以促進遊學的成效？

遊學知識建構的旨趣

運用市民社會視角，可以開啟遊學在宏觀層面的思考。微觀層面，討論遊學的理念與實踐，可以參考德國思想巨擘哈伯瑪斯（J. Habermas）的知識論，他將人類的知識建構歸納為三種旨趣：「技術——控制」、「實踐——理解」、「批判——自由」（Habermas, 1972）。以教師帶領學生參與的遊學為例，這三種旨趣展現相應範式的遊學，在定位、重點、設計原則、參與者角色及評估方向各具特色，如表一所示：

表一　遊學的知識建構旨趣

	技術——控制	實踐——理解	批判——自由
遊學定位	成品產出	建構過程	解放機會
遊學重點	程序操作	溝通交流	啟迪智慧
遊學的設計原則	確保順暢的作業流程	促進內部溝通及與外界的接觸	增進獨立、自主和思考
學生角色	接收者	探究者	詮釋者
教師角色	帶領完成任務	創造學習機會	促使增權賦能
遊學的評估方向	重視預設標準	重視實際經歷	重視體會及轉變

於「技術——控制」範式，遊學可視為成品產出，重點是程序操作。這範式下的遊學意義，在於確保順暢的作業流程，以工具理性作為依據。舉例說，香港旅遊業議會（2007）制訂《經營遊學團守則（修訂版）》，當中包括「遊學團重要項目一覽表」和「團隊安全質量監察表」，對遊學的籌辦和實施詳列注意事項。推行過程中，教師領導學生完成任務，而學生則是接收者。評估方面，按照預設標準進行考量，而學習成效主要由教師判斷。

於「實踐——理解」範式，遊學可視為建構過程，重點是溝通交流。這範式下的遊學意義，並非來自身體移動的經歷，而在於促進參與者的內部溝通，以及跟外界的接觸。推行過程中，學生是探究者，而教師擔任引導者，為學生創造學習機會。評估方面，學生的實際經歷需作整理分析，而學習成效不可能仰賴教師作出判斷。

於「批判——自由」範式，遊學可視為解放機會，重點是啟迪智慧。這範式下的遊學意義，不限於恪守規條或複製成功經驗，而在於增進學生的獨立自主。推行過程中，學生是詮釋者，而教師應對他們增權賦能，讓他們可以自由表達意見、展現潛能及激發想像，從反思中學習。評估方面，學生的體會及轉變需要加以檢視，而學習成效不可能只是取決於教師的意見。

上述三種知識建構的旨趣，展現遊學的不同範式，為遊學的理念和實踐提供參考框架，有助照顧參加者的多樣性。

遊學轉化學習的歷程

討論遊學的理念與實踐，可以借用「通過儀式」的概念。「通過儀式」原是指「伴隨著從一個境地到另一境地，從一個到另一個（宇宙或社會）世界之過渡式進程」（van Gennep，譯 2010，頁 10），它可分為三個階段：分離、邊緣或閾限、聚合，而閾限階段屬於模棱兩可及反結構的狀態（Turner, 2009）。Nelson & Harper（2006）參照「通過儀式」的觀點，以學習者為中心，提出由四種循環狀態構成的轉化學習歷程，包括聚合狀態、分離狀態、閾限狀態和再聚合狀態，學習者在不同狀態各有特點，如表二所示：

表二　轉化學習的歷程

學習者的狀態	學習者的特點
聚合狀態	處於靜態，難以察覺新的可能
分離狀態	願意暫停懷疑，存而不論
閾限狀態	感受挑戰，質疑當前理解，以批判的心態，面對待決事情
再聚合狀態	經歷轉化或改變，置身於新的知識境界

　　配合學習者在轉化學習歷程的狀態和特點，以學生為對象的遊學，可因應需要而加入以下重點：

1. 聚合狀態：配合原有學習經歷而設計活動，為學生提供深化理解的機會，例如指導學生在出發前搜集相關資料。
2. 分離狀態：舉辦行前簡介會，透過教師和學生之間互動，激發探索的好奇心，讓學生預備接受新觀點。
3. 閾限狀態：提供多元化的行程，讓學生開放感官，檢視原有信念，注入新思維。又可以安排分享會，讓成員之間進行對話，甚或互相質疑和詰問，從而釐清問題和觀念，促進批判性思考能力。
4. 再聚合狀態：安排延展學習活動，例如行程結束後安排跟進課堂或活動，鼓勵學生進行更深入的剖析，作出更睿智的判斷。

轉化學習歷程以持續學習為基調，目的是改變學習者的心智模式；對於遊學的策劃、組織和推行，可以帶來啟迪。

遊學的知識管理

　　一次遊學完滿成功，其效用難以永久存留。從知識管理的視角分析，遊學應該是不斷積累和創造知識的過程。知識可以分為內隱和外顯知識，內隱知識是個人的，與特別情境有關，較難以形式化和溝通；外顯知識指可以運用形式化、制度化語言傳遞的知識（Polanyi, 2009）。無論個人參與層面或組織實施層面，遊學同樣蘊含內隱和外顯知識。舉例說，遊學團成員之間的默契屬於難以言傳的內隱知識，而配合遊學的專題研習報告是外顯知識；學校舉辦遊學的信念和經驗是內隱知識，而為遊學編寫的計劃書、工作手冊屬於外顯知識。

根據日本學者野中郁次郎和竹內弘高提出的知識創造理論，知識創造包含四種知識轉換模式：（1）由內隱轉換為內隱，稱為共同化；（2）由內隱轉為外顯，稱為外化；（3）由外顯轉為外顯，稱為結合；（4）由外顯轉為內隱，稱為內化（Nonaka & Takeuchi, 1995）。這四種知識轉換模式，如圖三所示：

圖三　知識的螺旋發展（合併自 Nonaka & Takeuchi, 1995, pp. 71-72, 圖 3-3 和 3-4）
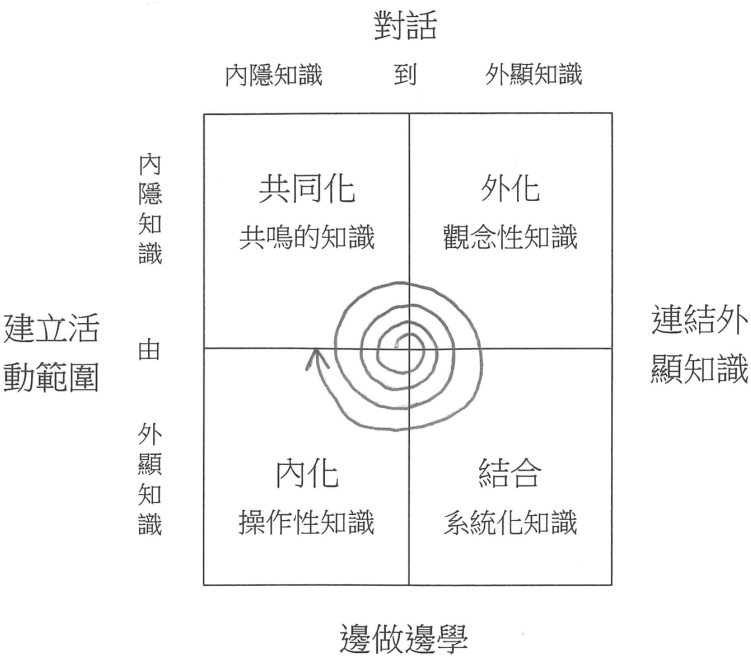
　　圖三展示的框架，可用以說明遊學知識創造的螺旋過程。共同化由特定範圍的互動開始，以促使經驗分享，例如學生遊學期間對不同人物、地景、事件的觀察和體會，形成共鳴的知識。透過對話與集體思考，內隱知識得以外化，例如學生以文字或圖畫表達感受，形成觀念性知識。不同外顯知識的結合，可以產生新知識，例如學生各自在簡報會分享專題研習成果，使不同知識接合，形成系統化知識。內化則透過邊做邊學，使外顯知識由實際操作轉為內隱知識，例如行程結束後，學生仍會以各種方式學習及實踐。然後，個人的內隱知識會與別人的內隱知識互動，再度啟動共同化，形成螺旋狀的循環。由此可見，遊學需要聚焦、深化和持續，以促進學與教的成效。

小結與再出發

　　法蘭西學術院的院士米歇爾・塞荷（Michel Serres）從「知識吟遊者」的故事，敘說旅行目的不在遠方，而是追求內在安頓，深信「沒有學習能夠避免旅行」（許宏儒，2011，頁49）。本文探索遊學的意義與實踐，跨文化到跨學科，國際視野到香港脈絡，宏觀到微觀，策劃到參與；知識系譜考掘本身便是遊和學並重的旅程。這旅程尋覓的目標，不是一服立效的學與教萬靈丹，而是各種可行建議。本文借用不同理論作分析，各具啟迪作用：市民社會四重架構，顯示遊學並非只涉及學校教育，需要多方面的配合；三種知識建構的旨趣，以及四種循環狀態構成的轉化學習歷程，不約而同示範分層遞進的學習模式，為遊學的設計與推展提供參考框架；知識管理的觀點，說明遊學的持續發展有賴各種知識的接合和轉換。這一系列理論的共通點是，確認遊學經驗變化多端，呼應 Urry & Larson（2011）指旅遊經驗本質是多元與流動的論調。當然，任何理論得視乎實際情況，靈活運用，或加以調適，以配合遊學經驗多元與流動的本質。

　　唐代（618-907）文豪柳宗元在〈始得西山宴游記〉一文，以「然後知吾嚮之未始游，游於是乎始」作結，意思是他知道以前的遊歷不算是遊歷，而真正的遊歷從該文敘述的這一次才開始（何沛雄，1990，頁 32）；更重要是，語句點明往昔不過是形軀之遊，而這一次卻是精神層次之遊（鄧城鋒，2012）。顯然，教育工作者不會期望學生參與遊學僅是身體移動，而是期望學生藉經歷在思想、知識、技能、價值觀和態度有所獲益。展望遊學在香港脈絡下持續發展，在其多元意義的基礎上，可以透過政策配合、理論建構、研究開展、分享平台建立等多方面配合，匯聚教育專業層面內外的討論，為全社會創造遊學的論述和參與機會，由個人到群體，從組織到跨組織，啟動內隱和外顯知識的螺旋轉換，使遊學知識積澱與創新，以多元視角促進學生的全人發展，為推動學生學習的遊學再出發作好準備。

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Tours begin - Multiple perspectives on the meaning of study tours

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Abstract

Going on study tours is a long-standing cross-cultural phenomenon. Research studies reveal that study tours are conducive to learning and gaining experiences. In digging up the genealogy of study tours, this interdisciplinary concept can be considered as a category of travel which embraces the elements of different disciplines such as tourism and education. Putting study tours in the context of the Hong Kong school curriculum, it can be classified as a part of life-wide learning and linked with curriculum, and stakeholders play different roles in the discourse and participation of study tours. This paper attempts to explore the meaning of study tours from multiple perspectives. It starts with a general overview of connotations and development of study tours, and then a discussion on the controversies and reflections. Recommendations are thus provided in the hope that they would yield insights into the concepts and implementations of study tours.

Keywords

meaning of study tour, educational travel, educational tourism, life-wide learning, cross-culture phenomenon

A case study of educational change and leadership in Hong Kong primary schools

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Abstract

This study uses Dimmock and Walker's cross-cultural comparative framework to investigate the interface between societal cultures and leadership styles in two primary schools in Hong Kong. The analysis shows that educational development and curriculum reform at the schools was influenced by global culture and by the local Hong Kong subculture. This case study illustrates the effect of leadership styles and culture on the development of educational reform in Hong Kong in the past 15 years.

Keywords

cross-cultural comparative framework, educational change, educational leadership, narrative inquiry

1. Background

In education, visions of the future proliferate (Facer, 2011). In Hong Kong, a financial and commercial centre influenced by globalisation and nationalisation, education professionals face both challenges and opportunities. Successful educational reform requires a system based on professionalism rather than managerialism. According to Dewey (1938), every experience is both personal and social. This study uses the narrative inquiry method (Clandinin & Connelly, 2000; Clough, 2002; Trahar, 2013) as a qualitative strategy to understand the author's own experiences in two schools and then uses those

perceptions to make generalisations about educational reform. As a Primary School Mistress (Curriculum Development) (PSMCD) for four years and as a General Studies panel head for eight years, the author experienced growth, conflicts and challenges. This study is an attempt to interpret the process of educational reform in the schools in which the author served. The broader global culture, the local subculture of educational changes and the educational system in Hong Kong, together with changes in the schools influenced educational development and curriculum reform at these schools. A comparison of the two schools illustrates the effect of different leadership styles and broader cultural, social, national and global forces on the schools. Dimmock and Walker's (2005, p. 24) cross-cultural comparative framework, Fullan's (1999, 2009) three phases of organisation development and other theories are used to deeply examine the cases. Finally, a relatively more comprehensive approach to educational reform is presented.

2. Methodology

" There is no better way to study curriculum than to study ourselves."
<div align="right">(Connelly & Clandinin, 1988, p. 31)</div>

" When we see an event, we think of it not as a thing happening at that moment but as an expression of something happening over time. Any event, or thing, has a past. A present as it appears to us, and an implied future."
<div align="right">(Clandinin & Connelly, 2000, p. 29)</div>

John Dewey is one of the most influential people in narrative inquiry (Clandinin & Connelly, 2000, p. 1). For him, every experience is both personal and social. An individual's perceptions of knowledge, values or pedagogy can reflect a person's attitude towards temporary and historical social influences (Clandinin & Connelly, 2000; Dewey, 1938). This research adopts the methodology of narrative inquiry. The author served as a curriculum development leader in two related half-day primary schools sharing the same building for eleven years and witnessed their growth and separation. Historical and interpretive research methods are used to analyse this process. The book *"Narrative inquiry: Experience and story in qualitative research"* (Clandinin & Connelly, 2000) provides theoretical support for this study. Understanding the process of educational reform in these two schools through the author's personal reflections and assumptions and her interpretation of relevant theories may reveal some insights into education professional development. Intensive and up-close participation are part of the author's strategy of qualitative research.

3. Framework for the case study

Hong Kong is an international financial city. It has an open system and changes in education follow global trends that are then modified by local commercial and Confucian cultural influences.

> *"A key direction for educational leadership and management in the twenty-first century is to embrace an international, cultural and cross-cultural comparative perspective."*
>
> (Dimmock & Walker, 2005, p. 15)

Dimmock and Walker provide a detailed justification for their approach. According to their cross-cultural comparative framework, shown in Figure 1 (Dimmock & Walker, 2005, p. 24), a school is influenced by the societal culture, which in this case study the author identifies as a mix of traditional Chinese and modern global cultural influences.

Figure 1. A cross-cultural school-focused framework for the comparison of educational leadership
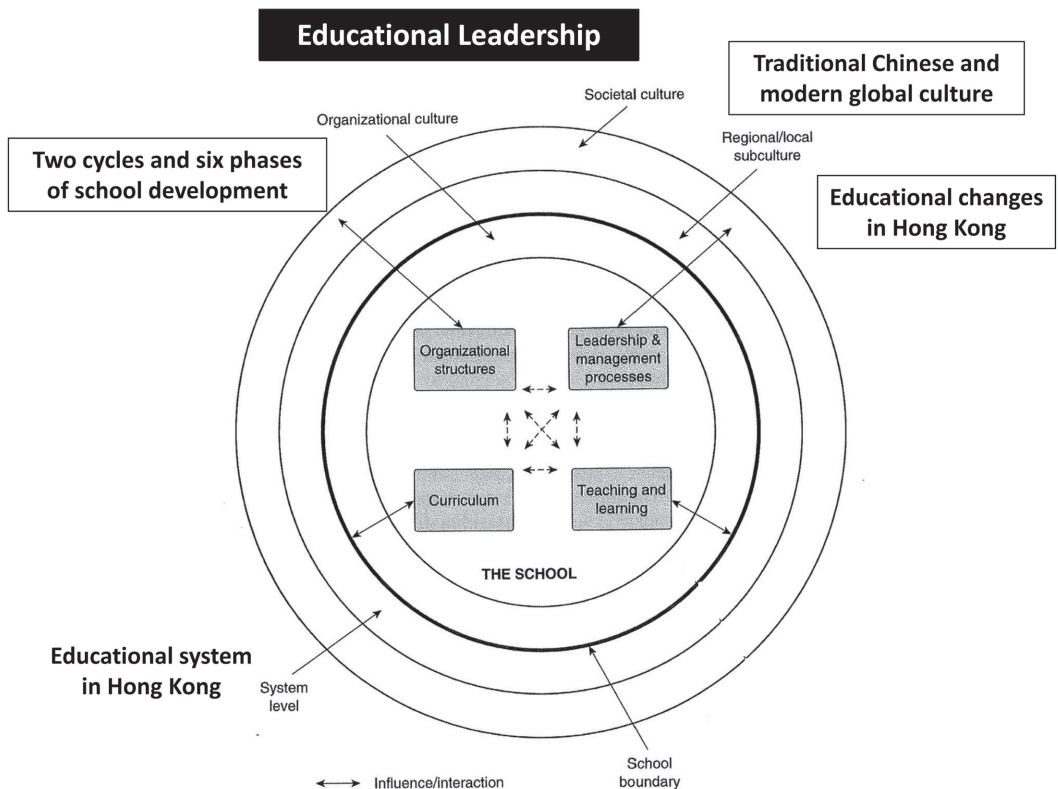
The local community continues to be influenced by hybrid Chinese cultural traditions (Walker, 2004, p. 78), such as Chinese beliefs about relationships, organisation and leadership. However, economic globalisation requires that education in Hong Kong also follows the trends seen in most developed countries. This trend is related to the Third Way (Shirley, 2011), which uses a managerialist and market-oriented approach to enhance quality in education and subsequently economic growth (Tang, 2011). The education reforms spreading around the world are driven not only by market conditions, but also by concepts of managerialism and performance (Ball, 2003; Tang, 2011). This approach has ushered in a new orthodoxy of testing, accountability and data-driven decision making (Shirley, 2011). As a result, *"educators learned to game the system by cutting back on untested subjects and by concentrating on drilling students for exams"* (Harris, 2011, p. 165). Hong Kong as an open system is strongly influenced by the outside world (Cheng, 2009). These new educational theories, ideas, paradigm shifts and practices have been imported over the last two decades.

The regional subculture, which the author defines as Hong Kong educational reform, also deeply influences schools' educational leadership styles. Due to the political transition in July 1997 and the fast-changing economic environment in the Asia-Pacific Region, Hong Kong has experienced great transformational change within the last two decades: *"In the last ten years, the Education and Manpower Bureau implemented numerous initiatives to change nearly every key aspect of the school system, from the administrative structure to the curriculum organization; from the school governance and management to the classroom teaching and learning; from the application of information technology to the examination system; and from the school external and internal evaluation to the accountability to the stakeholders"* (Cheng, 2009). Primary schools have been affected by curriculum reform, assessment reform and changes in the school places allocation mechanism. School-based management, school self-evaluation, external school reviews, performance indicators and so on restrict, construct and direct the way schools are run. The administrative process controls and assesses the performance of schools. Due to the city's colonial past, many administrators are accustomed to following instructions and avoiding mistakes; this can make them short-sighted. At the same time, there is a global trend towards the development of pedagogy for knowledge-based societies rooted in life-long learning.

Since the change in sovereignty, the educational system in Hong Kong has changed rapidly. Nurturing quality citizenship is an essential component of this new system. New posts for educational leaders are increasing (Education Bureau, 2012). In addition to traditional positions such as "Senior Assistant Master/Mistress" and "Assistant Master/Mistress", there are now posts for "Senior Primary School Master/Mistress" (SPSM), "Primary School Master/Mistress" (PSM) and "Assistant Primary School Master/

Mistress" (APSM). However, the authority for school development is still mainly in the hands of the principal and the SPSM, who generally emphasise managerial skills rather than professional educational development. Management development is shaped by performance pressures, which are dominated by a measurement paradigm, whereas educational development focuses on learning paradigms that emphasise the importance of learning construction in the classroom and the effectiveness of students' authentic learning experiences. For instance, managers in Hong Kong support the "Territory-wide System Assessment" (TSA) and "Pre-Secondary One Hong Kong Attainment Test" (Pre-S1 Test) by providing more drilling exercises for children (Tang, 2011). In this paradigm, strong leadership directs educational development and both principals and teachers expect to be given clear directions for achieving short-term goals (Walker, Dimmock, & Pang, 2002). Schools are influenced by societal culture, regional subcultures and their position in the wider educational system with each school also having its own organisational culture. Organisational structures, leadership and management processes, curriculum, and teaching and learning are the four elements that interact to create schooling.

In the following section, the author makes use of the framework given in Figure 1 to interpret her own experience of curriculum reform and development in Hong Kong schools.

4. Case study outline and background

A school is a complex system that undergoes multiple processes of development. A leader's mental models or beliefs are part of the system and, along with the structure, determine the system's behaviour. Therefore, analysing school leaders' thought processes and their effect on changes in the school system can help us to understand the system more completely.

The two half-day primary schools discussed in this study (hereafter called "School A" and "School B") were established in 1992 and were originally located in a public housing estate. They are run by the same school-sponsoring body and before 2005 they shared the same building, vision, mission, developmental plan and strategies, teaching and learning curriculum, teacher management and assessment papers and so on. Most of the students' parents are grassroots workers without good educational backgrounds, so they rely on the schools to educate their children. The administrators and professional leaders of the schools before 2005 were eager to promote and integrate new ideas, thinking skills and creativity in the teaching and learning process collaboratively.

For the pre-2005 period, these two schools' reporting lines showed that it can be treated as one system. For instance, the principal of School B was in charge of the General

Studies and English departments for both schools and the principal of School A was in charge of the Chinese and Mathematics departments in both schools. As a General Studies panel head, the author was at that time responsible to the principal of School B.

In 2005, the two half-day schools separated to turn into two individual whole-day schools and the well-developed cross-disciplinary curriculum could no longer exist. There was no further collaboration or professional development interaction between the two schools. The creation of effective and student-centred interdisciplinary project learning modes in the classroom stopped. In the post-2005 period, School A has focused on subject development and has de-emphasised interdisciplinary teaching and learning.

This study examines the following questions:

1. What problems arose from the interaction between the educational changes and leadership styles?

2. Why was the more than 10-year investment of time and resources into building and integrating the curriculum abandoned?

3. What can we learn from this case of leadership changes?

5. Analysis

According to Fullan's notion (1999), the process of school improvement has three phases: "initiation", "implementation" and "institutionalisation or abandonment". These two schools underwent two cycles of school improvement; the first was from the establishment of the school until 2002 and the second was from 2002 until the present.

5.1 Analysis of the first change cycle
The first 10 years of development are outlined in Table 1.

Table 1. *The characteristics of the school improvement process and the outcomes of the first cycle of change*

Years and phase	Characteristics	Outcomes
1992-1994 Initiation	Target focus – As School A and School B were newly established at that time and were run by a not very well-known school-sponsoring body, both schools needed to secure a stable intake of students. The keen competition and demand for accountability drove the adoption of private corporate management practices for running the school, in theory at least, more effectively and efficiently. Relevance – The two schools collaborated successfully. They shared a professional vision, mission, goals, developmental strategies, educational planning system and assessment structure. Innovation was driven by hidden "market" needs and educational professionalism. Readiness – The schools established an employment system and psychologically prepared administrators for their roles. Resources – There were many opportunities for promotion, four core leaders were employed from an experienced school, the two schools were located in a new development area with a big pool of students and keen competition. School system – The two schools shared a building and other resources.	Effective management Long-term professional developmental strategies and plans Leaders believed in the use of an up-to-date pedagogy of learning High expectations and clear vision and mission Engaged many young and enthusiastic teachers Active co-operation Formal and concentrated management and leadership

Table 1. *The characteristics of the school improvement process and the outcomes of the*
         first cycle of change (continued)

Years and phase	Characteristics	Outcomes
1994-1997 Implementation	Change agent – The principals, vice-principals and assistant masters and mistresses of the two schools were the agents of change. The leadership styles of the two principals were different, and the co-operation made good use of their managerial and transformational leadership styles. Professional development – The schools followed Hong Kong's educational reform (Education Commission, 1990, 1992, 1997) trends. They adopted an effective and student-centred approach, promoted professional development, emphasised an activity approach, had regular planning meetings and lesson observations and shared teaching aids. Staff members were organised as one school. The same set of examination papers was used at both schools. Power-concentrated – They used a paternalistic approach, top-down, fight for survival among schools to push the managerial thinking mode, the acceptance of hierarchy and respect for senior teachers. Action plan – The action plan was for school-based management	School-based management Managerial and professional working teams Successful promotion and managerial system High demand and good results for student allocation to the better secondary schools Reinforcement of development strategies

Table 1. *The characteristics of the school improvement process and the outcomes of the first cycle of change (continued)*

Years and phase	Characteristics	Outcomes
1997-2002 Institutional-isation	The schools were characterised by successful teacher developmental strategies and an institutionalised school culture that meant teachers were eager to learn, to try and to share for the good of students. Because the schools had already experienced a paradigm shift and pedagogical reform, they successfully implemented the educational reforms in Hong Kong (Curriculum Development Council, 2001). The schools developed information technology where teachers started to learn how to both store materials in, and retrieving materials from, the school server. Action plan – The plan focused on school-based management and school-based curriculum development, well-planned integrated project learning twice a year. Teachers were eager to follow the lead of senior teachers. The principals started to delegate authority for school self-assessment among their senior staff. The schools creates a collaborative culture for quality learning and teaching. School-based curriculum developed. Both schools joined the "School Around the World" project (HKSAW Steering Committee, 2002), and created a framework for project learning for General Studies.	The schools adopted a modern and up-to-date teaching and learning mode: a student-centred activity approach that included out-door activities, other learning experiences, school-based curriculum reform, project learning, etc. Stakeholders experienced the positive values of the school culture. The schools were appreciated by parents.

As new schools established in 1992, School A and School B followed the recommendations in the seven reports of the Education Commission's policy recommendations from 1984 to 1997 (Education Commission, 1984, 1986, 1988, 1990, 1992, 1996, 1997), which reflected the paradigm shift from quantity to quality. Leaders developed a widely shared vision for the schools. They built a consensus on school goals and priorities, and maintained high performance expectations for staff and students. Modelling good professional behaviour, building school culture and collaborative structures, and providing intellectual stimulation through teacher-sharing were the dimensions of leadership practice (Bush, 2005) in the schools in this period. Gradually, the schools built collaborative structures and professional cultures. Although the leadership styles of the principals of the two schools were completely different, where one was perceived as more managerial in approach while the other was perceived as more transformational (Bush, 2005), they both respected each other and co-operated successfully to lead the schools. While managerial leadership may ensure the implementation of a school's vision and strategy, it may be argued that transformational leadership engages with staff and other stakeholders to produce higher levels of commitment to achieve the goals of the organisation that are linked to such a vision (Bush, 2005). During the first change cycle, managerial leadership dominated the administration, and professional leaders executed the educational reforms smoothly and effectively. Gradually, the schools built their own cultures, analysed using the dimensions of societal culture as shown in Table 2 (Walker, Dimmock, & Pang, 2002, p. 40).

Table 2. *Comparison of leadership in the two schools with different cultural settings*

Dimension of societal culture	Leadership in culture	
	School A	School B
Power-distributed/ power-concentrated	• Leadership from the top • Teamwork and empowerment • Respect for seniority of management more than for education • Goals mainly set by top administrators • Acceptance of wide power and status differentials between principal and teachers • Delegation/decentralisation with control	• Leadership from the top • Teamwork and empowerment • Respect for seniority of leadership • Goals set by top administrators • Acceptance of wide power and status differentials between principal and teachers • Power-concentrated

Table 2. *Comparison of leadership in the two schools with different cultural settings (continued)*

Dimension of societal culture	Leadership in culture	
	School A	School B
Group-oriented/ self-oriented	• Emphasis on the "group" as a collective to which the individual has to conform • Closed confrontation of differences	• Emphasis on personal "goals" • Drive to secure commitment and high morals • Support for teachers seen as essential • Maintenance of social networks
Consideration/ aggression	• Conflict resolved through edict • Teacher and students status based on effort and achievement	• Assertiveness seen as a virtue • Decisiveness and emphasis on career are valued • Overt competition promoted
Pro-activism/ fatalism	• Belief that we can do little but accept life's eventualities • Low tolerance for ambiguity • Long-term view of evolving change • More on care and support and personal interest • Hierarchy, standardisation and conformity stressed	• Belief in capacity to shape and influence the present and future • High tolerance for ambiguity • Sense of urgency • Adherence to mutual duties • Pro-activism
Generative/ replicative	• More likely to adopt innovations • Experimentation in classroom common and encouraged, while traditional approaches to teaching and learning endure • Problems solved mainly through referral to precedent	• Appear more predisposed toward innovation • Experimentation in classroom common and encouraged • New ideas and ways of working valued • Original policies and ways of operating
Limited/holistic relationships	• Formal rules and regulations applied equally to everyone • Tasks stressed as much or more than relationships • Care taken not to alienate people	• Greater attention given to relationship obligations • Valued as much or more than tasks • Advancement based mostly on performance and competence

Over their first 10 years (1992-2002), these two schools developed into well-known and high quality schools. Parents in the region wanted their children to study there. During this period, school improvements came from the schools' own initiatives and the leaders were aware of the importance of school development. With strong leadership and the recruitment of young, energetic and enthusiastic teachers, the schools built up relatively ideal systems. The school professional development culture became institutionalised. As a result, educational reform at these schools occurred before the push from the government. The schools' system for reinforcing development is illustrated in Figure 2.

Figure 2. The first cycle of school development: Reinforcing loop for better development
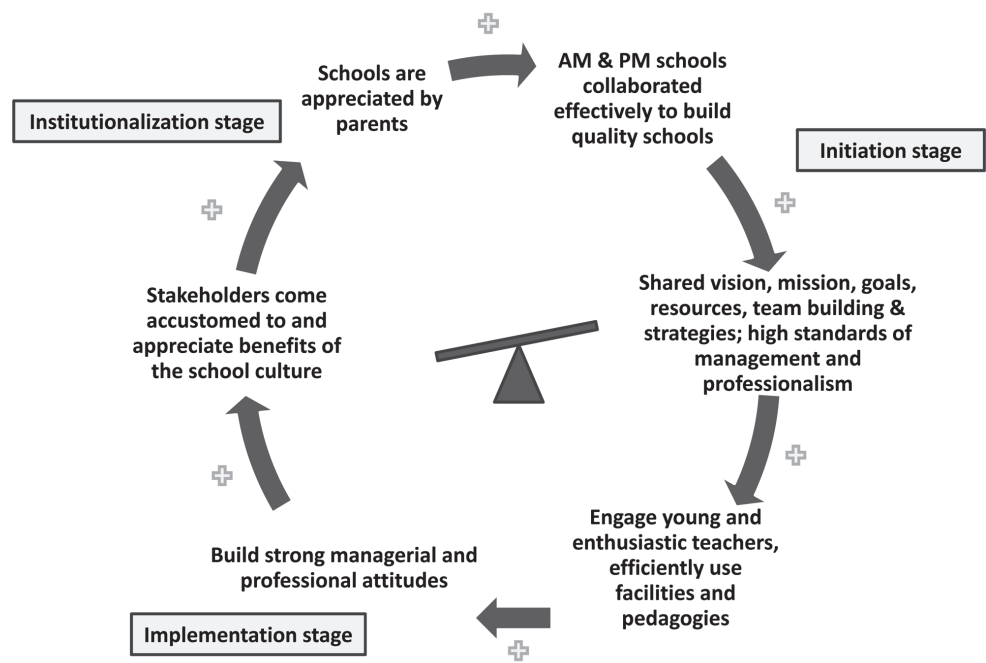
5.2 Analysis of the second cycle of change

Responding to the changing world, the Hong Kong government initiated large scale and pedagogical changes in education at the end of the twentieth century. The Education Commission in 2000 claimed to adopt the principles of student-focused, "no-loser", quality and life-long learning (Cheng, 2009). In 2002, the government provided each school with a temporary curriculum development officer, a post called the Primary School Masters/Mistresses (Curriculum Development) (PSMCD), for five years, to help principals carry out curriculum reform smoothly and deeply. Later, the post became permanent.

Eight key learning areas, generic skills, values and attitudes were emphasised (Education Commission, 2000). As an APSM and a panel head of General Studies with experience in project learning and curriculum design, the author was recommended for the post of PSMCD in School A. She was responsible for carrying out school-based curriculum development during this time. The processes of the second cycle of development and the outcome are outlined in Table 3.

Table 3. *The characteristics of the school improvement process and the outcomes of the second cycle of change*

Years and phase	Characteristics	Outcomes
2002-2003 Initiation	The new PSMCDs in the two schools collaborated closely to further and deepen the schools' education curriculum reform. Eight key learning areas, generic skills, values and attitudes were emphasised (Education Commission, 2000). The process encouraged teachers to experience a paradigm shift from traditional teaching and thinking modes to a student-centred and school-based curriculum. An interdisciplinary curriculum including project learning, other learning experiences, moral and civic education, thematic teaching, life-long learning, and application and learning by doing were widely promoted (Curriculum Development Council, 2001). School management encouraged more teacher autonomy for the daily implementation of change. A three-year curriculum development plan was proposed and agreed on.	Top-down demands for further and deeper educational reforms concentrated on quality learning and teaching were received from the Education and Manpower Bureau. Drafted and confirmed three-year school-based curriculum development plan

Table 3. *The characteristics of the school improvement process and the outcomes of the second cycle of change (continued)*

Years and phase	Characteristics	Outcomes
2003-2006 Implementation	Based on previous experience and teachers' abilities, the PSMCDs of the two schools collaborated on a three-year interdisciplinary project learning curriculum development plan (Figure 3). The principals of the two schools agreed and supported more teachers' participation in curriculum construction, lesson plan design and implementation. Starting from Primary 4 in 2003 until Primary 5 in 2005, two school teachers co-operated and shared the workload of teaching these levels. To build up long-term teaching resources, the schools proposed for and carried out a Quality Education Fund (QEF) in 2004. With the help of these extra resources, the schools constructed two websites for long-term learning. The three-year plan was carried out successfully. A cross-disciplinary curriculum that included project learning, other learning experiences, moral and civic education, thematic teaching, life-long learning and learning by doing was developed during this period. In this period, School A had three principals, one after another. The change in personnel did not change the school's management culture or the thinking mode. Management without vision is rightly criticised as "managerialist" but vision without effective implementation is bound to lead to frustration (Bush, 2005). In 2005, the two half-day schools separated to turn into two whole-day schools. The disagreements about the two schools' future co-operation and the diversified school development strategies reflected in the widening gap between the cultures of the schools.	The new principal of School A followed the school's tradition and the senior administrators' culture, which was more likely "managerialist". The principal of School B had a school vision that created new challenges. Teachers were required to support the vision and targets of the principal. Conflict between the two schools' administrative cultures became an explosive issue. Moreover, external changes in the market-driven system and business managerialism increased the conflict. In 2006, the two schools stopped curriculum collaboration.

Table 3. *The characteristics of the school improvement process and the outcomes of the second cycle of change (continued)*

Years and phase	Characteristics	Outcomes
Post-2006 Modification & abandonment	The culture and styles of the resultant two whole-day schools were very different. School A had an external school review in 2006. After the review, the school stopped integrating cross-disciplinary project learning and General Studies project learning into daily classroom learning. Project learning became part of a one to two weeks learning sessions after examinations. The school allocated more resources to the learning of languages, Mathematics, TSA and exam drilling exercises. The well-established cross-disciplinary project learning curriculum was abandoned. Life-long learning, multi-diversity learning experiences and integrated professional cultures were de-emphasised. School B tried many innovations based on a student-centred and caring vision. Teacher development and parental and community involvement created a good environment for students. Student-centred pedagogies were promoted. After eight years of development, the school became one of the best-known schools in the area. The principal won awards for leadership. The school engaged staff and other stakeholders to produce higher levels of commitment to achieve the goals. Both schools had shifted from an internal change agent to changes mandated by an external agent (Tang, 2011). The abandonment of the new paradigm in School A shows the power of the traditional culture. The school went through the first and second change cycle but did not undergo the third change cycle, which required leaders to make fundamental paradigm shifts to promoting the life-long learning abilities of children. However, with transformational leadership, the principal of School B successfully motivated senior and new teachers, parents and community followers and provided good services for students.	Due to a good foundation and good exam results, School A could attract enough students. It paid more attention to exam-oriented teaching and the learning of languages and Mathematics. Owing to the falling student population in the school area, School B struggled for survival. It continued to emphasise a student-centred approach with a vision. Transformational leadership was used to encourage teachers and stakeholders to help achieve the goals.

Figure 3. A three-year interdisciplinary project learning curriculum development plan

In the initiation and implementation stages, the author experienced, at first hand, the perception of children who were learning happily and effectively. The students created project books with highly advanced ideas, such as they pretending to be reporters or Olympic ambassadors while practising English or Putonghua with each other. They used what they had learnt in Mathematics lessons to conduct surveys and then made presentations with PowerPoint or by using craft materials. The group work process in the classroom allowed them to communicate and disagree with each other. They learnt how to solve problems and give their ideas in tangible shape or form. Parents sometimes joined in and helped to guide their children's learning. At the beginning of the project, children set their own learning targets and co-operated with each other to learn. Their learning, therefore, became more meaningful and target-orientated. Throughout the two or more months of interdisciplinary preparation and learning, their learning outcomes were rich and substantive. These processes helped them to construct their learning and helped to enhance their learning outcomes (Figures 4 and 5) during lessons. Students used

different methods such as mind maps to visualise their thinking about the spirit of Hong Kong. Most of them were happy to creatively express their feelings. Their thinking skills, particularly their creative thinking skills, were thus aroused. The outcomes of the projects and the action research were, respectively, shared at the Hong Kong Education City and in the Fourth Thinking Qualities Initiative Seminar at Hong Kong Baptist University (Creative Teachers Association (CTA) Limited, 2013).

Figure 4. Project structure and concept map of the Primary 4 "In search of Hong Kong spirit" project
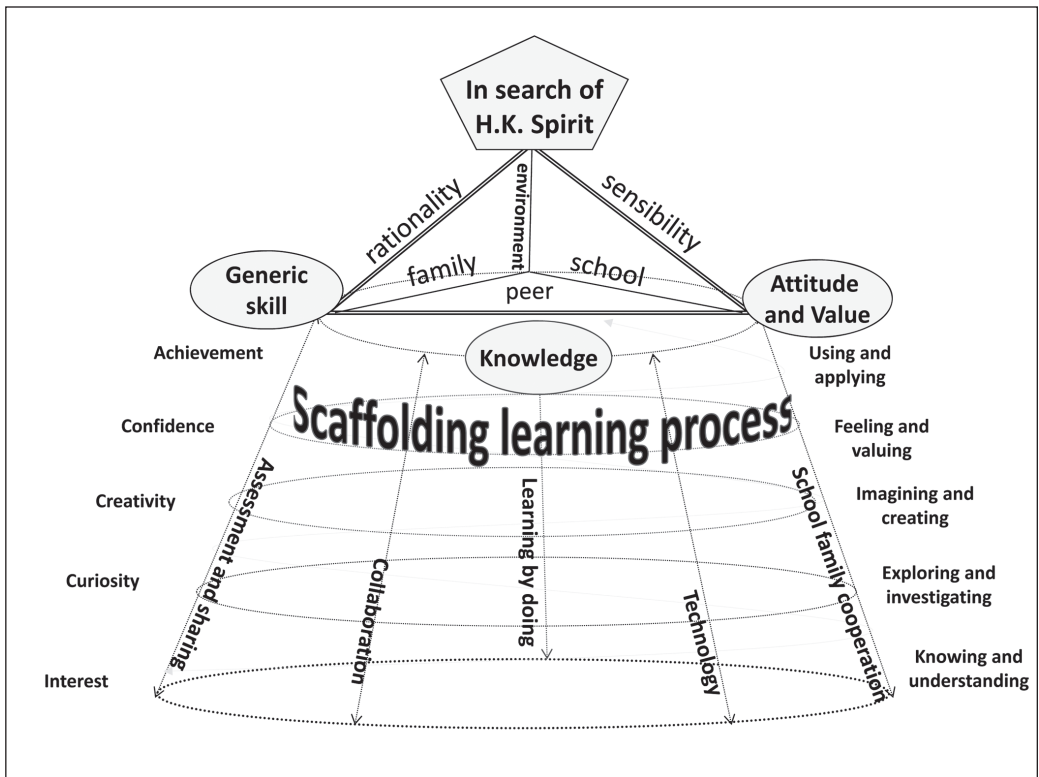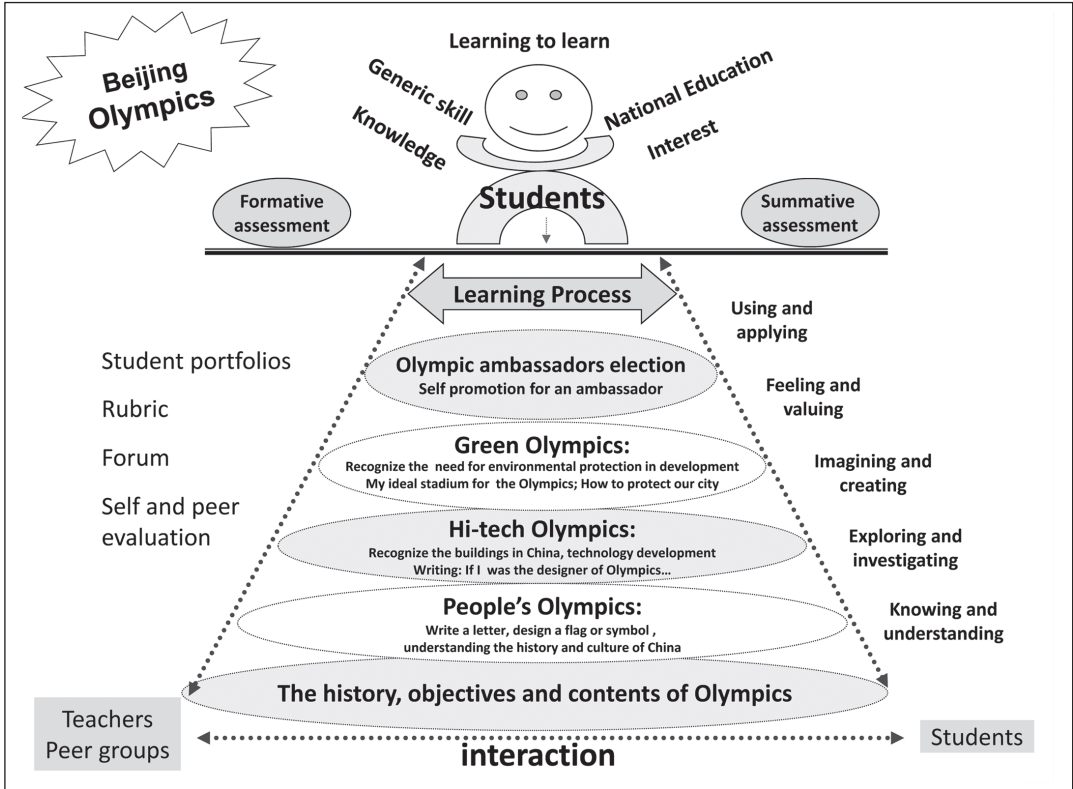
Figure 5. Project structure and concept map for assessment of the Primary 5 "Beijing Olympics" project

Six years after leaving the school, the author had a chance to meet five New Senior Secondary school graduates who had experienced the six-year project learning programme in School A. A questionnaire was designed to collect their views. With permission, the author recorded conversations with them, to analyse their thoughts about the effect of project learning in primary school. All of them still remembered the happy learning experiences in the Primary 5 "Beijing Olympics" Project (Figure 5). One of them remembered specific strategies for thinking and learning learnt. Many said that the generic skills and abilities they gained through project learning in primary school allowed them to become leaders of project learning groups in secondary school. They found that not many pupils from other schools had the same level of experience as they did. Their experience inspired them to actively participate in the Liberal Studies lessons. They thought they could integrate concepts and produce school-based reports that were more effective, interesting and thoughtful due to their primary school learning.

Ten years were spent building the rich materials and the well-developed project learning model and framework. Many examples remain on the website. The experiences and pedagogies have been shared and published on several occasions. However, the administrators of School A decided that the neo-liberal styles of performative culture that use test regimes as indicators of school performance were more important for school development. They could do little but accept life's eventualities. In 2006, after an external school review, School A abandoned the used of an interdisciplinary project as part of normal classroom learning. They restricted the pedagogy and methodology of project learning to a short period of one or two weeks in the academic year. The author believes that "drilling exercises" for the TSA and Pre-S1 Test took curriculum time away from any meaningful learning (Tang, 2011), something that is, unfortunately, common in schools in Hong Kong. Today, as a well-established system with good outcomes for students and experienced teachers, the new school system is welcomed by parents.

Due to School B's location being far away from residential areas and the declining student population, the new school struggled for survival during the second cycle. Without support from School A, School B continued to innovate with student-centred and happy learning pedagogy. With a transformational leadership style, the principal engaged with staff and other stakeholders to produce high levels of commitment to the school's goals (Bush, 2005). Today, the school has a record of success. It has received a Green School Award, a Love School Award and a Community, Family and School Collaborative Project Award.

5.3 Analysis of the change process

According to Dimmock and Walker's framework, during the first cycle of change, the schools successfully collaborated in school development. They developed into two successful schools and had the chance to separate into two whole-day schools. In the second development cycle, the initiation and implementation stages of change were smooth and successful. Facing the demands of top-down educational reform, the two schools collaborated closely and adopted the same three-year development plan. With their traditional culture of collaboration, the two schools successfully applied to QEF to obtain more resources for curriculum development. With the two schools' shared resources, they built a shared interdisciplinary project model and website resources over four years. However, the different cultures of the two schools widened when they separated. Although the principal of School B wanted the two schools to continue to co-operate as before, the administrators of School A strongly rejected this idea.

Although in the first cycle, School A adopted a new mode of teaching and there was a paradigm shift from a traditional teaching method to the activity approach, the school leaders were influenced by traditional Chinese beliefs about relationships, organisation

and leadership. It was not a religious school and Catholic, Buddhist and Christian teachers worked there; diverse beliefs and cultures existed and they were all respected. However, traditional Chinese culture influenced the social order at the school. Every teacher had his or her occupational position and there was a clear hierarchical structure. Harmonious relationships among colleagues were based on respect for hierarchy, and a set of formalised codes of behaviour tied the whole school together. Teachers expected the principal to be strong (Walker, Dimmock, & Pang, 2002). During the transitional period when changing principals, the school senior administrators insisted on a culture of 'managerialism'. By devoting more time to better exam performance results and free more time for teachers, they supported the school's traditional values in deep structures. They did not support the interdisciplinary pedagogy that the principal of School B believed in. They did not really understand or believe in the spirit of an integrated learning strategy. The professional leaders had to replace their long-term development strategies with short-term development strategies. Standardisation and data-driven decision making dominated the development direction at that time. As the educational development strategies and ideologies of the two schools were different, then when School B moved out of the school campus, the co-operation between the two schools stopped. Each school continued to develop its own culture, thinking mode and system of development.

> *"Since management is culture-bound, it would be unrealistic to expect top down structural reform will effectively introduce an attitudinal change in organizations. If reforms are to be successful, they require a strong commitment and a change of values and attitudes on the part of leaders and subordinates."*
>
> (Leung & Chan, 2001)

From its foundation, School A promoted a structure of hierarchical power relationships, where teachers were expected to respect management's seniority in decision making. As a result, senior administrative decisions were to be seen as final and did not involve a process of consultation or transformational change. Individuals had to follow the "group" collective needs rather than their own personal "goals". Conflicts were resolved through edict. Hierarchy, standardisation and conformity were stressed. Management had a tendency to mandate change from the top with active responses only welcomed from senior teachers. During the change process, the PSMCD concentrated on curriculum design, preparation of the teaching materials and instruction and not much on the participation of the senior teachers in the discussion. Most teachers did not have a feeling of ownership of the cross-disciplinary design and construction. Moreover, the second stage of the curriculum reform overwhelmed the teachers. It did not match the needs of their performance culture, which was shaped by increasingly popular external accountability measures. Public assessment made test results very high-stake goals. In their fight for survival, school administrators turned to extreme managerialism.

In addition to the local organisational culture that affected School A's u-turn, Hong Kong's regional culture also influenced the school's decisions. With the existence of the "bottle-neck" in school education (Cheng, 2009), curriculum reform had become a heavy burden to teachers. The Committee on Teachers' Work reported that teachers worked about 50 hours a week in 2006 (Tang, 2011). High mood disorders, suicidal tendencies and resignations were some of the negative effects of the syndrome in Hong Kong at that time. As a result, administrators at schools sought to ease the teaching burden, giving more time to training students in languages, Mathematics and examination preparation. The impact of this is that the focus on short-term results was methodologically and pedagogically different from the focus on life-long learning and professionalism.

During this period, the global educational culture was also changing, and these changes influenced educational management in Hong Kong greatly. Along with most modern cities and countries in the world, Hong Kong experienced the Second Way and the Third Way of educational reform. In the Second Way period, governments introduced standardisation to promote accountability and used marketplace models of reform to drive innovation (Harris, 2011, p. 164). The Third Way reforms were based on a new orthodoxy of testing, accountability and data-driven decision making (Shirley, 2011). The government provided funding based on accountability and markets to ensure high performance. Professionalism was emphasised and developed (Yu, 2002; Wan, 2011) and life-long learning was promoted through the teaching of generic skills and project learning. However, data-driven decision making and target-obsessed distractions were the characteristics of the market-driven model of reform.

As a result, the pressure for summative assessment increased in order to narrow any achievement gaps. Worst of all, the Third Way resulted in a narrowing of the curriculum in the form of teaching to the test and an over concentration on data rather than on student needs (Harris, 2011, p. 164). The fallacies of the Third Way educational reforms affected schools' control systems. The change reinforced the current examination-oriented assessment practices. The world-wide failure of the Third Way has been pointed out by Hargreaves and Shirley (2009). They propose a Fourth Way that focuses on the function of professionalism. They believe that change should be driven by a need for change itself rather than by the outcomes of the change. The focus is on changes in the classroom and in students' effective learning. The notion is similar to that promoted by the two case study schools in the first and the second phases. The schools promoted and implemented learning in the classroom through the lens of professionalism. Teachers were concerned with the effectiveness of student learning through activities. Constructivism and the promotion of rich experiences were the curriculum design pedagogies. However, the managerialism of the Third Way of educational reform caused arguments and conflicts, affecting both schools' development.

The global norm of managerialism and the trend towards data-driven decision making influenced the development of the schools. Moreover, with the separation of the two half-day schools into two whole-day schools and the replacement of principals in School A, the culture of the schools and the styles of school leadership played a crucial role in the schools' development. The main administrators of School A practiced managerial leadership, which helped to ensure the implementation of the school's vision and strategy. However, the "managerialist" approach also lacked the student-centred vision after the separation of the two schools. In contrast, the transformational leadership (Bush, 2005) of the principal of School B successfully engaged staff, parents and social human resources, who worked together to achieve the school vision.

6. Strengths and limitations of narrative inquiry

The author made use of her own experiences at two schools to investigate educational changes and leadership in the last two decades. The case study helped to organise the author's analysis of the two schools' development processes. As a researcher, the author made use of materials from the websites, reports, student interviews, reflections and memory. With the help of a literature review and the framework of Dimmock and Walker (2005), this study investigated the changes in these schools at the macro-, meso- and site-levels. The organisational culture and wider societal cultural framework help us to understand the decision making of the leadership during the period of educational reform. Understanding how the processes of organisational development and cultural change are influenced by trends in global and regional cultures, societies and individuals helps us to understand the strengths and weaknesses, the successes and failures of educational reform in Hong Kong.

To a certain extent, the two schools reflect the complex interaction of global, local and individual school contexts during the process of educational reform. Yet, the interpretation of data, events, relationships and descriptions from only one angle may be biased. Nevertheless, the subjectivity of the author's findings and interpretations is itself a social phenomenon. Although the reliability and validity of the data collection and interpretation could be improved through more interviews from different stakeholders, the author's mind-set remains deeply influenced by particular temporary and historical social influences. Many experts believe that a person's way of thinking comes from their life experiences. First-hand experience is the most profound and influential. Under globalisation, second-hand information from developed countries is becoming common. It is only local people who understand their own culture who can ensure that this does not result in internal contradictions and struggles (Cohen, Manion, & Morrison, 2011). The main findings of this study may not be generalisable to other schools, but it is valuable to interpret the whole from a particular angle. They are helpful for promoting further

investigation and discussion. More cases will help to reconstruct the broader process of educational reform. Different stakeholders may offer different interpretations and arguments. This study offers a case study for reflection and further discussion.

7. Conclusions

The case study indicates that education in Hong Kong has undergone numerous changes in the last two decades, with a variety of school-based curriculum initiatives. Some of the schools are still management-oriented and school leaders strongly influence school development. Some transformational leaders have successfully motivated followers to adopt a paradigm shift from managerialism to professionalism. Managerial leadership is an essential component of successful leadership. Transformational leadership effectively improves student outcomes (Leithwood, 1994), but only with effective implementation. Many schools have carried out the first phase of the change process, but have not continued into the second and third phases. This case study shows that without essential systems and mental mode changes, educational reform will not be effective and consistent. Although curriculum development with project learning, interdisciplinary school-based teaching and learning has been implemented in schools with the creation of new posts such as PSMCD and APSM, without the support of the principals and the co-operation of senior administrators, the curriculum reforms will not be successful.

Further educational reform now needs to consider how to develop whole school professionalism, which will guide teachers to construct and carry out life-long learning for the next generation. Moreover, to promote Hong Kong as an education hub (Education Commission Working Group on the Development of Education Services in Hong Kong, 2011), the primary schools should prepare students to be young learners with a global view of active citizenship. Educational reforms that follow global changes too closely without considering our own context may hinder leadership development in the Pacific-Asia areas especially in Mainland China. Nowadays, the developed countries are looking at the Fourth Way of educational reform (Shirley, 2011). However, without foundations, logical thinking, practical investigation, educational research, contextual needs analysis and pedagogical support, we can only follow behind the modern world and cannot make good decisions that are appropriate to our own region and its place in the global world. As educators, we need to be concerned about the relationship between management and educational leadership at schools. Moreover, we should pay more attention to the relationship between the needs of our own city and educational reform. Preparing the next generation to face the complex and diverse world as potential leaders is our responsibility. There are still many things that educational leaders need to discuss about the best ways to nurture our students. The author hopes this case study will allow people to use the parts to see the whole. Then, our educational reform can match the needs of our stakeholders.

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香港小學教育變革與領導的個案研究

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摘要

本研究採用 Dimmock 和 Walker 兩位學者的跨文化比較的框架為香港兩所小學之教育變革和領導文化作探究。分析表明,香港學校課程變革受全球化社會教育大趨勢、本港教育變革次文化,以及學校自身過程的領導變化等因素影響。個案展示與比較不同領導風格處身宏觀文化社會、國家與全球化下對本港過去十五年教育改革的影響。

關鍵詞

跨文化比較框架,教育變革,教育領導,敘事探究

香港學校生命教育的教學與評估：
以六所學校的孝親教學為例

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摘要
近年香港社會急劇轉型，學童問題日趨嚴重，自殺、霸凌、濫藥等情況日熾。不少社會賢達以為問題源於學童缺乏對生命的關愛及省思。故此，不少辦學團體、學校和教育工作者嘗試透過生命教育方式，開展德育及公民教育專項，強健學童心志，藉此回應知識型社會及資訊科技時代對學童成長的挑戰。

本文並非學術研究，旨在分享生命教育專業經驗：透過六所香港學校推行的孝親教學單元，嘗試疏理校本生命教育課程的現況，討論其良好經驗，並提供改善建議。

關鍵詞
生命教育，孝道教育，香港的德育及公民教育

甲、引言

　　為回應知識型經濟及資訊科技時代的契機與挑戰，香港政府在回歸後推出了一系列教育改革措施（香港特別行政區政府行政長官辦公室，1999）。而在 2001 年後，在教育局的政策文件，如《學會學習——課程發展路向》及《基礎教育課程指引（小一至中三）》等，均指出發展德育的重要性[1]。在這個背景下，近十多年，不同辦學團體[2]、學校、教育工作者，乃至教育當局[3]，更嘗試以生命教育作為德育的載體。

　　在 2011/12 年度行政長官卓越教學獎德育及公民教育範疇中，全部得獎學校均是以生命教育方式推行公民教育，從中可見這種模式能有效陶育學生正面價值觀，並得到教育工作者的認同。究其原因，除因其內涵不悖教育當局的指引外[4]，更可能與其重視情意激盪的教學方式有關。傳統的德育課程設計較傾向認識概念，如指出孩子保護自己的方法，但這種做法令學生只對有關價值觀有知識上的認知，而無法推動他們行動。而生命教育重視情意激盪，感染和幫助學生更深入體會相關概念，從而作出抉擇和行動（陳美華、李尚穗、簡秋蘭，2011）

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1 在 2001 年課程發展議會發表了教改藍圖：《學會學習——課程發展路向》。課程改革的宗旨除了幫助學生培育共通能力，以獲取和建構知識，成為擁有終身學習技能的終身學習者外，更重視正面價值觀和態度的培育，以全面發展學生潛能，幫助學生在新社會環境中安身立命，為本港社會、國家及世界作出貢獻（課程發展議會，2001）。在 2002 年，課程發展議會再發表了《基礎教育課程指引（小一至中三）》（下稱《指引》），期望學校在十年內（2012 年前）幫助學生實踐七個學習宗旨，其中「責任感」、「國民身份認同」和「健康生活方式」，均與德育直接相關。為此，當局將德育及公民教育列為五種基要的學習經歷及四個關鍵項目。考慮學生個人群性發展需要和當時社會情況，《指引》開列出五種首要培育的價值觀和態度：「堅毅」、「尊重他人」、「責任感」、「國民身份認同」及「承擔精神」（課程發展議會，2002）。在 2008 年，教育局公佈了《匯聚百川流‧德雨育青苗：新修訂德育及公民教育課程架構》，作為《指引》的補充。在這份課程架構中，除了清楚開列每個學習階段的學童成長需要及學習期望外，亦多加了兩項首要價值觀：「關愛」和「誠信」（教育局，2008）。在落實校本德育課程方面，局方建議學校將德育項目計入課時，及採用生活事件方式，整合不同範疇的價值教育，以促進學生的全人發展（課程發展議會，2002；教育局，2008）。至於具體開展的模式，則未見有太多著墨。

2 在 2002 年香港聖公會東九龍教區成立了生命教育資源中心，全面支援屬校及友校開展生命教育的學與教（香港聖公會東九龍教區，2013）；循道衛理聯合教育於 2005 年發展「優質生命教育發展計劃」，發展屬校的生命教育的正規、非正規和隱蔽課程（梁錦波，2013）等。

3 近期，教育局發佈了《遊戲中覓方向‧體驗中悟道理——生命教育互動學習教材》。該教材從「認識生命」、「欣賞生命」、「尊重生命」和「探索生命」四方面，提供一系列配合生活事件的教學材料，具體地說明如何在德育及公民教育框架下開展生命教育專項（教育局，年份不詳）。

4 據孫效智（2001）的看法，生命教育是新穎的概念，有不同的定義。而較廣泛來說，其目標是啟發生命智慧，整合知情意行，深化價值反省。而且，生命教育涉及多個範疇，包括宗教教育、情緒教育和人格調整等，十分廣泛。簡言之，生命教育貫通天人物我，重視宗教、自然、個人和他人之間的關係。而這些內涵，均與教育當局揭櫫的首要價值觀有暗合處。

根據梁錦波（2013）的說法，生命教育於香港已有十多年的實踐經驗。所謂十年樹木，實有需要整理本地的生命教育開展經驗，並討論推行過程中的良好經驗和找出可改善之處。故此，本文擬透過評析六所致力推動生命教育小學的孝親單元，整理其推行經驗，提出發展建議[5]。

乙、中國儒家經典中的孝親觀念

筆者根據儒家經典《論語》、《孟子》、《禮記》和《孝經》，以電腦檢索方式搜索含「孝」字的文句，發現共有 128 句，頻次達 152 次。而近儒唐君毅（1960）指出，孝行為仁之本，而「由孝父母，而及於父母之父母，及於祖宗。孝之擴充，為孝於整個之民族，而忠於民族之歷史與文化」。由此可見，行孝是踐行儒家道德倫理價值的重要標準之一。

雖然本文的主旨並非探究孝道在中國文化的哲學本質。然而，由於儒家經典的孝親價值涉及教師如何理解孝親的重要根據，而這些理解又直接影響教師編訂課程目標、教學步驟及評估標準，故此，有需要先略為釋述孝親的內涵。

「孝」字的甲骨文是「𡥐」，其中上部「𦒴」是「老」字「𦒶」的省略，而下部「𡿨」則是「子」字。「孝」是會意字，其圖示方式為老人在上，小子在下，即有兒子（小子）攙扶父母（老人）的意涵（許慎，1972）。而《說文解字注》根據《禮記》為「孝」字作注，注文為：「善事父母者」，即善於侍奉父母長輩（段玉裁，1981）。至於怎樣才算是善事父母的孝者呢？按楊國樞、葉光輝（1991，頁 47）的理解，孝可分為四個層面：

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5 本文之所以會選用孝道主題說明本港生命教育的推行現況，其原因有三：首先，不論宗教文化背景，不少學校及教育工作者均將孝親內涵納入德育課程中。以一項本地生命教育支援計劃為例（為保障參與計劃學校的私隱，計劃名稱將以匿名方式處理（下稱：某生命教育計劃）。下文處理辦法相同，不贅），有三成學校同工已選擇了孝親作為試行單元的主題。故此，選用孝親內涵說明主題，較易引起讀者的共鳴，切合專業分享的定位；再者，孝親涉及公民教育中的多個價值觀，包括「尊重他人」、「責任感」及「承擔精神」，也是中國重要的文化內涵之一，與「國民身份認同」有關。故此，孝親內涵符合課程要求。最後，生命教育揭櫫的知（知識）、情（情感）、意（意志）、行（抉擇）均能在孝道單元中彰顯（詳見正文）。這有別於一般只能教導知、情、意的主題，如性教育。故此，透過孝道主題單元，可以較全面了解本地生命教育的發展優勢和局限，較為切合題旨。

層面	定義
孝知	孝的認知層次，即子女對父母的良好認識、瞭解及信念
孝感	孝的感情層次，即子女對父母的良好情緒或感受
孝意	孝的意志層次，即子女對父母的良好行為意向或反應傾向
孝行	孝的行動層次，是上述三個孝道態度層次的實踐

　　礙於主題所限，茲不為上述四端列舉經典原文。有關解說可見楊國樞、葉光輝（1991，頁 48-52）。從上文所見，在規劃孝道課題時，不應只停留在認知層面（孝知），亦應重視為人子女對父母應有的態度和抉擇（孝感和孝意）。以上四者，即為生命教育揭櫫的四端：知（認知）、情（情感）、意（抉擇）、行（行動）。

丙、香港學校的生命教育學與教——以六所學校的孝親單元為討論中心

　　為了解香港學校生命教育學與教的推行概況，筆者從某生命教育計劃中，選取了六個跟孝親相關的教學作說明。而在某計劃的成果彙編（下文稱作「彙編」）中，載有這六所學校的教學目標、教學材料和評估等資料，可以分析其施行目的及實踐過程中所面對的困難及處理辦法。

一、策劃生命教育項目的考量因素

　　在進行學校支援過程中，支援團隊成員觀察到教師普遍認同孝親教育。例如，教師均坦言是受近年的倫常慘案等新聞啟發，他們認為「百行以孝為先」，當學生透過孝親單元，學會孝敬親人，除了能緩和學生與家人之間的衝突，也能幫助學生推己及人，尊重他人。從這個觀點看，教師策劃生命教育項目的考量因素，包括對社會需要或社會改良的角度作出抉擇，他們認為孝親教育可以培育學生遵從社會秩序、養成學生感恩和尊重他人的性向，達到移風易俗之效。

　　此外，教師重視開展課程的可操作性，如教學資源的獲得。在學校支援過程中，不少中層老師有意無意間反映，推行孝道教育肇始於其優質教材。由於現時市面有不少有關孝親的繪本、閱讀篇章和歌曲，加上台灣也有類似的課程，有助老師搜集良好教材。

因此，一般教師對孝親教學不持反對態度。相信這亦是中層老師在編訂課程內涵前的考量因素。

二、生命教育項目的主要教學及評估策略

　　吳宗立（1999）認為，生命教育宜以多元化方式進行，透過不同的體驗活動，幫助學生主動建立及發揚其情意。在彙編中，每所學校均採用了不同的教學策略。茲將其選用策略及有關說明表列如下：

教學策略／活動	學校甲	學校乙	學校丙	學校丁	學校戊	學校己
在課堂直接講授	✓	✓	✓	✓	✓	✓
講宗教故事		✓			✓	
教師分享自身的生命故事	✓		✓		✓	✓
講繪本故事	✓	✓	✓	✓		✓
電影欣賞						✓
戲劇	✓	✓				✓
體驗活動（如：護蛋行動、模擬懷孕、種植等）	✓	✓	✓	✓	✓	✓
詩詞誦讀／歌曲頌唱		✓			✓	✓
生命禮儀（如：畢業禮、啟動禮等）			✓			✓
詩歌創作／藝術品創作／撰寫心意卡／文章寫作	✓	✓	✓	✓	✓	✓
學生討論及分享	✓	✓	✓	✓	✓	✓
課後行動	✓	✓	✓	✓	✓	✓

從上表中，可以將不同學校採用的教學策略 ／活動作出以下分類：

・　課堂直接講授：透過教師面授，直接向學生傳授價值內涵。

・　故事及影視材料分享：透過教師自身故事、宗教故事、繪本故事、電影及戲劇，利用小故事說出大道理，並讓學生觀察在他者身上的生命故事，再作相關引導，以反思自身處境。例如，其中一所具基督教背景的學校透過聖經的比喻「浪子回頭」，教授學生父母無私的愛和對子女的包容，以故事形式，加深學生對有關概念的認識。

- 體驗式學習：透過盆栽種植、懷孕體驗、護蛋行動等以學生為中心的體驗活動，讓學生代入指定角色。再透過解說（Debriefing）方式，澄清學生的觀察，讓他們自行說出個人感受及反思。

- 詩詞及歌曲頌唱：透過教授文藝作品（包括詩詞及流行曲）的文本，間接向學生傳授價值內涵。再鼓勵學生集體頌唱或誦讀文藝作品，利用集體力量，將價值內化。例如，其中一所學校教授學生歌唱流行曲〈真的愛你〉，並在過程中講解歌詞的意思，令學生對孝道有更深的印象，並增加情意激盪的效果。

- 生命禮儀：透過啟動禮、畢業禮等禮儀方式，增加情意激盪的作用。如在畢業禮中，學生會透過歌舞表現及詩詞誦讀，感謝父母的恩情，讓學生在邁向新階段時，同時反思過去父母的付出。

- 創作：透過創作不同的藝術作品（如：心意卡、新詩仿作、短文、視藝作品等），讓學生表達所學所感。

- 學生討論及分享：在教師帶領下，讓學生自行就生活經驗或教師提供的個案作出討論及反思，教師透過個別分享時段，聚焦學生的所思所感，並作出更深層次的引導。

- 課後行動：透過指定的行動（如：替父母完成家務），將課堂所學價值以具體的方式實踐出來。

在評估方面，根據彙編，參加學校的評估方式主要分為兩類，一類屬於活動紀錄及工作紙，另一類是學生回饋、老師和家長觀察。前者為學校常用的課業，茲不贅。而後者則有不同的展現形式，包括：教師的教學反思、學生個人反思及回饋、家長的評鑒等，幫助了解課程的成效。

而在活動紀錄上，各間學校的形式不同。例如：乙和丙校要學生紀錄個人孝行，在日常生活中實踐孝親。學校透過孝親紀錄表，根據學生行孝的次數和感受，評估活動成效。而甲、丙、丁和戊校則會要求學生在進行活動（如護蛋）時，紀錄對活動的感受。

丁、香港生命教育課程及實踐的良好經驗

良好經驗一：有效處理完整孝親教育的知、情、意、行內涵

　　從以上例子可見，香港學校採取多元的教學策略。透過課堂講授，教師將生命教育的基本知識直接傳授予學生，處理孝知（知）的需要。接著，無論故事分享、創作和體驗活動等，旨在激盪學生的孝感（情）和孝意（意）。

　　根據彙編，在體驗活動後，受訪學生表示能體驗父母的辛勞，會在將來努力回報父母。家長反映學生較過往更願意承擔家庭責任及嘗試向父母表達謝意。從學生和家長的感言中，可以看到以生動多元的教學方式能激盪學生的孝感和孝意。而為何這些教學策略能有效激盪學生情意呢？筆者擬以體驗活動模擬懷孕為例，作出說明。

　　綜合乙、丙和戊三所學校的經驗，在模擬懷孕活動中，老師先會透過「為寶寶命名」、「為寶寶畫上臉蛋」等方式，讓學生代入為人父母迎接新生命的喜悅之中，並透過「產前講座」等項目，提昇這份喜悅和帶出初為孕婦的不便，為之後的懷孕活動立下指示；其後，透過預設種種障礙的模擬懷孕活動（如：逛市場等），讓學生在現實環境中感受母親在懷胎時的辛勞；接著，透過解說，教師邀請學生分享，並透過已為人父母的教師作生命分享，帶領學生思考為人父母的艱難，反思怎樣在生活中孝順父母；最後，透過立願儀式（如：寫心意卡、祈禱等），讓學生決志以行動孝順父母。筆者認為，以上以學生為中心、漸進、軟性的教學方式，有助逐漸發展他們的孝知、孝感和孝意，有效處理情意教學目標。

　　至於孝行方面，學校老師通常以課後活動輔以工作紙及學生滙報方式作出處理。學校乙的一位家長對學生在活動過程中的孝行轉變作出描述，認為學生較以往主動與家長分享生活點滴。在日常生活中，學生更主動地照顧自己，也有幫忙做家務，家長對此表示感動。

　　從以上教學例子可見，學生在經歷了一系列以孝知、孝感和孝意為目標的活動後，即時在孝行上有所轉變。然而，這種行為改變是短暫的還是長遠的，目前未能作定論，尚有需要作進一步觀察。

良好經驗二：透過統整，在有限課時實踐生命教育，並對學生發展作持續支援

香港大部份學校的生命教育課的課時不多[6]。由於課時有限，倘若學校要處理課程開列的所有價值課題，則不能在課堂中兼顧知、情、意、行的教學。故此，不少香港學校巧妙地透過課程統整方式，延展學習空間。例如，一些學校會在學科中（如：在中文科的課文教授孝順的方法）先行教授孝知內涵（知），從而騰出生命教育課空間，更集中醞釀學生的孝感和孝意（情、意），而孝行則以課後工作紙形式予以展示（如：設計孝行紀錄表，鼓勵學生紀錄其行孝過程）。而另一些學校則在學科中（如：在音樂堂教授讚頌親恩的歌曲、在視藝堂設計心意卡送給父母）處理孝感和孝意課題（情、意），而知識的傳授（孝知），以及行動成果的檢視（孝行），則會安排在生命教育課處理。從以上例子可見，學校透過課程統整，令生命教育能在正規課程時間進行，有更多空間灌輸有關價值，解決受課時限制的問題，也能提高各科的連貫性（陳健生，2008）。

另外，開展課程前的目標定位工作，及課程完結後的跟進工作也是需要處理的問題。根據團隊成員觀察，部分學校在籌備課程時，已考慮部分學生的個別需要（如：有家庭問題的學生）在課前作出輔導。在教學後，學校會鼓勵老師觀察學生的情緒反應，方便訓輔組同工跟進。

蔡培村（2001）指出，課程統整能將複雜的輔導概念放在各科教導，是有效將教訓輔合一的方法之一。從團隊成員所見，不少學校在教訓輔合一上，有清晰理念：先透過班級經營，確認目標；然後透過課程統整，延展學習空間，幫助學生從知、情、意、行四個方面全面掌握價值內涵；最後以訓輔個案跟進方式，對個別問題個案作出跟進。

戊、香港生命教育課程及實踐的改進建議

一、現況分析

在與參與學校交流經驗時，老師們均指出生命教育評估存在相當難度。

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6 按課程發展議會及教育局的德育及公民教育指引，建議學校在第一及第二學習階段，安排約 19% 課時、第三學習階段安排約 8% 課時，及於第四學習階段安排約 5% 課時，進行德育及公民教育（教育局，2008）。

在評估生命教育的成效時，不少學校均會選擇慣用的評估方式——學生課業評估。然而，由於不同教育工作者的測量標準不同，故存在一定的評核差異。而且，課業評估通常偏重文字表達，部分語言能力尚未發展完善的學生（尤其初小及有特殊學習需要的學生），可能較難仔細以文字方式，指出個人情感和意志的轉變，影響了評估的準確性。故此，部分學校以問卷方式，輔助課業評估，更全面了解課程的成效。透過問卷方式，可以更全面了解家長與學生對課程的評價，而從家長對學生家中表現的反饋，更可以分析課堂教授的正面價值能否轉化成學生的行為，以補充一般紙筆課業評估的不足。

但由於老師未有接受長期、專業的擬寫問卷培訓（梁恩榮、吳迅榮，2004），學校支援團隊成員發現，一些生命教育評估問卷設計，仍有進步空間。

二、優化評估的方向

為了優化學校的評估工具，本文參考楊國樞、葉光輝（1991）和楊國樞、葉光輝、黃曬莉（1989）制定的孝行測量工具為例，說明生命教育評估的可能發展方向：在大學學者的帶領下，參考心理測量量表及情境測驗，優化評估工具。

此項測量工具將孝道分為孝知、孝感、孝意和孝行四個不同層面，並以李克特量表和情境測驗進行測量。這種設計既能了解受試者對不同孝道層面的贊同程度，更能深入探究受試者選擇背後的動機。另外，本文選用楊國樞、葉光輝的評估工具，是因為他們能根據生命教育的概念分類孝道思想，較能個別測量出課程在知、情、意、行四個層面上的教學成效。而楊國樞、葉光輝、黃曬莉的情境測驗，其測驗問題與真實環境相似，一般用作探索人格的測驗（葉重新，2010），則有助深入了解受訪者對孝道的看法。

然而，此類測量表雖能有效評估受訪者對孝道的認知、感受及實踐等，但該量表本用作測量高中生及成人，所以對中小學生而言，用字可能較為艱深，而題目的處境未必與其真實生活有關。事實上，不少能評估生命教育概念的量表無法應用在中小學，往往也是受這些因素所影響。因此，下文將會提出一些改善建議，以供同工參考。

建議一：用淺白的字詞代替學童不懂的艱澀字詞

　　據參與計劃的老師反映，評估困難包括學生無法理解部分問卷的用字。故此，筆者建議學校可參考《小學中文科常用字表》，改寫問卷的用字。以楊國樞、葉光輝（1991）孝行測量表為例，其中一條「為了不增加父親的困擾，你在外是否應該言行小心，少惹麻煩？」，「困擾」一詞或對初小學生較艱澀，影響他們理解題目內容。

　　有論者認為，倘學生因種種原因，無法自行解讀問卷的內容，調查者也可讀出題目，給學生作答（Hopkins, Stanley, & Hopkins, 1998）。然而，這方法雖能在一定程度上幫助文字閱讀能力較弱的學生了解問題內容，惟所需的人力資源較多，而調查者亦有可能在解題過程給予學生作答暗示，影響問卷調查的客觀性。

建議二：考慮學生的程度，將複雜概念簡化

　　由於大部份孝道評估工具都是針對高中學生及成人而設計的，故此，當將之用在小學生身上時，便要將部份學生未必能理解的複雜概念稍作修訂。以楊國樞、葉光輝、黃囇莉（1989）的處境題為例，受訪者需要從「順從父母的意思，另覓伴侶產子」，還是「保持美滿的婚姻」之間作出選擇。這個兩難局面涉及「不孝有三，無後為大」的觀念，學生未必能清晰掌握，故較難作出回應。

建議三：處境題目要生活化，或乾脆刪減以留待日後再用

　　在參考情意量表時，前線同工可能要考慮問題提及的狀況是否與學生的生活有關。若前線同工面對以上問題，可能要將題目處境改為與訪問者的生活有聯繫，或將該題刪去。以楊國樞、葉光輝（1991）的情意量表為例，其中一條「為了照顧父親，你是否應該有自我犧牲的精神？」，相信較難令學生代入處境作答。若具體地開列自我犧牲的內容（如：放棄打電玩的時間），或會令學生更能代入處境。

己、小結

本文並非學術研究，然而，經初步整理部分學校在推動生命教育的經驗後，發現學校在課程統整、輔訓教合一、教學策略等方面有較佳表現；然而，在評估方面，不少學校仍有進步空間。

傳統評估方法可分作認知測驗和情意測量（Hopkins, Stanley, & Hopkins, 1998）。而在本港的評估發展，較多著眼於認知測驗評估。至於反映典型表現的情意測量，則仍有很大的發展空間。其實，在西方亦有研究顯示，教師在評估學生的情意反應時，面對不少困難（Schon, Hopkins, & Vojir, 1980）。而情意評估，相信困難不僅僅在於生命教育範疇，在整個教育界也是難題之一，尤其評估對象是心智尚未成熟的學童。

筆者相信，若大學學者願意參考心理測量量表及情境測驗並加以優化，在應用於中小學時，或許便能突破上述的困難。首先，教育科研同工可以透過訪談等觀察方式，了解前線教師的評估難點，並就這些難點，按上文提及的三項建議，發展新的評量工具或修訂現有用於成人身上的評量工具。然後，在前線老師的幫助下，以嚴謹方式測試評估工具的效度。最後，透過教師專業發展方式作知識轉移及聆聽前線教師的需要，對評估工具作出微調。相信在這種模式下，或能突破現有情意評量的困難，從而做到從評估（Evaluation）反饋策劃（Plan）及教學落實（Implementation），建立「策劃——落實——評估」的良性循環，讓生命教育更臻至善（教育局質素保證分部，2008）。

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附錄

六所學校的孝道教育單元、施教對象、評估方法和教學材料

學校	單元	施教對象	教學策略／活動	教學材料	評估方式
甲	惜福‧感恩‧孝順活動：真的愛「您」	小二	●體驗活動（護蛋寶寶） ●故事和繪本賞析 ●向父母呈獻感恩卡 ●在卡紙上寫上感謝父母的話	●工作紙（蛋寶寶成長日記） ●親親我的寶貝繪本工作紙 ●真的愛你承諾行動表 ●護蛋寶寶家長信 ●護蛋寶寶工作紙	●教師觀察 ●工作紙（蛋寶寶成長日記） ●行孝記錄
乙	以科目統籌方式進行生命教育：感恩‧孝順系列	小四	●圖書閱讀 ●誦讀〈遊子吟〉 ●領唱有關母愛的流行曲 ●戲劇教育 ●製作心意卡 ●分享有關聖經故事	●中文課、宗教課、戲劇課、視藝課、音樂課教案 ●父母恩——讀書札記 ●〈遊子吟〉課業 ●父母恩記錄冊	●教師觀察 ●感恩卡 ●讀書札記 ●新詩創作 ●給爸媽的信 ●孝順記錄冊
丙	全校動起來：感恩與惜福	小六	●繪本欣賞 ●產前講座 ●模擬懷孕 ●為小孩（氣球）改名及畫圖	●愛，由我開始（行動紀錄表） ●我的小寶寶及反思工作紙 ●製作小學紀念冊教案 ●模疑懷孕活動反思問題紙 ●英文寫作、中文科教案 ●模擬懷孕教案 ●家長及學生感言	●教師觀察 ●〈小學紀念冊〉 ●學生心意卡 ●新詩創作
丁	感激之情在心頭：體驗親恩‧報答劬勞	小五、小六	●產前講座 ●模擬懷孕 ●栽種植物 ●電影及繪本欣賞 ●製作感謝卡 ●歌曲頌唱	●分組活動觀察紙 ●「給種子一個家」工作紙及投映片 ●「感恩父母的愛」工作紙及投映片	●教師觀察 ●感恩卡 ●栽種活動紀錄工作紙 ●分組活動觀察紙

六所學校的孝道教育單元、施教對象、評估方法和教學材料（續）

學校	單元	施教對象	教學策略／活動	教學材料	評估方式
戊	以行動情，情生意動，「飲水思源」系列	小四	● 圖書閱讀 ● 歌曲欣賞 ● 課文教學（中文及聖經科） ● 體驗活動（模擬懷孕、護蛋行動）	● 我的寶貝蛋工作紙 ● 護蛋行動反思工作紙 ● 自評表（護蛋行動） ● 護蛋行動日程表 ● 飲水思源教案（孝順）及工作紙 ● 模疑懷孕活動自評表 ● 愛的小記者工作紙（訪問母親） ● 模擬孕婦障礙教學計劃	● 家長評鑒表 ● 學生寫作 ● 學生即場分享 ● 心意卡 ● 學生對家長懷孕時的訪問記錄
己	觸動、沉澱、反思、感恩、實踐：感謝生我育我的人	小六	● 電影欣賞 ● 詩歌頌唱 ● 盆栽種植 ● 繪本欣賞 ● 新詩創作 ● 分享見證（教師及傳道人） ● 畢業獻禮 ● 製作成長冊 ● 以行動表達感恩：在畢業禮透過不同方式向父母表達謝意	● 成長冊 ● 生命教育專業實踐教案或活動設計	● 學生和老師的回饋 ● 學生的感恩卡 ● 植物成長手

Teaching, learning and assessment of life education in Hong Kong: A case with the teaching of filial piety in six schools

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Abstract

Under the backdrop of recent rapid social transformation in Hong Kong, students' problems like committing suicides, bullying and drug abuse have become increasingly critical. Some suggested that a paucity of students' caring for and reflecting on lives is the origin of the above-mentioned problems. In assisting students to respond the challenges of knowledge-based society in the era of information technology, many sponsoring bodies, schools and educators develop moral and civic education through life education to strengthen students' values.

This article aims at discussing the good practices and identifying possible improvements on school-based life education curricula exemplified by the teaching modules of filial piety in six Hong Kong schools.

Keywords

支援學校應用知識管理的香港經驗

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摘要

根據國際文獻，知識管理在教育領域的應用與推廣，相對於其他行業來說起步較遲。香港初等教育研究學會曾於 2010 至 2012 年期間推行「知識管理與小學發展」計劃，在十間小學推廣和實踐知識管理的理念。筆者兩人從中選取三個成功的小學個案，分別從知識管理系統、知識管理的領導和組織分享三個角度闡述學校應用知識管理的實況。為了有效描述這個案的經驗，筆者兩人除採用該計劃的資料外，還約見三校負責同工作深入訪談，剖析三校推行知識管理的應用細節。

關鍵詞

知識管理，學校發展，香港小學教育

甲、知識管理在教育的應用

　　知識管理的概念來自商界的策略管理，並視知識為促進組織發展的資源（Prusak, 2001）。上世紀，已有不少企業利用知識管理概念整理組織，從而利用轉化成組織的知識促進企業的發展。知識管理在教育領域的應用與推廣，相對於其他行業來說起步較遲，2000 年國際經濟合作與發展組織公佈的《學習社會中的知識管理》，指出知識管理在「公共部門包括教育部門，知識傳播與應用程度較低」。Sallis & Jones（2004）在《教育知識管理》一書亦指出，學校正進入經濟效益越來越依賴組織創造知識的能力的時代，社會期望學校為競爭激烈的知識型社會發展人力資本，並管理好教學知識。由於教育和

課程的改革，大量新知識迅速湧現，大眾期望學校管理人員強化校內獲取知識的能力，而教師也需發展自己的學習，整理好內隱知識和促進組織知識的分享。Serenko, Bontis, Booker, Sadeddin, & Hardie（2010，頁 3）也指出，有關知識管理或人力資本的核心概念於近十年才冒起，但其多元學科取向使相關研究在不同學科內既有吸引力亦有很多成果。基於上述國際文獻的發現，香港學校也應引入知識管理概念，以促進學校發展和教師專業成長。

　　香港方面，李子建教授於 2004 年在〈課程領導與教師專業發展：知識管理的觀點〉一文內，提倡利用知識管理推動學校成為學習型組織，知識管理經過共同化（或稱社會化）、外化（或稱表達）、結合（或稱整合）及內化這四個方式螺旋轉化（Nonaka & Takeuchi, 1995），成為有利學校組織和教師個人發展的新知識。教師就可按其校情，在變化不斷的社會中適應新要求，以適切方式推展校務和提昇教師的專業發展，最終令學校發展和學生得益。進行知識管理的目標是在組織建立系統以儲存知識，並發展一套機制把知識轉化為智慧資本（Edvinsson & Malone, 1997; Stewart, 1997），換言之就是創造一個學習型組織（Bollinger & Smith, 2001）。知識管理是指能被收集、整理、共享和分析的個人或集體知識、應用知識和其他知識資產，這些都能令與知識相關的效率提升至最高（Wiig, 2004）。在學校教育的層面，知識管理不單為教師提供方法討論教學，發展學生的學習資源，也保留了富經驗教師的專業知識，增加他們在教學和學習表現的效率，支持學校發展知識社群，促進學習文化（Leung, 2010）。綜合而言，應用知識管理能使學校和教師皆得到發展和成長。

乙、支援學校應用知識管理的計劃

　　知識是人類的資源，與學習過程緊密關連，面對教育改革和社會發展的挑戰，學校應研究如何提升自身的學習能力，好好管理新訊息和知識。Sallis & Jones（2004）把有建設性使用學校固有訊息和知識以提升表現、管理和運作的過程定義為知識管理。學校的知識管理可以視為一套策略管理的方法，讓學校組織內的教師發展一套實踐或知識策略，以收集訊息和分享所知，引發改善教學與學習成果和學校學習能力的行動，最終達至學校的持續發展。香港初等教育研究學會曾於 2010 至 2012 年期間舉辦了「知識管理

與小學發展」計劃，在香港十間小學推廣和實踐知識管理的理念，以提高知識管理在香港小學的普及與應用。在年半的計劃內，香港初等教育研究會向參與小學提供系統培訓、校本診斷、校本教師培訓、友校參觀、內聯網和支援行動學習等專業學習活動，以提高參與小學教師對知識管理的理解與應用，從而促進學校校務和教師專業的發展，使學校管理得更有效。在這個知識管理專業發展計劃中，該會提供了「知識管理在小學的應用」及「提昇校本知識管理」兩個系統課程，每個課程都有 9 小時的專題學習，分別由學者講解理念及前線同工分享經驗。與此同時，計劃又給予參與學校同工提供各 7 小時的校本診斷和培訓，各校可按校情需要進行不同重點的培訓，在每間學校進行校本培訓前還會派出代表先進行焦點訪談，以分析及診斷各校同工對培訓的期望，使培訓更能促進各校教師的專業發展。

這個「知識管理與小學發展」計劃兩期共有十所參與學校，分別是：打鼓嶺嶺英公立學校、荃灣公立何傳耀紀念小學、香港教育學院賽馬會小學、嶺南大學香港同學會直資小學、聖公會德田李兆強小學、中華基督教會基法小學（油塘）、保良局百周年學校、佛教林金殿紀念小學、香港教育工作者聯會黃楚標學校和聖公會聖馬太小學。這十所小學的同工在參與計劃過程中，須完成一個行動學習和就校本的知識管理經驗作分享。本文首名筆者為該計劃籌委會成員之一，經參考同工的學習成果後，認為其中三所學校的個案既有成效又有校本特色，故聯同本文次名筆者，分別從知識管理系統、知識管理的領導和組織分享的理論架構（Cheng, 2013），去闡述這三所學校（下文分別稱為：甲校、乙校、丙校）在應用知識管理的情況。選擇這三個個案的一個重要原則，是基於這三個個案分別包含推行知識管理的三個關鍵因素：資訊科技（Alavi & Leidner, 2001）、組織領導（Cavaleri & Seivert, 2005）及分享文化（Davenport & Prusak, 1998; Pan & Scarbrough, 1998）。

內地學者劉倩倩（2014）在《隱性知識顯性化研究綜述》一文指出：「眾多的研究中，只有極少數隱性知識共用的研究有實證或個案研究」（頁 147），因此，將學校在應用知識管理的個案經驗作外顯，對於其他學校運用知識管理去改善學校管理工作和促進教師專業發展具參考價值。

知識管理的其中一個措施是系統地整理組織知識,甲校是十所參與計劃學校中,最善於運用知識系統去建構和整理學校的顯性和隱性知識。乙校的分享焦點在於促進科組主任成為知識管理者的歷程,「在現代企業管理中高層企業主管擔負著制定和實施知識管理的主要職責,同樣學校主管也擔負著制定實施知識管理的主要任務」(王萌亞、金玉梅,2011,頁 25)。丙校則著重於組織的知識分享,Cheng(2012)指出,「知識分享是個人學習能力與組織學習能力的預測因素,這顯示知識分享是提升學校學習能力最重要的知識流程」;丙校經驗說明了善用外來專業計劃,可促進校內教師交流的分享,從而發揮學校推動正面文化的發展策略。為了有效解釋這三所學校應用知識管理的經驗,筆者兩人除了採用香港初等教育研究學會相關計劃資料外,還約見三所學校的負責同工作深入訪談,以三角檢定方式核實各校推行知識管理實踐的細節。

一、學校的知識系統

「學校中的知識管理並不是定義為『知識』本身得到管理,而是一種管理思想和管理行為,其工作包括教育教學知識的找尋、研發、整理、儲存、流通和利用,從而實現教育知識的信息化和價值化」(樊平軍,2010)。知識管理的一個重點是透過資訊科技將組織知識儲存於資料庫中,經過適當地分類並儲存相關知識,有效促進校內同工分享與利用組織的知識。學校應用知識管理首先要制定一個知識管理系統,才可有效累積和儲存學校個人和組織的知識,方便同工搜尋和分享學校的資訊和知識,並作有效的運用和創新。甲校作為一所有幾十年歷史的學校,校內儲存文件數量越來越多,有效儲存和整理這些資料正是刻不容緩。藉著參與這個校本專業支援計劃,正如下文負責同工在訪談中所分享,學校引入了更多資訊科技,將學校教學和管理的數據、資料和文檔存入一個知識系統內。在構建組織內的知識地圖時,知識編碼是一項比較頭痛的事情,因為編碼方案既要考慮現實,又要考慮學校長遠需要,如果考慮不周全,知識地圖的編碼規則就得被迫經常修改變更。正如易凌峰、楊向誼(2006)所說「知識制圖對組織內的知識進行分類配合組織的專業術語,將知識分門別類地歸納在不同的範疇內,並標示其間的關係」(頁 25)。

> 「因為學校儲存文件數量不斷增加、存放地點分散、資料容易變黃、提取資料及檔案費時、難於監察資料儲存和應用與儲存的效率低等原因,學校藉參與

　　　　這計劃認真地將所有學校文件檔案資訊化，使學校資料、資訊和知識更有效
　　　　地儲存和分類，以方便同工提取和分享學校的資訊和知識。」

<div align="right">（甲校負責同工訪談的分享）</div>

　　「知識地圖是表述或分類知識關聯和知識概念的工具，它不僅可以揭示知識的位置
和知識間的關係，還可以成為隱性知識界面，起到了一種為詳細知識搜索導航的功能，
依據知識地圖對知識內容的科學的分類，可以幫助使用者快速查找其所需要的知識點」
（張瑞珏、李馨、周霞霞，2014，頁 25）。甲校同工經討論後決定配合香港的視學系統，
將資料分成「管理與組織」、「學與教」、「校風及學生支援」和「學生表現」等四範疇；
圖一是甲校的知識地圖，這個知識地圖能將學校文件資料和知識清晰地編碼和存檔，校
內教師就能按系統編碼逐級尋找所需的資料和知識，為學校管理的效率提供優化的基礎。

圖一　甲校的知識地圖
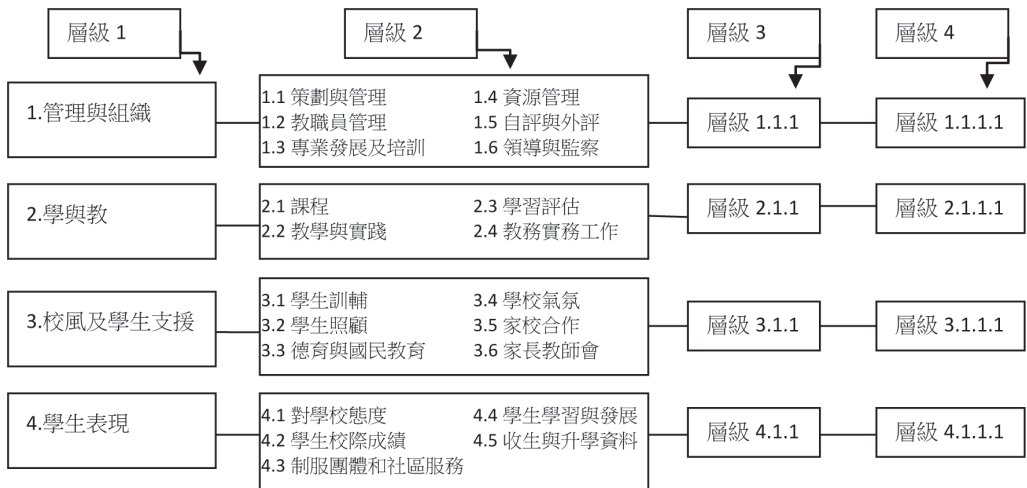
<div align="right">（引用：香港初等教育研究學會，2012，頁 10）</div>

　　與此同時，甲校在參與計劃過程中還利用 Google 的優惠平台，發展了一個全校學生
個人檔案、學生學習概覽、學校影片和學校相片資料庫，不單可使校內師生瀏覽相關資
料，使學生家長透過網絡了解學生在學校學習或參與校外活動的情況，加強家校溝通，
促進合作，亦有利於學生家長在家進行親子溝通。資訊科技雖是知識分享的必要條件，

但它可以使知識分享變得更有效率，能影響所蒐集的資訊量和所需花費的時間。甲校能利用資訊科技建立一個學校知識系統，不單使歷年的學校資料文件有效處理，並使同工在找尋和更新資料文件時，有較高的行政效率。該校同時亦建立了學生資料庫，有效促進學生資料的處理和家校溝通。

二、知識管理者的領導

知識領導在知識管理的定位是扮演了整合知識資源和推動知識管理的關鍵角色（張文權、范熾文，2011）。理解知識管理作用的同工皆知道，有效的知識領導是需要以推行知識管理作為發展任務，帶領校內同工落實應用知識管理。而明確知識管理者的角色與職責，是落實學校知識管理的重要策略；知識管理者作為促進知識分享的領導者，其「任務是瞭解學校和教師的資訊需求，監督保證知識庫內容的品質和深度，對知識庫進行維護，確保知識庫的及時更新，並提供相應的檢索幫助等」（譚朝陽、李紅波、黃利妮，2014，頁93）。乙校參與這個計劃的優化策略，是確立學科主任在校內的知識領導角色，並要求學科主任承擔組內溝通的責任，推動各級組長將學科知識有效傳播。下文引出該校負責同工在訪談時，說出科主任和各級級長在知識溝通與傳遞的功能。

> 「*在計劃過程中有機會重新整理學校科組的工作，科組由科主任、科顧問、級長組成，負責聯絡和統籌班級。以往科主任要以一對全校教師將資訊傳遞，訊息傳遞較難；現在科主任只須將重點向六個級長交代，再由級長轉達給各級老師，令隱性和顯性知識較易傳遞。*」
>
> （乙校負責同工訪談的分享）

學科主任是中層管理者，在上層和下層間扮演中介角色，並位於垂直和橫向資訊流通的交界，是學校組織的知識溝通者和創造者。「知識管理者責任在於協調部門內成員的工作，使得知識能共同分享而不致支離破碎」（程晉寬，2014，頁8）。為了充分發揮中層人員作為知識管理的領導角色，乙校在各科內除設一位科主任外，在四個主科內更設兩位副科主任。與此同時，該校亦在科內設各級組長，負責處理級內科務文件資料，這可確保各級學科教學的資料妥善儲存和編碼。此外，該校同時亦清晰地確定學科手冊的內容（見下表一），以便新任同工順利承接和開展科務。「科組主任必須負責整理科

組的共有知識，將相關資訊和知識放入學校的知識地圖內，讓這些科組內的知識成為學校的組織知識，可供其他人利用和改良，從而有益於校內團隊推行各項工作和任務」（香港初等教育研究學會，2012，頁 34）。乙校能釐定學科主任擔任科務知識管理的領導責任，並在科內設立六級級長，這明顯地推動了科務文件和各級教學的交流，有利學校整理學科的顯性和隱性知識。

表一　科組人手架構與學科手冊

1. 本校在「學與教」的人手架構中，各學科均設科主任一名，而主科中包括：中文、英文、數學及常識設兩名副科主任；術科則設一名副科主任，協助科主任管理科務、制定課程政策、課程實施及組織活動等，並作為教師與校長間的溝通橋樑，向校方交換意見。此外，在各科各級均設級組長，負責聯絡及帶領分級備課等會議，並處理文件存檔（包括軟件及硬件）。

2. 各科每年均制定學科手冊，讓各科任老師依照科本指引進行教學。學科手冊大部份內容每年相若，包括：（1）教學宗旨、目標及課程組織；（2）科組架構圖；（3）科主任、副科主任及級組長的職責；（4）用書表；（5）教具及參考書；（6）家課及堂課指引；（7）各級教學及評分指引；（8）評估指引；（9）編寫進度表及評估準則。而少部份內容須每年更新，包括：（10）年度老師名單及（11）工作分配及年度週年計劃及關注事項。

（引用：香港初等教育研究學會，2012，頁 23）

三、組織的知識分享

在知識管理理念下開展的教師知識的產生、交流、共用和轉化的活動，可「張揚教師個體在知識產生過程中的主體地位，調動教師學習的主動性和積極性，促進組織和個體知識管理能力提升，使教師知識觀、學習觀持續更新」（王彥飛，2010，頁 105-106）。丙校這三年的其中一個發展策略是建立正面文化，為了落實這個學校發展策略，校方曾安排教師接受 NLP 身心語言學課程培訓，由熟知這個正面心理學的課程專家到校

進行五天培訓，然而因財務和行政限制，學校並未能為個別新同事提供相關培訓。正如下文丙校負責同工的分享，學校藉參與這個知識管理計劃的機會，透過組織校內教師講故事的方式，促進新舊同工對正面文化的交流，使新同事很快就了解正面文化的內涵。在校本講故事圈教師分享活動中，「上一個傳授者在自己解釋基礎上又吸收了新的理解，從而又對知識進行了新的分析加工，這種反覆將在學校全體成員中不斷的進行，這種過程使得單一的傳授變成了交互傳遞」（周舉坤，2012，頁40）。丙校善於利用參與這個「知識管理與小學發展」計劃，提供多些校內同工分享隱性知識的機會，營造了學校的正面文化，並加強了同事間隱性知識的交流。

> 「知識管理對不了解學校文化的新同事有很大作用，因為他們不會很仔細閱讀行政手冊。透過正面文化分享會，知道大家也重視正面文化，了解大家的價值觀／大方向。參與後察覺實行得較以前有系統，又加強了分享部分，間中會在科組中有系統地把隱性知識分享，大家知道的都多了許多。」

（丙校負責同工訪談的分享）

「倘若每一位教師都願意並主動地將珍貴的隱性知識顯性化，讓更多的教師分享之，那麼，不僅教師的個體發展成為可能，教師共同體的發展亦成為可能」（周洋，2014，頁52）。為配合推廣正面文化和促進校內教師的分享，該校設計了一個校本教學觀課表（見下表二），從觀課表內的範疇和參考項目可見，該校同工已將正面文化融入日常課堂教學的細節。利用這個觀課表，可使授課教師在教學設計和教學時留意正面文化的體現，又可讓觀課同工在觀課時反思正面文化，有益於觀課後同工間交流和分享。正如 Connelly & Kelloway（2003）指出，知識分享的文化為成功知識管理的基石，而信任則是促使組織成員樂於與他人分享知識與經驗的關鍵要素。丙校同工能有效建立分享正面文化的氣氛，其一原因是該校教師人數不多，同事間彼此信任。任何一個組織若信任度不足，將會影響組織內同工分享隱性知識，不利同工將知識社群化和外顯化。這個案例引證了丙校同工在相互信任的環境下，善用參與這個知識管理計劃的機會，利用教師故事圈和正面文化觀課表，促進同工們在校內分享正面文化。

表二　正面文化教學觀課表

範疇	參考項目	十分同意	同意	不太同意	不同意	不適用	備註／意見
和諧	師生關係良好、鼓勵、支持						
	學生間關係良好、協調、支持						
合作氣氛	老師提供參與機會						
	鼓勵師生互動						
	老師鼓勵回應						
	老師鼓勵朋輩互動						
	老師鼓勵發問						
	師生互相尊重						
	學生有興趣、專注、積極、自信、自發、開放						
正面教學語言／態度	措詞用語正面						
	給予學生足夠時間思考作答						
	發問難易適中						
	具體指出學生的成就						
	老師能跟進學生的回應						
	老師能贊同、獎勵						
營造課堂關愛	教師友善、親切、負責、熱心、投入、鼓勵學習、支持、啟發						
	教師對學生意見的回應：理解、關懷、尊重、開放						
	教師鼓勵學生學習、探索；發展學生潛能追求卓越						

（引用：香港初等教育研究學會，2012，頁 30-31）

丙、個案討論與分析

　　筆者兩人在十所參與計劃的學校中，選取這三所學校作為個案分析，原因是這三所學校在知識管理的不同環節有成功的經驗，並呈現出推行知識管理的關鍵要素。上文可見，甲校的成功經驗是利用資訊科技系統建立校本知識地圖，「建立知識地圖的目的在於應用，不斷拓展應用領域，通過各種評價體系對知識地圖進行評價、反饋信息，從而逐漸完善知識地圖」（蘇新寧、任皓、吳春玉、朱曉峰，2004，頁 105）。甲校同工透過參與這個知識管理計劃，全面檢視校內知識和資訊的儲存系統，並創建了一個共用的知識編碼系統。甲校能於一個學年內檢視了校內文件，更建立了一個編碼系統和學生資料庫，其成功實踐知識管理的原因，是在於甲校能善用集權式領導來促進校本知識地圖。正如 Merat & Bo（2013，頁 13）所說，假若一間公司能執行一個有效的編碼策略，一個集權式領導系統會較為可行。由此觀之，在一所學校，如果學校領導層沒有決心，不願調撥資源，絕不可能在一年間以資訊科技建立一個知識管理系統。

　　「處於知識經濟社會，知識為學校提升競爭力的關鍵因素，誰對知識進行妥當的管理，將決定誰能在社會中主導大局。因此，教師必須從傳統的知識傳遞者，轉型為知識生產者；學校領導者也不應只是傳統的人員、物質、資源管理者，而應同時為學校知識的管理者」（李安明、謝傳崇，2003，頁 70）。乙校的成功經驗是透過參與計劃去推動學科主任成為知識管理者，學校制定措施要求學科主任負責管理科內文件，並透過級長促進教學內隱性知識的分享。「知識管理要求學校管理者超越組織管理的層面，理解知識獲取與管理的流程和職能之間的戰略關係，推動教師獲取和共享知識，組織教師不斷開發知識，資助和支持對知識展開深化」（任佩佩，2012，頁 32）。在知識型社會，學校能否成為一個專業社群，其關鍵因素是校內中層人員是否做好知識管理的領導角色；乙校決策層建立了一個完整的學科知識管理者的政策，使學科主任除了做傳統管理角色的同時，也負責管理科內的顯性和隱性知識，領導同事專業的成長。

　　「信息不是免費的，獲取知識、傳遞知識、創新知識都需要成本，包括時間、教育資源等；一旦校園能形成共享知識的文化氛圍，將不但大大降低個體獲取知識的成本，而且能夠減少知識管理系統的管理運作成本」（鄭康、諶啟標，2010，頁 17）。丙校同工能將正面文化成功深化，全賴校內領導善用知識管理策略，以教師故事圈和正面文化

觀課表作措施，推動同工分享和交流正面文化，既減低了同工獲取正面文化的知識成本，亦使新舊同工對正面文化的隱性知識得到充份的外顯，並成為共有的學校組織知識，究其成功原因，正如 Cheng（2013）所說，擁有一個關懷、和諧的工作環境，可讓全校教職員工在互相信賴與支持的氛圍中，進行知識的分享與創新。由此可見，丙校同工間的信任，是學校建立分享文化的重要因素。在推行計劃的過程中，丙校亦豐富了校內專業社群的發展，使學校同工得到有效的專業成長，亦有助學校關注的事項得到順利推行。

丁、知識管理應用的經驗與限制

「個人知識管理不僅會影響到教師專業發展，也涉及到學校整體素質能力的提高，因此學校建立一些相關政策和組織團隊協作機構，完善相關管理制度」（回智光，2014，頁 103）。知識管理在香港學校教育仍是一個新興的學校發展策略，不少學校同工對知識管理的理念和運作仍不大了解。本文分析了三所曾參與香港初等教育研究學會「知識管理與小學發展」計劃的小學在推行知識管理的成功經驗，印證了學校知識管理文獻（Cheng, 2012, 2013）中資訊科技、知識管理的領導及分享文化對實踐知識管理的重要性。正如 Nonaka & Krogh（2009，頁 641）認為，組織科學的其中一個學術目的是提供管理實踐的知識，這不單需要學者去發展試驗理論，亦同時要求他們提出應用於組織的知識以解決具體問題。從上述三個個案，可了解到利用資訊科技建立校本知識地圖，制定學科主任擔任知識管理者的領導角色和推動學校的分享文化等知識管理策略，的確能促進學校發展和提高校內教師的專業能力。

本文引用了香港初等教育研究學會的公開資料和三間學校負責同工的分享，介紹了三校成功運用知識管理的實施細節；然而，正如黃雪盈（2008）指出，「個案研究法詳細地描述個案在一個時段內的狀況，可以用來測試現有的理論，以作輔助或補充之用」，故本文重點不是發展知識管理的新理論，而是論述相關學理在個案的實踐情況，以印證可在學校有效地應用知識管理的三個關鍵因素：資訊科技、組織領導及分享文化。而因應文章的篇幅所限，本文並沒有論述參與「知識管理與小學發展」計劃的其他七所小學的經驗，在此僅作聲明。最後，本研究的另一個限制是研究員未有進一步搜集三校其他同工對計劃的看法，相信有關做法可為這個質性個案提供更豐富的素材，亦使讀者了解更多成功運用知識管理的經驗。

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Experiences for supporting schools to apply knowledge management in Hong Kong

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Abstract

According to international literature, the application and promotion of knowledge management in the education area is still in a preliminary stage when compared with other areas. In 2010-2012, the Hong Kong Primary Education Research Association launched the "Knowledge Management and the Development of Primary Schools" Project to promote and put into practice the vision of knowledge management in ten primary schools. In this paper, the two authors extracted three successful cases from the ten schools to explicate how the selected schools applied knowledge management in their context in terms of three perspectives, namely, knowledge management system, knowledge management leaders and organization sharing. In order to describe the experiences gained from the three cases effectively, the authors also had in-depth interviews with the responsible colleagues in the three schools apart from adopting the data from the Project so as to analyze the details of the three schools in launching knowledge management.

Keywords

徵集論文

我們歡迎教育界同工投稿，內容以教育研究、教育行動研究及教學經驗分享為主，課題可包括：

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