

# 香港教師中心學報

Hong Kong Teachers' Centre Journal



第三卷

Volume Three

教 育 統 籌 局  
Education and Manpower Bureau

# 香港教師中心

香港教師中心（中心）是根據1984年教育統籌委員會第一號報告書的建議而於1987年成立的，中心的總部位於北角百福道四號，由前身為一所小學的建築物改建而成，於1989年6月開幕，是一所多元化和多用途的中心。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、中立的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。此外，中心亦致力為教師提供互相切磋和交流經驗的機會，並協助發放教育資訊和宣傳教育理念。

中心不單為教師而設，也由教師管理。他們可以通過教師中心的三層管理架構參與教師中心的管理工作。這管理架構包括一個諮詢管理委員會、一個常務委員會和六個工作小組，負責中心的決策，監察和執行中心的不同工作及活動。

諮詢管理委員會（諮管會）的工作主要是決定中心的策略和監察中心的運作。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，另外兩位由教育統籌局常任秘書長委任。

常務委員會（常委會）是諮管會的行政架構，與中心的日常運作和活動有著密切的關係。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；其他成員包括兩位代表教育統籌局的諮管會委員及十位由諮管會提名及選出的諮管會委員。

各工作小組負責中心內不同範疇的工作，包括出版小組、圖書館及教學資源小組、活動小組、章程及會籍小組、教育研究小組及專業發展小組。各小組的成員均是諮管會的委員。

目前，有153個教育團體登記為中心會員。中心除了單獨主辦各類型活動外，亦經常與本港的教育團體合作或贊助團體籌辦推動教育專業的活動。在2003年至2004年度，中心已經與多個教育團體合辦超過150項有關教師專業發展和康樂的活動，參加人數超過2萬人次。

## 香港教師中心（北角會所）

位於香港北角百福道四號的香港教師中心（北角會所）佔地約九百平方公尺，設有一間大型演講室／展覽室、一個會議室、三間講堂、一間資訊科技教育室、一間教育團體綜合辦事處、一間教育專業圖書館和一間休息室。歡迎學校、教育團體預訂借用。

# Hong Kong Teachers' Centre

The Hong Kong Teachers' Centre (Centre) was established in 1987 in accordance with a recommendation of the Education Commission Report No. 1 published in 1984. Its base or headquarters, a multi-facet and multi-purpose Centre housed in a former primary school building at 4 Pak Fuk Road, North Point, was opened in June 1989. The Centre aims to promote continuous professional development and enrichment among teachers, and to foster among them a greater sense of unity and professionalism in an encouraging, neutral and non-hierarchical environment. Specific objectives of the Centre include the provision of opportunities for teachers to meet and exchange ideas and share experiences; the promotion of in-service education; the promotion of curriculum development; the development and trying out of new teaching aids and approaches; the provision of resources; the dissemination of news and ideas concerning education; and the organisation of social, cultural and recreational activities for teachers.

The Centre has a three-tier management structure to help plan and run its activities - an Advisory Management Committee (AMC), a Standing Committee (SC) and six Sub-committees. They are responsible for policy-making, monitoring and implementation of various duties and activities.

The AMC is a policy-making and monitoring body with a total membership of 72. These include 35 members nominated by and elected from educational organisations or teaching-related organisations; 35 members nominated by and elected from teachers; and 2 members appointed by Permanent Secretary for Education and Manpower.

The SC is the executive sub-structure of the AMC. It is concerned with the day-to-day functioning of the Centre and the running of its activities. The SC comprises the AMC Chairman and 2 Vice Chairmen, the 2 EMB (Education and Manpower Bureau) representatives, and 10 other members elected by and from the AMC.

The six Sub-committees are working groups responsible for specific areas of work in the Centre. They include Publication, Library and Teaching Resources, Activities, Constitution and Membership, Educational Research and Professional Development. Members of the sub-committees are also members of the AMC.

At present, 153 educational bodies are registered members of the Centre. Apart from organising activities by itself, the centre also jointly organises or sponsors activities with non profit-making educational organisations for teachers in Hong Kong. During the financial year of 2003 to 2004, the Centre has organised, jointly with many educational organisations, more than 150 professional development and cultural activities for teachers, with a total attendance frequency of more than 20,000.

## ***Hong Kong Teachers' Centre (North Point)***

The Hong Kong Teachers' Centre (North Point), with a total area of about 900 square metres, has a large seminar / exhibition hall, a conference room, three lecture rooms, an information technology education room, a composite office for educational organisations, a multi-media professional library and a lounge. Schools and educational organisations are welcome to use these facilities on a booking basis.

# 香港教師中心學報

## *Hong Kong Teachers' Centre Journal*

《香港教師中心學報》(《學報》)為香港教師中心出版的刊物，每年出版一次。《學報》刊登與教育有關的行動研究報告及論文。近期《學報》的投稿者多來自本地及海外的教師、師訓機構導師、教育研究人員及學者等。以下為《學報》第二及第三卷之顧問及編輯委員名單。

The Hong Kong Teachers' Centre Journal (HKTC Journal) is an official publication of the Hong Kong Teachers' Centre. It is published once a year. The HKTC Journal publishes action research reports and original contributions on areas of education. Contributors of Volume 1 to 3 are mainly teachers, teacher educators, educational researchers and scholars from local and overseas communities. The advisors and editorial committee members of Volume 2 and 3 are listed as follows.

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# 主編序

由一九九九年起，我們便參與香港教師中心《學報》創刊號的工作，擔任籌備委員會委員及執行編輯的工作，與一群教育界同工一起探索《學報》發展的方向。創刊號出版後，我們又繼續參與《學報》第二卷的編輯工作。在籌備《學報》第三卷時，編務委員會決定採用「雙主編」制分擔《學報》之事務，以減輕工作量。

當《學報》編輯，工作雖是較為細碎，但卻甚為重要，尤其當要安排合適的評審員評審文稿時，往往涉及多次工作會議、通訊聯繫、反覆校對與訂正；如遇文章論點有爭論時，還要尋求不同學者的意見，務使文章在刊登前得到充份的修正。雖然這些工作需時六至八個月，但有賴編委會各委員和評審員利用工餘時間評審，同時也有賴編委會秘書處勤奮、盡責的同工支援，編務工作才得以完成。在此感謝各同工付出的努力。

香港教師中心《學報》在這幾年慢慢成長，文章質素也逐漸提高，投稿更見踴躍。以第三卷為例，中、英文稿件數量能取得平衡，各佔一半。現在《學報》逐漸廣為學界認識，今期有幸邀請了兩岸四地及國際知名學者加入成為編輯顧問，務求提高水平，爭取《學報》成為一份理論與實踐並重、具審查制度的亞洲地區學術期刊，這也是編委會在創刊時的目標之一。

在《學報》第三卷的工作進入最後階段之際，我們在此謹向曾參與評審員工作的人士及協助修訂文稿中、英語文的大學或學院講師，致以衷心的謝意，當中包括 Ms Christine Anne BRUCE、Dr Victor FORRESTER、何文勝博士、李子昂博士、李怡老師、李家和博士、李傑江校長、李潔冰博士、周昭和先生、周淑娟老師、林嘉妮教授、胡颺博士、施敏文先生、梁柏偉先生、許俊炎校長、陳淑安女士、黃顯華教授、楊善錦先生、葉淑儀老師、雷其昌校長、董學平先生、蔡達香博士、潘玉琮博士、鄧兆鴻校長、鄧國俊博士、楊兆榮先生、鮑偉昌博士、謝均才教授及譚肖芸博士。

第四卷《學報》將以「高中學制與課程改革」為主題，並計劃於二零零五年十月出版。藉此希望對這課題有認識的前線教師、教育研究人員及學者踴躍投稿，與大家分享對這嶄新課題的觀點。

《香港教師中心學報》主編  
李子建、容萬城  
二零零四年十一月

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*歐凱鑫*



# ***Emergence of Demand for Private Supplementary Tutoring in Hong Kong: Argument, Indicators and Implications***

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## **Abstract**

The paper highlights the determinants for demand for private supplementary tutoring and their interrelationships in a case study of Hong Kong. Reviews of past local and international literature reveal several research gaps related to tutoring studies and lack of theoretical explanations for the emergence of tutoring demand. Based on relevant interview and survey data, some socio-economic and socio-cultural patterns of tutoring demand are depicted in terms of a multi-level socio-cultural argument for its nature and determinant relationships via some conceptual indicators. New issues and challenges to various educational fields are finally addressed.

## **INTRODUCTION**

Past comparative and international research on examining educational systems (Dore, 1976, 1997; Eckstein & Noah, 1992; Little, 1984, 1997) realized that private tutoring is, to a large extent, a by-product of examination-oriented learning or examination-driven school curricula. Other past social or sociological studies like Dore (1976, 1997) and Little (1997) indirectly touched the 'hidden' educational phenomena at national level and in comparative perspective when examining the pervasive phenomena of 'diploma disease' or 'credential inflation' in lately developing societies. As private tutoring was not their research focus, there was a gap in theoretical explanation for emergence of 'diploma disease' or 'credential inflation' and

demand determinants, or causal links among their determinants for tutoring in single countries or comparative perspective.

Among the existing works on private tutoring, Bray (1999) stood out as an important and broadly-focused comparative work on both of its demand and supply sides and drew policy-making implications and his following works (2003) pinpointed the adverse effects of private tutoring upon mainstream schooling, societies and economies, based on five case studies in Asia and Africa. Other studies (de Silva, 1994; Foondun, 1992; Zeng, 1999) hinged upon pervasive 'hidden' educational phenomena in African countries or Asian regions without any inter-regional contextual

comparisons. And all of their works lacked a detailed theoretical analysis of causal relationships among demand determinants.

Methodologically speaking, there are logistic difficulties for doing research on tutoring, due to its subtlety, complexity and irregularity. The subtlety of private tutoring lies in its hidden scale, subject to intangible nature of tutoring services in socio-economic perspectives (Hua, 1996, p.5). Its complexity comes from inexact causal relationships between formal daytime schooling, family and tutoring in socio-cultural and socio-economic dimensions. Its irregularity is derived from governments' difficulties in controlling its growth, censoring or monitoring the functioning of tutorial schools, owing to some socio-cultural and socio-political reasons (Bray, 1999, pp. 37-41 & 74-83). Such three characteristics often lead educational policy-makers or researchers to pay little attention to tutoring. It is because there are more thorny educational problems in pressing policy agendas and other urgent research issues.

Through a multi-level analysis, the paper endeavors to portray how some educational and social phenomena at micro (individual), meso (institutional) and macro (system) levels are related to the pervasive phenomenon of private tutoring at all secondary levels (Secondary 1-7 / Grade 7-13) of schooling in Hong Kong. It also puts forth some theoretical arguments for causal relationships between social, educational changes and demand determinants, and conceptualizes a socio-cultural argument, accounting for the emergence and nature of demand for tutoring in Hong Kong. Subsequently, its far-reaching implications for further research will be drawn.

## **LITERATURE REVIEW**

### **Comparative studies on examining educational systems**

When doing cross-national comparisons of educational systems, some researchers have detected the widespread phenomena of 'diploma disease'. Theoretically speaking, Dore's 'diploma disease' (1976, p.72) thesis and Little's modified term (1997) 'credential inflation' have contended that the later the development of societal modernization, the more widely will be credential uses for occupational selection, or the more rapid will be the rate of credential inflation. As a result, schooling will become more examination-oriented and educational certificates will turn to be problematically stressed, devaluating the true values of schooling. When considering strategies for combating 'diploma disease', Little (1984, pp. 202-228) has observed that there will not be much impact on reducing demand for or changes in value beliefs about tutoring, and emergence of diploma disease does not necessarily entail occurrence of pervasive tutoring phenomena. For instance, despite commonly suffering from diploma disease, some lately developing countries like China, Egypt, Japan and Sri Lanka had a large scale of the 'hidden' educational phenomena whilst others such as England and Tanzania did not have such pervasive phenomena of tutoring in 1990s (Little, 1997, pp. 5-21).

### **Single-society or cross-national studies on tutoring**

Past comparative researchers on tutoring (Bray, 1999, 2003; Chew & Leong, 1995; de Silva, 1994; Foondun, 1998, 2002) realized that the phenomena of private tutoring are complicated. Its possible multi-level demand determinants can be related to various arenas of education (Baker et. al, 2001), society and heritage

culture (Sorensen, 1994). Macro-level social factors include credential inflation, favorable economic prosperity, big income differentials and limited job opportunities (de Silva, 1994). Meso-and macro-level educational factors are significance of high-stake examinations for upward social mobility, national government's ineffective censorship, ineffective daytime schooling (Bray, 1996; de Silva, 1994), peer group influence (Hua, 1996) and uneven access to higher education (Stevenson & Baker, 1992). Micro-levels social factors are students' personal characteristics (Hua, 1996) and their families' socio-economic status (George, 1992) and no free academic guidance from families (Kim, 2000; Polydorides, 1986). On evaluation, causal relationships among such social and educational factors articulated by past researchers have not been fully conceptualized into a unified theoretical framework in single societies or cross-societal perspective so far. And there has been no investigation about overall impacts of determinants upon students' or their parents' determination to seek tutoring in intra-societal and inter-societal perspectives.

Other pieces of past single-society or cross-national research (Akiba & LeTendre, 1999; Chew & Leong, 1995; Foondun, 1998) lacked a clear definition of private tutoring and a systematic classification of its types, resulting in inaccurate analysis or invalid comparisons. Single-country past research literature on tutoring (Fenech & Spiteri, 1999; Harnisch, 1994; Rohlen, 1980; Yoon, 1997) merely investigated the intensity or scope of demand for tutoring without bridging the gaps between micro-level and macro-level determinants.

## **Tutoring research in Hong Kong**

In Hong Kong, most past studies (Lee, 1996; Liu, 1998; Man, 1998; Tseng, 1998; Wong, 1998) on tutoring were quantitative research reports, depicting the span and intensity of demand in statistical variations or patterns. For instance, reasons for seeking or not seeking tutoring, distributions of tutoring fees, duration of tutoring, types of supply at primary (Primary 1-6 / Grade 1-6) or secondary levels (Secondary 1-7 / Grade 7-13). They lacked detailed educational and social explanations for those descriptive demand variations and patterns, and no in-depth investigation was focused on lower secondary (Secondary 1-3) levels. In particular, Tseng (1998) hypothesized possible impacts of high-stake examinations and credential inflation upon tutoring without sufficient qualitative data support. Yeung (2000) articulated qualitative patterns of teachers' value beliefs towards private tutoring at middle secondary (Secondary 4-5) levels through teacher interviews. On the supply side, Tong (2001) detected the supply of private tutoring as a commercial commodity in massive scales in Hong Kong and Taipei without any scrutiny of the supply-demand mechanism or theoretical socio-cultural explanations for the supply. On the whole, past research in Hong Kong did not cover conceptual and theoretical issues concerning demand or supply for private tutoring.

In other fields of education, previous researchers in Hong Kong tended to underestimate the significance of private tutoring or indirectly touched it without penetrating studies, despite its widespread existence at primary and secondary levels of schooling. For example, Yiu (1996) only depicted a case of how mass tutors helped tutees make preparation for economics at advanced level. Facing the new syllabus, an economics teacher was so helpless that he borrowed lecture notes indirectly from those tutees. Moreover, little attention was paid to household expenditure on private tutoring

in some studies of financing of basic education (Cheng, 1992; Kwan, 1992; Wong, 1992). Past researchers on social stratification (Post, 1994; Postiglione, 1997) focused on gender variations or ascription over achievement in educational opportunities and the influence of social classes (or status groups) and families resources upon students' educational attainments (or learning outcomes). They neglected possible effects of tutoring on educational outcomes. Other bodies of sociological research done by Post (1993) and Tsang (1993) concerned more about the tensions between the government and educational policies and internal mechanisms of policy implementation e.g. the impacts of nine-year free, compulsory education policies implemented at primary and lower secondary levels since 1978 mentioned by (Wong, 1997). Noteworthy, additional effects of social stratification induced by demand for tutoring have not thoroughly been investigated in their studies.

## **NATURE, PATTERNS AND DETERMINANTS**

With all these research gaps and limitations, the author strives to undertake a multi-level social analysis of students' demand and to build up a unified theoretical framework, accounting for the nature and emergence of the demand in Hong Kong as a case study (Kwok, 2001). Such case study qualitatively explores into causal interactions of its possible demand determinants and their interrelationships, in socio-cultural and socio-economic senses. Its research foci lie in the nature and socio-cultural and socio-economic patterns of secondary school students' demand for private supplementary tutoring in Hong Kong from 1 September 1997 to 31 August 2000. The marketing mechanism of its supply

side will not be scrutinized in the paper. Multi-level educational and social determinants for the nature and such patterns of demand for private tutoring and their causal inter-relationships will be formulated in terms of theoretical argument and pattern indicators, based on interview and survey data.

### **A definition of private supplementary tutoring**

Private supplementary tutoring, throughout the paper, refers to a kind of extra, fee-paying academic teaching or drilling for full-time students studying in regular school instruction programs or syllabuses at all levels of education. It necessarily has three characteristics:

- academic oriented
- monetary transfer (from tutees or their parents / guardians to tutors)
- tutoring content or mastery of some cognitive skills being in line with tutees' day-time schooling.

Private supplementary tutoring can complement and repeat what tutees (full-time students) have learned in their daytime schools. It can help them revise their daytime lessons and deepen their understanding of the underlying concepts or theories through drilling exercises. Its main functions are to help students cope with examinations and to improve their academic achievements. There are various types of tutoring: individual, group (2-8 tutees per group) and mass (more than 8 tutees in a class) and their geographical locations can be in tutees' or tutors' residential areas, day-time school campus or even in commercial buildings. Its massive scale can partially be reflected on the supply side by heavy advertisements of various types of tutoring in streets, popular public areas and through mass media,

and by an increasing number of registered mass tutorial schools in Hong Kong. On the demand side, indicators are its high occupation rate of students' spare time and rough statistical figures reflected by some past studies done in Hong Kong (Lee, 1996; Tseng 1998).

### **Socio-cultural and socio-economic patterns**

A student questionnaire survey (containing semi-open multiple-choice and five-point Likert-scale optioned statements concerning degrees of agreement / disagreement) was conducted in six conveniently sampled secondary schools of 630 respondents in Hong Kong in the school year 1998-1999. One class was randomly selected from each of form range: Secondary 1-3 (S.1-S.3), Secondary 4-5 (S.4-S.5) and Secondary 6-7 (S.6-S.7), with the permission of the school heads and assistance of the school administrators. Items were written in Chinese language and tested and modified after a pilot study conducted in another secondary school in April 1998. Criteria for determining families of low,

middle and high socio-economic status (SES), father's, mother's or (inclusively in logical sense) guardian's occupation were classified into blue-collar / unclassified types, white-collar types and professional / executive types respectively. The following socio-cultural and socio-economic patterns of tutoring demand are depicted, in triangulation with interview data, collected from snowball samples involving various types of stakeholders in Hong Kong:

- ***Emergence of nuclear families:*** The average household size (including tutoring and non-tutoring respondents) was 4.52 and the average number of schooling children per family was 2.28 respectively. Their nuclear families (of average size 4.52) in general had great academic concern. For detail, variations over studying forms can be found in table 1. Such nuclear family structure would increase the likelihood of seeking tutoring, as educational expenditure (including tutoring costs) focused merely on 1-2 schooling children per family.

**Table 1 Distributions of mean numbers of family members, school children per family**

Groups of students	Tutoring students			Non-tutoring students		
	S.1 - S.3	S.4 - S.5	S.6 - S.7	S.1 - S.3	S4 - S5	S6 - S7
<b>Various studying forms</b>						
<b>Mean no. of family members (including the respondents) (FN)</b>	4.40	4.26	4.28	4.75	4.82	4.39
<b>Mean no. of schooling children (including the respondents) (SN)</b>	2.15	1.96	2.09	2.54	2.45	2.47

Note: all numbers are round off to 3 sig. figs.

- **Affordability of tutoring fees:** It was found that in families of low socio-economic status (SES), students' participatory rates in private tutoring were 24% at S.1 - S.3, 47% at S.4 - S.5 and 61% at S.6 - S.7 levels whereas in high SES families, the rates were 63% at S.1 - S.3, 55% at S.4 - S.5 and 68% at

S.6 - S.7. Among one five-opinioned statement concerning decisions tutoring fees over quality, affordability of tutoring fees was one decisive factor for seeking tutoring, especially in low-income or middle-income SES families, in tutees' perceptions in table 2.

**Table 2 Distributions of opinion about affordability among tutoring students**

Affordability is more important than quality when considering current forms of tutoring	Parents' or Guardians'	Parents' or Guardians'	Parents' or Guardians'
	Low SES (blue collars, no occupation, or unclassified)	Middle SES (white collars)	High SES (professionals or executives)
<b>Strongly agree</b>	(14 / 132) 11 %	(7 / 51) 14 %	(12 / 123) 10 %
<b>Agree</b>	(32 / 132) 24 %	(12 / 51) 24 %	(22 / 123) 18 %
<b>Neutral</b>	(44 / 132) 33 %	(14 / 51) 27 %	(39 / 123) 31 %
<b>Disagree</b>	(33 / 132) 25 %	(13 / 51) 25 %	(36 / 123) 29 %
<b>Strongly disagree</b>	(9 / 132) 7 %	(5 / 51) 10 %	(14 / 123) 11 %

Note: all percentages are round off to whole figures.

- **Insufficiency of free academic guidance from elder family members:** Survey data illuminated that the higher educational qualifications of tutees' parents or guardians, the greater would be the demand for tutoring, despite the fact that they could teach tutees

freely by themselves in table 3. Qualitative data reflected that the busy daily working schedule of tutees' elder family members was the most probable reason.

**Table 3 Distributions of parents' or guardian's educational qualifications**

Parents' or guardians' educational qualifications								
Demand for tutoring	Primary education below	or	Junior Secondary	Upper Secondary	Matriculation	University above	or	Proportion out of total respondents
No	(126/195) 65%		(101/182) 55%	(59/125) 48%	(19/58) 33%	(19/70) 27%		(324/630) 52%
Yes	(69/195) 35%		(81/182) 45%	(66/125) 53%	(39/58) 67%	(51/70) 73%		(306/630) 48%
Proportion out of total respondents	(195/195) 31%		(182/630) 29%	(125/630) 20%	(58/630) 9%	(70/630) 11%		(630/630) 100%

Note: all percentages are round off to whole figures.

- ***Relationships between consuming tutoring types and nature of curricula:*** Both qualitative and quantitative data reflected that the lower the secondary level, the more popular would be individual home tutoring and multi-functional tutoring (provision of lesson revision, examination preparation and homework guidance). The higher the level of upper secondary (S.4-S.7), the more popular form would be examination-oriented mass tutoring. One-to-one residential tutoring and multi-functional tutoring were relatively more common at lower levels of secondary schooling than upper levels. Interview data also revealed that upper secondary curricula were less flexible without catering for individual learning differences than lower ones. Student tutoring at upper secondary levels of schooling were accommodated to open examinations whilst tutoring at lower secondary levels of schooling focused more on individual learning differences, in line with less rigid school curricula.
- ***Examination-oriented school culture:*** In the survey, examination pressure was the biggest reason for seeking private tutoring at upper secondary levels of schooling whilst it was only the fifth big reason at S.1-S.3 level. The more senior the studying forms, the higher were the participatory rates in private tutoring: 35% at S.1-S.3 level; 47% at S.4-S.5 level; 70% at S.6-S.7 level. Among extra learning needs identified by students, examination skills were the most common. So examinations dominated surveyed students' learning, and tutoring students sought private tutoring in order to cope with examination pressure. The situation was more serious at the upper level of secondary schooling (i.e. S.4-S.7). This implied open examination-driven upper

secondary curricula in the mainstream sector of Hong Kong (Hong Kong Baptist University & Hong Kong Examinations Authority, 1998).

- ***Selective functions or screening effects of the secondary educational system:*** The earliest starting time to seek private tutoring was mostly at P.4-P.6 level for tutoring and non-tutoring students during the survey time, regardless of their current studying levels in the survey. The second peak starting time was at S.4-S.5 level for S.4-S.7 students. Qualitative data indicated the screening effect or selective function of the educational system where some junction points were found between upper primary and lower secondary levels and between upper secondary (S.4-S.5) and matriculation (S.6-S.7) levels.
- ***Social significance of some popular tutoring subjects:*** Popular tutoring subjects were Mathematics and English. These two subjects were major ones in the whole S.1-S.5 curricula and also important for tutees' future careers. One of the common mass tutoring subjects at S.6-S.7 level was Use of English, which was a compulsory subject for university entrance examination, playing a decisive role in their future career. Despite the transfer of its sovereignty to Mainland China with Chinese as her official language since 1997, English itself is still an international and official language for maintaining prosperity of the Hong Kong society. In the six schools, there was a higher proportion of Science tutees in particular than Arts ones at S.4-S.7 level, because of greater expected rates for receiving tertiary education or better job prospects after graduation.

- ***Societal credentialism and meritocracy:*** Among the 5-optioned statements, the majority (strongly or just) agreed to the statements that education was the most potent means for upward social mobility and that private tutoring was regarded as a kind of educational investment. Qualitative data provided the underlying reason. Upper secondary students near the graduation time had more time to think about their future career and naturally higher expected rates of return when seeking tutoring.

## **THEORETICAL ARGUMENT FOR TUTORING DEMAND AND THEIR DETERMINANT RELATIONSHIPS**

Through cross-method and cross-data triangulation (Neuman, 2000), a comprehensive picture of how a combination of multi-level demand determinants acted upon each other during the research period is portrayed as follows:

- I. The ultimate causative forces lied in rapid social modernization with corresponding economic growth and technological advancement, facilitating the marketization of various types of tutoring and affordability of tutoring fees at the societal level.
- II. Education was the major screening device for upward social mobility, in line with some salient features of Confucian-heritage culture. And credentials were used for elite selection and job allocation in such a meritocratic society of Hong Kong. As a result, credential inflation or qualification escalation was involved at societal level.
- III. At educational policy level, there was little effective censorship or monitoring of quality education in mass tutorial schools. At societal level, marketization of mass tutorial schools was

prevalent through mass media and their locations were geographically located in urban areas with convenient access by means of public transport systems.

- IV. At school level, examination-oriented upper secondary curricula and dominating summative assessment reinforced students' and teachers' heavy stresses on academic achievements. Students faced considerable studying pressure and peer group pressure when crossing over 'hurdles' at upper secondary and matriculation levels. They were accommodated into rigid school curricula, without catering for their individual learning differences. As a result, their learning problems increasingly arose, in case of insufficient academic guidance from teachers, their questionable pedagogy and tight studying schedules.
- V. At nuclear family level, elder family members' heavy daily workloads or inappropriate educational qualifications rendered little free academic guidance for students.
- VI. Subject to the above I-V, secondary school students would seek tutoring, in case of unfulfilled basic or extra learning needs from family, peers, teachers and ineffective self-learning in Hong Kong.

### **Conceptual indicators and determinants relationships**

To trace out interrelationships among demand determinants for private tutoring, three key conceptual indicators were articulated as accessibility, affordability and insufficiency. Accessibility referred to the availability of various types of tutoring, promoted through mass media or other promotion means under the state's policy governance. Socio-economically, affordability concerned whether tutees or their families could afford certain types of tutoring whilst



insufficiency in socio-cultural sense, pointed to the dissatisfaction of basic or extra learning needs initiated from daytime schools and lack of free academic guidance from tutees' elder family members, school teachers, peers and self-learning.

In fact, there were three sets of determinant patterns. Firstly, big socio-economic changes led to marketization of various types of tutoring in a multi-service economy and establishment of convenient public transport system after fast technocratic changes under the state's ineffective policy censorship towards various types of tutoring. This came to accessibility of demand for tutoring. Secondly, affordability of tutoring fees was mostly resulted from emergence of nuclear families with 1-2 schooling children on average. The underlying reasons were high economic growth in the 1980s, successful control of birth rate since 1970s (Ng, 1978) and parental willingness of spending education for students' future, under great societal competitive pressure in the late 1990s. Thirdly, facing credential inflation and social selective functions of educational system under heritage Chinese culture, students (key stakeholders) regarded education as the most potential means for upward social mobility. In some cases, low quality in school education and rigid school curricula created extra learning needs or basic learning problems for some students, which could not be satisfied freely by their elder family members, school teachers, peers or solved by themselves. In short, this referred to insufficiency of free academic guidance from students' social circles.

## **ISSUES AND CHALLENGES**

There are two major contributions of the study. Firstly, it provides a multi-level theoretical argument accounting for socio-cultural and socio-economic demand patterns

for tutoring and demand pattern indicators help explicate determinant relationships. Secondly, socio-cultural and socio-economic patterns of tutoring demand help imply further advancement in several fields of educational research.

### **School effectiveness and improvement**

Based on research findings, lack of alternatives for satisfying extra learning needs of schooling children from families and schools reflect unresolved problems in school quality education, intended curricula implementation and family education. This poses a great threat to the normal functions of formal schooling, in view of enormous demand for private tutoring in Hong Kong and other societies with similar development. Educational researchers on school effectiveness and improvement (e.g. Neville, 1995) and local policy-makers (e.g. Education Commission, 2000) often regard daytime schools as a standard unit of analysis at meso level. However, the influence of mass tutorial schools or home tutoring upon schools and students cannot be neglected, because of the supplementary role of private tutoring. Therefore, notions of 'school effectiveness' and 'learning effectiveness' need to be revitalized, facing the joint effects of day-time schooling and part-time private tutoring on students' learning outcomes.

### **Economics and financing of education**

Reflected from interview data, some tutees or their elder family members regarded private tutoring as a kind of educational investment for upward social mobility, under great meritocratic and credential pressure. The notions of 'private or social rates of return' to both formal and informal education (Carnoy, 1995; Psacharopoulos, 1994) should include allowance for considerable

financial figures spent on private tutoring in the societies with pervasive phenomena of private tutoring. Theorists who advocate formal education as a screening mechanism (Groot & Hartog, 1995) need to consider the effects of seeking private tutoring on students' overall academic achievement. Under peer group pressure and higher studying motivation, high-achievers seek more affordable tutoring lessons with fruitful academic returns than lower-achievers, reflected from survey and interview data. As a result, screening effects are reinforced in such a way that more academically talented or able students can survive at the top of schooling systems. So more theoretical discussion on 'screening models' and empirical studies on 'rates of return' need to be rectified.

### **Sociology of education**

On the one hand, cultural capital, investigated by the pioneer sociologist Bourdieu (1977, 1997) and his followers such as Brown (1997) and El-Bilawi (1982) needs to include considerable monetary expenditure upon private tutoring at household level in those countries with pervasive phenomena of private tutoring. On the other hand, social capital in the creation of human capital, which is proposed by some sociologists like Coleman (1997), should incorporate some resources attributed to subsidized or charged types of private tutoring from some commercial enterprises or voluntary community organizations. Such resources are not negligible when considering community or household financing of education (e.g. Bray, 1996, 1998, 2002). Further, the supplementary roles of tutoring will complicate the educational inequality and social inequity issues. Inequalities of educational opportunities and qualities in educational input and teaching and learning processes will be aggravated by students' unequal

accesses to different types and extent of tutoring. In table 3, those students with high parents' or guardians' educational qualifications tended to indicate greater demand for tutoring than those with low qualifications, besides quality considerations in tutoring. In particular, heavy demand for individual residential tutoring or taking numerous mass tutoring subjects might cause financial burden to low-income families revealed by qualitative data. Other blackmail cases of 'moonlighting' teachers towards their day-time students and idol tutors' illegal release of open examination trends are also unfair to the majority of examination candidates during educational assessments (Bray 2003; Greaney & Kellaghan, 1995).

### **Cultural issues**

Some past culturists (Cheng, 1997; Zeng, 1999) argued for the influence of 'Confucian-heritage culture' over the massive demand for private tutoring in East-Asian countries. They speculated some commonalties such as meritocratic drive towards nation-wide examinations (similar to examinations recruiting civil servants in ancient times of China), working through hardship and studying by diligence rather than inborn abilities, and repetitive, holistic approaches to learning. All these salient features exhibited distinctive characteristics of heritage Chinese cultures, uncovered by some researchers in educational psychology (Dahlin & Watkins, 2000; Watkins & Biggs, 1996). On evaluation, such cultural argument seemed to lack rigorous cross-cultural data support. It was because some non-Chinese heritage societies with pervasive 'hidden' educational phenomena might have similar inter- or intra-societal tensions, similarly articulated in the above socio-cultural argument (de Silva, 1994; Foondun, 1992, 1998, 2002; Hua, 1996). And large-scale cross-societal studies like

TIMSS 1995 and TIMSS-R 1999 have not scrutinized any correlations between intensity of tutoring demand (except some parameters such as time spent on after-school lessons in Leung, Yung & Tso, 2002, p.37) and features of societal cultures. Nor have follow-up comparative studies pinpointed any causal relationships between cultural features and intensity or span of tutoring demand (e.g. Baker et. al., 2001) when comparing East Asian societies with African, European, North American and South American counterparts. Hence, more cross-national or cross-societal qualitative studies should be conducted in future to articulate how heritage cultures constitute or reinforce schooling students' demand for tutoring under those inter- and intra-societal tensions in the above socio-cultural argument.

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## CONCLUSION

In the above, a multi-level socio-cultural argument for the emergence of demand for tutoring has been articulated. And demand determinants and their causal interrelationships have also been conceptualized in terms of indicators like accessibility, affordability and insufficiency. Further research recommendations are made to academic fields of school effectiveness, economics and financing of education, sociology of education and cultural studies in education.

Note: Earlier versions of the paper were presented at the Annual Conference of Comparative International Education Society (CIES) in Toronto, Canada in 1999 and Annual Conference of Hong Kong Educational Research Association (HKERA) at the University of Hong Kong in 2000.

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# 課程領導與教師專業發展：知識管理的觀點

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## 摘要

隨著知識經濟時代的來臨，知識社會逐漸形成，新型態的知識工作者（knowledge worker）出現，不少學者開始重視「知識管理」的觀念，並把「知識管理」的理論應用於教育改革和教師專業發展。本文初步探討知識管理的理念對課程領導與教師發展的啟示，並對下列範圍作討論：

- (1) 知識管理的意涵及課程知識的管理；
- (2) 校長和中層管理者成為課程（知識）領導，著重知識的創造、整理和分享、教師個人知識管理，以及知識社群和網路的發展。

## 序言

Elliott（1998）和歐用生（2000）都強調課程改革是一種「革新的社會實踐」，教師宜成為革新的實驗者和行動研究者，並具有反省、批判的能力，透過同儕間合作慎思和協同實踐，以及師生的協商和共同建構，創造具脈絡化和校本精神的課程知識。

最近，課程發展議會（2002）公布的《基礎教育課程指引》裏指出：「從學校經驗所得，行動研究、教師發展及校本課程發展有緊密的關係。」（10，頁13）此外，文件建議學校教師以小組形式進行行動研究，並向校內其他同事推廣。

在學校和課程改革的經驗裏，以往我們以為如果找到最有效能的學校運作模式和最佳的課程／教學實踐，把這些模式和實踐傳播出來，其他學校加以摹仿和採用便能產生理想的效果，可是實際上，正如課程發展議會（2001，頁63）指出：「由於每間學校的教師和學生各有不同的特色，學校本身進化的過程和變數也截然不同，以

『一刀切』的概念推行課程發展並不可行。」

隨著知識經濟時代的來臨，知識社會逐漸形成，新型態的知識工作者（knowledge worker）出現，Hargreaves, D.（2000）根據英國的經驗指出不少行業的知識生產由純正的學科為本、同質性、專家領導、同儕評審的和大學為本的模式逐漸轉移到應用的、問題為本、跨學科的、異質性、問責檢視的和含蘊在網絡的模式，而教育亦不能避免這種方向的轉變。不少學者開始重視「知識管理」的觀念，並把「知識管理」的理論應用於教育改革和教師專業發展（Sallis & Jones, 2002; 陳美玉，2002；王如哲，2000a；譚偉明、李子建、高慕蓮，2004）。本文初步探討知識管理的理念對課程領導與教師發展的啟示，並對下列範圍作討論：

- (1) 知識管理的意涵及課程知識的管理；
- (2) 發展學校成為一個學習型組織，並著重知識的創造、整理和分享、教師個人知識管理，以及知識社群和網路的發展。

## 課程領導

何謂領導？Lambert（1998, p.5-9）指出領導（leadership）具有以下涵義：

- (1) 一個團體（group），而非僅指個別的領導者（如校長）。每位（組織內成員）都有成為領導者（leader）的潛能和權利。
- (2) 關於一起學習、一起合作地建構意義和知識。領導是關於導致建設性轉變的學習，而學習是邁向共同的目的（shared purpose）。
- (3) 涉及透過持續的交談，把觀感、價值觀、意念、資訊和假設表面化的機會；一起探究和衍生意念；在共同信念和新資訊的情景下，尋求反思工作和賦予工作意義；創設對工作新理解所衍生的行動。
- (4) 要求權力和權威的再分配（redistribution），以邁向共同／共享的學習、目的、行動和責任。

課程（與教學）領導可說是近年一個新興的議題，許多學者對這個議題都做出了探究。黃顯華、徐蔣鳳、朱嘉穎（2002）分析不同學者的課程領導定義及性質，指出課程與教學領導可在下列學校課程發展的過程中產生作用：

### （一）課程設計

- 認清形勢、揚長補短
- 上下一心、建構願景
- 課程與教學改革的優先次序的抉擇
- 探究課程目標與行動的配合

### （二）課程決定

- 作「保（留）、改（變）、開（始）、停（止）」（Keep, Improve, Start, Stop）的決定

### （三）課程實施

- 建立夥伴式的團隊文化，尋找課程改革的同行者
- 注意教師反思性的專業發展，培養「轉化型課程領導」
- 改變學校文化，建構學習型組織

- 善用資源，為教師創造空間
- 邀請家長的參與，爭取家長的支持

### （四）課程評估

- 對學生的評估
- 教師的評估
- 對課程本身的評估

Wiles 及 Bondi（1998, pp.216-218）指出就課程工作而言，下列為常見的領導任務（recurring leadership tasks）：（1）發展操作的理論（an operating theory）；（2）發展機構和一個工作環境；（3）訂定標準；（4）利用權力去建立一個組織氣氛；（5）建立有效的人際關係；（6）規劃和啟始行動；（7）維持溝通渠道開放和有效運作；（8）評估成績。

此外，不少學者認為建立專業學習社群（professional learning community），或使學校成為學習型組織（learning organization），是促進學校和課程變革的途徑。就前者而言，Hall 及 Hord（2001, p.197）指出專業學習社群具有五個度向：（1）共同價值和願景；（2）集體學習與應用；（3）支持性及分享式領導；（4）支持性條件；（5）分享式個人實踐。要建立專業學習社群或者一個學習型組織，每一位組織的成員需要協助：（1）建立共同遠景；（2）規劃和提供資源；（3）投資專業學習；（4）檢查進展；（5）提供持續的支援。

Henderson 及 Hawthorne（1995）亦指出革新或轉化型的課程領導（transformative curriculum leadership）在下列三種情景脈絡有助於學習社群的建立：（1）合作性檢視現行的政策、實踐和成果（如行動研究）；（2）溝通和解難的訓練；及（3）形成一個「應該是如何」（what should be）的共同願景。就後者來說，聖吉等人（Senge, et. al, 2000）指出學校成員可考慮組織學習的五個基本法則（key disciplines）：

- (1) 個人通達（personal mastery）—— 表達個人願景的意象，並同時務實地評估現狀；



- (2) 共同願景 (shared vision) ——大家建立共同目的；
- (3) 智力模式 (mental models) ——強調反思和探究技能；
- (4) 團隊學習 (team learning) ——重視團體互動；
- (5) 系統思考 (systems thinking) ——人們學習更好理解相互依賴性 (interdependency) 和變革 (change)，以及尋求達致最具建設性變革的槓桿作用 (leverage)。

## 知識領導與學校和教師發展

Sallis 及 Jones (2002) 指出在知識組織裏，知識領導方面宜具下列特徵：

- 培養知識工作者 (knowledge workers)，確認知識是一種社會建構 (social structure)，而知識工作者是自我激發 (self-motivating) 的；
- 培養機構的互信和合作性，並鼓勵成員分享知識（例如利用「講故事」和學習對話方式）；
- 培養中層管理者作為溝通的橋樑，發展團隊和知識社群。

David Hargreaves (1999) 建議學校可發展成為「創造知識」(knowledge-creating) 的學校，它們具有下列四種特徵：

- (1) 審計 (audit) 校內的專業 (工作) 知識 —— 發掘員工的知識和專長；
- (2) 管理創造新專業知識的過程；
- (3) 使專業知識變為有效 (validation) —— 通過分享和研究增加知識的有效性；
- (4) 傳播專業知識 —— 使知識和實踐可轉移 (transferable) 至另一教師或可轉換 (transposable) 至另一情景。

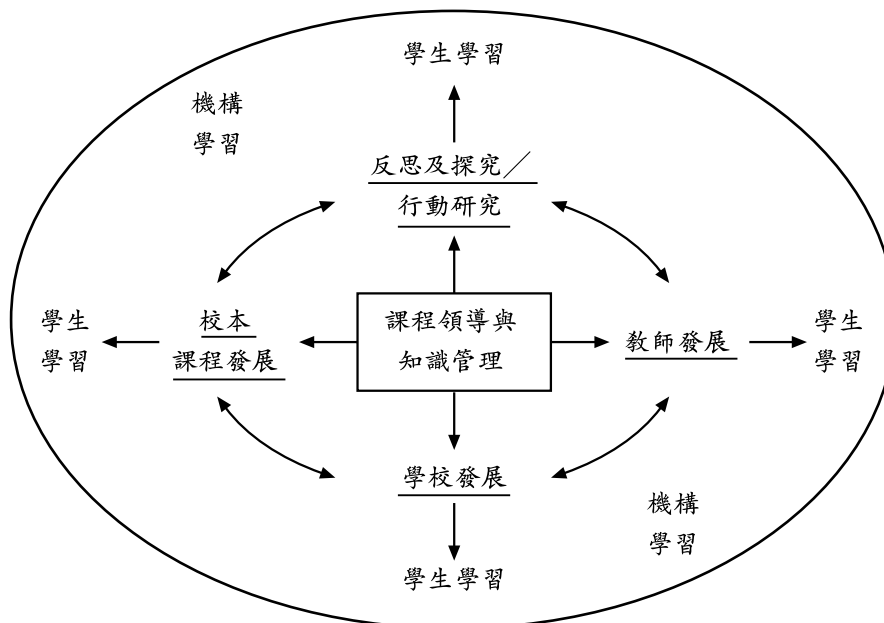
學校作為一個學習機構，領導者方面的角色也有相近的特徵 (Morrison, 2002, p.113)：

- 辨認自我組織和組織學習的平台；
- 發展團隊和網絡作為組織學習的主要機構；
- 發展校內的願景、投入和連繫性 (alignment)；
- 鼓勵和支持冒險試驗和精神；
- 發展校內組織學習的策略，以及不同形式和條件的學習，如 (1) 維持性學習 (maintenance learning)：為新教師而設的導引 (induction) 學習、對外和對內的基本資料和行政步驟；(2) 基準式學習 (benchmarking learning)：成員與他人分享其工作實踐；多渠道溝通，使成員知道校內所發生的事情；(3) 創意式學習 (creative learning)：資訊系統地分類和儲存；成員主動地從個案材料中學習，並分享意念和實踐。

正如課程發展議會 (2002) 指出，校本課程發展、教師發展、行動研究和學校發展存在著緊密而互動的關係，不斷促進學生的學習 (圖一)，課程領導和知識管理的觀點在這些環節發揮那些作用呢？

- 課程領導和知識管理促進學校發展，使學校機構邁向一個學習機構；知識管理鼓勵成員的團隊學習，整體的機構學習，而校本課程發展和行動研究促進課程知識的創造和轉化，成為組織的知識；
- 課程領導強調校內成員共同建構遠景，並透過賦權教師和分享式領導，鼓勵教師反思性的專業發展和具校本特色和需要的課程發展；
- 課程領導和知識管理的共同目標是促進學校成為學習型組織 (機構學習)，並透過課程和教師發展使機構累積和整理知識，以及改善學生的學習。

圖一 課程領導與知識管理的概念（修訂自課程發展議會，2002，10，頁13）



教師發展可說是學校作為一所學習型組織的發展焦點，教師發展大致可分為三種取向（Hargreaves & Fullan, 1992; 李子建，2002a），分別為知識與技能發展、自我理解和生態轉變（表一）。就課程領導和知識管理的角度來說，教師發展作為知識技能發展宜培養教師掌握反思和行動研究、團體學習、溝通（如講故事）和解難

等技能。教師發展作為自我理解宜培養教師的反思、鼓勵教師與他人分享知識和收集資訊，藉以建構共同的目的、願景。教師發展作為生態轉變重視團隊工作，教師在學習的自主性，並透過建立互信而合作的變化，促進集體學習和學習社群的建立。

表一 教師發展取向 (Hargreaves &amp; Fullan, 1992)

	教師發展作為 知識與技能發展 (knowledge & skills development)	教師發展作為 自我理解 (self-understanding)	教師發展作為 生態轉變 (ecological change)
焦點	<ul style="list-style-type: none"> <li>• 裝備教師的知識與技能 (以改善學生的學習機會)</li> <li>• 技術取向</li> <li>• 教師專業發展 (staff development)</li> <li>• 知識源自外來專家；強調由上而下的取向</li> </ul>	<ul style="list-style-type: none"> <li>• 反思教師的個人與實用知識</li> <li>• 人本取向</li> <li>• 教師個人發展 (需經歷若干階段)</li> </ul>	<ul style="list-style-type: none"> <li>• 改變教師的工作脈絡因素 (如時間、領導、資源)</li> <li>• 創設一個支持教師持續專業發展的教師文化和工作環境限制</li> </ul>
限制	<ul style="list-style-type: none"> <li>• 未能充分尊重教師專業主義 (professionalism) 和重視教師的實用知識</li> <li>• 技能和知識未能在適當的脈絡 (如具協作文化的學校情景中) 中應用</li> </ul>	<ul style="list-style-type: none"> <li>• 緩慢、花費時間和昂貴，而且並不能預測成果</li> <li>• 仍有控制的意味 (教師被視為「被發展者」)；教師發展被視為「治療式的控制」</li> <li>• 未能注意教師所處的脈絡，過分強調教師對變革所負的個人責任</li> </ul>	<ul style="list-style-type: none"> <li>• 可能變為「強制的合夥文化」 (contrived collegiality)</li> <li>• 容易演變為強迫的、正規的、滿足行政需要的和重視可預測成果的取向</li> </ul>
課程領導的取向及相關功能 (黃顯華、徐蔣鳳、朱嘉穎，2002；Lambert, 1998；Hall & Hord, 2001)	<ul style="list-style-type: none"> <li>• 掌握建構願景、評估、反思及行動研究團體／集體學習、溝通及解難的知識和技能</li> </ul>	<ul style="list-style-type: none"> <li>• 反思工作，賦予工作意義；分享個人的知識、觀感、價值觀、意念、資訊和假設，藉以建構共同的目的和共同願景</li> </ul>	<ul style="list-style-type: none"> <li>• 領導者與教師分享權力；建構學習型組織和合作性文化；建立支持性條件促進集體學習、應用和分享</li> </ul>
知識管理的取向 (Sallis & Jones (2002))	<ul style="list-style-type: none"> <li>• 掌握講故事和學習交談的技巧</li> <li>• 掌握記錄重要事件 (critical incidents)、行動學習及與知識管理相關的技能</li> </ul>	<ul style="list-style-type: none"> <li>• 利用行動學習作為個人和團隊發展的手段</li> <li>• 給予知識工作者的智力自主性 (intellectual autonomy)</li> <li>• 關懷知識工作者的壓力</li> </ul>	<ul style="list-style-type: none"> <li>• 鼓勵建立團隊工作 (teamwork) 及學習社群</li> <li>• 營造分享和收集資訊的過程</li> <li>• 培養機構的信任度 (trustworthiness)</li> <li>• 建構持續學習的文化</li> </ul>

## 知識管理的意涵

學者對知識管理有不同的定義，Sallis 及 Jones (2002, p.3) 認為「知識管理」涵蓋新技術的應用以至開發某一組織的智力資本 (intellectual capital)。他們進一步覺得「知識管理」是關於「學習去知道我們所認識的東西」(learning to know what we know) 和「知道不認識但應該認識的東西」(know what they do not know but should know)。

王如哲 (2000a, 頁 31) 引述 Rossett 及 Marshall (1999) 的定義，指出：「知識管理」包括確認、文件化，以及分類存在於組織員工與顧客的顯性與隱性知識。他認為「『知識管理』是促使人員運用知識的一種機制，並使人員能夠在特定情境中採取有效之行動。」(頁 30) 台灣陳美玉 (2002) 率先提出「教師個人知識管理」，強調使「教師有機會將個人的『外顯知識』，以及內隱的

實踐性知識，化作系統性且能相互傳承與保存的資料。……教師能處在知識型的社會中，以最短的時間發揮最高的環境適應、知識創造與快速學習的能力，成為新經濟時代的典型知識工作者。」（頁 8）

Liao 及 Yau(2001)從商業的文獻指出暫時沒有一個統一「知識管理」的定義，不過他們指出不同的定義反映下列觀點：（1）知識管理是一個過程——它用以確定、組織、轉化和利用機構內的資訊和專門才能；（2）知識管理涉及發展一個系統——幫助人去學習其工作、環境和人，並更快和更佳地溝通知識；（3）知識管理是一套技術——一套工具用以組織知識成為小組，以及管理規則和規則間的互動；（4）知識管理是一種功能——它是智性資產的辨別、有利化和主動管理，包括外顯知識和個別人士及社群所擁有的隱性知識。

綜上所述，筆者認為：知識管理與知識建立（knowledge building）、知識分享（sharing）、知識創造（creation）互為關聯（Fullan, 2002）。它是一種策略、過程、收集、保存和分配——發展新知識和分享現存知識，以及建立一種機構文化為所有教育持分者創造價值（修訂自 Liao & Yau, 2001, p.44）。

## （課程）知識的類別及其管理方式

在知識管理的文獻中，不少學者提及知識分為顯性知識和隱性知識兩大類（表二）。這個分類建基於 Polanyi（1983）的意念，尤其是隱性知識的分析。Polanyi 指出「我們可以知道的比我們可以講述的更多」（we can know more than we can tell）（p.4），例如我們可以認識某人的面貌，並從不同人士辨認其面貌，但我們不一定能夠講述我們如何能辨認出來。再例如騎單車，很多人懂得騎單車，但未必能夠清楚地說明如何平衡自己，以免從單車跌下來（Cook & Brown, 2002, p.73）。同樣地，有些新手懂騎單車的原理，但未必擁有騎單車的隱性知識（平衡，並向不同方向行駛）。這種情況在課程改革中也屢見不鮮。比如有些教師懂得不同課程統整的模式和發展校本課程的程序（顯性知識），但未必能有效地設計和實施符合校本情景的課程統整方案。亦有些學校教師創設和實施校本課程統整方案（隱性知識），但未必很具條理和理念地表述校本課程統整背後的原則和相關理論。

表二 顯性知識與隱性知識之比較（Sallis & Jones, 2002, pp.12, 14）

顯性知識（Explicit knowledge）	隱性知識（Tacit knowledge）
<ul style="list-style-type: none"> <li>• 「認識它」（knowing that）</li> <li>• （宣告式知識 declarative knowledge）</li> <li>• 客觀和正規的知識</li> <li>• 明確的（tangible）資訊</li> <li>• 能夠被編碼（codified）</li> <li>• 有意識地獲得（accessible）</li> <li>• 能夠容易以網絡方式連繫在資料庫和號和信念</li> <li>• 能夠容易以信件、電郵、互聯網等傳遞和轉移給他人</li> </ul>	<ul style="list-style-type: none"> <li>• 認識如何（程序式知識 procedural knowledge）</li> <li>• 社會建構的知識</li> <li>• 包括兩類：技術性知識（知識如何）及認知性知識</li> <li>• 包含機構裏的傳說（folklore）</li> <li>• 儲存在人們的腦海</li> <li>• 可以作為掌握某一技能的知識</li> <li>• 包含價值觀、覺察、預感、偏見、感受、意象、符號和信念</li> <li>• 可以變得混亂（chaotic）</li> <li>• 難於編碼和儲存在資料庫和內聯網內</li> <li>• 通常難於溝通和分享</li> <li>• 有價值和成為經驗和學習的一種豐富來源</li> </ul>

根據不同學者的分析，顯性知識和隱性知識是互為補充的實體，並可能透過個人或集體人員的互動，從其中一類知識轉化為另一類，為組織累積新的知識。王如哲（2000a，頁64）引用Nonaka和Takeuchi的觀點，指出有四種知識轉換（knowledge conversion）方式，以前述課程改革為例，它們是（參考Sallis & Jones, 2002）：

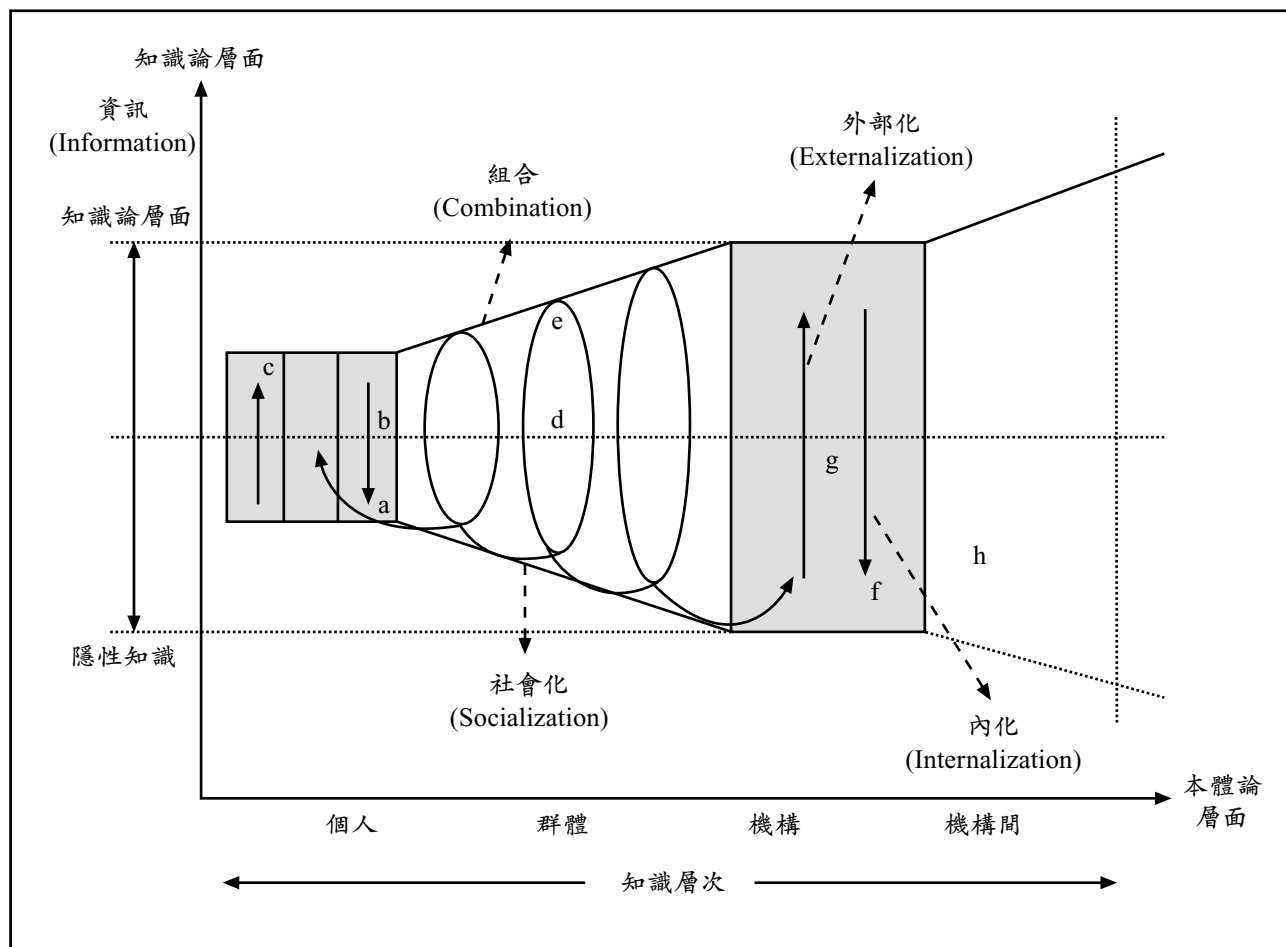
- （1）社會化——從個人的隱性知識至團體的隱性知識。例如課程發展主任（個人）向他／她的同事分享課程統整的意念和他校的經驗，同事也交流他們對課程統整的看法，在分享（一種社會學習）的過程產生了一些新意念。
- （2）外部化——從隱性知識至顯性知識，意念轉化為實在（practical reality）。這個過程通常涉及隱喻、比喻和理念之運用，例如佛教茂峰法師紀念中學在發展跨科主題教學的過程，運用「以學生中心」、「以社會中心」及「以知識中心」作為校本課程設計的理念（李子建等，2002）；不少學校在發展課程統整時，會選擇一些主題（李子建、張翠敏、張月茜，2002），這些主題的孕育某程度上也可說是外部化過程。
- （3）結合／組合——從分離的顯性知識至統整的顯性知識。這是一種轉移知識的手段，使知識得以檢驗。例如某校的課程統整的經驗通過分享方式（如組織研討會、發表論文）與其他人士溝通，並獲得他們的回饋。

- （4）內化——從顯性知識至隱性知識，這是一個較困難的過程，目的是使團體形成需要解決問題的心智圖像（mental image）（Sallis & Jones, 2002, p.21）。例如經過多次設計和實施校本課程統整方案後，學校組織衍生了不少正面的經驗和待改進的議題，通過內部分享，不同教師一方面從校方的經驗豐富了自己的隱性知識，另一方面經意或不經意地孕育了集體解決未來校本課程統整的共同興趣（common interest）和共同目的（common purpose）。另一種內化的方法是「從做中學」（learning by doing）。例如學校嘗試從小做起，引入真切性評量，不同教師從實踐中理解真切性評量的意涵和評估在校本實踐的可行性。

總括而言，通過四種知識轉換的方式，隱性知識與顯性知識產生不同的互動，進行衍生不同類型的知識（圖二）。以課程改革為例，社會化過程可能產生團體內不同人士的「共鳴性知識」（例如對課程統整的理解）；外部化過程可能產生「概念性知識」（例如建立校本課程統整的設計原則和特徵）；組合過程可能產生「系統性知識」（例如分享校本課程統整的評估結果及學習成果顯證）；內化過程可能產生「操作性知識」（例如引入課程統整的革新研究或新評量方式）。此外，Nonaka及Takeuchi（1995）指出：

圖二 組織知識創造的螺旋

(修訂自王如哲，2002a，頁 67，79；Nonaka & Takeuchi, 1995, p.73)



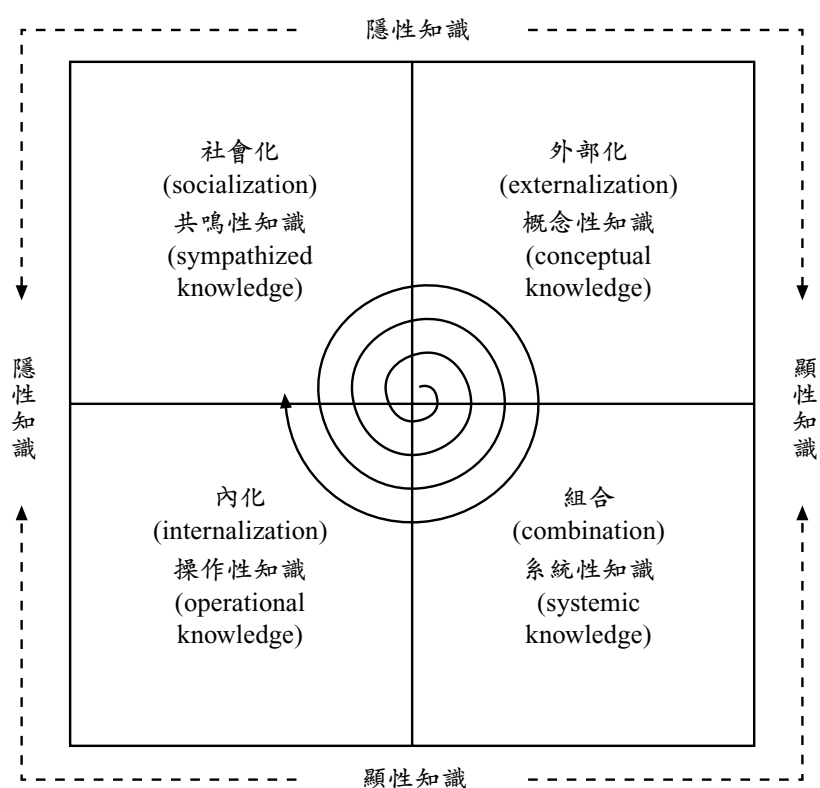
- a 面對面接觸
- b 從做中學
- c 內部訓練與教育
- d 討論論壇
- e 內部資訊公報和資料庫
- f 革新研究
- g 知識的轉移和再次使用：研究與發展
- h 外部的接觸：聯盟、夥伴

- 組織知識的創造透過四種知識轉換方式的螺旋而達致（圖三），但通常從社會化過程起始。
- 組織知識創造的螺旋除了認識論層面（顯性知識和隱性知識的分野）外，也可涉及本體論層面，即可跨越個人、團體、組織及組織之間的

層次，而個人的隱性知識是組織知識創造的基礎，透過較大規模的團體和組織的互動，知識不斷轉化、累積（沉澱而成為組織知識的資產），使不同層次（由個人以至組織間）的機構學習得以完善（Morrison, 2002）。

圖三 四種知識轉換的方式及知識螺旋

（修訂自 Nonaka & Takeuchi, 1995, p.62, 71-2；王如哲，2000a，頁 64）



就課程知識的管理方式來說，王如哲（2000a）引用普羅特國際管理顧問公司，指出知識管理會遵循下列三項步驟：

- 進行知識內容分析——例如把校本課程的經驗分析和整理成為可以向他校分享的知識；
- 激勵人員和文化——例如透過發展共享文化

和表現評估機制獎勵參與知識創造、維持和管理的同事；

- 應用科技——例如利用資訊基本設施儲藏和整理知識，使同事很容易取得相關資訊，並透過網際網絡分享和討論知識對校本課程發展方向的啟示等。

## 以教師發展為導向的學校知識管理

知識管理理論的知識論層次起始於個人，而個人的知識管理是機構學習和學校發展的重要基礎。就學校而言，陳美玉（2002，頁55）指出：「教師個人的知識管理同樣要在學校支持系統的協助下，在一個鼓勵個人持續進行動態的學習，並且不斷將知識外顯化、檔案化與書面化，助長知識分享、交互流動與移轉的環境中，才能將教師個人具高度脈絡性與經驗性的內隱知識與實踐智慧具體化出來，並有效的回饋到學校組織的發展上。」

學校可考慮透過教師發展的強化，鼓勵教師採用下列不同個人知識管理方法（陳美玉，2002）：

- (1) 合作自傳法 —— 把個人生活史的描述，與同儕分享，例如可針對目前工作環境脈絡、班級內常用教學方法與理念、個人專業發展與教學理想的詮釋，一方面擬定未來的專業發展計劃，另一方面反省與分享建構的個人知識，並尋求解決教學問題的實踐方案；
- (2) 札記反省法 —— 把教學實踐與教學理論相互印證，反省實踐與理論的差距或不一致的地方（李子建，2002b），以及特定事件處理與事後分析等。這個方法除了與同儕共享個人知識內容外，亦著重他人的回饋和對話，藉以發展更高層次（具反思性）的個人知識。
- (3) 經驗學習法 —— 把重要事件與經驗的描述，然後由閱讀者（如校外人士、校內不同部門同僚）標示他們的看法，作為集體合作討論反省的材料，這種方法一方面協助教師澄清自己的想法，另一方面可建立團體成員間的信任，以及把個人的經驗傳遞至另一個人或部門；
- (4) 教學檔案或檔案法 —— 把教學或課程發展的相關資料（如文字記錄、相片、錄影、錄音

等），加以註解、註釋和反思，使內隱知識轉化為外顯知識，並可透過與他人對話和分享，促進校內的基準式（或標竿）學習（benchmarking learning）；

- (5) 個人理論建構法 —— 描述或回顧個人與教育相關的重要生活經驗及歷史，以隱喻方式把教師的觀點作深刻的處理，然後透過合作反思和不同方法（如庫存方格技術），把教師的內隱知識外顯化和理論化，並通過檢視理論間的邏輯關係和一致性，建構和發展教師的個人理論。

此外，教師也可通過反思和行動研究（李子建，2002c），豐富個人的專業實踐理論和學校組織的課程知識。

不過，正如不少學者指出，教師從事行動研究並非易事，一方面是缺乏資源和時間，另一方面也可能欠缺信心和技巧，因此大學和其他機構可考慮與學校建立夥伴關係（李子建等，2002；黃顯華、朱嘉穎，2002），以平等和互信的方式促進教師發展。

## 學校邁向學習型組織

在學校作為學習組織層面而言，Sallis & Jones（2002）指出下列取向有助強化知識管理：

- (1) 多元智能及創意能夠發揮學校組織內不同人士的才能，藉著他們的創意和創新，促進組織內知識的創造和轉化；
- (2) 情緒智能 —— 透過發展良好的人際關係，促進團隊學習和知識社群的建立，以及隱性知識的分享和轉化；
- (3) 困難的交談（difficult conversations） —— 交談由困難的交談開始，透過對話和了解雙方的情緒和觀點，把交談變成學習式交談；
- (4) 行動學習 —— 從做中學，並透過創意地解決問題或推動改革，把隱性知識外顯化；



- (5) e-學習(電子化學習)——學會學習，透過資訊及通訊科技提供另類而互動式學習的媒介；
- (6) 社團式大學(corporate universities)——發展組織內(in-house)知識創造的取向。

除了行動學習和學習型組織，王如哲(2000b)建議學校組織成員可運用利用式學習(exploitative learning)及探究式學習(exploratory learning)，前者強調任務外顯化和持續改進的品質、明確而詳細的工作程序和適度的工作循環，後者較強調彈性和創意，不過會存有一定的風險。

## 小結

本文初步探討從知識管理的觀點看課程領導和教師發展，就未來發展而言，學校可考慮下列方向：

- 課程領導宜與學校發展結合，創造有利條件使學校成為一個學習型組織，以配合校本課程發展；
- 課程領導宜促進合作性文化、團隊工作和學習社群的建立，配合知識管理的方向。

課程改革的迷思和挑戰很多，其中較弱的一環是課程評鑑和總結經驗。歐用生(2002)指出：「若只是有『衝勁』的校長，帶著有『創意』的教師，一直往前衝，沒有往後看，沒有加以評鑑。缺乏反省、批評的『草根模式』將淪為『草莽模式』。」(頁13)學校成員可藉著學校自我評鑑的機會把校本課程改革的經驗作一梳理和沉澱，以往學校可能只是關心「已經做了些甚麼」和「是否把事做對」，課程實施和評鑑的過程是否已得到照應，日後學校成員或可思考「可能和應該做些甚麼」和「做正確的事」(張吉成、周談

輝、黃文雄，2002)，多反思甚麼是對學校，尤其是對學生學習是最好的，把校本課程改革提煉成為課程知識和實踐智慧。

課程改革本身是一個複雜的系統，涉及學校所處的脈絡、學校的組織結構(如時間、空間和角色描述等)、政治、學校領導、教師的生活及其工作、學校文化和教師學習等元素(Hoban, 2002)。不少學者認為要擁抱課程改革，校長和中層管理人員宜扮演課程領導的角色，例如校長成為教學領導或革新的課程領導(高新建等，2002；Fullan, 2002)，而教師發展，尤其是教師的賦權增能(teacher empowerment)更是學校本位課程發展關注的重點。此外，學校宜發展成為學習型組織，促進教師間的合作和團隊學習。

校長和中層管理者宜成為課程領導，並以民主和革新(transformative)為取向，大家可思考Henderson所提出的一些問題，例如(修訂自Henderson, 1999, p.16)：

- 如何使我們的某一科老師在其任教科目內引入動手、解難和創意的活動？
- 如何鼓勵我們的某一科老師領導其他同事去探討教學改進的問題？
- 如何重新設計課程去促進學生「學會學習」？
- 如何使我們的老師花更多時間去進行有意義的合作式教學探究？
- 如何使家長一同討論對某一科學習表現欠理想的策略？

教師發展方面，根據Hargreaves及Fullan(1992)所建議的取向，知識與技能發展，除了反思、行動研究和行動學習外，學校宜發展教師的交流和團隊協作技巧；自我理解可給予他們較寬鬆的工作間環境，多關顧教師的工作壓力和給予教師更多的專業信任和自主性；生態轉變則可鼓勵他們共同持續學習、創造、整理和分享從課程和教學所得的知識，藉以培養持續學習和改善的學校文化。

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# 如何落實香港小學常識科的「性教育」

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「性」在華人社會常被視為一種禁忌，不但中國政府<sup>1</sup>和一般家庭刻意規避，連學校也避免直接深入探討。然而，21世紀的社會風氣，使性意識的解放成為時勢所趨，大量的性報導、性刺激隨著無遠弗屆的大眾傳播、互聯網等充斥社會，對兒童、青少年帶來衝擊。由於這種客觀局勢的改變，使得「性教育」在華人社區受到前所未有的關注和重視（例如李文照、黃志明，1996；林孟平，1997；潘綏銘，1997，1999，2000；Archard，1998，2000；劉光華，2002；王鍾和，2002；楊雄、姚佩寬，2002；袁岳，2003；胡珍，2003；紫薇、佐桐，2004；張耀銘，2004）。這情況在香港也不例外，（程敏夫、少年維特，1993；吳敏倫、吳穎英，1993；王易鳴，1995；文思慧、蔡寶瓊，1997）。香港警方（香港警務處，2004）在2003年拘捕七至廿五歲青少年罪犯近一萬七千人，當中涉及強姦、非禮、非法性行為及其他色情罪行等犯案者有五百七十人。至於犯強姦及非禮罪名被捕的「青少年」中，竟有八十四人年僅七至十五歲；十六至十八歲的則共有三十八人。有議員及學者認為數字令人咋舌，當局應正視問題，全面推行性教育，教導青少年如何克制性慾。

目前，香港小學的「性教育」課程主要集中在小五及小六的常識科中，是屬於個人與群性發展的範疇（香港課程發展議會，2002，頁34）。對課程改革與教學創新而言，這是一個十分重要的環節，畢竟性教育的課程實踐有助培養學生在社會生活的能力，幫助學生的個人成長，而最重要的是培養德育的發展（香港課程發展議會，2002，頁5-6）。這些知識、態度和技能將會對學生的一生產生重要的影響，然而在2002年頒布的《個人、社會及人文教育學習領域課程指引》中，對小學常識科性教育課程的描述，則仍是在第一學習階段的分類表中簡單概述「與性有關的議題」而已（香港課程發展議會，2002，頁28-29），似乎對性教育仍未能作更深入的探究。由於前線教師們所能掌握有關教授「性教育」策略的資料不多，所以不能對如何落實香港小學常識科的性教育作深入探討，和研究多元化的教學策略。

無可置疑，在新一輪的課程改革中，香港的小學常識科在2004年將會採用不同的模式來組織個人、社會、人文教育和科技教育等六個不同的學習範疇，以達至學生的有效學習。目的是確保能銜接幼稚園階段與日常生活相關的主題式及專題式課程（香港課程發展議會，2002，頁63）。事實上，「性教育」的定義不只是狹義的生殖、生理教育，而應是廣義的人生教育、人格教育、生活教育。性教育不僅是教導各種有關性的知識，更主要的乃在於培養負責任、有愛心的做人態度，促成兩性之間的和諧關係，引導個體在生理、心理及社會三方面的成熟發展（王鍾和，2002）。

1 中國人民大學教授、性社會學研究所長潘綏銘（1999，頁9-15）著的《存在與荒謬-中國地下「性產業」考察》揭露中國內地的娼妓問題不僅是「死灰復燃」，而是在迅速發展，這已經是一個人盡皆知的現實。由80年代初到1997年底，中國累計查獲的嫖娼賣淫人員約是210萬人次。該書在出版時曾受多方壓力，後來得著名社會學家費孝通教授為該書的書名題字，才得以順利出版。由此可見，政府對與「性」有關的課題仍被視為一種禁忌。

但如何落實香港小學性教育，將會是香港的課程設計者、學校、教師在未來需要面對的重要課題。可惜的是，前線教師似乎不敢接觸這課題，例如在2003年2月由香港教師中心主辦全港最大型、以教師為主的《課程改革與教學實踐》的教育會議中，當中39項活動，沒有一項與如何在香港小學常識科落實性教育的課題有關。

由此可見，在香港的小學教師看來，性教育依然是一個有所顧忌的區域，儘量避而不談，這景況真教人惋惜！從課程改革與教學創新的角度來看，教師的態度會不會構成推廣性教育的障礙？教師能否健康地建構和發展教學創新的知識、技能和態度呢？課程改革是否要從教師教育開始？以上種種問題也是教育工作者需要面對和探討。

## 世界各地的小學性教育

早在七十年代，瑞典<sup>2</sup>、美國、法國、加拿大及澳洲等發達國家，便在小學一年級時開始推行性教育，有的國家甚至在幼兒園階段便開始。劉國霖（2000）指出，「兒童在幼稚園接受性教育，容易把性教育視為一般事物，更能以開放態度去探索」。而中國青少年研究會秘書長孫雲曉也認為應該在孩子進入青春期之前，就進行性教育。在小學二、三年級就對孩子進行性知識教育是非常好的黃金時期，那時講陰莖、陰道、子宮就像講杯子一樣，對他們來說都是知識。性，好

比一層薄紙，捅破了也就沒有甚麼了，不要把性搞得很神秘（紫薇、佐桐，2004，頁247）。大部份西方的小學性教育課程和教學是由嚴格的教學進度來規管。課程內容大都主要針對7~13歲小學生正值身體迅速成長階段，其要點是：

- 一、 認識自己的身體：瞭解男女身體的簡單區別，瞭解人體主要器官及其功能；
- 二、 培養良好的衛生習慣，瞭解生殖器的清洗方法；
- 三、 學習青春期發育的知識，瞭解第二性徵；
- 四、 懂得男女之間互相尊重，互相幫助。

繼而在初中階段，再進一步學習.....

- 五、 心理發展認知
- 六、 異性交往的禮儀和方法
- 七、 性生理知識
- 八、 性對人生的意義
- 九、 甚麼是愛情
- 十、 處理性慾的知識和方法
- 十一、 人類的性與動物性的不同
- 十二、 性交知識
- 十三、 性病知識
- 十四、 避孕知識

在過去，英國的性教育的發展則比其他西方國家較為緩慢。小學教育中雖有政策，但學校往往不需要提供性教育，辦學組織有權決定是否需要或在何時提供性教育，但必須在中學階段進行性教育。直至1994年，英國教育部才開始將權限放寬，但仍保留小學家長能要求子女退出性教育課程的權利，不過學童依然要學習「全國課程」中的常識科內容。畢竟，「全國課程」的常識科內容，也只是一些關於生殖系統의普通知識。這種不合時宜的情況，近年已開始受到英國教育界的關注。英國聖安德魯大學道德哲學與公共事務研究所所長雅捷教授（Archard，2000，p.7）曾

2 楊雄（2002，頁195）瑞典是世界上第一個推行性教育的國家，在政府建議下於1942年開始性教育。1956年提出義務化性教育，1957年制定了性教育指導要領，其中包括了所有新興的性科學研究成果和實態調查，也匯總了各個學校報告的問題；1977年推出教師用性教育指導書，但是在所有學校真正地開展性教育是在70年代以後。這是因為即1956年以後，多數人仍持有傳統的價值觀，視性為可耻，反對喚醒兒童式的性教育。自1976年開始明顯減少，與此同時，瑞典的性病和性犯罪的比率也在下降。瑞典的性教育主要從幼兒園便開始普及，以滿足孩子們的要求為前提，由淺入深，主要是從生理學的角度傳授妊娠與生育知識；中學則完整地傳授生理與身體機能的知識；在高中，則把重點放在如何調整對象關係和人際關係上，最終以避孕知識教育而告結束。

對此提出了強烈不滿，批評英國政府忽略學校的性教育，導致缺乏教師培訓與資源，也只有少量的課外活動計劃或相關的跨科目活動來支持性教育的健康發展。

值得注意的是，過去香港的課程發展很大程度是沿襲英國本土的課程政策，這也難怪香港的教育當局對這方面是有所保留。但在 21 世紀，香港特區政府是否仍要墨守成規呢？

在亞洲，日本的中小學性教育比其他亞洲國家較為先進，在八十年代開始便在中小學推行有規劃的性教育，內容包括身體發育、心理發展、男女的人際關係及與社會協調方面。

環顧亞洲各國，日本的中小學是通過學校的全部教育活動來進行性教育的，包括「性的學習」和「性的指導」兩部分。所謂「性的學習」是指為了向學生傳授科學的性知識，使他們理解生命的寶貴，具有正確的異性觀和性行為的自我決定能力等，而按照《學習指導要領》的要求，在一定的科目中，有計劃地進行的性教育。這些學科主要有小學體育科中的「保健」領域、初中保健體育科中的「保健領域」、高中保健體育科中的「保健」科目、理科、家政科或技術、家政科（初中）、社會科或公民科、生活科、國語科等。另外，在特設的「道德」時間中，也部分進行性知識、性道德方面的教學。應當指出的是，這些學科、科目是按照各自的教學目的、目標和計劃進行的，他們不是專門的性教育課程，所以在性教育上，通過制定全體計劃和學年計劃，明確各學科、科目的作用，加強其教學的協調，使其內容具有連續性和系統性很有必要。

「性的指導」主要是通過特別活動、「領域外活動」(即包括學科課程、道德、特別活動等三部分的教育課程體系以外的活動)進行的性教育。這種性教育不是以性知識傳授為主要目的，而是讓學生掌握如何處理、解決自身存在或面臨有關性的問題上所需要的各種能力，形成應有的態度，養成良好的習慣。在特別活動中，與性教

育有關的活動主要有班級活動（高中為課外學習活動）、兒童會（初中、高中為學生會）活動和學校例行活動等。在領域外活動中進行的性教育主要是教師利用課前、課後時間，對在性發育上有不適應症狀的學生和在性行為上有問題的學生進行的個別教育。另外，在「道德」時間中也進行這種「性的指導」。

根據日本性教育協會編著的《性教育指導要項解說書》的解說，從小學至高中階段的性教育的內容大體如下：

1. 情緒性和感受性。即：培養學生自然地、豐富地接受「性」的心情；讓學生領略生命的神秘性、偉大性和純真性；培養學生對生命的連續性、親子緣分等偉大自然的裁量的敬畏之念。
2. 社會性。即：讓學生知道自己生命的珍貴，使他們認識和發現自己是與其他生命共同生存的；培養學生尊重男女各自的特質和平等性的精神，使學生理解性的作用和男女關係的應有狀態，培養他們相互合作的態度；使學生對社會上的性問題有堅定的認識，培養他們審視性文化和性道德的能力，養成他們符合於社會人的素質。
3. 科學性。即：使學生對自己身體上和心理上產生的性的發展如何變化有科學的理解，傳授正確的知識，培養學生能恰當地對待自己的能力和態度。
4. 自我控制能力。即：為了培養正確地控制性慾望的能力，使學生理解行為的手段和對待性衝動的方式。

另外，日本文部省編輯的《關於學生指導中的性指導》指明了中小學性教育的四項目標：使學生確實認識自己作為男性或女性的性別；使學生能基於尊重人性和男女平等的精神，建構男女人際關係；使學生作為家庭和社會的一員，取得

基礎、基本事項；適應身心的發展，解決面對的各種課題；使學生學習作為青年期的人的理想生活方式（張德偉、饒從滿，2000）。

日本學校性教育的發展，值得我們參考。相對而言，華人地區包括中國內地、香港、澳門及台灣，中小學性教育的推行則發展得緩慢了。

## 華人地區的性教育

為何「性教育」在華人社會常常被視為一個敏感的課題？這主要是家長、老師和學生均受傳統觀念的影響，在面對性教育的時候感到尷尬。以中國東北的長春市為例，在長春地區，仍有很多家長擔心過早開展性教育，會引起孩子對性的關注。也有老師認為孩子年紀太小，講了也未見能聽得明白，所以性教育多安排在初中開始。長春市朝陽區教育局通過對全區小學五六年級和初中學生進行大規模問卷調查，知道現在的孩子青春提前，小學五六年級的學生已進入青春前期，性教育應該在學生青春前期開始，所以得出在小學階段實行性教育是勢在必行的結論（蔣蕾、康磊，2002）。中央電視台（2002）報導，1998年的一次全國調查顯示，80% - 90%的中學生缺乏基本的性知識，許多高中生還不清楚「懷孕」究竟是怎麼回事。此外，有資料表明，目前中國青少年的犯罪中30%是性犯罪，其中網上不良資訊是重要誘因。

《讀者文摘》（2003）為了探討青少年對「愛情與性」的看法，在台北、上海、香港三地各訪問了五百名十三至十九歲青少年，男女比例約各佔一半；發現台北青少年的性態度較上海和香港的開放，對十五個「性」問題之中的十四個，贊同程度都高於香港和上海。只有「允許未成年少女合法墮胎」一項，上海的贊成率最高（百分之三十八點六），但台北也高達百分之三十五。意見調查也發現，香港是兩岸三地之中最保守的，在八個問題上不贊同的比率最高。可是，台北青

少年的性知識似乎較為貧乏，這一點從保險套的問題上可見一斑：台北有近四成受訪者認為「使用兩個保險套較能避免染上性病」；上海的比率為二成七；香港的比率只有二成四，超過一半人不相信這說法。目前，中國有三億多青少年，每年有二千多萬人進入性成熟期，並渴望得到正確、健康的性教育。

一項香港和深圳兩地的對比調查顯示，香港的中、小學生獲得性知識的年齡普遍比深圳要早，而且多數是從課堂上獲得，而深圳的學生更多是從影視作品中學到的，知識很不全面，但深圳學生嘗試性行為的時間卻比香港學生要早，次數也較多。

大學生方面，香港城市大學研究員岳曉東、甄雪麗（2001）以大型問卷調查，分析京、港大學生性觀念、性經驗和擇偶觀之異同。發現香港與北京的大學生在性觀念和性經驗存有相當大的差異，卻在擇偶觀上差異不大，主要仍按照「郎才女貌」的偏好。在性觀念上，香港大學生較北京大學生要開放得多，且兩地女大學生的性觀念較男生要保守得多。在性經驗上，香港大學生也較北京大學生開放得多，且兩地男大學生的性經驗又較女大學生要豐富得多。這正好反映出中國需要具有「性別平等」的性教育（晏涵文、黃富源，2000）。

在台灣，王鍾和（2002）指出教育行政當局對性教育的態度較為消極。規定課程標準雖然列有「青春期的健康生活」、「美滿的家庭」、「認識異性」、「優生與生產」、「國中健康教育」等單元，高中也列有若干生物學的單元，但對於「性教育」卻隻字未提，更遑論對「性教育」課程的整體規劃。多年來，台灣學校性教育的實施經常都相當的被動，除非教育行政當局極力推行，否則學校較少去積極面對如「性教育」等這種敏感的問題。楊雄（2002，頁130）更指出台灣性教育方面缺少系統資料，根據現有資料反映，台灣中學生認為學校實施性教育相當不夠的約佔90%以上，贊同應積極推行性教育者約佔85%以

上。推行性教育應首先從提供充分的性認知開始。例如：如何與家人相處與親愛、如何保護自己不受傷害、男生與女生之間的尊重與合作、如何控制及適當地表達自己的喜、怒、哀、樂情緒等。

在香港，突破（1994）做了一項有關青少年與性角色、態度與行為的調查，發現約三成被訪者對性慾的出現產生罪咎感，約六成人會採取壓抑的方法處理性慾。林孟平（1997）就中學生與性進行的調查中，發現有四成的被訪者用壓抑方法處理性慾，更有五成人為處理性慾而感到不安；而不知所措者則佔四成之多。以上數字反映年青人對性慾抱有負面感覺，由於他／她們不知如何面對自然的性慾流露，於是壓抑便成為青少年處理性慾的方法，但抑壓卻會帶來不良的後遺症。吳敏倫（1995）指出長久抑壓對某些人會造成傷害，甚至使人做出犯罪的性行為。

此外，多個調查更發現（FPAHK，1991；突破，1994；林孟平，1997；李文照，1998）約有三至四成的青少年以自慰解決性慾。但自慰的結果卻往往換來傷害。其中一份報告（林孟平，1997）發現，在有自慰經驗的中學生中，（一）怕被人知道的有百分之十一點七；（二）認為有害身心的佔百分之八點四；（三）有罪咎感的則有百分之六點六；（四）感覺羞恥與懊悔的也有百分之四點七。以上數字反映香港不少青少年以自慰作為解決性慾的方法，但卻要面對不道德與罪咎的負面情緒。

香港明愛黃大仙明愛青少年綜合服務（1999）的一項調中發現 57% 的受訪者表示得不到足夠的性教育，在聚焦小組中，學生表示學校未盡力提供性知識，而且內容不全面。學生吸收性知識的途徑，主要來自報章（31%），學校（29%）及朋友（24%）。聚焦小組中，學生也表示多從報章或成人影碟中獲得性知識，當遇到「性」方面的困惑時，43% 的受訪者最希望從朋友身上獲得幫助，其次是家人（17%）及社工（14%），只有 19% 及 21% 的受訪者答對愛滋病

的傳播途徑和行為的題目。性行為方面，有 41% 受訪學生無想過自己發生性行為的年齡，24% 則選擇 17-20 歲。聚焦小組中，同學表示性行為多在無計劃及匆忙下進行，47% 表示在拍拖階段要面對及處理「性行為」這問題。

近年，香港青少年對性的態度越趨開放，按城市大學社會科學部（2003）的調查，受訪者對青少年性思想的評價，五成七指青少年對性較隨便，四成七指他們較多性濫交；至於行為指標，七成九人認同青少年有自由選擇性取向，這反映青少年較成年人更接受同性戀。當學校、家庭與教會未能提供正確與健康的性教育，青春期的男女就通過報刊、影視媒體等耳濡目染，吸收了歪曲的不良資訊。

## 香港的性教育發展

在香港，正規的性教育課程要遲至八十年代中才在香港出現。前教育署在 1986 年 12 月成立了性教育資源中心，為教育和有關教育團體提供參考資料及教學輔導服務，並編印了《中學性教育指引》，這是一本較有系統的中學性教育教材，主張不設性教育科，建議將性教育通過不同科目，以隱蔽式或綜合式的方法向學生作滲透，提議不指定由一位老師授課，而提議老師在所教的科目，遇到有關性的內容時，便負責教導。1985 年又成立了香港性教育促進會，從事理論研究和宣傳工作，收到較好的效果。但是一些學校仍視「性教育」為洪水猛獸、禁區，除了只在中三的生物科中偶爾一提之外，願意在香港的學校推行性教育的學校簡直是鳳毛麟角。性教育開展至今，各方面都認為離開青少年的實際需要還存在差距，極需努力改進。這景況實在是不利香港的青少年健康的成長。先賢說「食、色、性也」<sup>3</sup>，既然「性」是一種與生俱來的現實，為何不正面的面對，而刻意避而不談呢？

3 見《孟子·告子上》第四章。



自九十年代初，在香港家庭計劃指導會及香港電台電視部合力推動下，第一部關於性教育的電視節目——「性本善」面世，開始深入社會，將性和與性有關的話題及知識全面的向市民推廣。但「性教育」的禁區仍未能全面開放。文思慧、蔡寶瓊（1997，頁3）在《性教育再思教育工作者參考手冊》一書中指出，香港大部份成年人對「性」方面缺乏清晰而坦誠的思考，以致對「性」及其有關的文化理念、社會制度及權力關係不能好好掌握。這反映出香港的華人表面西化，但對性觀念的禁區仍有顧忌。

為了更有效地推動香港的性教育，香港課程發展議會（1997）發表了《學校性教育指引》，提出性教育的八個基本原則，要求學校推行性教育時應以學生為中心，在不同時候、階段因應學生不同的發展而施教。但據文思慧、蔡寶瓊（1997）指出學校推行性教育有不少困難。（見表一）

表一 學校推行性教育時常遇到的困難

學校推行性教育時常遇到的困難	
困難	百分比
教學時間不足	91%
欠缺曾受性教育訓練的教師	89%
缺乏專業建議	81%
教師感到不自然／尷尬	78%
資源／教材不足	65%
教師不願參與	57%

資料來源：文思慧、蔡寶瓊（1997）《性教育再思教育工作者參考手冊》。

有些事件曾對前線教師構成打擊，使他們裹足不前。例如在2001年，有一節目講述一間小學的一連串性教育課程，包括青春期的身心轉變，以及約會、婚姻和婚前性行為等倫理問題。此節目在每一節播出前，均有字幕建議家長陪同子女一同觀看。在其中一節，一群小一及小二學生繪

畫男孩和女孩成長後的身體改變。一些學童在開始的時候感到尷尬，但在教師指導下，他們全都能完成習作，部分更在鏡頭前介紹自己的作品。其中一節的節目遭一位觀眾投訴，節目內容描述一名教師要求一群小學生繪畫人體的性器官，有侵犯兒童之嫌。此節目有關兒童性教育的嚴肅紀錄片並無不雅，也無侵犯兒童之處，並附有警告字句，因此可以接受在上述時段播放。最後，投訴因理據不足而不被接受（香港政府新聞處，2001）。但由此可見，在香港的小學落實性教育仍是荊棘滿途，問題也相當複雜。

香港小學的性教育主要集中在小五小六的常識科，主要提及學生（青少年）在青春期中生理及心理上的變化。雖然在課程中有性教育的部份，可是知識只是局限在青春期這一個狹窄的範圍之內，缺乏技能和態度上的培養。這樣的教學，毫無疑問能提高學生對青春期的認識，但同時也會引起更大的好奇心。如沒有培養適當的態度，好奇心可能會導致他們犯錯，社會問題也隨之出現。

歸根究底，是學校的老師未能配合。首先，香港人對「性教育」諸多避忌，甚至認為「性教育」是無必要的。而香港大部份的小學老師就是在這個環境下成長。當小學老師在需要講授有關性教育的課題，便會覺得尷尬，加上欠缺性教育的訓練，教師在講授時會難以啟齒，更不免覺得無所適從，因此在面對性教育課程時，常常是輕描淡寫的帶過，或讓學生自修或回家自行研讀，而不會深入的講解。再者，香港小學的科目繁多，性教育是安排在五、六年級的常識科中教授，而常識科課程緊密，往往礙於上課時間不足而不能全面傳授性教育的知識，而且在考試主導的學習制度下，也沒有硬性規定學校對實施性教育進行評估。試問學生在這樣的情況下，又如何獲得有質量——即具有知識、技能和態度的性教育呢？

## 如何克服及落實香港的小學性教育的挑戰

學校是傳授知識的地方，也最能按部就班，有系統地向青少年推行性教育。實施周詳而有計劃的性教育課程，實有賴學校、家庭和社會三方面的配合和努力。面對小學常識科的課時限制，除了通過正規的教育方法傳授性教育知識外，也可以同時通過非正規教育方法在小學推行性教育。

### 課外活動

小學除了在常識科中教導與性有關的課題外，也可以在課外活動中加入性教育的元素。香港家庭計劃指導會幹事李明英（2001）認為，最重要是校方的參與和配合外界團體的援助，例如舉辦「小學性教育講座」，因應不同級別學生的需要，按其心性發展和理解能力而建議各式各樣性教育課題，例如「青春期」、「約會戀愛」、「性騷擾」、「性取向」等。這主要是針對學校受到固定節數的限制，這些性教育講座可編排於班主任課、早會或課外活動，通過問答、討論、錄影帶播放、遊戲、信箱解答、短講、節目欣賞等，輔以各式各樣器材，如模型、卡通圖板、教材套及錄影帶等，增強學習興趣，例如學生就錄影帶片段內容以「人生交叉點」形式作出選擇及發表意見，務求讓學生能夠從自己的情況出發，主動吸收性訊息，建立個人的性觀念。以靈活的方式施教，較單向的講授方式來得有效直接（李明英，2001）。同時，這些活動也可以邀請家長一起參與，一則作為親子活動，二則可以讓家長獲得正確的性教育觀念，成為家長在家庭教育中灌輸正確的性教育知識的途徑。

### 家庭教育

兒童及青少年最信任、最具影響力的啟蒙老師就是父母。性教育不但應由零歲開始，還應由家庭開始。性是個人成長的一環，若父母能緊貼子女

的心性發展需要，積極負起教育的責任，相信對啟發子女學習正確的性觀念及健全的性態度，可收事半功倍之效，也能有效加強兩代之間的緊密關係。家長在推行家庭性教育所遇到的障礙，主要是性知識不足、欠缺信心、不能克服尷尬心理、不懂施教技巧等。因此學校及教育當局有需要幫助家長掌握良好性態度及基本知識，內容方面也應特別加強兒童心性發展、回答子女性問題技巧、親子溝通方法等，以便增強向子女談性的信心。此外，當局也需鼓勵父母承擔家庭性教育的責任，強調兩代要建立有效的溝通及互相關懷，使孩子確認家庭的重要性（李明英，2001）。由此可見，通過家庭和學校合作來推動小學的性教育和家庭教育，可收事半功倍的效果。

### 教師教育

對很多已接受小學師範教育的教師來說，尤其是一些年青及未婚的教師來說，推行學校性教育仍是一個嶄新的經驗。因此教師培訓機構仍需要不斷加強在職教師對推行性教育的「常新教育」。可是，各大師訓機構所提供有關性教育的培訓不足，大多數只佔一個單元的部份課時或是選修課程，試問這樣又如何能提供充份的學習和討論呢？可幸的是，香港教育學院及香港浸會大學（校外進修部）的教育學士學位課程中也加插了一個單元的「性教育」課程。此外，在2003年3月由教統局主辦的「教師交流月」也開始鼓勵前線教師面對小學性教育的課題，但成效如何，仍為未知之數。這些活動的目的為充實在職教師及準教師的性知識，確立良好、坦誠、開放的性態度，能嘗試接納學生們的想法，以增強討論和教授有關課程的信心。

與此同時，教師培訓機構也需要介紹各項資源及幫助教師掌握施教技巧，例如在互聯網頁上搜集資料的途徑，並將資料運用於課堂、專題學習、小組學習、反思學習及疑難為本學習之中，

也需介紹如何處理學生的突發性「性」提問時的正確技巧。其次是克服在表達性教育內容時可能出現的障礙和困難，並能分享及接納他人的性態度，用不同的分析角度給學生提供全面的知識、技能和態度。

## 總結

總括而言，周詳而有計劃的性教育，實有賴學校、家庭和社會三方面的配合和努力。小學常識科的內容不單只是著重性教育上的知識，也應將內容推及至人格教育及道德範疇（文思慧、曾家達及吳敏倫，1990；Lamb，1997；晏涵文、黃富源，2000），並應盡量以平等、交流和討論的形式進行（文思慧、蔡寶瓊，1997，頁23）。然而，性教育的目的，並非要機械式的灌輸我們所接受、所推崇的某一套價值觀念給予下一代，而是培育他們的思考和選擇能力。第一階段的性教育可通過小學常識科來推動兒童成長，而推行

性教育最終的目的，是可以使小學生開始對性和性行為的效果有正確和全面的認識，探討自己對性的態度，以及對婚姻和家庭的觀念，藉以培養出更好的判斷技巧和溝通技巧。最後，培育出一致和積極的價值觀及負責任的行為（香港課程發展議會，1997）。誠如文家安（2000，頁18）所希望「性教育能培養學生在肉體的、認知的、情感的、社會的、道德的和靈性的都各有成長」。換言之，待學生吸取有關資料後，懂得以其成長背景、教育或個人經驗，衡量面對性行為或其他性向抉擇的後果，並明白自己所能承擔責任的能力範圍，以最合適其本人的性價值觀去作出判斷和決策行動（Archard，2000，頁34）。在香港的小學常識科中落實性教育的困難與挑戰仍然存在，主要是教師的培訓不足，課時不足；其次是性教育仍深受傳統文化影響。因此，要打破僵局，跳出困境，未來的發展仍需要教育界同工積極面對和開拓，轉變落後的觀念，為下一代的幸福繼續努力。

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# ***Understanding Teachers' Development in China: An Illustrative 'Snap-shot' of Three Teachers' Professional Lives***

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## **Abstract**

Teacher development is a major concern of current educational reform in China. This paper draws on theories that there are three aspects of teacher development : professional knowledge, teachers' commitment and community of practice. This paper reports an illustrative 'snap-shot' of three middle school English teachers' lives, to illustrate the current situation in China of teachers' professional development. An analysis of this data indicates a current deficiency in professional knowledge, teachers' commitment and community support, which undermines these teachers' professional practice for the purpose of professional development.

## **Key words**

Teachers' professional development, Teachers' knowledge, Teachers' commitment

## **INTRODUCTION**

Substantial progress in education has been witnessed in China, embracing both educational policies, institutional management and teacher training. However education in China is still found to be "imbued with problems" (Li,1999,p.179). One major cause of these problems appears to be the teacher education system (Zhang Jiexiang, 2001). In China, teachers are usually graduates from normal universities, colleges or schools, where various area of 'subject knowledge' such as psychology, pedagogy and methodology are offered for

professional development.

After graduation, the schools where they work may then provide limited in-service training including mentored teaching, basic skills training, modern technology training, short-term training in holidays, participant observation, and collegial lesson planning (Zhang Jiexiang & Sang Yongna, 2001; Zao Mengceng, 1999). These forms of training however may not fit well with the teachers' professional practice (Song Deru, 2001).

Based on the concept of “lifelong education” (UNESCO report, 1996), the Ministry of Education in Mainland China now seeks to develop teachers’ “further education”, by involving all elementary and middle school teachers in the enterprise of professional development (Cheng Shuhua, 2000). The intent here is to raise the quality of education.

Learning from countries adopting a similar “quality of education” goal and with contexts similar to China, such as India (as reported in Dyer et. al, 2004), people come to realize that in-service training could not achieve expected goals where the training content is felt to be irrelevant to teachers’ professional daily practice. To bridge this ‘relevance’ gap, the focus of teacher development has now been oriented towards the teachers’ lifeworld (Goodson, 1994; Allwright, 2003; Wu, 2002a).

This paper seeks to investigate three ‘teachers’ lifeworlds’ and to illuminate what is relevant to the ‘professional development’ of middle school teachers in Mainland China.

## THEORETICAL BACKGROUND

Research in teacher development has changed its focus over the past few years. Two decades ago, it was still based on the “delivery mechanism” (Freeman, 1998) which was mainly concerned with what we knew or thought was important about teaching. But by the 1990s interest had been diverted towards “the thinking of the teacher” (ibid) i.e. teacher learning. This implied that teacher development was to provide teachers with “opportunities to learn” (Hargreaves and Fullan, 1992, p.1). This change in focus is reflected in the various approaches adopted in teacher development practice. Hargreaves and Fullan (1992, p.2) categorize three types of teacher development as:

- knowledge and skill development
- self-understanding, and
- ecological change

In this paper the three facets of teacher development are reformulated as three guiding research questions to investigate the situation of Chinese teachers’ professional lives.

### What expertise does the teacher need to have?

“Xu gao wei shi” (‘the knowledgeable can be the teacher’) may best characterize Chinese traditional expectations of teachers. Knowledge of subject matter has long been considered central in China’s teacher education system. This view is now gradually changing. Freeman and his collaborators (Freeman, 2002; Freeman & Johnson, 1998; Freeman & Richards, 1996) propose theoretical frameworks that redefine the scope and nature of teachers’ professional knowledge and emphasize teachers’ personal understanding of their daily practice. For Rose (2003) such changes in the notion of professional expertise indicate a move from ‘official’ to ‘local’ knowledge - the former being unitary and totalitarian while the latter appears to be “discontinuous, disqualified and illegitimate” (Jorgensen 2002, p.31).

### What developmental approach deserves teachers’ commitment?

Approaches to teacher development fell broadly with a ‘skills- and knowledge-based’ paradigm in the majority of our past practices (Hargreaves & Fullan, 1992; Dyer et. al, 2004). Knowledge or skill was considered as something existing objectively there, usually discovered or possessed by some experts or authorities and therefore

known as “official knowledge” (Apple, 2000). Based on such a theory, teacher development is usually manifested as efforts exerted in various ways to facilitate the transmission of knowledge from trainers (experts) to trainees (teachers). Therefore it depends heavily on training institutions, bureaucratic authorities and ‘experts’. Teacher trainees only play a passive role. But for Hargreaves & Fullan (1992), this “top-down” or “outside-in” method may silence teachers’ voice arising from their practice and prevent teachers from gaining true understanding for their own professional development. As more “local” knowledge is preferred now, we no longer regard knowledge as something that we can move around from one person to another (Wu, 2002a, p.339). This implies that teacher development cannot be achieved through institutional instruction but through understanding of individual teachers’ life in exploratory practice. (Allwright, 2003)

### **What external supports are needed to facilitate teacher development?**

Where top-down imposition of knowledge and contextual irrelevance may drown teachers’ authentic understanding of their practice, interest has focused on communities of practice (Wenger, 1998).

Communities of practice are assigned two key characteristics:

*Collaboration:* Collaboration in teaching can take various forms such as peer discourse or dialogue (Manouchehri, 2002; McCotter, 2001), seminars or workshops (Frank, 1998), observing colleagues’ classroom teaching (Richards, 1998), action research in group (Wu, 1995; Carr & Kemmis, 1986) or even informal communication like chat, discussion, writing letters or emails, and other collective activities among colleagues.

*Autonomy:* For Clement & Vandenberghe (2000, p.85) autonomy “holds prospect for creativity, personal study, reflection, the elaboration of new orientations and as a consequence for professional development”. For Richardson (1997, p.185) a community conducive to professional development shall be one of “sacred space”. Given these characteristics, for professional autonomy to flourish, it requires both social and institutional respect and nourishment.

Teacher development, as we can see from the review above, has been approached from various perspectives with different foci. A common feature amongst the more recent approaches is that they address teachers’ practical and local needs and teachers’ “dwelling” (Wu, p.2002a) i.e. their daily professional life (Goodson, 1994; Allwright, 2003; Wu, 2002a). So in this paper we propose to take a “snap-shot” of three middle school English teachers’ professional life in China to illuminate the challenges and opportunities they encounter in their professional development.

## **THREE CASE STUDIES**

The three case studies comprise three native-Chinese teachers of English and their reflections sampled over one representative teaching week. Convenience sampling - interviewees are long-term colleagues of the researchers: the ‘teaching week’ is arbitrarily selected - is an acknowledged research limitation. However the intent here is to report a ‘snap-shot’ of teaching reality. The validity of this ‘snap-shot’ stems from the mutual respect and confidence shared between researcher and respondent as demonstrated in the following biographic sketches:

*Huifei:* She was born in a scholarly family (her mother was the headmaster of a middle school), educated in a medium-sized city in Jiangxi, elected

Chairperson of students' union at college and awarded the Championship title in a debate contest. As a teacher, she has been honored as a "model teacher" in her school and invited to give demonstrative classes for her colleagues.

*Lifang:* She is a girl from the countryside, a second-prize winner in a provincial English proficiency contest and promoted from a rural middle school to the No. 1 in her county for her excellence in teaching achievement and professional competence. Her husband is headmaster of a middle school and they have one daughter.

*Linwei:* He is also from a rural family in Jiangxi and known for his diligence as a student at college. As a teacher, he was also promoted from a junior to a senior middle school for his professional accomplishments.

The three interviewees have each had five-years' teaching experience. They are reaching a stage of "impact concerns" (Fuller, 1969) in which teachers usually start to be concerned about further development in their profession by drawing on not only their personal but also social potential. This also can serve well our purpose of researching professional development.

Reflecting geographic distances, the data comprise a series of telephone interviews. All interviews are held in the evening, once a day over a period of one full teaching week. Each interview starts with the reminiscences of our past shared college life, our feelings about our life and career, an account of what they do at work during the day including their daily teaching routine, their contact with students or colleagues and their feelings and comments on these interactions.

Interviews are recorded in the form of book notes, whose accuracy is confirmed immediately after each interview. Then episodes or activities are identified. The analysis presupposed the concept that life is revealed as consecutive episodes and that the primary way of

living is manifested as "comportment" within an episode (Donnelly 1999, p.936), so those episodes are the windows for us to understand the teachers' life. Episodes are categorized and analyzed in terms of teachers' knowledge, commitment and community of practice. The following serves as one example of this analysis process (Note: interviews were originally conducted in Chinese).

Prompt: How was your school day today?

Huifei: I attended a meeting this morning. It was summoned by the school's League Committee. It had nothing to do with teaching. It was held as a response to a circular from upper educational authorities. ... (Interview Notes on April 7). In this conversation we can see that Huifei is talking about an administrative meeting she had joined. Her story also reveals that in this meeting they just sit there, listening to one school leader's speech reporting on a circular passed down from the upper educational authorities. From this we deduce

- 1) that the knowledge within this meeting is "hard" or "official" (Apple, 2000) for it is circulated and universally applied in all schools of their city, taking no account of the specific situation or needs of individual teachers and schools.
- 2) that teachers show little or no commitment to the agenda of the meeting, since this meeting is imposed top-down on the teachers, does not emerge out of their authentic teaching practice and "it had nothing to do with teaching".
- 3) that there is no collaboration among leaders and teachers in this meeting, for what they have to do is follow the requirements or stipulations in the circular. They do not have the autonomy to change



the proceedings or content of the meeting. It appears that all teachers are taking uniform actions but this impression is contrived.

By drawing on the analysis of their daily practices in the way we illustrated above, we reach the following understanding of middle school teachers' professional life.

## **FINDINGS**

Our analysis shows that the three case studies share remarkable similarities in terms of the three analytical dimensions of professional life.

### **Knowledge**

Our talks with the three teachers all show that they are embedded in "an organizational knowledge structure" (Schon, 1983, p.336). The main drive of their professional activities is the imposed "official knowledge" from top down. Linwei has the following account:

Our primary duty is to fulfill the requirements listed in the syllabi and help students achieve high marks in exams. (Interview Notes on April 7)

As illustrated above the official guidelines are internalized as the perception of teachers' duty, and are embodied in their pedagogical discourse in terms of both their teaching content and method.

### **Commitment**

By "commitment" here we do not mean the time, energy or emotion teachers devoted to their profession. Instead it is intended to mean the self-elaboration of authenticity of teachers' practice i.e. the personal horizon which a teacher explores in order to enact his authentic understanding in his professional life.

Their stories in our interviews indicate that the teachers are all more bothered with their daily routines than voicing and reconstructing the meaning of education within their own "knowledge landscape" (Clandinin & Connelly, 1995). One example demonstrates this phenomenon:

Lifang: Every day, I teach lessons, grade students' homework, plan lessons or chat with some friends. (Interview Notes on April 7)

Linwei: The majority of teachers here consider that their only duty is to perform the routine classroom teaching. They care nothing about their own professional development. (Interview Notes on April 8)

However, we do find that instances where they can engage in "marginal practice" (Wu, 2002), which can lead to authentic understanding as demonstrated in the following:

Huifei: Now I am experimenting with a new theory—task-based learning.

Caishun: How did you come up with that idea?

Huifei: I came across it in some books. And I felt the idea is not only significant to our education but also practical in my teaching. So I started to try it. I surfed on the net to look for relevant materials and new ideas for my teaching. And now it works well.

Caishun: I am quite interested in it because in my university some teachers are experimenting with a kind of similar theory called "RICH".

Huifei: That's too great! Could you send me some relevant materials? The problem I have now is lack of materials and equipment. (Interview Notes on April 2)

Huifei's spontaneous response to the idea of task-based learning is rooted in her concern for her daily teaching routines. Through her marginal practice (experiment in her own private space of classroom) she starts to match her life and work. This could encourage her further exploration in her professional life. But this authenticity will depend on her capability in negotiating the dialogues between her reading of institutional text and her own exploratory practice, which is the hardest point for all of them.

## Community of practice

All three stories reflect the features of their professional communities. The collegial activities they talk of in the interviews include:

*Classroom observation:* In Linwei's school, all teachers are required to observe their colleagues' classroom teaching 15 times every school year. In Lifang's school, they are required to observe at least each colleague's classroom teaching once every school year.

*Collegial lesson planning:* Both Huifei and Lifang's schools require that all those who teach the same subject grade meet and plan their lessons together once every week.

*Staff meeting:* Every week the school administrators will convene all the staff at least once, to circulate new educational policies, regulations or information on school's daily life. (Interview Notes on April 7)

One remarkable feature of these activities is that they are all officially administered, as time and places are fixed for teachers to meet and measures are taken to make sure that all those involved will take part on time and make requested contributions. These activities were intended to develop a collective and collaborative culture

in which all teachers could achieve 'professional development'. But they are not well accepted by teachers as we can see from teachers' responses:

Lifang: This afternoon it was our time to do collegial lesson planning. But this activity has long existed in name only. We never actually did it. We just sat there, some having idle talks and others minding their own business. (Interview Notes on April 8)

Linwei: Although we are supposed to observe colleagues' classroom 15 times every school year, we do not observe this rule strictly. We think it is of little help to our own teaching. (Interview Notes on April 7)

However, this lack of interest in those collegial activities seems to be in contrast with their uncertainty in teaching and inner desire for opportunities to learn from others.

Lifang: I just go it blind. I really want to see how others are getting on. I wish we could have more chances to observe teachers' classroom teaching in other schools. (Interview Notes on April 10)

Linwei: Learning from other teachers is important. We need more opportunities to learn from those experienced teachers. (Interview Notes on April 7)

These two types of paradoxical stories are categorized as "overt" and "covert" by Clandinin & Connelly (1995), which are told respectively in public and private spaces. According to Clandinin and Connelly (1995), it is the covert stories that are related to teachers' professional development and therefore should be encouraged in practice. However, this kind of "narrative authority" (Olson & Craig, 2001, p.670) is often thwarted or silenced in professional contexts so that teachers always feel uneasy to speak out such covert stories: e.g.

Lifang: We do sometimes ask each other questions. But they are usually problems with language points for teaching. We rarely discuss such professional questions like how to teach. We feel uncomfortable to talk about those things. (Interview Notes on April 10)

Lastly we would also like to mention in passing some differences we find between these three teachers. They differ in degrees of passion and commitment towards their profession. Whereas Lifang is a highly devoted teacher and accepts her current way of life as a teacher, we can feel a sense of “having no other choice” from her words in our talks. Linwei has decided to change his job. He is leaving to study for his master degree. Only Huifei appears enthusiastic about her job. Certainly personality in relation to gender may be one important reason for their differences. But we find the contexts also play an important role. For example in Huifei's school, she can experiment with theories like task-based learning and explore new possibilities. We know these innovations in teaching require communities of certain authenticity. The possibility in Huifei's school is made possible by the openness of her school in the city. For example, she has easier access to information such as internet and higher value is placed on professional development. But Lifang and Linwei do not have such luck. In the relatively less developed towns, the institutional morale appears to be more conservative, where teachers are more ready to accept what they are used to through institutionalization.

## **IMPLICATIONS FOR TEACHERS' PROFESSIONAL DEVELOPMENT**

This paper reveals in current middle schools in China more challenges than opportunities for teachers'

professional development. Through the study of three school teachers' one-week career life, we find that all the three teachers are imbedded in educational contexts where authorized versions of knowledge prevail, teachers' voice and their authentic understanding are suffocated, collegiality is mandated and manipulated superficially and staff are generally alienated at work. The culture can be characterized as stagnation, resistance and alienation. It is far from conducive to teachers' professional development.

Educational authorities and researchers in Mainland China recognise these problems and are making strenuous efforts to popularize the concept of school-based in-service training for middle and primary school teachers (Yang Xiuzhi, 2002). This concept allows schools to design their own training plans, objectives and content based on the school and teachers' specific practical needs. Teachers are expected to achieve development in their own daily practice. This approach towards teacher development aims to shape “teachers as learners” and “schools as learning communities” (Clarke & Hollingworth, 2002, p.949). Basically, we agree that this concept should be encouraged to address the situation facing middle school teachers now. But in order to realize a fundamental change in our educational practice, we would argue that our endeavors should be first directed to address the following three primary issues:

### **Transforming current teachers' beliefs and value systems about educational knowledge and practice**

The first reality we reveal in our study is the dominance of “official knowledge”. We have already pointed out that one result of such dominance is the uncoupling of theory and practice. In order to motivate teachers' professional development, we must first of all make

them realize the indeterminacy and unpredicability of the constant changing reality and the limitations of the authorized version of knowledge in addressing their changing practical needs. We shall also commit them to the belief that the truth of knowledge only comes from their authentic educational practice.

We find most of our teachers are always looking for or expecting to be given some kind of model in teaching so that they can simply follow it<sup>1</sup>. But they are actually often disappointed by those transplanted teaching methods or approaches, which are usually the results of technically manipulated experiments, because those scientific findings are irrelevant to their practical contexts. Their needs can only be addressed through their own understanding in practice or “local knowledge” (Dyer et. al, 2004). So “teacher development programme(s) needs to be able to convince teachers of their own capacity directly to effect change, and to build on and extend teachers’ views of the possible” (ibid, p.51). Teachers will not simply depend on the theories and official knowledge they are provided with. Instead they will see themselves as creators of professional knowledge.

But this shift cannot simply be stimulated through inculcation. Otherwise, the new endeavor will fall again into a vicious circle as we we have seen in the past educational reforms. The prerequisite of its success is that school-based in-service training be implemented in an authentic sense of “school based”.

### **Committing teachers to authentic reflective practice**

As we have argued above, most teachers are more ready to accept what they have been accustomed to. They are resistant to change imposed upon them. This has been the reason for the failure of our past education reforms. We can never successfully formulate any model for all

teachers to follow. We argue that in-service training now should be re-focused on teachers themselves. This is congruous with our stress of “local knowledge”.

When teachers begin to turn their interest to their own daily practice, they may be able to start a dialogic process between their own beliefs and practice. In this way teachers can involve themselves in “exploratory practice” (Allwright, 2003) and reflect authentically on their practice.

To arrive at such a goal theoretically teachers need to understand:

- 1) that teacher development programs are started not because their daily practice is problematic and needs correcting. Instead, we shall take our daily practice as normal and base professional development on the normal. (for this point see Donnelly, 1999)
- 2) that teacher development is a process of negotiation between educational theories, teachers’ own authentic (local) understanding and authentic (local) practice, which may be illustrated by Allwright’s (2003, p.115) closed circle that unites ‘Thinking globally, acting and thinking locally’.
- 3) that the authentic voice and practice of teachers can only be nourished in authentic communities.

### **Transforming school into a learning community**

“Contrived collegiality” may be the best concept to represent the current nature of school communities in Chinese schools. Most of the collegial activities are institutionalized and compulsory, as our study has shown. They are grounded on the extant institutional and educational systems like unified curricula, examinations, etc which function to strengthen the traditional ‘technical practice’ (Halliday, 1998) rather

than stimulating 'authentic practice'. Within such communities, teachers will not feel safe, for they are always faced with challenges from the institutions, colleagues, and students. Now most schools in China have introduced the scientific management mechanism, which forces teachers into struggle against each other. For example, they have to be evaluated by institutions for their personal promotion; they have to compete with their colleagues for the security of their position in the school, and they hold the responsibility for the students' performance in the examinations. In this way, how could teachers have true dialogues while working together? How could they practise authentically? The following words of two teachers reveal part of teachers' mental tortures in practice.

Lifang: Since my students are going to take the college entrance exam soon, I had no way but to do those reading and listening practice exercises in class. (Interview Notes on April 7)

Linwei: Sometimes I did come across some ideas but I could not apply it in practice. Because for the senior students examination is considered most important by all. I could not risk my students' future for my personal experiment. (Interview Notes on April 9)

Lifang and Linwei both betray their own authentic understanding to give way to the dominant institutional control. They are doing what they are actually unwilling to do.

What our teachers need is autonomy and constructive collegiality. For the former, the way out might be, as Hargreaves and Fullan (1992, p.16) argue, "to shift the balance of responsibility for teacher development and curriculum development from the centre to the periphery, from administrators to teachers, and from men to women". To achieve this we need to provide enough safe space in which teachers can freely talk about their covert stories. This kind of community must be based on democracy, mutual understanding and joint action. We must be particularly cautious against any violent interventions by institutions and bureaucracy.

These three case studies were one enterprise to explore Chinese middle school teachers' professional life. From this research, we already got a snap-shot of their social and institutional constraints in professional development. But we want to state here that the significance of research of this kind lies more in its consciousness raising than what it reveals of individual teachers or schools.

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# ***Problem-based Learning: a Problem with Education?***

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## **Abstract**

As the discovery of penicillin from a 'failed' medical experiment illustrates, it is good practice to revisit apparent teaching and learning 'failures'. Two Hong Kong case studies are here reviewed for they report educational 'failures' evidenced by students displaying a negative learning experience while undergoing Problem-based Learning (PBL). The first case study involved Primary Four and Five pupils; while the second investigated post-Secondary school students. An analysis is provided of these two negative learning experiences followed by a critique of possible solutions. The findings are intriguing - Problem-based Learning is shown to provide a flexible, responsive pedagogy that reflects Hong Kong's current learning priorities. It is argued that the reported educational 'failure' reflects a tension between learner diversity and educational priorities, which raises the possibility that these 'failures' indicate not a 'problem with PBL' but rather a 'problem with education'.

## **INTRODUCTION**

Given that the origins of Problem-based Learning (PBL) have been traced back to the educational pragmatism of John Dewey (Menon, 1997) it is perhaps not surprising that PBL's claim to present real-world problems within a learning context currently attracts popular attention amongst educationalists (Savin-Baden, 2000; Little et. al, 2001; Tan, 2003).

Specific educational claims for PBL have arisen from findings in a range of educational settings e.g. PBL has been shown to bridge the gaps between theory and real-world practice in both medical education (Balla, 1990a,b; Schwartz et. al, 2000) and engineering (Perrenet, Bouhuijs, & Smits, 2000). At a more general educational level, PBL has been found to enhance

specific learning skills e.g. knowledge construction and reasoning (Albanese and Mitchell, 1993); building positive study attitudes (Kaufan and Mann, 1996) and the transfer and integration of concepts to new problems (Norman and Schmidt, 2000).

Such positive claims have led to the practice of PBL to be subjected to closer scrutiny. For example Tan, Little, Hee and Conway (2000) note that the ability to pose and define a problem can be limited by the learner's access to information. Within conventional school settings for example, the potential of PBL to expose students to open-ended learning was found to be constrained by the higher priority of meeting and following the formal school-based curriculum.



Recognition of a tension between the open-ended learning offered by PBL and the closed-learning of the formal curriculum has stimulated debate that currently focuses on making education relevant to the 'real-world'. This view argues that the real world is filled with problems, projects and challenges and that creating a "curriculum that reflects this reality makes sense" (Glasgow, 1997). Within Asia a similar debate has centred on questioning the ability of the education system to meet the market-demands for a knowledge-based workforce (Levin, 1994; Mok & Chan, 2002). In Hong Kong the argument that education should reflect reality has been strongly promoted (Learning to Learn - Curriculum Development Council, 2000) and accordingly PBL's potential to expose this 'reality' to Hong Kong students would appear to have a pivotal role in fostering current education reforms (Cheng, 2002). Where PBL's potential to expose 'real-life' to Hong Kong students may not be in doubt, professional teachers may legitimately question whether PBL really fosters students' learning.

To explore whether or not PBL fosters students' learning, this paper reviews two Hong Kong case studies where PBL students display learning problems and argues that the findings may question the current assumption that Hong Kong's education should reflect reality.

## **WHAT IS PROBLEM-BASED LEARNING?**

For Tan (2003), a current definition of PBL is:

*a progressive active learning and learner-centred approach where unstructured problems are used as the starting point and anchor for the learning process*

Tan also acknowledges that, for some students, the experience of PBL can induce a sense of helplessness. Rather than exploring the reasons for their

helplessness, Tan offers a three-point checklist for PBL implementation:

1. Is the 'problem' set in a contexts meaningful?
2. Does tutor-support include a protocol of questions?
3. Does appropriate scaffolding support self-directed learning?

However the very need for such a checklist indicates that the implementation of PBL has not always been a complete success. Accordingly it is appropriate to identify and explore why PBL may not be helpful for all students.

To explore the possibility that PBL may not be helpful for certain types of students, two Hong Kong case studies are now examined.

## **Context And Research Method**

The first case study involves Primary Four and Five students (n=240). These students were drawn from a range of Hong Kong Primary schools whose staff volunteered to have their students experience PBL. Their PBL experience comprised a key element which was a Baptist University two-day Summer School initiative that aimed at promoting thinking skills ([www.hkbu.edu.hk/~think](http://www.hkbu.edu.hk/~think)). The specific PBL experience to be considered here was monitored and reported by the host staff in co-operation with the pupils' regular school teachers (Wu and Chan, 1999).

The second case study involves post-Secondary Hong Kong students (n=25). These post-secondary students were in their first year of a two-year Bachelor in Education (Add-on) programme at the Hong Kong Institute of Education where part of their teacher-training programme employed PBL. This case study was monitored and reported by the relevant teaching staff (Forrester, 2001).

The research method employed here involves revisiting these two published case studies from the

perspective of investigating the students' reported problems with PBL. The research method involves:

1. reviewing the findings of two published PBL case studies
2. analyzing the underpinning problems with PBL
3. critiquing PBL and individual learning styles

Having outlined the context and research method, the following investigation begins by reviewing these two PBL case studies and their respective findings.

### 1<sup>st</sup> Case Study: Primary School PBL

Eight PBL forums were formed from (n=240) Hong Kong Primary Four and Five students. Each PBL forum (n= 30 pupils; duration approx 1.5 hrs) was both led and monitored by the Baptist University Summer School

host staff and the pupils' regular classroom teachers. Each forum comprised pupils (girls/boys) from the same school/class. Although details of the pupils' family background were not reported, it is reasonable to assume that participation in this thinking Summer School signified that these schools recognized certain limitations with their current curriculum.

All PBL forums first viewed a traditional story modified to include popular local children's cartoon characters. Subsequently, the pupils discussed aspects of the story.

Embedding PBL within a 'discussion scaffold' each PBL forum followed a five-step cyclical sequence that alternated between Student and Instructor-led activities. The assumption here was that thinking is enhanced by prioritizing cooperative and cognitive learning:

#### PBL Forum: 5-step sequence

Student-led activities	Instructor-led activities
<b>Step 1.</b> view video brainstorm contextual questions	
	<b>Step 2.</b> introduces higher-order questioning (Why, Who, What, When, Where, How.)
<b>Step 3.</b> brainstorm higher-order questions select (by voting) one of the questions	
	<b>Step 4.</b> introduce 1. a set of rules for discussing the selected question. "I dis/agree, because....." 2. how to examine ideas by using thinking skills/tools (e.g. an idea may be valued in terms of its Plus, Minus, Interest)
<b>Step 5.</b> circle-discussion of the selected question	

## **Findings**

The reported research method generated cross-validating observations made in tandem by both participant observers - the pupils' regular classroom teachers and the researchers' own observations. These observations were supplemented by both teachers' and researchers' post-event reflections (Wu and Chan, 1999). Across all eight PBL forums, two different sets of student attitudes or behaviors were observed:

- 'cooperative' students (80%) who discussed fully and with engagement.
- 'non-cooperative' students (20%) whose discussion contributions were characterized as being confusing, chaotic, non-productive, and non-constructive.

## **2nd Case Study: PBL and the training of post-Secondary students**

Post-Secondary students (n=25; age range 19-22 years old, all female) embarking on their first year of a two-year Bachelor in Education programme at the Hong Kong Institute of Education were observed over one thirteen week semester. Part of their studies aimed at promoting professional reflection. Participants were required to:

1. formulate individual research proposals
2. offer an oral presentation of the research project (at local conference standard)
3. present a final written research report (following local conference guidelines)

PBL scaffolding support was dispersed throughout the thirteen-week semester. The assumption here was that reflection is enhanced by prioritizing periodic learning that is practical and cognitive:

- research methods; library search; research report writing conventions

- group meetings
- whole-class'research-in-progress reports'
- explicit awareness both of choice and the need for the individual to be able to defend that choice

## **Reported Research Method and Findings**

The research method involved a participant-observer - the instructor maintained a weekly diary, whose observations were cross-validated by both formal and informal feedback sessions with participants. Supplementary data were obtained from students' mid and end semester anonymous course evaluations. The reported findings were of students rapidly dividing into two groups:

- a larger group (n=20) who engaged with the set practical learning and went on to successfully present papers at an international conference.
- a smaller group (n=5) who, though socially interactive, were disengaged and challenged by the set practical learning.

Participants' informal feed-back was reported as being guarded but towards the end of the programme 'disengagement' was acknowledged and sourced to a questioning of their commitment to teaching as a career. The instructor's weekly diary entries acknowledge this minority's growing 'disengagement', the majority's 'success' and the initial difficulties of identifying the source issue. Formal mid-semester anonymous feedback confirmed 'difficulties' but not the source issue. Approximately two-thirds through the timetable, a source issue was identified and corrective initiatives were implemented - involving counseling and exploring alternative learning paths - however the effectiveness of these initiatives was mitigated by curriculum time-constraints.

## **Analysis - Why Does PBL Ill Serve Some Students?**

The analysis here takes as its focus those students who appear ill served by their PBL experience. This analysis will illustrate potential weaknesses within the open-ended education of PBL.

In both case studies, an analysis of the reported findings reveals two key features.

First, both case studies display contextual similarities. None of the participating students were entirely voluntary - the Primary pupils were 'volunteered' by their respective schools; the post-Secondary students were undertaking a mandatory course. Both curriculums were delivered within fixed time-constraints. Both involved students assumed to be academically homogenous - primary schools shared the same banding; tertiary students passed the same entry vetting-procedures.

Second, neither of the two case studies demonstrates homogenous results - in both case studies, a majority was reported as 'active' PBL learners' alongside a minority reported as being 'ill-served' by PBL.

For school teachers, dealing with students who are neither entirely voluntary nor homogenous learners is perhaps not unusual and is commonly termed either teaching a 'mixed ability' class or taken as an example of the professional challenges presented by 'inclusive education'. Certainly the professional challenge of dealing with such learners is widely acknowledged - along with recommended appropriate strategies. For example, Brown (2001) advises teachers facing 'mixed ability' or 'inclusive education' that group discussion/presentation may challenge those students who experience general delays in cognitive functioning. In other words, not all students can cope with the exposure of PBL group discussions. Brown's recommended strategy to facilitate such students' learning involves

providing repetition and practice of basic information and skills - e.g. hands-on activities. In contrast, Guillaume (2000) offers an alternative view by explaining that students challenged by social and/or behavioral problems commonly display off-task behavior, an inability to work independently and poor social skills. In other words, not all students develop into self-learners. To help such students, Guillaume's suggested strategy is to provide cooperative learning.

For professional teachers engaged in addressing the challenges of 'mixed ability' or 'inclusive education' the strategies recommended by Brown or Guillaume - providing opportunities for 'hands-on' or cooperative learning - are perhaps neither new nor for the professional teacher, too demanding. What such strategies serve here to illustrate is that in education the professional teacher is a flexible teacher who recognizes that the learning context priorities or at least encourages students to have individual learning styles.

## **PBL and individual learning styles**

Two examples serve here to illustrate the relationship between the demands of PBL and students' individual learning styles. For illustrative purposes, both examples are hypothesised as being sited within a Hong Kong class setting, in which a PBL class teacher is adopting one of the two coping strategies offered by Brown and Guillaume. In each example the selected strategy is then critiqued in terms of the learning outcomes.

Following Brown (2001), it is hypothesised that a class teacher presents PBL within a context or problem that emphasises practical applications. A critique of this strategy in terms of the learning outcomes reveals that the teacher may expect to find that this emphasis on practical applications may confound students who flourish within the contexts of cooperative and cognitive learning.

Following Guillaume (2000), it is hypothesised that a class teacher presents PBL within a context or problem that emphasises cooperative learning. A critique of this strategy in terms of the learning outcomes reveals that the teacher may expect to find that this emphasis on cooperative emphasis may confound and disadvantage students who flourish within the contexts of practical and cognitive learning.

As the above two critiques serve to illustrate, PBL by itself, does not offer a panacea to meet all students' individual learning needs for PBL. Instead, like many teaching approaches, it is mediated through the teacher's choice of pedagogy.

The question then arises, what influences the teacher's choice of pedagogy? In both the Primary and post-Secondary case studies, the evidence indicates that the teachers' choice of pedagogy was successful for the majority but less so for the minority. On reflection, this situation may have been improved had the teachers adopted a multi-pedagogic approach - in effect matching pedagogies to individual learning styles. However the teaching contexts of each case study appears to have narrowed the teacher's choice of pedagogy. In the Primary case study, the 'teaching agenda' held that thinking was to be enhanced by prioritizing cooperative and cognitive learning. In the post-Secondary case study, the 'teaching agenda' held that reflection was to be enhanced by prioritizing periodic learning that was practical and cognitive.

What influences the teacher's choice of pedagogy - as illustrated by these two case studies - is the 'teaching agenda'. As is perhaps common throughout Hong Kong's education, teachers are positioned as mediators between a mandatory curriculum and 'streamed-by-ability' students. Where it is assumed that students are 'streamed-by-ability', their teacher's choice of pedagogy will tend to be narrowed to address the perceived imperatives of the mandatory curriculum.

## SUMMARY

PBL has been demonstrated to be an inherently flexible pedagogy that reportedly has been successfully implemented across diverse knowledge areas such as medicine and engineering and also - with less reported success - across the more general educational contexts of Hong Kong students ranging from primary levels to post-secondary levels. This flexibility can here be characterized as demonstrating that PBL:

- is adaptive to a wide range of educational contexts
- promotes active learning
- provides a learner-centred approach

A review of two case studies of PBL within the more general educational contexts of Hong Kong students ranging from Primary age to post-Secondary however demonstrates that despite PBL's flexibility, certain students remain ill served. An examination of these PBL-failed students serves here to highlight that solutions and alternative learning scaffolds are available and could readily be adapted to address a plurality of individual learning styles.

A critique of these PBL adaptations then serves to illustrate that in teaching/learning the 'problem with PBL' lies not within this one pedagogy but arguably within a mis-match between educational priorities and student learning styles. For example, where teachers mediate PBL through cooperative learning (as in the first case study involving Primary students), such a priority may ill-serve those who flourish through practical learning. Similarly, where teachers mediate PBL through practical learning (as in the second case study involving post-Secondary students), such a priority may ill-serve those who flourish through cooperative learning. In other words, it appears that it is not PBL but rather the teaching and learning contextual priorities - the 'teaching agenda' - that may not match individual learning preferences.

Recognition that teaching and learning contextual priorities - the 'teaching agenda' - may not match the individual's learning preferences invites teachers to question these priorities. Such questioning is helpful for it serves to highlight that the 'problem with PBL' may reflect a more general 'problem with education'.

Of this more general 'problem with education', Tan, Little, Hee and Conway (2000) have argued that the open-ended learning of PBL can be constrained by formal curriculums. This paper expands their view, by highlighting that formal curriculums may only be part of a broader 'problem with education', which constrains teachers' choice of pedagogy.

As the two case studies illustrate, the teacher's choice of pedagogy can be constrained by contextual similarities. First, both case studies report a curriculum located within a constraining timeframe. Second, both case studies report students as assumed to be academically homogenous. Where students are assumed to be academically homogenous, teaching that addresses

a plurality of individual learning styles may have a low teaching priority. It is this combination of contextual similarities that constrained teacher's choice of pedagogy and which suggests that a 'problem with PBL' may rather be a 'problem with education'.

To resolve this learning and teaching 'problem with education', one solution rests in challenging 'ownership' of the curriculum along with pedagogic reliance on assumptions of 'homogenous' learners built on the questionable legitimacy of 'streaming-by-ability'. Where a curriculum accounts for all the allocated time, conflict with learner diversity appears inevitable and the teacher may expect to encounter student 'failure'. However, where a curriculum is 'negotiated', where teachers feel empowered to exercise their professional flexibility, then pedagogic reliance on assumptions of 'homogenous' learners can be reduced and the essential unity of learning and teaching restored.

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# ***Teacher Professional Development: In-service Teachers' Motives, Perceptions and Concerns about Teaching***

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## **Abstract**

This paper reports a survey study of in-service teachers' motives, perceptions and concerns about teaching. Three motives were identified for their choosing of teaching as a career, viz. Intrinsic/Altruistic, Extrinsic/Job condition and Influence from others. Of the three motives, it was mostly Intrinsic/Altruistic motive which caused them to join the teaching profession. For the concerns, the teachers under study demonstrated a higher proportion of "concern for pupils" than "concern with self", suggesting they had progressed to a higher stage of professional development. The teachers were generally inclined towards the constructivist conceptions about teaching and learning. Nevertheless, they were pressurized by the tight teaching schedule and examination system, hence they still relied on didactic teaching and required students to memorize or recite what were taught in class.

## **Key words**

Motives, Perceptions, Concerns, Professional development, In-service teachers

## **摘要**

本論文報導一個調查在職教師的教學動機、看法和關注結果。選擇教學作為職業的動機，可分為內在 / 利他，外在 / 工作條件和他人的影響。其中持內在 / 利他動機的人數最多。至於教師的關注焦點，“關注學生”比“關注自己”的人數較多，顯示受調查的教師已進展到較高的專業發展階段。調查中的教師具信心、投入，一般傾向於建構主義，然而，受壓於緊湊的教學程序和考試制度，仍然倚靠傳統的講學方法和需要學生背誦和記憶課堂內所學。

## **關鍵詞**

動機、看法、關注焦點、專業發展、在職教師



## **INTRODUCTION**

The quality and performance of teachers are always considered as determining factors for the success of educational changes. Since the 1980s, the decline in quality of teachers has become an issue of concern to the education sector (Ballou & Podgursky, 1997; Education Commission, 1992). Scholars and educators have identified several major problems faced by recruitment and retention in the teaching profession, such as the teaching profession fails to attract bright young people (Murnane, 1991), a disproportionate share of higher ability teachers leave teaching to pursue for other careers (Ballou & Podgursky, 1997; Murnane, 1991), and the under-representation of both qualified minority teachers (Newby, Smith, Newby, & Miller, 1995) and males in the primary school teaching force (Johnston, Mckeown, & McEwen, 1999).

The first few years of teaching seem to be critical for novice or beginning teachers. Studies showed that a fairly high proportion of teachers leave the teaching profession in the early years of teaching and that some potential teachers do not join the teaching profession (Ingersoll, 2001; "Teacher Shortages", 2001). In US, about one-fourth of teachers leave by the end of their second year (National Center for Education Statistics, 1992; cited in Smith, 1997). Some of them leave the teaching profession with disappointment and a sense of helplessness during these period. Several reasons may account for their leaving of the teaching profession, viz. the attractiveness of the teaching work which is related to their motives of taking up teaching as a career, the lack of support (assistance) related to their concerns about teaching, their perception about teaching before and after joining the teaching profession, which eventually may strengthen their desire to stay in the profession or to leave with disappointment and dissatisfaction.

It is obvious that the quality of teaching force is not governed only by the qualification, pedagogical knowledge and teaching skill of teachers, but also their enthusiasm, dedication and commitment in teaching. It is also determined by the motives of teachers to join the teaching team and how they perceive teaching as a career. At the same time, the teachers' behaviour and teaching performance may also be influenced by their conceptions about teaching and learning and their confidence to teach.

Thus it is important to examine all these psychological constructs of teachers. The present study aims to study the professional development of in-service teachers from beginning to experienced teachers through investigating psychological constructs of in-service teacher education students in a tertiary institute of Hong Kong. The examined psychological constructs included in-service teachers' motives in joining the teaching profession, their perception/conception about teaching and learning before and after taking up teaching and their focus of concerns in teaching. It is hoped that the results would provide valuable information to teacher educators and school authorities to assist professional development of teachers to promote their qualities and retain quality teachers in the teaching profession.

## **RELATED LITERATURE**

The professional development of teachers can be considered in two aspects: cognitive and affective, both of which are important in determining teachers' efficacy. The cognitive aspect refers to acquisition of pedagogical knowledge and improved instructional skill, which will help teachers' classroom teaching and management. In some way, this is influenced by the teachers' beliefs and conceptions about teaching and

learning, for example, the role of teacher and pupils and the preferred way of teaching and learning.

The teachers' commitment and dedication to the teaching career is an important affective component in teacher development. Probably they are influenced by the motives in taking up teaching as a career, the confidence level and concerns in teaching. Qualified teachers lacking the motives to teach often have little enthusiasm and driving force in their work. When a teacher has taught for sometime, work may become routinized. Consequently, interest decreases and the teacher fails to work to his/her full capacity and becomes less effective. In concrete terms, the result is lack of planning, resistance towards change and general negligence.

Researchers are keen to find out the reasons that may have affected students' perceptions and career choices. There have been research literature on the views of student teachers (e.g. Johnston et. al, 1999; Reid & Caudwell, 1997), the career intentions of undergraduates and high/secondary school leavers and their perception of the teaching profession (e.g. Hutchinson & Johnson , 1994; Kyriacou & Coulthard, 2000). All these studies have helped teacher educators understand student teachers' motives to teach.

Numerous studies on the motives of teachers entering the teaching profession have been conducted in US and Britain; however, few have been conducted in Asian countries (Yong, 1995). Research on prospective teachers in the US and Britain show that their major motives in choosing a teaching career are both altruistic and intrinsic. However, the study conducted by Yong (1995) shows that extrinsic motives were the determinants for teacher trainees entering into teaching in Brunei Darussalam. The results do not lend support to earlier research studies in Western countries. In a study of non-graduate pre-service teacher education students by Chan (1998), it was found that their major motives

in enrolling in the teacher education program were mainly extrinsic.

While the motives to choose teaching as a career is influential upon individual's performance in classroom teaching, teachers' concerns about teaching are often studied in the stages of teacher development. Fuller (1969) conceptualized teacher development around concerns expressed by teachers at different points in their professional experiences. She believed that concerns were reflective of strong motivators and of areas of great interest to the teacher (Heathcoat, 1997). Fuller's (1969) model of concerns has been widely used in teacher education institutes as illustration of different stages of teacher professional development. In her studies, Fuller (1969) identified two categories of concerns - concerns with self and concerns with pupils. Student teachers and teachers in their first year consistently showed concerns with self (e.g. class management, acceptance by pupils and others), which are related to survival in the classroom. As teachers progressed along, teachers become increasingly concerned with their ability to manage the teaching tasks and their influence on pupils' learning and development. That is, experienced and effective teachers tend to focus their concerns on pupils' needs and development. Later, Fuller reorganized her early model of teacher development and theorized that teacher concerns could be classified into three distinct categories: "self concerns" which center around the individual's concern for their own survival related to their teacher preparation program, including their teaching experience; "task concerns" which focus upon the duties that teachers must carry out within the school environment; and "impact concerns" which are related to one's ability to make a difference and be successful with his/her students and the teaching/learning process (Fuller, 1969; Fuller, Parsons, & Watkins, 1974). Fuller (1969) believed that as pre-service teachers moved through their training, their concerns moved from self

to task, then finally to impact concerns. Similar kinds of concerns changes are expected to be found in in-service teachers as they progress in the periods of teaching. The categories of teachers' concepts hypothesized by Fuller (1969, 1974) have been demonstrated and partially supported in some other researchers' work (Chan, 2002; Furlong & Maynard, 1995). It was reported that pre-service and beginning teachers have greater self concerns than those exhibited by in-service and experienced teachers (Adams, 1982; Kazelskis & Reeves, 1987). Teacher educators need to have a knowledge of pre-service and novice teachers' concerns and to address their concerns in order to decrease the rates of attrition of teacher candidates within their progress (O'Connor & Taylor, 1992). Whether there is a cultural or social difference is also an interesting area of investigation.

Related to the teachers' concern is their confidence to teach. Weinstein (1989, 1990) has found that pre-service teachers in US are unrealistically optimistic about teaching before teaching practice. Although they agree with the concern of experienced teachers on class discipline, they are optimistic in handling class teaching and lay much value on teacher-pupils relationship. O'Connell's (1994) study indicated that the first year teaching was not what the novice teachers expected and many of the previous beliefs and optimism had broken in face of the reality. Therefore, the degree pre-service teachers are prepared for teaching are reflected from the confidence and optimistic view held. The changes in confidence and optimism toward teaching before and after taking up teaching can be reviewed from the teachers' perceptions. The information gathered would provide useful feedback to teacher educators and teacher education students to evaluate the adequacy and effectiveness of the program for professional development of teachers.

Another important component in teachers' professional development is teachers' conceptions about

teaching and learning. Researchers have suggested that teachers' conceptions about teaching and learning are beliefs driven, and are related to teachers' instructional decisions, teaching behaviour and actions in the classroom (Caldehead, 1996; Flores, 2001; Richardson, 1996). A teacher's educational beliefs or conceptions may influence his/her judgement about what kind of knowledge is essential, the ways of teaching and learning and the methods of class management to be adopted. That is, teachers' beliefs and hence their conceptions about teaching and learning can guide pedagogical decisions and practices (Ennis, Cothran, & Loftus, 1997; Wilson, Readence, & Konopak, 2002). Research has also suggested that teacher education students' beliefs are well established by the time they begin a teacher education program and that these beliefs about teaching are formed during the apprenticeship of observation in their former days of schooling (Lortie, 1975). There are varied opinions and findings as regards whether the teachers' beliefs and conceptions about teaching and learning can be altered by training and experiences gained in teacher education programs (e.g. Tillema, 1997). Therefore, examining teachers' conceptions about teaching and learning (such as their views about pedagogy, the role of teacher and students, the relative importance of theory versus practice, the usefulness of teacher education program to their teaching, etc.) would provide valuable feedback to teacher educators and program designers on the effectiveness and impact of the teacher education program on pre- and in-service teachers' professional development.

## **OBJECTIVES**

The present study aims to examine the motives, conceptions and concerns of in-service teachers in the process of professional development. Based on the purpose of the study, several research questions were drawn.

## Research Questions

1. What are the motives of in-service teachers in choosing teaching as a career?
2. What perceptions/conceptions are held by in-service teachers before and after taking up teaching?
3. What are their concerns about teaching?
4. Are there any significant differences in teachers' motives to teach and concerns about teaching with respect to their demographic characteristics?

## Method

A questionnaire was administered to 246 in-service teacher education students of a tertiary institute in Hong Kong. The questionnaire contained 80 items, to be rated on a five point Likert scale: from 1 (Strongly Disagree) to 5 (Strongly Agree). Based on the theoretical concepts and research findings on teachers' motives, concerns, perceptions/conceptions about teaching and learning as mentioned in the Related Literature section, items were written to measure these variables and grouped into four areas. Area 1 consisted of 21 items intended to measure the motives of the participants to take up teaching as a career. Areas 2 and 3 each consisted of 19 items, intended to examine the psychology of the participants before and after taking up teaching. The assessed psychology of the participants included the confidence to teach, their perceptions/conceptions about teaching and learning, related to the constructivist and traditional views about teaching, pedagogy, teacher-pupils relationship and class management. Area 4 consisted of 21 items intended to examine the concerns in teaching, which targeted at students' learning and development, the teaching tasks and the teachers themselves. Before completing the questionnaire, participants were asked to supply their demographic

characteristics including their gender, age, elective or subject, teaching experiences and level (primary or secondary) taught in school.

## Participants

The participants were in-service teacher education students enrolled in the Two-year Part-time Postgraduate Diploma of Education (PGDE) and the Three-year Mixed Mode Bachelor of Education (MMBEd) program. There were 80 students (32.52%) from the PGDE program and 166 (67.48%) from the MMBEd program. Of those who had indicated their gender ( $N = 203$ ), 64 were male (31.5 %) and 139 were female (68.5%). The age ranged from 20 to 36 and above, mostly around 20-25 (38.5%) and 26-30 (34.6%). For teaching experiences, they ranged from less than 1 year (4.7%) to more than 20 years (6.8%), most of them around 1-5 years of teaching experiences (61.3%). There were 58 students teaching at primary and 186 at secondary level, with 2 teaching at post-secondary level.

## Data Analysis

Exploratory factor analysis using Maximum Likelihood and Oblimin Rotation was applied to the rated response items (Areas 1 and 4) of the questionnaire to determine the number and nature of factors accounting for the motives to take up teaching as a career; and the focused concerns perceived by the in-service teachers. Psychometric properties (reliability Cronbach alphas) of the motives and concerns factors or subscales identified were then computed. Multivariate analysis (ANOVA) was also applied to investigate if there was any significant difference of the identified factors or subscales with respect to the demographic characteristics of the participants.

## Results

### 1. *Motives to Teach*

With eigen-value of 1 as the cut-off and scree-plot test, three factors were extracted accounting for an accumulative percentage of variance equal to 51.11%. The first factor accounts for a variance of 24.03%, the second factor 17.32% and the third one 9.76%.

According to the nature of items, factor 1 was labeled “Influence from others”, factor 2 was labeled “Intrinsic/Altruistic” and factor 3 was labeled “Extrinsic/Job condition”. The factor structure and the mean, standard deviation and reliability (Cronbach alpha) of the extracted factors are given in Table 1.

**Table 1 Factor Structure, Mean, Standard Deviation and Reliability of the Motives in Choosing Teaching as a Career Pattern matrix (Maimum Likelihood and Oblimin Rotation)**

Items	Factor 1	Factor 2	Factor 3
Q20 Influence of peers	.916		
Q21 Influence of the mass media	.787	.196	
Q19 Influence of family	.645		
Q12 Meaningful job nature		.829	
Q13 Challenging job nature		.747	
Q15 Interest to work with children/ teenagers		.716	
Q14 Interest to work on campus		.686	
Q11 Fitting my personality	-.125	.686	
Q16 Desire to help others		.608	
Q17 Desire to teach subject(s) I like		.400	
Q18 Influence of teacher(s)	.314	.366	
Q10 Reflecting my religious belief		.347	.168
Q3 Higher salary			.724
Q4 More holidays		-.196	.724
Q2 Better job security			.722
Q6 Higher social status		.166	.668
Q5 Better working hours			.599
Q7 Good career prospect	.158	.147	.593
Q8 More opportunities for continuing education	.120	.136	.474
Q9 Government's regard for education	.144	.184	.443
Q1 Ease in finding teaching vacancies		-.103	.440
Mean	2.31	3.75	2.85
Standard Deviation	.77	.57	.67
Reliability	.81	.82	.84
(Cronbach Alpha)	(N = 246)	(N = 242)	(N = 241)
	(3 items)	(9 items)	(9 items)

ANOVA was applied to analyze the motives of in-service teachers to take up teaching with respect to their demographic variables. Significant difference was found at .05 level between programs of study, age and teaching experiences. For programs of study, significant difference was found in the second motive to teach, that is, “Intrinsic/Altruistic” motive (PGDE: mean = 3.64, SD = .52; MMBEd: mean = 3.80, SD = .58), ( $F(1, 240) = 4.34, p < .05$ ;  $t(240) = -2.08, p < .05$ ). For age groups, significant difference was found in the motive “Influence from others” and the difference was found between two age groups (20-25: mean = 2.49, SD = .73; 26-30: mean = 2.20, SD = .73), ( $F(3, 230) = 2.81, p < .05$ ;  $t(169) = 2.59, p < .05$ ). For teaching experience, significant difference was found in the motive “Influence from others” ( $F(5, 229) = 2.40, p < .05$ ) and this was found between the following groups of teaching

experiences (1-5 years versus 6-10 years and 1-5 years versus 16-20 years). In the former case, (1-5 years: mean = 2.39, SD = .69; 6-10 years: mean = 2.05, SD = .75,  $t(181) = 2.67, p < .05$ ); and in the latter case, (1-5 years: mean = 2.39, SD = .69; 16-20 years: mean = 1.82, SD = .69,  $t(153) = 2.65, p < .05$ ). There was no significant difference in the motives to teach across gender, elective groups and levels taught.

## ***2. Perceptions/Conceptions before and after taking up teaching***

The perceptions/conceptions of in-service teachers before and after taking up teaching were analyzed in several domains, the frequency counts and percentages were given in Tables 2.1 and 2.2 respectively.

**Table 2.1 Perceptions/Conceptions before taking up teaching**

	Disagree*	Neutral	Agree#
<b>A. Confidence and Optimism</b>			
Q22 Lack of confidence about one's class teaching ability	142 (57.7%)	64 (26.0%)	40 (16.2%)
Q23 Feeling optimistic in the first teaching	32 (13.0%)	77 (31.3%)	137 (55.7%)
<b>B. Class Management</b>			
Q24 Friendly towards students, then no problem in class discipline	99 (40.3%)	85 (34.6%)	62 (25.3%)
Q25 Reduce punishing students, more rewards	27 (10.9%)	95 (38.6%)	124 (50.4%)
Q26 More rewards, students increase motivation to learn	49 (20.1%)	84 (38.9%)	111 (45.5%)
Q27 Dedicate to teach and care for students, would be accepted by students	12 (4.9%)	67 (27.2%)	167 (67.9%)
Q28 Don't want to be severe towards students	26 (10.5%)	63 (25.6%)	157 (63.8%)
Q29 Can't be lenient and relaxed, else hard to control students	68 (27.7%)	105 (42.7%)	73 (29.7%)
Q30 Make more use of teacher's authority to control students, this helps class management	86 (35.3%)	91 (37.3%)	67 (27.5%)
<b>C. Conceptions: teaching and learning</b>			
Q31 Follow the practice of my former teacher (Prim/Sec.) to teach my students	132 (53.8%)	76 (31.0%)	37 (15.1%)
Q32 Follow the practice of the existing teacher as they are experienced	104 (42.2%)	95 (38.6%)	47 (19.1%)
Q33 By all means provide opportunities for students' discussion, no worry about class discipline	41 (16.6%)	98 (39.8%)	107 (43.5%)
Q34 Students need not recite the subject knowledge I taught	82 (33.4%)	98 (39.8%)	66 (26.8%)
Q35 The role of teacher is to facilitate students' learning rather than teach knowledge	32 (13.1%)	86 (35.2%)	126 (51.6%)
Q36 It is more effective for teacher to teach students direct instead of allowing students to construct knowledge by themselves	86 (35.1%)	110 (44.0%)	49 (20.0%)
<b>D. Theory versus Practice</b>			
Q37 To teach, subject matter comes first, educational theories next	80 (32.7%)	101 (41.2%)	64 (26.1%)
Q38 The main purpose of attending teacher education program is to acquire a qualified teacher status	67 (27.3%)	73 (29.8%)	105 (42.8%)
Q39 The Institute only teaches theories, no actual help towards teaching	89 (36.2%)	95 (38.6%)	62 (25.2%)
Q40 The program offered by the Institute enhance my teaching efficacy	34 (13.9%)	101 (41.1%)	111 (45.1%)

\* Sum and percentage include Strongly Disagree and Disagree

# Sum and percentage include Strongly Agree and Agree

**Table 2.2 Perceptions/Conceptions after taking up teaching**

	Disagree*	Neutral	Agree#
<b>A. Confidence and Commitment</b>			
Q41 Confidence increased	9 (3.7%)	69 (28.0%)	168 (68.3%)
Q42 More committed in teaching	14 (5.7%)	69 (28.0%)	163 (66.3%)
Q43 Increased interest to teach	16 (6.5%)	75 (30.5%)	155 (63.0%)
Q44 Teaching is meaningful, students need me to help their development	11 (4.5%)	46 (18.7%)	189 (76.8%)
Q45 Feeling frustrated and no sense of achievement	148 (60.2%)	71 (28.9%)	27 (11.0%)
Q46 If chance permits, don't teach	140 (56.9%)	68 (27.6%)	38 (15.5%)
Q47 Teaching is hard, little reward	83 (33.7%)	90 (36.6%)	73 (29.7%)
Q50 The teaching behaviour and performance of existing school teachers enhance my commitment in teaching	48 (19.5%)	110 (44.7%)	88 (35.8%)
Q51 The students' learning attitude and behaviour weaken my enthusiasm in teaching	75 (30.5%)	89 (36.2%)	82 (33.3%)
Q55 Lack of support from existing school teachers	87 (35.3%)	73 (29.7%)	86 (34.9%)
Q56 Can't bear with the large teaching load, feel tired and fed up	29 (11.8%)	94 (38.2%)	123 (50.0%)
<b>B. Class Management</b>			
Q48 Too lenient towards students, should be more severe	110 (44.8%)	89 (36.2%)	47 (19.1%)
Q49 Reward/Approval won't promote students' motivation to learn	109 (44.3)	93 (37.8%)	44 (17.9%)
Q52 Being friendly towards students can't solve the class discipline problem	82 (33.4%)	76 (30.9%)	88 (35.8%)
Q53 Being friendly and caring for students would reduce their misbehaviour	44 (17.9%)	92 (37.4%)	110 (44.7%)
<b>C. Theory versus Practice</b>			
Q54 The theories taught by the Institute do not match with the practice of the existing school teachers	47 (19.1%)	117 (47.6%)	82 (33.3%)
Q57 Allowing students to construct knowledge is idealistic and impractical	44 (17.9%)	105 (42.9%)	96 (39.2%)
Q58 The existing school teachers' ways to teach are more effective than what have been learnt from the program in the Institute	40 (16.3%)	138 (56.3%)	67 (27.4%)
Q59 The theories taught by the Institute can help me to teach	33 (13.4%)	107 (43.5%)	106 (43.1%)

\* Sum and percentage included Strongly Disagree and Disagree

# Sum and percentage included Strongly Agree and Agree

The results in Tables 2.1 and 2.2 show the confidence, optimism and commitment expressed by the in-service teachers under study, as well as their perceptions/conceptions about class management, the relative importance of theory versus practice, the preferred ways of teaching and learning.



### 3. Concerns about Teaching

With eigen-value of 1 as the cut-off and scree-plot test, two factors accounting for an accumulative percentage of variance equals to 35.37%. The first factor accounts for a variance of 22.75%, and the second factor 12.62 %.

According to the nature of items, factor 1 was labeled “concerns with pupils” and factor 2 was labeled “concerns with self”. The factor structure and the mean, standard deviation and reliability (Cronbach alpha) of the extracted factors are given in Table 3.

**Table 3 Factor Structure, Mean, Standard Deviation and Reliability of the Focus of Concerns about Teaching Pattern matrix (Maimum Likelihood and Oblimin Rotation)**

Items	Factor 1	Factor 2
Q78 Students' moral and value development	.867	-.336
Q77 Students' cognitive and mental growth	.861	-.221
Q72 Students' motivation to learn	.650	
Q69 Students' understanding and mastery of taught knowledge	.578	
Q80 Impact of teacher's speech and behaviour on students	.538	
Q61 Students' acceptance	.444	
Q66 Teacher- students relationship	.434	
Q71 Lesson planning/preparation	.390	.210
Q62 Mastery of subject knowledge	.355	.183
Q79 Students' academic achievement	.349	.208
Q76 Relationship with colleagues (teaching/administrative staff)	.343	.216
Q73 Support and cooperation from other teachers/administrative staff	.300	.293
Q60 Class discipline	.191	.141
Q64 Requirement of Information Technology (IT) Proficiency		.722
Q75 Design and use of teaching media	.110	.552
Q63 Requirement of Language Proficiency Test		.532
Q67 Evaluation given by lesson observers (Principal/Panel Chairperson/Inspector/Lecturer)	-.110	.507
Q68 Peer observation		.505
Q70 Teaching progress	.206	.386
Q65 Mastery of teaching methodology	.194	.348
Q74 Curriculum and class to teach		.316
Mean	4.06	3.27
Standard Deviation	.43	.51
Reliability	.81	.71
(Cronbach Alpha)	(N = 246) (11 items)	(N = 244) (8 items)

ANOVA was applied to examine if there was any significant difference in the concerns displayed by in-service teachers with respect to their demographic

variables. No significant difference was found in their concerns across programs of study, age, sex, elective groups, and levels taught.

## DISCUSSION

Three factors were extracted from factor analysis of the item responses representing the sampled in-service teachers' reasons to join the teaching profession. These three factors accounted for the motives of the in-service teachers to choose teaching as a career. The three motives were "Influence from others", "Intrinsic/Altruistic" and "Extrinsic/Job conditions". In terms of the mean values of the three factors (see Table 1), the in-service teachers under study chose teaching as a career mostly due to the "Intrinsic/Altruistic" motive (mean = 3.75, SD = .57), next, the "Extrinsic/Job condition" (mean = 2.85, SD = .67) and last the "Influence from others" factor (mean = 2.31, SD = .77). That is, the in-service teachers joined the teaching profession mainly due to the fact that they liked to work with children and adolescents; they liked to help others and found the work meaningful and challenging, and suited their personality.

Material rewards such as salary, stability, holidays, and easy to find a job as contained in the "Extrinsic/Job condition" factor were not as important and determining as the "Intrinsic/Altruistic" factor in their choice of teaching as a career. "Influence from others" such as teachers, parents, peers and mass media, though influential, was not as decisive when compared with the previous two factors.

The result was similar to some of the findings reported in Western countries, but differed from that of the Young's (1995) and Chan's (1998) findings of pre-service teachers. The difference was probably due to the different composition and demographic characteristics of the samples in the studies including their educational qualification. In the present study, the teacher education students were in-service teachers of either university graduate status or non-graduate teachers holding Certificate of Education qualification

(qualified teacher status), the latter group continued to upgrade their qualification to university graduate status through part-time study. In Young's (1995) and Chan's (1998) study, the sample, however, consisted of pre-service non-graduate teacher education students enrolled in a certificate course. These students usually could not enter university although they got Advanced level subjects passes and hence they often consider teacher education as an alternate means of continuing further study and they might not be intrinsically or altruistically motivated in joining the teaching profession.

ANOVA study showed that a significant difference at .05 level was found in the motives to teach between programs of study, age and teaching experiences. Both PGDE and MMBEd students had mean value of "Intrinsic/Altruistic" motive above the mid-point of a five-point scale (PGDE, mean = 3.64, MMBEd, mean = 3.80 showing their relatively high interest to teach children and adolescents. The difference between the two groups was possibly due to their different background. The MMBEd students had destined to take up teaching after completing their Certificate course (a full-time two or three year sub-degree programs, designed to prepare non-graduate teachers for primary and junior secondary level teaching) some years before they got enrolled in the MMBEd program while the PGDE students could have other career options after university graduation besides teaching. Younger people might not have made up their mind at an early stage of choosing teaching as a career and they might have been more influenced by others such as their former teachers, parents, peers and media when they eventually joined the teaching profession. This might account for the differences in the motive "Influence from others" between age groups. Similar effect might be found due to different teaching experiences. Those with more

teaching experiences, usually also older ones were more matured, stable in thought and decision making, hence less influenced by others in joining teaching profession. This was reflected by the relatively lower mean score of the elder groups (mean = 2.20) and more experienced group (mean = 1.82) in the factor "Influence from others" in comparison with the younger (mean = 2.49) and less experienced group (mean = 2.39).

Referring to the perceptions/conceptions held by the sampled in-service teachers before taking up teaching, as shown in Table 2.1, the teachers tended to be confident about their class teaching (57.7% confident versus 16.2% lack of confidence) and optimistic (55.7% felt optimistic in the first teaching versus 13.0% not optimistic) when they took up the first teaching, the result was similar to the findings by Weinstein (1990) study of pre-service teachers that they tended to be optimistic at their beginning of teaching practice. Table 2.1 suggests that the sampled in-service teachers have their own ways of teaching based on their beliefs and conceptions rather than followed the practice of their former primary and secondary teachers (53.8% reported they did not follow the practice of their former teacher to teach their students and only 15.1% did) or existing teachers in the schools they taught (42.2% indicated they did not follow the practice of the existing teachers versus 19.1% who did). The result was somewhat different from the "apprenticeship of teaching" notion put forward by Lortie (1975) although some individuals of the sample did follow this practice. As for class management, the in-service teachers appeared to be in favour of rewards over punishment (50.4% agreed versus 10.9% disagreed). A majority of the teachers (63.8%) did not want to be severe towards students. Many of them (67.9%) agreed that if they were dedicated to teach and care for students, they would be accepted by students. However, there were mixed views among the teachers about whether they should be friendly, lenient and

relaxed; the percentages of agreement and disagreement in these perspectives were quite close when class discipline and management were concerned (Table 2.1 refers).

For the conceptions about learning and teaching, more teachers in the sample believed the role of teacher is to facilitate students' learning (51.6%) instead of direct teaching/transmission of knowledge (13.1%). 35.1% of the teachers did not agree that direct teaching is more effective than students' construction of knowledge while 20.0% held opposite view. It was interesting to find that the majority (44.0%) remained neutral in this conception. That is, while some teachers were in favour of the constructivist conception of learning and teaching, others remained undecided or neutral towards the views. Further reflection of the varied teachers' conceptions about teaching and learning was reflected from their responses towards the statement "students need not recite the subject knowledge the teachers taught". The percentages of those who disagreed and agreed to this view were not widely different (33.4% versus 26.8%). Similarly, they won't totally ignore the importance of educational theories in comparison with subject matter knowledge and many of them agreed that the program in the Institute helped their teaching.

For the perceptions/conceptions held by the in-service teachers after they took up teaching, it was delightful to find that their confidence and commitment to teach increased as shown in Table 2.2 (confidence increased: 68.3%, commitment increased: 66.3%). However, it is worthy to point out that student's attitude and misbehavior in learning, as well as the performance and behaviour of existing teachers in the school did influence teachers' commitment to teach. In other words, while the teachers were dedicated to teach, the school management side and the education authority should empower teacher's commitment with support and provision of sound learning atmosphere.

Many of the teachers in the sample after taking up teaching still agreed to use rewards and approval in class management, they also tended to be caring and friendly towards students despite some agreed that being friendly and caring might not reduce the students' misbehaviour and class discipline problems. While many teachers were in favour of the constructivist conceptions of teaching and learning, considerable number of them held the views that allowing students to construct knowledge by themselves were idealistic and impractical. This view exists both before and after taking up teaching. Possibly the influence of the assessment and examination system, the tight teaching schedule, the large students number in class, all these factors caused teachers to be cautious and not readily give up the didactic mode of teaching and allows students to construct their knowledge. Besides, many teachers in the sample agreed the program offered by the Institute helped their teaching; this reinforced the conception that the teachers enrolled in teacher education program not only for the sake of acquiring qualified teacher status and upgrade their qualification but also had the will to continue their professional development with further learning.

The result in Table 3 supports the hypothesis and findings of Fuller (1969) that two major concerns were detected within teachers, one "concern with pupils" and the other "concerns with self". Comparing the means of the two factors, factor 1 "concerns with pupils" has a higher mean score (4.06) than factor 2 "concerns with self". The finding is similar to previous research reports that pre-service and beginning teachers have greater self concerns than those expressed by the experienced in-service teachers and that in-service teachers' task concerns are higher than their self concerns (e.g. Kazelskis & Reeves, 1987; Maxie, 1989). Two implications arise. First, it is a positive sign to find our teachers care and concern more with pupils than their self in the process of professional development. Students

are placed on the top priority and what the teachers do mainly is for the good and well being of the students. The teachers in the sample might have been more conscious about their impact on the development of students, that is, many of them have reached the final stage of professional development proposed by Fuller (1969, 1974). As well, many of the teachers are committed, dedicated and work for the benefits of the students and they inclined to be student-centered. Second, viewed at a different angle, there might be troublesome factors related to students' learning, e.g. students' low or lack of motivation to learn, disruptive behaviour and class discipline problems. All these aroused teachers' anxiety and concerns that "pupils' cases" was put as priority concerns/issues. If that is the case, then the education authority, parents and teachers should work collaboratively to solve the problem and teacher education institutes should equip teachers with more knowledge and techniques to handle the problem cases and relieve their worry and concerns.

For "self concerns", this included the language competency and information technology competence, the teaching technique, teaching schedule progress, use of media and which class to teach; some of these are concerns for survival, and some are task concerns. As the sample comprised teachers of different age and teaching experiences, it is no wonder why both types of concerns were found. Notice that with the recent educational reform and changes put forward by Education and Manpower Bureau (EMB), the language bench mark test and information technology competency requirement had caused much anxiety and concerns within teachers. Teachers were pressurized to handle such many requirements and reformation changes besides normal teaching and non-teaching duties within a short duration. This cannot be neglected as it has a strong psychological impact on teachers. Additional training and support are required to help teachers overcome these concerns.

## **IMPLICATIONS AND CONCLUSION**

This study identified three motives and two concerns of a sample of in-service teachers in Hong Kong. The three motives were: “Intrinsic/Altruistic”, “Extrinsic/Job condition” and “Influence from others”. Of the three motives, the in-service teachers under study were mostly influenced by the “Intrinsic/Altruistic” motive in joining the teaching profession. They were inclined to help children and adolescents in their development through teaching their interested subjects. They indicated that teaching was meaningful, challenging and fitting their personality or religious beliefs. Consequently, it is expected they care more about the well-being and learning of their students than extrinsic values attached to the job condition, such as salary, holidays, status, ..etc.

The “Intrinsic/Altruistic motives” would help the teachers remain in the teaching profession with persistence and enthusiasm and not to give up teaching readily. Such expectations were reinforced with the concerns expressed by the teachers under study, who demonstrated a higher proportion of “concern for pupils” than “concern with self”. The phenomenon suggested the Hong Kong in-service teachers under study had progressed to a higher stage of professional development, according to the theoretical framework of Fuller (1969) and others (Buhendwa, 1996; Kazelskis & Reeves, 1987). However, the higher proportion of teachers’ concerns about “class discipline”, “the students’ learning motivation”, “intellectual, moral and value development of students” should not be neglected as it raised an alarming sign to the negative learning attitude and misbehaviour displayed by increasing number of students. The solving of these problems obviously requires cooperative effort of teachers, parents, community and the education authority.

The present study found that the Hong Kong in-service teachers under study were confident and committed to their teaching; their confidence and

commitment increased after they took up teaching. This is an encouraging finding. Nevertheless, teachers should not be overloaded as they have been facing with countless educational reform and requirement all the time, which might cause teachers exhausted, and eventually burnt out. The Hong Kong in-service teachers in the sample in general were self-improving, always tried to upgrade not only their education qualification but also the efficacy of their teaching work through attending teacher education program which they considered useful and functional in helping their teaching. The Hong Kong in-service teachers were generally inclined towards the constructivist conceptions about teaching and learning, agreeing to provide more opportunities for students to discuss and that the teacher’s role is a facilitator of students’ learning rather than transmitter of knowledge.

Being exposed to both the Chinese and Western culture and philosophy, Hong Kong teachers had gradually changed to be more democratic and inclined to adopt the constructivist approach to teaching and learning. However, being pressurized by the tight teaching schedule and examination system, the Hong Kong teachers would not entirely give up didactic teaching and they still require students to memorize or recite what were taught in class. Recitation or memorization is not bad if considered as rehearsal to enhance memory in information processing of knowledge, a foundation for further learning and application. This accounts for a considerable number of teachers who agreed that students should recite or memorize what they were taught in class.

In summary, the Hong Kong teachers under study were found to be confident, committed and caring for their students’ learning and development. They had a positive sense about teaching and learning. While they tended to conceive learning and teaching in a constructivist manner, they were also practical and realistic in practice in order to adjust to the present education and examination system.

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# 香港初中推行公民教育的現況

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## 摘要

本研究是以問卷，配合有目的的抽樣個案訪談，對本港中學負責初中公民教育的教師作出調查，探討自九九年公民教育建議成為獨立科目後，初中推行公民教育的組織、目標、模式、課題、途徑和困難。結果顯示很多負責公民教育的教師未接受或接受少於十小時的培訓；很多學校未設有獨立科而以周會或講座形式推行公民教育；學校和教師的價值取向會影響校本公民教育的設計和內容；及不清晰的教育政策使學校在推行方面無所適從。研究建議教育統籌局和大專院校可以在培訓和課程目標和設計方面加以支援，使公民教育教師能運用多元的教學方法，以爭議性的事件和政治概念去充實公民教育課堂，藉此提升學生的批判思考能力。

## 前言

一九九七年七月一日，中國在香港恢復行使主權後，香港便毅然進入一個非殖民化時代，這時，公民教育的其中一個主要任務是重新界定香港市民的國民身分 (Ng等，2000)。其實，自一九八四年中英簽訂聯合聲明開始，直至九七年主權回歸前這一段過渡期間，有關日後香港公民教育的內容和如何推行以適切地配合非殖民化香港的討論，持續不斷；有關機構對香港青年作出多項關於公民意識的調查，例如，課程發展議會的調查認為有需要加強中國文化和國民教育 (Curriculum Development Council, 1995)；基督徒學會及教育行動組的調查則指出有需要在公民教育中加強政治元素的訓練 (梁大輝、劉修妍等，1994)；也有調查發現教師在推行公民教育時的教學資源不足 (教育署輔導視學處，1997)。

由於殖民地時期的教育是一種強調社會控制的疏離本土文化的教育 (Kelly 及 Altback, 1978)，九七年前的香港教育刻意把中國民族教育疏離和淡化。曾榮光 (1994) 批評，殖民地香港的公民教育是一種「無政治」(apolitical) 和「無民族」(anational) 的殖民地精英教育。黎國雄 (1998) 更認為在欠缺政治實體的香港殖民地，港人只有子民 (subject) 的地位而沒有所謂「公民」(citizens) 的身分。

因應八四年關於香港前途的中英聯合聲明，香港政府於八五年推行《公民教育指引》(Curriculum Development Council, 1985)。可是，這份強調以滲透形式推行公民教育的指引，被很多學者批評欠缺明確內容及組織，無新意且原地踏步 (例如：陳建強，1996；曾榮光，1985；



Bray 及 Lee, 1993; Lee, 1996; Leung 等, 2000; Ng 等, 2000)。Leung (1995) 形容這個指引將公民教育德育化和瑣碎化 (trivialization); Morris 及 Morris (2000) 認為《指引》提議的跨學科滲透課程需要將目前各科課程目標擴闊來迎合公民教育的個人及社會目標。但現實告訴我們, Morris, McClelland & Man (1997) 的研究發現大部分的教師不按照指引的提議去推行公民教育, 且避開了《指引》中的政治元素。

九十年代香港政制出現改革, 包括九一年立法局直選議員及九五年將投票年齡由 21 歲降至 18 歲。面對政權移交, 八五年的《指引》已顯得過時。殖民地政府於九五年成立公民教育工作小組, 課程發展議會並於九六年發表了新的《學校公民教育指引》, 新《指引》較舊指引具體而全面, 除加入民主、自由、平等、人權與法治等政治元素外, 更強調以批判思考及解決問題的技能來認識社會、民族國家和世界, 祈能作出合理的判斷 (Leung 等, 2000)。在推行方面, 九六年《指引》建議學校採用跨學科滲透課程、獨立學科和綜合學科等策略, 使學生能在學校多元的教學環境下培養公民價值觀。最重要的是, 政府接納新《指引》的建議, 決定於一九九九年初中設立獨立的公民教育科。雖然如此, Ng 等 (2000) 環顧當時的教學環境, 覺得在學校推行新《指引》會受到很多限制, 包括時間表安排、教師培訓、課程重點和教學資源等; 從公民權責範疇來看, Tse (1997) 則認為新《指引》的民主教育和民族教育元素仍感不足, 教師也未能有足夠的知識與技巧去裝備自己成為一個有效的公民教育工作者。Ng (2000) 的一項調查也發現教師在民族教育範疇中的政治知識匱乏, 他們在校內只著重民族教育的文化部分而避開政治議題。

面對九七政治環境轉變, 新《指引》無疑較八五年的《指引》更有系統及具體地描述回歸後公民教育的目標、內容和推行策略, 並加強公民教育應有的政治元素, 培養學生的公民權責。可是, 九七年後, 教育環境隨著經濟和政治環境的

轉變而受到衝擊, 且政府在2001年開展了中、小學的課程改革, 學校在新《指引》下推行公民教育的現況是值得我們探究的。本研究嘗試以問卷, 配合有目的的抽樣訪談的方法, 探討九六年《學校公民教育指引》公佈及九九年開始實施公民教育初中獨立科目以來, 現時初中 (中一至中三) 學校推行公民教育的現況。所謂現況, 是指在初中推行公民教育的組織、目標、模式、課題、途徑和困難, 從而探究影響公民教育在學校推行的因素。

## 研究方法

本研究主要採用問卷調查法向全港 400 間中學 (國際學校除外) 發出問卷, 由負責公民教育的教師以不記名的形式填寫, 以蒐集關於中一至中三推行公民教育的資料。研究員收集問卷後進行分析, 並於兩個月後有目的地選擇 (purposive sampling) 四位在不同背景中學任職的校長或負責推行公民教育的教師進行訪談, 得到的個案資料, 有助佐證、澄清或檢視問卷的調查結果。去函時主要邀約校長進行訪談, 但有兩所學校校長推介負責教師面見。四所學校中, 一間是傳統的左派愛國學校, 其餘三所則具有宗教背景, 目的是探討辦學團體的價值取向會否影響推行公民教育。訪談的內容大致與問卷的內容相同, 包括組織和統籌公民教育、推行的途徑和方法、困難及影響因素等。

二零零一年底, 研究員以郵遞方式將問卷寄往 400 間中學, 由學校校長或負責公民教育教師填寫, 兩個月後, 共收回 181 份, 回收率是 45.5%。回收率偏低是本研究的局限, 一則是郵遞問卷的回收率往往出現偏低情況, 二則是聖誕假臨近時發出問卷, 也可能影響教師填寫問卷的意欲; 另一方面, 本研究只能描繪學校推行公民教育的現況, 而未能就原因和效果作深入的討論。問卷設計分為五個部分, 包括 (1) 樣本學校的背景資料,

(2) 組織及人力資源，(3) 推行模式，(4) 目標和方法及 (5) 困難與展望。研究員將收集回來的資料加以整理和統計以協助分析及討論。

## 問卷分析

問卷的第一部分是樣本學校的背景資料。在 181 間學校當中，有 83.4% 開校具十年歷史以上，76.8% 的問卷來自男女校，回應率大致與現時中

學的男女學校比例相約。有關其他部分的結果，分述如下：

### 一、推行公民教育的組織及人力資源

「推行」在這裏是指統籌、策劃和推動。一般學校都有公民教育小組統籌初中校本公民教育，從表一顯示，超過一半學校由班主任負起推行公民教育的角色，有三分一學校以公民教育科科主任為推行公民教育的核心。有少部分學校以其他小組及人員負責或策劃與推行公民教育。

表一 學校在初中推行公民教育的組織及人員的百分比  
(可選擇多項)

推行公民教育的組織及人員	學校百分比 (N=181)
公民教育小組	82.3
班主任	58.6
科主任	34.3
道德教育小組	22.7
專任教師	21.5
生活教育小組	14.4
駐校的社會工作者	12.2
個人及社會教育小組	2.8
其他	5.5

其他數據顯示，43.6%的中學參與策劃及推行初中公民教育的教師少於五人，另外 43.6% 則由五人至十人推行公民教育。在收回的 181 份問卷統計中，共有 316 位教師參與推行公民教育，

其中94位未受過這方面的培訓，約一半教師接受少於十小時培訓，只有74位曾受十小時以上的公民教育培訓 (表二)。

表二 曾受訓的公民教育教師的百分比

公民教育教師受訓時數	人數百份比 (N=316)
從未	29.7
少過六小時	24.3
少過十小時	22.4
十小時以上	23.4

## 二、推行模式

新《指引》提議採用四種模式去推行初中公民教育，以下是學校在採用不同模式的百分比。

表三 學校初中推行公民教育的方式的百分比  
(可選擇多項)

公民教育推行方式	學校百分比 (N=181)
非正規課程	72.9
滲透式	56.9
綜合課程	48.1
獨立科	23.2

表三數據顯示，佔七成以上的學校採用非正規課程，即普遍以早會或周會，其次是課外活動形式進行；也有五成多學校使用跨學科滲透形式融合在正規課程科目內。此外，接近五成學校以綜合課程的方式推行公民教育。綜合課程是把公民教育與其他相關的範疇，包括倫理教育、環境教育、班主任課、通識教育、生活技能課等，在正規時間上佔有節數。不同課堂名稱反映該課節的重點或不同的教學理念。例如班主任課是透過班主任接觸學生的時段去幫助學生全人的成長；倫理課較強調道德價值的培養，生活教育課則將重點放於日常生活的技能。調查指出超過五成學

校使用班主任課來推行公民教育，其餘的綜合課節則各佔一成。

## 三、初中公民教育的課程目標

研究員將九六年《公民教育指引》的各範疇目標列出，共有一百六十至一百七十多所學校在問卷中填寫本項目。從表四所見，大部分樣本學校認為他們的公民教育課程的目標都能配合《指引》，而第一項「關懷社區、國家、國際關係及人民生活」、第三項「關注本地的社會、公民權利和義務」和第四項「了解香港、中國及世界關注的事情」最為學校所認同。

表四 學校在推行公民教育課程目標的百分比(可選擇多項)

公民教育課程目標	學校百分比				學校數目
	完全配合	配合	不配合	不適用	
幫助學生：					
關懷社區、國家、國際關係及人民生活	15	80.8	1.2	2.9	172
認同和尊重中國文化	14.9	75.6	3	6.5	168
關注本地的社會、公民權利和義務	14	84.3	0.58	1.16	172
了解香港、中國及世界關注的事情	12.1	84.4	1.73	1.73	173
認識民主、自由、法治等精神並實踐	10	81.8	4.1	4.1	170
搜集和分析資料及辨別問題根源和解決	7.2	76.5	9	7.2	166
對民族及文化持開放和客觀的態度	6.6	77	7.8	8.4	166

#### 四、常教的課題

大部分學校表示常將香港公民的權責、家庭觀念、基本法和當今時事列為公民教育課題(見表五)，而且較著重香港與中國的關係，以及香港人

在政治群體中扮演的角色。惟當課題涉及中國國民教育、政治制度和抽象的政治概念時，學校的關注較少。

表五 學校在初中常教的公民教育課題的百分比(可選擇多項)

公民教育課題	學校百分比 (N=181)	公民教育課題	學校百分比 (N=181)
香港公民的責任與權利	89.5	學校的功能	39.2
家庭的價值觀念	75.7	社會政治參與的方法和方式	38.7
基本法	70.2	代議政制	32.0
當今大事和時事	64.6	憲法和法律制度	28.7
中國國民歸屬感	59.7	中國的社會政治問題	23.2
香港政治制度的發展	50.8	多元化的世界	17.7
公義社會的有關概念	49.2	政府的權威與認受性	12.7
重大的全球性問題	47.5	國際組織的功能	12.7
校內組織與班會的本質	44.8		

#### 五、學校推行公民教育的困難

表六顯示，大部分學校遇到的困難是缺乏曾受公民教育培訓的教師，而學生對公民教育缺乏興趣也不容忽視。若將「常遇到」及「間中遇到」的百分率加起來，超過六成學校認為教學資源不

足、教育政策不清晰、沒有校內文化配合、缺乏同僚共識等都成為推行公民教育的阻力，而佔五成的學校表示經常或偶然遇到教師不願意任教公民教育，這點值得我們關注。

表六 學校推行公民教育常遇到的困難的百分比(可選擇多項)

推行公民教育常遇到的困難	學校百分比 (N=181)				學校數目
	常遇到	間中遇到	少遇到	從未遇到	
缺乏受過公民教育培訓的教師	51	34.6	13.6	0.6	176
缺乏教學資源	28.3	37	32.9	1.7	173
學生不感興趣	28.2	45.4	24.7	1.7	174
缺乏校內文化配合	28	41.1	26.9	4	175
同工間(包括校、教師)對公民教育的理念缺乏共識	23.9	44.3	27.8	4	176
教育政策不清晰明確	20.9	43.6	32.5	2.9	172
教師不願意任教公民教育	19.2	31.7	33.5	15.6	167
缺乏專業支援	17.4	46.5	30.8	5.2	172
學校的行政不能配合	13.7	42.3	38.2	5.7	175
與學校教育目標不符	4.1	32.1	55	8.8	171
家長反對	2.4	5.4	32.7	59.5	168
其他，請闡釋	0	0	0	0	0

## 六、加強公民教育的途徑

在展望公民教育推行的途徑方面(見表七)，頗多學校已委任教育負責人和設立公民教育統籌委員會，有超過一半學校考慮將會增加公民教育的資源、增加非正規課程中公民教育的時數、增加課題、增加公民教育活動和鼓勵更多教師接受公民

教育的培訓，這顯示有很多學校愈來愈重視公民教育，態度積極。可是，有差不多一半學校不欲增加公民教育的正規課程時數，相信由於學校的時間表空間有限，公民教育只宜於非正規課程中推行。

表七 學校在加強公民教育途徑的百分比(可選擇多項)

加強公民教育的途徑	學校百分比				學校數目
	已有做	將會做	考慮做	不會做	
委任公民教育的召集人	79.7	2.9	8.1	9.3	172
建立公民教育統籌委員會	64	4.3	11	20.8	163
在教授公民教育時，增加活動	27.5	38.3	26.9	7.2	167
鼓勵更多教師接受有關公民教育的培訓	20.1	47.3	27.8	4.7	169
增加公民教育的課題	19.5	33.5	34.7	12.1	164
增加公民教育的資源	18.1	35.7	40.6	5.5	165
增加非正規課程公民教育部份的時數	16.4	18.2	42.8	22.6	159
增加正規課程公民教育部份的時數	9.6	9.6	32.7	48	156
其他：請註明	0	0	0	0	0

## 訪談的結果與分析

研究員在分析收回的問卷後，在二零零二年中，就問卷的內容，到四間不同背景學校與校長或負責公民教育的教師進行訪談，聽取他們的意見，以補充和佐證問卷調查的內容。

### 一、 甲校

甲校乃一間「愛國學校」，即所謂「左派」學校，自一九四六年創校已有公民教育，希望學生在校園中培養對國家的認同和歸屬感。校歌有一句：「讓我們的青年人走上民主科學的大道，為建設新中國而貢獻自己的力量。」因此，該校的公民教育重點是以國家民族感情和基本品德操守為主。該校校長說：

「在公民教育中，我們除了培養學生的品德修養外，更重視一年一度的國慶、校慶和五四青年節活動。」

在推行方面，該校沒有公民教育委員會來協調初中公民科在正規課程和非正規課程的活動。最重要是教師既合作又有共識，校長說：

「我們的教師均有共同理念，立場一致。我們容許學生有一個較寬的討論空間。例如陳水扁上台事件，有人贊成，有人反對。但學校的態度則十分明確，就是反對台獨，擁護一個中國的看法。」

在教師培訓方面，校長並不看重教育學院提供的課程，並懷疑其成效；他認為公民教育最關鍵的並非知識，而是教師的態度：

「我們的教師以自學和關心時事去裝備自己的公民意識，公民教育是一種感情

教育。教師的態度、表達能力、感情流露等能影響學生，這就是公民教育。」

校長對《公民教育指引》的內容也欣賞，但認為作用不大，因為沒有教科書配合，故此他相信公民教育是各取所需的。但他也發覺在現時的教育環境下難以有效擴展公民教育的教授：

「在現有的考試主導課程下，公民教育不受重視，這是鐵一般的事實。況且，家長多採取功利態度、公民教育可有可無；還有，學校發展公民教育的空間有限。」

### 二、 乙校

乙校是一間佛教學校，由於校長不要求負責公民教育的教師篤信佛教，所以公民教育並無涉及宗教色彩。負責初中公民教育的教師認為該校在推行公民教育時有清晰的目標：

「我們希望學生能透過公民教育掌握正確的資訊，讓學生明白、思考和實踐，藉著此批判思考培養適當的做人態度和價值觀，對社會有參與和有建樹。」

學校主要是透過非正規課程推行公民教育，由公民教育組統籌有關的活動。該教師說：

「我們利用周會時間推行公民教育，為時大約三至四分鐘，高年級及低年級輪流進行。周會內容視情況而定，較時事性。除此之外，我們也透過展板、參觀、問答比賽和講座去推廣公民教育。」

協助推行公民教育的教師，基本上沒有接受有關的培訓過程，教師邊做邊學，對一些問題的

看法未必相同，但盡可能在意見交流過程中尋求共識，或多與其他學校公民教育教師交流，從而學習更多教學法。整體來說，該校遇到的困難是：

「我們要花時間去設計和更新課程的內容，我們實在太忙，沒有時間去仔細閱報，了解時事發展；而且教師的公民教育理念訓練不足，沒有培訓的機會，這是最大的障礙。」

雖然如此，該校在推行公民教育時較為暢順，乃由於推行公民教育的組長教師非常負責，具時事觸覺性，且與其他學校的公民教育教師經常保持聯繫。學校的行政安排容許教師有較大的自由度去剪裁公民教育的內容，而且教師可自願參與教學，這都是推行公民教育的助力。

### 三、 丙校

丙校是一間天主教的鄉村學校，曾利用宗教倫理科向教育統籌局(教統局)申請公民教育津貼，推行國民教育。校長說：

「任教國民教育的教師全部都有宗教背景，在宗教倫理科的正規課程中進行。雖然較強調宗教信仰，我們相信無礙推行公民教育，因為培養學生的批判思考能力是課程的目標之一，使他們具有良好公民的內涵和要素，對社會和國家作出貢獻。」

除了宗教倫理科外，該校經常以班主任課，周會和其他公民教育活動，如升旗禮以增強學生的「香港情、中國心」。可是，學生在公民教育的接收方面，強差人意：

「學生的學習興趣只是一般，對正規課程反應並不熱烈，自我反省的能力

弱。可能他們覺得並非和自己有切身的關係，更切身反而是自己的家庭問題。」

在推行方面，負責非正規課程的教師來自公民教育及德育委員會，成員是不同科目的教師。委員會成員與任教國民教育的教師之間的溝通，主要靠角色重疊的兩位教師之間維繫。在培訓方面，學校鼓勵同事進修，但教師並不十分重視，寧願參與本科進修。困難方面，校長認為：

「阻力很大，我不得不承認校內公民教育教師的角色不太明確，且他們培訓不足，而學校投放在公民教育中的資源亦不足。另一方面，學生對該科的興趣不大，眼光狹窄，顧己不顧人，都是公民教育推行的絆腳石。」

### 四、 丁校

丁校是一間道教學校，但校內宗教氣氛不濃厚。由於學生的成績組別較低，教師較少談及高層次的公民概念，如人權、自由、民主和平等，而且對培養學生批判思考的能力沒有充分信心，但他們較強調個人的價值觀與成長。負責公民教育的教師說：

「我們在公民教育課程裏的目標是提升學生的公民意識，培養個人價值觀、國家歸屬感和世界公民使命感。由於學生的學業成績稍遜，故批判思考能力相對薄弱。」

在丁校的正規課程裏有生活教育科，其內容結合了公民教育與德育，包括同學的個人認知、成長價值、性教育、傳媒教育、國民身分及環境教育。而非正規課程中，每年都有不同主題，例如美化校園、關心社會、心繫祖國、立足香港和面向世界。師資方面，該校只有四位教師任教公

民教育，其中兩位同時兼教生活教育中的德育範疇，主要是公民教育只佔生命教育中的一部分。該校教師說：

「公民教育組只有四位成員，但我們積極與其他科目教師合作，推行各種活動。可是，其他教師並不感到公民教育的重要性，對公民教育的掌握與認同不足，故在推行方面也得遷就，以免產生衝突。」

由於人手缺乏，四位教師工作忙碌，未能參與教統局舉辦的培訓課程，全靠同事間的溝通和經驗補足。幸好有校長的支持，給予小組自由度去釐定課程，使負責公民教育組的教師能有較大空間在正規和非正規課程中設計活動。

綜合上述四間學校在初中推行公民教育的情況，各校由於背景各異，推行公民教育的目標、重點和模式都有不同：有些著重愛國教育；有些強調素質培養；有些則關注價值薰陶。值得提及的是，在四所訪談的學校中，負責公民教育的教師都肩負使命感，要配合學生的特質而設計公民教育課程，並以多元化方式推行公民教育，可是他們遇到的困難也不少，包括：

### 1. 學校傳統及辦學宗旨對公民教育課程有顯著影響

例如甲校由於有清晰的政治立場，在學校裏推行以愛國教育為重點的公民教育，丙校則以宗教倫理科推行公民教育。

### 2. 學校管理層的態度

被訪的教師認為，學校管理層的態度在推行公民教育起著決定性作用。校長的支持和認同公民教育的重要，可令教師有更多空間、人手和資源推行公民教育。

### 3. 教師的共識

要有效推行公民教育，必須全校教師合作，達到共識。可是，訪談發現個別學校的教師缺乏默契和承擔。

### 4. 教師的培訓

根據被訪教師表示，大部分教師未有接受正規公民教育的培訓，有些只有參加過一些短期課程或講座，有時或工作繁忙，未能關注時事，引致信心不足。

### 5. 資源與課程

由於學校時間表緊迫，不容許投放太多資源於公民教育的課程上，有礙公民教育的發展。

### 6. 家長和學生的態度

個別被訪教師表示家長和學生都太功利，由於公民教育非考試科目，所以得不到重視。

這些困難因素，很多都和問卷結果不謀而合，且更有效地說明影響個別學校推行公民教育的實際情況。

## 討論及建議

綜合問卷和四所學校校長或負責公民教育的教師訪談結果的分析，現時學校在初中推行公民教育課程受著教師師資、辦學團體背景、推行的模式、教師的共識和教統局搖擺不定的政策所影響。

### 1. 校本公民教育共識的建立

一直以來，公民教育的推行都相當強調「人人有責」，問卷也顯示大多數學校都是以非正規課程和滲透式來推行公民教育(表三)，但要做到「人人



有責」及成功，在校內建立同工的共識，並以上述兩模式來推行公民教育，誠然是極之重要的；但從面談得知，除了甲校情況較佳外，其他三校同工對公民教育理念大都缺乏共識，已明顯地阻礙了學校公民教育的發展。

推行公民教育，必須是全校教師的共識。學校可考慮在老師培訓日，由有關教師統籌，邀請師資培訓機構的專家與全校教師一齊探討如何建構共識及在各科目、各種活動中發展公民教育；此外，教師也應定期交流彼此對公民教育的看法與期望，努力建構一個全校取向的公民教育目標和計劃。

## 2. 人力資源與師資培訓

綜合問卷和訪談得悉，缺乏曾受訓的教師是學校推行初中公民教育的主要困難，一則是肯任教公民教育的教師數目少，如果不是學校指派，很多教師也未必有興趣任教；二則是很多負責教師未曾接受或接受少於十小時的公民教育培訓。事實上，提供公民教育訓練的途徑並不多，師資培訓機構只提供選修單元，但修讀學生人數不算太多。教統局也委託大專院校開辦中、小學公民教育短期課程；但正如訪談所顯示，由於教師工作繁忙和興趣所限，修讀人數不多，且時數所限，學習內容也不能太深入。

當然，教統局和大專機構提供足夠及適切的公民教育訓練課程是責無旁貸的，但更重要的是，教育當局應提供進修時間，讓老師能專心進修，否則訓練也只是走過場而已！

此外，更需要增強班主任及負責公民教育教師的知識和教授技巧，學校有需要邀請大專講師或專業人士成為顧問，並舉辦多一點「到會式」的全校教師發展工作坊，除了探討如何建構共識外，更要協助教師掌握滲透式公民教育的推行理念和方法，並以學校為本位設計教學，將理論付諸實踐，進一步了解二零零二年課程改革將公民教育劃入「個人、社會及人文教育」的學習領域。

為了保證公民教育教師的質素，課程除了知識、技能和態度外，還須注意澄清教師本身對公民教育的詮釋和價值取向。因為他們必須掌握基本理念，並就學生的需要選擇教學主題及設計教材。

## 3. 推行的模式和課程

學校多設有公民教育小組來統籌公民教育活動，雖然教統局於一九九九年將初中公民教育設定為獨立科目，並由課程發展處編寫課程大綱，惟只有不多於四分一的樣本學校設有獨立科目，學校最常用的是透過非正規課程，如週會、講座等去推行公民教育；可能這方式較為省時，但這種「斬件」式的公民教育能否滿足學生的需要是一大疑問。

透過正規課程的科目去推行公民教育也是常見的推行模式，可是，這種「滲透式」方法在香港學校緊迫的時間表中，因各科目互相競爭，既有自己的目標及內容，又以考試為主導，所以專科教師未必能在授課時，兼顧學生公民教育方面的需要。此外，滲透式的模式推行公民教育需要教師擁有一定的技巧和公民教育造詣，在缺乏公民教育培訓的情況下，這種方式的效用成疑。

此外，綜合課程的模式也多為學校採用，即讓公民教育在學校時間表上出現，通常以公民教育、道德教育、情緒教育、生命教育等為名稱，以價值澄清及批判思考方法在課堂上討論問題。不過這些課程內容廣泛，且多在班主任課中進行，全校的班主任能否掌握這麼多樣教育的知識和技巧已是疑問，況且調查發現，很多教師因工作繁忙，沒有時間去關注時事，更何況大部分班主任未受過正規的公民教育訓練。還有，班主任課的部分時間往往用來處理班務，其效果如何，可想而知。故此，學校可能被迫只集中發展其中某一方面，例如個案訪談顯示甲校強調愛國教育，乙校強調時事，丙校以宗教倫理代之，丁校側重於個人價值觀的成長。不但如此，在這種種的困難下，學校可能被迫較少談及高層次的公民

概念，例如人權、政治。在這情況下，九六年《公民教育指引》提出以人權教育、民主教育、法治教育、環境教育的教學焦點很容易被邊緣化，而學校公民教育就可能會再走回道德化、非政治化和瑣碎化的情況 (Leung, 1995; Leung & Ng, 2004)。

因此，學校需要有一個高層次的公民教育委員會，全面統籌正規課程和非正規課程中公民教育的部分，透過學校各種活動全方位地推行公民教育，確保能全面及均衡地發展公民教育。

#### 4. 公民教育目標和課題

九六年《公民教育指引》的目標，大體上以本土出發，進而對國家文化的認同，同時著重價值的培養；其中以「關懷社區、國家、國際關係及人民生活」、「認同和尊重中國文化」和「關注本地社會、公民權利和義務」最為學校認同。可是，研究顯示，教師自身對公民教育的價值取向及教學能力也影響公民教育的目標和內容。還有，學校的背景及辦學宗旨也影響對公民教育的取向，例如愛國學校多側重於中國民族的感情教育，宗教學校則以道德教育為重。

在課題方面，從表五顯示，多數學校選取「香港公民的責任與權利」和「家庭的價值觀念」為教授內容，較少採用的課題是「多元化的世界」和「國際組織」的功能，這可以看出香港的教師在推廣公民教育方面較喜歡以本土為重，而關心國際事務則較少。在全球一體化的今天，學校有責任擴闊學生視野，而有關法治及政治參與的課程也須得到注重，以培育學生作為公民的多元身分 (梁恩榮，2003)。因此學校課程設計者，宜多參閱公民教育課程指引，因應學校的資源和學生需要，平均地將各個課題包括在公民教育的正規課程和非正規課程內，才可以設計出一套理想而有系統的課程，否則公民教育只會變得支離破碎。可是，Ng (2000) 的研究顯示，超過一半的教師未曾閱讀公民教育指引，這一點是值得關注的。

#### 5. 公民教育課程改革

除了缺乏師資之外，教學資源及專業支援不足也是一大問題，但這些都是技術性問題，教統局和各志願團體及大專院校可以在這方面配合援助。此外，教育政策不夠清晰明確，也使學校在推行公民教育方面倍感困難。

由一九八零年的《道德教育指引》，到一九八五年的《公民教育指引》，曾經被批評為公民教育道德化、非政治化和瑣碎化的時代 (Leung, 1995; Leung等，2000；Ng等，2000)。一九九六年的《公民教育指引》是針對以往的弱點和配合回歸時香港學生需要而訂定的文件 (Lee, 1996)，將一些政治觀念和批判思考的價值培養方法納入課程，使學生由本土觀念擴展到對全球公民身分有觸覺和認識。可是，二零零零年的《學會學習》課程改革文件將公民教育與道德教育作同等的歸類 (課程發展議會，2002)，很多在九六年《指引》被認為是重要的概念、價值，例如人權、民主、參與、公義等都被輕輕帶過，甚至隻字不提，取而代之是國民身分對社會及國家的承擔態度等，使公民教育道德化及返回「非政治化」的層面 (Leung 及 Ng, 2004)，對教育學生多元身分的公民教育目標有所抵觸 (梁恩榮，2003)。教統局宜汲取九六年以前模糊不清的公民教育政策的教訓，有需要向學校清楚交代現時公民教育中的政治元素和其在新課程改革中的地位，避免公民教育重蹈覆轍，返回道德化和非政治化的道路。另一方面，在推行公民教育時，教師不應逃避教授「政治概念」的單元及「爭議性」和「敏感性」的課題。

#### 結論

是次調查結果顯示學校在初中推行公民教育的態度頗積極，相當高比率的學校已設立了公民教育小組 (82.3%, N=181)。不過，一些老問題如校長取向、師資培訓、缺乏教師共識等仍有待解決，

也影響正規和非正規課程的推行模式。Lee (1999) 在研究國際公民教育推行情況時鑑別了公民教育四個範疇，包括 (1) 民主、制度、公民權利和責任；(2) 國民身分；(3) 社會連繫和社會分歧和 (4) 大眾傳媒。本研究顯示，由於香港在二零零零年以後面對新的課程改革，以上的國際公民教育

共通的範疇有可能被不清晰的公民教育政策忽略，在邊緣化與道德化的威脅下，公民教育教師應多運用多元的教學方法，以爭議性的事件和政治概念去充實公民教育課堂，藉此提升學生的批判思考能力。

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# 教育及課程改革的思潮下：香港小學體育科科主任對領導技巧的重要性排序

## *Hong Kong Primary Schools Physical Education Panel Chairpersons' Ranking of the Importance of Different Leadership Skills Amid the Climate of Education & Curriculum Reforms*

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### 摘要

香港小學的體育科科主任在教育及課程改革的思潮下，仍然身擔繁重的教學工作及行政職務。本文嘗試探討小學體育科科主任對領導技巧的重要性排序，從而討論小學體育科科主任應如何於教育及課程改革下，憑著其既有的專業訓練和經驗，配合教育領導技巧的理論，轉化為實用的領導技巧，接受『變』為學校的新文化。

### 關鍵詞

教育及課程改革、體育科科主任、領導技巧

### Abstract

Chairpersons of Physical Education (P.E.) Panels of Hong Kong primary schools, amid the climate of Education and Curriculum Reforms, still bear heavy workload derived from teaching and administration tasks. In this article, we would like to investigate the P.E. panel chairpersons' ranking of the importance of various leadership skills. A discussion of how P. E. Panel chairpersons of primary schools can mingle their received professional training and experiences with the theories of educational leadership skills, so as to transform into practical leadership skills and to accept "change" as a new school culture will also be conducted.

### Keywords

Education and Curriculum Reforms, Chairpersons of P. E. panel, Leadership skills

## 引言

香港現正著力於教育及課程改革。根據香港教育制度改革建議(2000)之內容，未來的教育方向及理念著重為生活而學習、終身學習及全人發展。當中希望學生有樂於學習、善於溝通、勇於承擔及敢於創新的特質，而且課程內容更從以往強調知識的灌輸，轉為著重學生如何「學會學習」；從偏重學術，轉為多元化的全人發展；從固有的科目框框，推行整合性的學習領域；從以課本主導，轉而採用多元化教材的學習模式；社會支援教育、教學跑出課室；從學校傳統的上課時間表觀念，轉變為綜合而富彈性地編排學習時間；取消過早分流，為學生提供發展潛能的機會；由傳統技術的傳授，轉為著重認知、情意及技能，以及提升協作能力、溝通能力、創造力和批判性思考能力(課程發展議會，2002)。現時香港小學體育科科主任不僅教授及統籌體育一科，也同時兼顧一至幾個學科。在當前教育改革下日益繁忙的工作中，小學體育科科主任要掌握各項領導技巧，並按優先次序排序，使教學工作更具成效。

## 九項教育改革的領導技巧

以下是根據Reavis & Griffith (1992)九項領導技巧要點的申述：

1. 變革管理的知識 —— 當一個團體意識到有變革或新需求時，領導者所需要的知識包括：如何反應、收集訊息、如何準備、提出訴求、如何發展、意見採納、執行、評估及修訂。教改或教育整合的取向是全盤取向的面對轉變，以至如何計畫財政、人事、課程、指導、決策及配合文化。對於改革的行政管理，有時會低估其難度，例如：難改的舊習慣、身心疲累或內外阻力等。所以，身為主張改革或帶領改革的領導者，必須充分把握變革管理的知識及應變的策略。
2. 協作的領導作風 —— 與他人合作的領導作風，可以換來高強度的互信及減少危機出現，使變革時，能降低不安及恐懼感。
3. 團隊營造的能力 —— 組織與團隊有大不相同的地方。組織只是把人事組合起來或分配到各單位；而團隊則是隊內各人各有職份，各有其工作目標以達成團隊的使命。再者，隊員之間共同承擔責任、互信、互相體會及互相欣賞。變革中的領導者是須要有營造團隊的能力，而非只領導一個組織。
4. 教育的價值 —— 越複雜的行政架構，其領導者所考慮的不同價值狀況就更多更廣。例如：財政責任、政治生存、守法精神、公共宣傳、勝負競爭的考慮等。
5. 富道德目的 / 有目的感 —— 改革中學校的領導者，應該以學校辦學宗旨為依歸。有教學的遠象及切實執行以最好的教育為出發點的方案或計劃，使教改更有目標感及道德感。
6. 有課程及指導的知識 —— 學校行政人員皆為課程及政策之導航者，對於課程改革及指導的知識必須能充份掌握，也能有清晰的工作遠景。他們可以公平地分配工作，而非橡皮圖章，而且深入了解整體教育及課程改革的來龍去脈，就有如交響樂團的總指揮。
7. 有理性及可解釋的據點 —— 教改中的領導者須要有目標感及能理性分析變的原由。在混亂或迷茫時，有足夠的導引；對同事及下屬有不屈不撓、堅定不移以及恆久不變的處事理據；於變的過程中提供支援及帶領；訊息下達、決策過程及工作分配能夠達到可靠性、一致性及完整性；當同事或下屬產生疑問或躊躇時，能夠理性地解決問題及作出適

當的支援；又能根據其文化、立場以及角色解釋當中的理據，使同事或下屬得到安撫及協助。

8. 具該文化知識及了解如何改變 —— 團體中各成員的感受、各階層運作的模式、文化、傳統以及意識等，皆為教改成敗的重要關鍵。領導者如能掌握自如，作出適當的調適及疏導，便能帶領團隊盡快適應改變。
9. 具觸覺性 —— 觸覺性是對人的行為如何影響他人的察覺能力。團體中各成員若有困惑或迷失，如能被領導者及早察覺，以同理心、同情心及支持的心態紓解，便能提高信心和士氣，以及樂於接受改革。

## 香港小學體育科科主任對領導技巧的重要性排序

香港小學體育科科主任對以上領導技巧的重要性排序與Reavis & Griffith (1992)得出的九項教育的領導技巧重要性排序不盡相同(見下表一)。其次序為：1. 團隊營造的能力；2. 具課程及指導的知識；3. 協作的領導作風；4. 變革管理的知識；5. 教育的價值；6. 具觸覺性；7. 具該文化知識及了解如何改變；8. 富道德目的 / 有目的感；9. 有理性及可解釋的據點。

表一

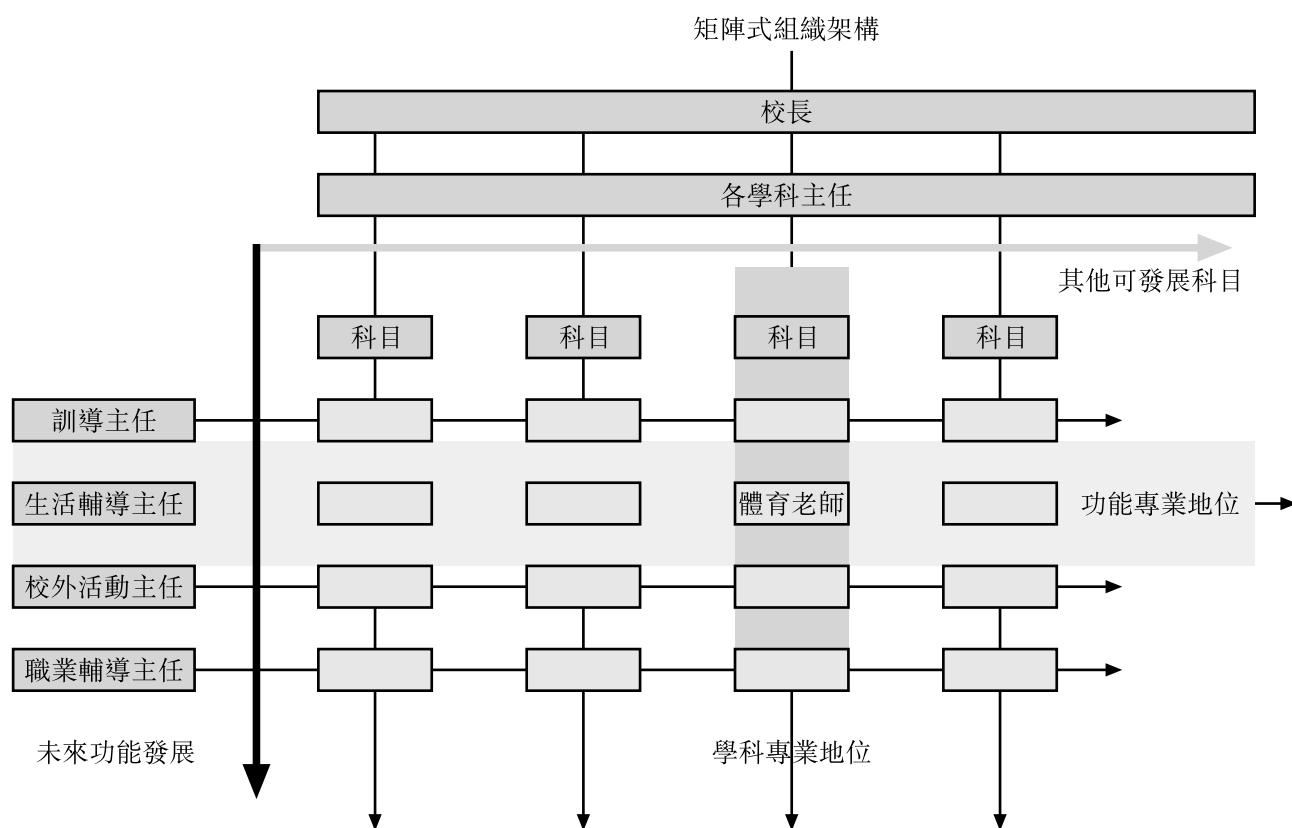
領導技巧	Reavis & Griffith 的排序	香港小學體育科科主任 的排序	平均值	標準差
變革管理的知識	1	4	4.60	2.54
協作的領導作風	2	3	4.37	2.35
團隊營造的能力	3	1	3.74	2.36
教育的價值	4	5	4.87	2.46
富道德目的 / 有目的感	5	8	6.31	2.60
具課程及指導的知識	6	2	4.00	2.36
有理性及可解釋的據點	7	9	6.33	2.25
具該文化知識及了解如何改變	8	7	5.48	2.66
具觸覺性	9	6	4.89	2.66

## 討論

在深入了解香港小學體育科科主任為何對以上九項領導技巧重要性如此排序之前，我們要先對小學學校的行政架構及各科老師的職責有所理解。

圖(一)修改自Goggins (1974)的The Dow Corning Matrix的概念，主要表達各成員於組織架構中的功能和專業的平均權力，是持久及平穩和諧的，而且尚有發展空間 (Stoner & Freeman, 1989)。

圖（一）



從圖（一）中，我們不難理解到小學體育老師除任教體育科外，也身兼功能小組的主任或成員，甚至身兼三至四個其他學科的教學工作。在學校的整個團體中，他可能是功能組別的訓導主任，亦同時任教體育、英文及數學等數項科目，也多是一班的班主任。當遇到校內各科或各組會議時，特別是教育改革下的新措施、新的課程內容或試行新的學制，這些體育老師未必能同時間釐定其崗位及角色。碰到重要決定時，更可能忘記體育科在學校課程和教育理念的重要性。因此，在這種境況下，最終受影響的可能是學生。再者，在一項香港小學體育組內部溝通的研究報告中顯示，小學體育組成員的內部溝通現況是有值得改善的空間，而其內部溝通皆遇上某程度上的障礙。增加參與決策的機會、持開放的態度、主動傾聽、縮短溝通距離、運用回饋的方式及增

進對組織目標的理解，以上六項訴求皆為參與該研究之小學體育組成員，對改善其內部溝通得出的應有策略 (Sum, 2003)。

我們有理由相信，這些小學體育科科主任對於領導技巧最主要排序為「團隊營造的能力」。在繁複的日常行政及教學的工作中，他們要求的是一位可以營造團隊能力的領導人才，目的是可以更加專注於體育學科的發展及策劃，其次是這些領導人才須具備體育課程及指導的知識。體育有別於其他科目，體育是與健康、生理、心理、解剖.....等多方面的整合，所以涉及的知識甚廣，也要了解如何滲入及應用在體育課中，對於現今工作繁重的體育老師，實在極富挑戰性。體育在教育及課程改革中不能獨善其身，科目間的合作及各科主任的協作風氣，應是一間好學校及願意接受改革的團體必有的作風。變革管理的知識並



非不重要，在教育及課程改革中，體育老師比其他科老師可能較易適應新政策；因為體育老師的專業師資培訓中，必有牽涉到比賽及競爭的元素，比賽及競爭的環境是多變的，順境時乘勝追擊；逆境時會消化因由，採取對策。其實，對於工作繁重的小學體育老師，他們對教育及課程改革的領導技巧中到底有否教育價值、具該文化知識及了解如何改變、富道德目的或有目的感及觸覺性等，已經大多麻木或不盡消化。他們多考慮到有工作便盡量完成，可能已忽略了變革到底對學生有利與否及富有育人的理念。工作繁重、角色衝突以及行政主導的小學現況，可能是導致小學體育老師減低有理性及可分析的據點的考慮。

實施教育改革及新課程顯然是一個敏感的話題，特別是當新課程將會威脅到某些利害關係者及現況時。要學校接受新的體育課程，體育老師必須對家長的關注更為敏感 (Chan & Johns, 1998)。實施教育改革及新課程時，所遇到的困難重重，特別是香港現時出生率下降，各區小學縮班，但師生比率沒有因此下降，甚至某些小學教席變為二人一職。這種種因為財政及經濟環境下的困局，令到改革及新課程下，體育科科主任要有好的領導技巧，實在增添難度。無論怎樣下去，體育科科主任及老師，應有正面的專業態度及行為，盡量避免有負面的想法，有確切的教育改革立場，接受變才是永恆的意識形態。凡事共商合作及確認同事間的貢獻，做一個轉化型的領導者多於一個事務辦理的領導者。

有效的改革皆要學校的行政者及各科(體育科)的領導者，能適應政治上、教育哲學上、政府政策上及社會需求上的轉變。辦學團體的成功皆取決於教育行政者是否有能力適應教育的內容、方法及社會思潮的新需求。體育老師的專業訓練，通常是著重於如何教體育，而非管理體育；但他們最後很多都因為機遇、需求或個人喜好，而擔任行政管理工作，以及領導其他體育老師。所以，他們需要在職前及在職期間學習有關領導

的工作，而且於教育及課程改革中擔當推動新措施的重要導航者。

## 總結

在整體的大氣候中如中國，正如火如荼地推行教育及課程改革，其根本的目的是通過更靈活的課程安排，使學生能建立全面發展的基礎，有利於他們成為富創意、好思考、善解難及能應變的人才 (盧乃桂，2002)。

教師在改革的過程中扮演著舉足輕重的角色，並強調應該關注他們的專業發展，促進他們在知識、能力、態度和情感等方面的改變 (盧乃桂及操太聖，2003)。體育科科主任本身已接受了專業的體育及教育訓練，在教育及課程改革過程中，體育科科主任本身就是一個「動力」。這個動力可以領導學生、同工及學校各階層，甚至家長協助推行改革。

經過了由政府及學術單位舉辦的學術會議及工作坊，香港小學體育科科主任已能正面地接受新的體育學習領域課程指引(小一至中三)(Ha et. al, 2003)。態度及理念正面是領導教育及課程改革的先決條件。當領導者能發揮其領導技巧時，加上與學校各階層人士保持足夠的溝通，相信體育科的發展，不只是現在教育改革中八大學習領域的其中一大範疇，亦是未來健康及日常生活的重要部份。

體育科科主任應關注自身的專業發展及知識、技能的改進。他們亦應以既有的專業訓練和經驗，了解教育改革中領導技巧的理論，配合轉化型的領導型態，實現團體遠景及目標。體育科能成為八大主要學習領域，皆須要有遠景的領導者，在教育及課程改革的思潮下，能接受及使用多元化的機制，推動各體育科同事接受『變』為學校的新文化。

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# *Using 'Jigsaw II' in Teacher Education Programmes*

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## **Abstract**

Most in-service teachers find curriculum modules difficult to understand when they are studying for a part-time degree in education. In teaching in-service teachers about curriculum, the author first encountered difficulty in catering for their different needs arising from their diversified backgrounds. The condition gradually improved when cooperative learning was used as the main teaching strategy. In this paper, the author attempts to share his experience of using Jigsaw II to teach in-service teachers. The successful implementation of Jigsaw II is discussed, including skilful handling of participants' requests, clearing their misunderstanding of the concept of Jigsaw II, and allowing time for the participants to appreciate the beauty of Jigsaw II.

## **BACKGROUND**

Education in Hong Kong is undergoing a fundamental reform that has sparked off a series of changes at various levels: system, school and classroom. One of the notable changes relates to teachers' professional development. Teachers are expected to act as curriculum change agents and leaders in school to develop a school-based curriculum that aligns with the new curriculum framework. A variety of measures are taken to support teacher development, such as the provision of curriculum resources and school-based support for curriculum development and creating time and space for teachers (Curriculum Development Council, 2001). These measures are vital to the successful implementation of the curriculum change, and are particularly helpful to those teachers who have not taken curriculum studies in their teacher training.

As a major teacher education provider, the Hong Kong Institute of Education is proactive in its

programme development and has been offering core modules in curriculum studies since 1994. However, the teaching of curriculum has met with some difficulties. First, student teachers often find curriculum studies a remote subject, especially compared with their major subject. Unlike the major subject, which is a continuation of one of the academic subjects in their secondary education, the subject content of curriculum studies is often perceived as new and hence unfamiliar. Second, it is difficult for student teachers to relate the content of curriculum studies to their own experience, and hence asking them to construct knowledge based on their personal experience is not easy.

The scenario discussed above becomes more complicated when we teach curriculum to another group of student teachers - namely the in-service teachers (hereafter called the participants). These participants are serving teachers who have got a qualified teacher status.

They are taking mixed-mode programmes to upgrade their professional qualification to the bachelor's degree level. Though they all hold a Certificate in Education or Teacher's Certificate, they differ in their teaching experience. It is not surprising to find both novice and veteran teachers in the same class. Unlike the pre-service student teachers, these participants have certain understanding of the concept of curriculum. They know what the school curriculum is, but may not understand how it came about or why a certain kind of curriculum is adopted. The curriculum modules therefore aim to equip them with the necessary skills and knowledge to reflect on their practice, and to evaluate and design a curriculum that suits their school context.

Various methods have been used to teach the participants who are diverse in ability, learning style and teaching experience. These methods include lecturing, individual and group presentation, as well as discussion in pairs, small groups and with the whole class. The discussion method appeals to the majority of the participants as they have something to share and learn from each other. However, a major drawback of the method is that it creates an opportunity for some participants to become "free riders", especially when the discussion is held in small groups. These free riders share the group outcome, but contribute little to the group. This brings harm not only to the group collegiality, but also to the free riders themselves. For the free riders, the gain is minimal, and they end up losing interest in the module. Indeed, the productivity of the group does not reflect the group size, since "the sum of the whole is less than the potential of the individual members" (Johnson & Johnson, 1999, p.71). As a result, the group becomes a pseudo-learning group in which "the interaction among group members detracts from individual learning without delivering any benefit" (Johnson & Johnson, 1999, p.71).

## **SHARING AN EFFECTIVE TEACHING STRATEGY**

Apart from sharing with the readers a new teaching strategy, the paper aims to fulfill two objectives: (1) to explore the usefulness of Jigsaw II in in-service teacher education programmes; and (2) to find out ways to enhance the effectiveness of Jigsaw II.

Cooperative learning is the instructional practice in which students help each other to learn in small groups towards a common goal (Johnson and Johnson, 1999). Much research has been done over the past thirty years on the use of cooperative learning across age groups, ability levels and cultural backgrounds. The results generally suggest that cooperative learning develops higher-order thinking skills (Mathews et. al, 1995), enhances motivation, improves interpersonal relations (Nastasi & Clements, 1991) and peer relations (Slavin, 1985). Most important, it exploits the diversified abilities of pupils to enhance their cognitive and social performance.

Various cooperative learning methods have been developed over the years and put into practice in the classroom. Some of the most extensively researched and widely used methods include Student Teams-Achievement Divisions (STAD), Teams-Games-Tournaments (TGT), Jigsaw II, Team Accelerated Instruction (TAI) and Cooperative Integrated Reading and Composition (CIRC) (Slavin, 1995). Each of these methods has its own characteristics and relevance to different curriculum areas and students in different key stages of learning. For example, while STAD, TGT and Jigsaw II can be adapted for use across most subjects and grade levels, TAI is specifically designed for mathematics in Grade 3-6 and CIRC for reading and writing instruction in Grade 2-8. There are some other popular cooperative learning methods, which include

Group Investigation, Learning Together, Complex Instruction and Structured Dyadic Methods.

## **Jigsaw II**

The cooperative learning method that I have used to teach curriculum to the participants is Jigsaw II, which was developed by Robert Slavin, having adapted Elliot Aronson's Jigsaw technique. The implementation of Jigsaw II comprises five steps: (1) reading; (2) expert group discussion; (3) home group reporting; (4) testing; and (5) group recognition. I will give a brief overview of its implementation, followed by an elaboration with examples.

### **Overview**

First, the materials to be read and learnt are divided into four parts with guiding questions. Each pupil in a group is asked to focus on reading one part of the materials. Upon finishing the reading, pupils from different groups who have read the same part of the materials form an expert group to discuss the materials. After the discussion, the group members go back to their home group reporting what they have discussed in the expert group. After listening to each "expert" in the group, all group members become familiarized with all the four parts of the materials. At the end, testing is performed on individual members to compare their performance. Each group member takes an individual quiz and the score is compared with the base score to calculate the individual improvement score, based on which a group average score is worked out. The group with the highest average group improvement score is given group recognition by getting a group reward. Alternatively, any group which has its average group improvement score reaching a pre-determined level can receive a group reward.

## **Reading**

Take teaching the topic on models of curriculum design for a 3-hour session as an example. Each participant is given an identical set of materials relevant to the topic, as well as an expert sheet. For groups of four, the expert sheet consists of four questions, each of which focuses on one of the four themes of the reading materials. Every member of the group is responsible for finding answers to one of the questions in the expert sheet from reading the relevant part of the materials. The questions in the expert sheet shown below can be randomly assigned to the group members.

1. What are the features and limitations of Tyler's model?
2. What are the features and limitations of Wheeler's model?
3. What are the features and limitations of Walker's model?
4. What are the features and limitations of Skilbeck's model?

Each participant reads the relevant materials for half an hour. Alternatively, the reading of the materials can be done as homework before the class to save the lesson time, especially when the materials are lengthy.

### **Expert group discussion**

Participants working on the same question in the expert sheet form an expert group. Four expert groups are thus formed. In order to facilitate the discussion, some guiding questions can be set for each expert group. Each member is encouraged to take notes of what they have discussed so that they can teach their members in their home group after the expert group discussion. Whenever a problem arises, the participants should try to handle it by themselves before seeking help from the teacher. Conflicts should be resolved using appropriate social

skills. Depending on the type of questions, group consensus may not be necessary. This step can also take half an hour.

### ***Home group reporting***

Participants in the expert groups go back to their original home group to teach others the things they have discussed. They are reminded to help each other to master the materials as much as possible. After each member has shared his/her expert knowledge with each other, it is useful for the teacher to conduct a short whole class discussion. The purpose of the class discussion is for clearing doubts, if any, as well as for provoking further discussion of the topic. This step may take an hour to one and a half hours to complete.

### ***Testing***

Members of each group take an individual short test after mastering the reading materials. Usually, the test items are in the form of multiple-choice questions. Immediately after the test, members exchange their test papers to mark the answers. The individual test scores are then computed as improvement scores by comparing with the base scores that represent students' past performance. This step takes about half an hour to complete.

### ***Group recognition***

If the average group improvement score (calculated by adding the total improvement scores of the members of the group and dividing it by the number of members) reaches a predetermined level, each member of the group will be awarded a group reward. The reward may take the form of a certificate or other forms that the group

members treasure. Each member of the group gets the same reward, irrespective of their individual performance in the test. The purpose is to strengthen their cooperation. This final step takes 10 minutes to finish.

## **Success of Jigsaw II**

In the design of Jigsaw II, Slavin has constructed in it four elements which contribute to its success: (1) mixed-ability grouping, (2) individual accountability, (3) group reward; and (4) equal opportunity to success. These four elements will be discussed below with reference to my experience with the participants.

### ***Mixed-ability grouping***

In my class, the participants were carefully assigned to heterogeneous groups in terms of ability, gender and teaching experience, so that each group was a cross-sectional representation of the whole class. Research shows that the performance of low ability students improves in heterogeneous grouping (Webb & Cullian, 1983) because these students receive more elaborated explanations from their high ability peers about the learning materials (Webb, 1992). In the case of high ability students, research shows inconsistent results for their learning outcome. Some research suggests that there is no regression among high ability students (Hooper et. al, 1989); others show that they perform as well in heterogeneous as in homogeneous groups (Nastasi & Clements, 1991; Hooper & Hannafin, 1988). Webb (1992) argues that high ability students learn more in heterogeneous than in homogeneous groups because when giving elaborated explanations to the low ability peers, they reorganize and clarify information in different ways, which enhances the development of their meta-cognition.

Sometimes, the composition of the group has to be revised slightly to smoothen the implementation. On one occasion, after I had carefully allocated the participants to groups, I noticed a male participant in a group showed no interest to participate in the discussion. I talked with him during the break and found out that he preferred to join his neighbour group in which he had friends of close working relations. He said:

*I know the merits of learning in a mixed-ability group. I am also using it with my pupils. They seem willing to join the groups that I allocate them to. But as an adult learner, I prefer to work with someone I know.*

I accepted his request and noticed that in the new group, his performance measured up to his potential.

### **Individual accountability**

Individual accountability means that the success of a group depends on the individual learning of all the group members (Johnson & Johnson, 1989; Slavin, 1995). Apart from responsibility for one's own learning, each member has to be responsible for facilitating the learning of the rest of the group. Individual accountability exists when the performance of each individual member is assessed, the results are given back to the individual and the group to compare against a standard of performance, and the member is held responsible by groupmates for contributing his or her fair share to the group's success (Johnson & Johnson, 1999). As such, individual accountability motivates the group members to help one another to exert maximum effort in the learning process (Slavin, 1995).

My experience with the participants revealed that it could be difficult for them to accept the concept of individual accountability. Three participants told me that they could not convince themselves that they should be

held responsible for the learning of their group members. They insisted that learning was a personal thing and a person should get what he had paid for. One of the participants remarked:

*It sounds strange to me that one has to be held accountable for others' learning. If a person does not want to learn, he should bear the consequence, but not the members of his group.*

Another participant reiterated:

*It's already very good if everyone can be responsible for their own learning. It will be difficult, if not impossible, to go further to ask them to be responsible for each other's learning.*

I respected their views and let each of them form a 'one-man group'. They read the whole set of materials and were responsible for their own learning. After four weeks, one of them changed his mind and asked me to let him join one of the groups.

### **Group reward**

Individual accountability can be fostered by the effective use of group reward based on individual performance (Slavin, 1987). As members know that for each to get a group reward, the performance of the group, which is determined by the sum of each member's improvement score, must reach an expected level. This extrinsic reward motivates them to learn hard for themselves, as well as to help each other to learn well. With other things being equal, group reward and individual accountability enhance the achievement outcomes of cooperative learning (Slavin, 1995).

At first, the participants in my class were interested in receiving a group reward as recognition of their cooperative effort. I gave each member a certificate that I designed. After several times, they were not interested

in the group reward, though I attempted to change the form of the reward each time. Nevertheless, they still made effort to learn hard for themselves and to help each other to learn. They told me that they were intrinsically motivated as they had really learnt something and experienced enjoyment in the process of learning.

One of the participants commented:

*Experiencing success in learning itself is an effective reinforcer. I don't think I need any extrinsic reward unless it is very attractive, like a scholarship or a free trip overseas.*

### ***Equal opportunity to success***

Jigsaw II uses improvement scores instead of test scores for computing the group score. If test scores are used, members of low ability will be perceived as a burden to the group as it is impossible for them to get as high test scores as those of brighter members. It is unlikely that they will see themselves giving as much contribution to the group as other members. With improvement scores, members of different ability are given an equal opportunity to earn points towards the group score so long as they make improvement over their past performance, irrespective of their actual score. The only rival is the self while the other members of the group are friends.

Two of the participants sent me an email saying that they thought it was unfair that their performance could be influenced by other members of their group. One of them wrote:

*No one wants a member of low ability in their group as the group score will be dragged down.*

It is evident that the participants do not understand that each member can contribute as much to the group as the other, irrespective of their ability. I explained to them that the influence could be positive and negative.

Sometimes, the group got a good score mainly because of the improvement made by the other members of the group. Moreover, this kind of assessment is formative and could only help them learn better. In no circumstances would the group score be counted towards the summative assessment of individual participant.

## **CONCLUSION**

Various overseas studies have suggested that Jigsaw II as a method of cooperative learning can be effectively used across most subjects and grade levels. It not only enhances the motivation and performance of students, but also develops their social skills for group work. From my experience, Jigsaw II can also be successfully employed to teach curriculum studies, a brand new subject, to the local in-service teachers of diversified backgrounds. Nevertheless, the tutor has to be cautious in handling individual participants' needs and interest. It is suggested that the tutor should exercise a certain degree of flexibility in structuring heterogeneous groups so that the members can learn from each other in a collegial atmosphere. Learning in cooperative groups may not appeal to every learner. If an adult learner prefers to learn alone, there is no reason why he/she should be forced to learn in a group, unless his/her mindset of learning has been changed. It is suggested that before cooperative learning is employed in the classroom, the tutor should conduct some problem-solving activities with the participants that require a different mindset so that they will be less resistant to the idea of cooperative learning.

To conclude, for successful implementation of Jigsaw II, the tutor has to handle the participants' requests skilfully (e.g. grouping) and make sure that participants have a clear understanding of each step of the method. Finally, the tutor has to allow time for the participants to appreciate the concept of learning together.



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# ***An Investigation into Students' Preferences for and Responses to Teacher Feedback and Its Implications for Writing Teachers***

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## **Abstract**

Most teachers believe that providing students with effective feedback on their writing is vital as it helps students to correct their own mistakes and be more independent writers, which will in turn train them to become better writers. However, some research studies on the effectiveness of teacher feedback on ESL students' writing report a grim picture (Hendrickson, 1980; Semke, 1984; Robb et. al, 1986; Truscott, 1996) as teachers' feedback does not seem helpful for students to improve their writing. This paper presents the results of a classroom research study that examines factors that affect the effectiveness of teacher feedback by analyzing students' preferences for and responses to teacher feedback on their writing. It is suggested that the ineffectiveness of teacher feedback may not lie in the feedback itself, but in the way how feedback is delivered to students. The study also provides several implications for teachers when giving effective feedback to students.

## **BACKGROUND OF THE STUDY**

Teaching writing is one of the most difficult tasks for ESL teachers as it involves various processes which require teachers to devote a lot of time to helping students write better. Teachers in Hong Kong spend a great deal of time in the post-writing process because most of them are required to grade students' compositions in detail. It is especially time-consuming when the compositions are badly written and organized. Apart from focusing on teaching students how to actually write good compositions, most teachers believe giving effective feedback is an alternative way to train students to become better writers because it helps students to correct their own mistakes and be

independent writers. However, some research studies on the effectiveness of teacher feedback on ESL students' writing report a grim picture (Hendrickson, 1980; Semke, 1984; Robb et. al, 1986; Truscott, 1996) as teachers' feedback does not seem helpful for students to improve their writing.

As an English teacher, I am interested in finding out to what extent the tremendous work English teachers have been doing is useful to students. Therefore, I decided to conduct a classroom research study to examine students' preferences for and responses to teacher feedback in order to get a clearer picture as to how effective teacher feedback could be given.

## **Definition of Teacher Feedback**

Teacher feedback can comprise both content and form feedback. Content refers to comments on organization, ideas and amount of detail, while form involves comments on grammar and mechanics errors (Fathman & Whalley, 1990). In the present study, teacher feedback is defined as any input provided by the teacher to students for revision (Keh, 1990), and this includes both content and form.

## **Research into Teacher Feedback on Student Writing**

Investigations into teacher feedback have included studies examining the effectiveness of teacher feedback (Fathman & Whalley, 1990; Kepner, 1991; Zamel, 1985; Truscott, 1996) and examining student preferences and reactions towards teacher feedback (Hedgcock & Lefkowitz, 1994, 1996; Leki, 1991). There are also studies examining the effectiveness of teacher feedback through the comparison of peer feedback (Connor & Asenavage, 1994; Zhang, 1995).

Although the effectiveness of teacher feedback has been examined in different ways, the findings have not been conclusive. In Zhang's (1995) study, students highly valued their teacher's feedback and corrections. Leki's (1991) study also demonstrated that students found error feedback very important and they demanded to have their errors corrected by their teachers. However, Truscott (1996) proposed that error correction should be abandoned. He argued that direct correction is not useful for students' development in accuracy and that grammar correction would bring about harmful effects on both teachers and students. While teachers would waste their time and effort in making grammar corrections, students would be demotivated by the frustration of their errors. He also introduced the notion

that the absence of error correction would not contribute to fossilization of errors.

Apart from the disagreement on error feedback, there are mixed views on giving feedback as regards grammar and content. Zamel (1985) suggested teachers should avoid mixing comments on content and grammatical corrections in the same drafts while it was argued that a combination of both content and grammar feedback will not overburden students but help them with their writing (Ashwell, 2000; Fathman & Whalley, 1990).

## **THE STUDY**

Owing to the lack of consensus on the effectiveness of teacher feedback, this study aims to gain more insights into giving effective feedback by asking what students think, want and do after they receive teacher feedback.

As most of the past studies have pursued the inquiry of teacher feedback in two general ways, namely students' preferences for teacher feedback (Hedgcock & Lefkowitz, 1994; Leki, 1991), and students' responses to teacher feedback (Cohen, 1987; Ferris, 1995), this study follows the similar traits and attempts to find out how students perceive teacher feedback, what they are concerned about, and what they do after receiving teacher feedback.

In addition, from my observation, students of junior forms and senior forms tend to respond differently to teachers' feedback, and this affects how they correct their errors. Thus, in the present study, I also examine what teachers need to pay attention to when they give feedback to students of lower and higher proficiency level. In other words, I explore the following research questions:

1. What are the students' preferences for teacher feedback?

2. What are the students' responses to teacher feedback?
3. Are there any differences in the preferences for and responses to teacher feedback between junior and senior form students?
4. Are there any implications for the teacher to provide more effective teacher feedback?

## Subject

The subjects were 15 Form 7 students and 15 Form 2 students of a secondary school in Hong Kong. The students volunteered to help the teacher to conduct the study concerning their writing. The students, who took part in the study, had been taught by the teacher for one and a half year and half a year respectively.

In the writing classes, the usual practice was that the students wrote the first drafts for peer editing before they submitted the final products to the teacher. The teacher then read the final products and wrote error feedback and feedback on content and organization on the compositions. The students were required to do corrections by revising the compositions at home and submit their revised compositions. The students were taught the correction codes that the teacher used for error feedback at the beginning of the academic year. They were also given a checklist of correction codes to refer to when doing corrections.

## Questionnaire Survey

The questionnaire is adapted from the ones used in Ferris's study (1995) that investigated students' reactions to teacher feedback in multiple-draft compositions and Leki's (1991) research on the preferences of ESL students for error correction. However, since the objective of this study aims at investigating students' preferences for and responses to teacher feedback, some

questions were modified. Questions 3-6, 7-10 were set to examine students' responses to teacher feedback, while question 5 aimed to look into students' preferences for teacher feedback (See Appendix 1).

## Adjustment

Because half of the subjects were Form 2 students, they might not be able to understand some of the terminology in the questionnaires. In order to ensure their understanding of the questions, the teacher explained the terms in the questionnaires explicitly. The teacher was also present when the junior form students did the questionnaires so that they could ask questions directly.

## Interviews

While the questionnaires would provide quantitative information of the study, in-depth interviews were conducted to obtain qualitative data. The interviews were conducted to look into the issues that could not be clearly addressed from the findings of the questionnaires. Three of the students who had completed the questionnaires were randomly selected and interviewed. The interviews were conducted in Cantonese and aimed to find out what students think of teacher feedback, and what in detail they do with teacher feedback. The core dimensions explored were as follows:

- Do you like teacher feedback? Why and why not?
- Do you think that teacher feedback is useful for you to improve your writing? Why and why not?
- Which aspect of teacher feedback do you pay most attention to? Why?
- What do you usually do after you receive teacher feedback on your composition? Why?
- What is the biggest problem for you to make use of teacher feedback? Why?

## Questionnaire Results

In the study, Question 6a, 6b, 6c and 6d aimed to look into students' preferences for teacher feedback. When asked how important it was for their English teachers to give them feedback, the majority of the students answered that it was either very important or quite important. In finding out how they perceived teacher

feedback in different aspects, 83.4% (See Table 1) and 80% (See Table 2) of the students thought that feedback on grammar and vocabulary was very important and quite important, but a smaller percentage of the subjects expressed the same view on organization ( 56.7 % ) (See Table 3) and content (53.4%) (See Table 4).

**Table 1**

*Q6c: How important is it for your English teacher to give you comments on grammar?*

<b>Responses</b>	<b>F.2</b>	<b>F.7</b>	<b>Average Percentage</b>
Very important	40%	53.3%	46.7%
Quite important	33.3%	40%	36.7%
Okay	26.7%	6.7%	16.7%
Not important	0%	0%	0%

**Table 2**

*Q6d: How important is it for your English teacher to give you comments on vocabulary?*

<b>Responses</b>	<b>F.2</b>	<b>F.7</b>	<b>Average Percentage</b>
Very important	33.3%	33.3%	33.3%
Quite important	46.7%	46.7%	46.7%
Okay	20%	20%	20%
Not important	0%	0%	0%

**Table 3**

*Q6a: How important is it for your English teacher to give you comments on organization?*

<b>Responses</b>	<b>F.2</b>	<b>F.7</b>	<b>Average Percentage</b>
Very important	13.3%	26.7%	20%
Quite important	20%	53.3%	36.7%
Okay	60%	20%	40%
Not important	6.7%	0%	3.3%

**Table 4**

*Q6b: How important is it for your English teacher to give you comments on content?*

<b>Responses</b>	<b>F.2</b>	<b>F.7</b>	<b>Average Percentage</b>
Very important	33.3%	20%	26.7%
Quite important	13.3%	40%	26.7%
Okay	46.7%	40%	43.3%
Not important	6.7%	0%	3.3%

It was found that both junior and senior forms students had the tendency to view feedback on grammar and vocabulary as more important, showing that they valued feedback on surface errors more than macro-level or semantic errors.

As indicated above, the majority of the subjects expressed that teacher feedback was important to them. However, interestingly, when asked how often they read over their composition again after their teachers returned

it to them, only 13.3% and 10 % of them indicated they would “always” and “usually” do it. 50% of the subjects even said they did not do it very often. Surprisingly, when looking at how differently junior and senior form students responded to the question, 73.3 % of the senior form students responded that they did not read over their composition very often while only 26.7% of the junior form students said they did so (See Table 5).

**Table 5**

*Q3. How often do you read over your composition?*

<b>Responses</b>	<b>F.2</b>	<b>F.7</b>	<b>Average Percentage</b>
Always	20%	6.7%	13.3%
Usually	20%	0%	10%
Sometimes	26.7%	20%	23.3%
Not very often	26.7%	73.3%	50%
Never	6.7%	0%	0%

**Table 6**

*Q4. How often do you think about your teacher's comments and corrections carefully?*

<b>Responses</b>	<b>F.2</b>	<b>F.7</b>	<b>Average Percentage</b>
Always	13.3%	13.3%	13.3%
Usually	53.3%	40%	46.7%
Sometimes	20%	46.7%	33.3%
Not very often	13.3%	0%	6.7%
Never	0%	0%	0%

Questions 5a, 5b, 5c, and 5d examined more closely what kinds of feedback the subjects paid more attention to. Similar to the findings of Question 6, the subjects paid more attention to feedback involving grammar (23.3% *Always*; 46.7% *Usually*) and vocabulary (13.3% *Always*; 40% *Usually*) when compared to feedback related to organization (6.7%

*Always*; 33.3% *Usually*) and content (13.3% *Always*; 36.7% *Usually*). It was anticipated that the junior form students would pay more attention to grammar; however, it was, unexpectedly, found that the senior form students paid more attention to feedback on grammar than organization and content (See Table 7-10).

**Table 7**

*Q5a. Do you pay attention to the feedback involving organization?*

<b>Responses</b>	<b>F.2</b>	<b>F.7</b>	<b>Average Percentage</b>
Always	13.3%	0%	6.7%
Usually	40%	26.7%	33.3%
Sometimes	33.3%	73.3%	53.3%
Not very often	13.3%	0%	6.7%
Never	0%	0%	0%

**Table 8**

*Q5b. Do you pay attention to the feedback involving content/ideas?*

<b>Responses</b>	<b>F.2</b>	<b>F.7</b>	<b>Average Percentage</b>
Always	26.7%	0%	13.3%
Usually	20%	53.3%	36.7%
Sometimes	53.3%	33.3%	43.3%
Not very often	0%	13.3%	6.7%
Never	0%	0%	0%

**Table 9**

*Q5c. Do you pay attention to the feedback involving grammar?*

<b>Responses</b>	<b>F.2</b>	<b>F.7</b>	<b>Average Percentage</b>
Always	20%	26.7%	23.3%
Usually	46.7%	46.7%	46.7%
Sometimes	26.7%	26.7%	26.7%
Not very often	6.7%	0%	3.3%
Never	0%	0%	0%

**Table 10**

*Q5d. Do you pay attention to the feedback involving vocabulary?*

<b>Responses</b>	<b>F.2</b>	<b>F.7</b>	<b>Average Percentage</b>
Always	0%	26.7%	13.3%
Usually	40%	40%	40%
Sometimes	40%	20%	30%
Not very often	20%	13.3%	16.7%
Never	0%	0%	0%

Questions 7 and 9 aimed to explore the subjects' responses to teacher feedback and their responses to the comments and corrections that they did not understand respectively. The findings show that most of the subjects responded to their teacher's feedback by using different strategies. The most common practices of the students included making corrections (70%), and remembering the mistakes (70%). They also asked their classmates (66.7%) and teacher (43.3%), checked dictionaries (46.7%), and checked grammar books (20%). When comparing what the junior and senior forms students did to address teacher feedback, it was found that the senior form students tended to be more independent (e.g. remembering the mistakes and checking dictionaries) while the junior form students tended to depend more on the others (e.g. classmates and teachers). When asking what they would do when they did not understand teacher's feedback, the subjects expressed they would mainly ask classmates or friends (60%), ask teachers (36.7%), and try to correct the

mistakes themselves (36.7%). Overall speaking, the students would only employ very limited strategies to address teacher feedback. It seems that there is still much room for improvement in this aspect.

Question 8 attempted to examine if students had difficulties understanding teacher feedback and what the difficulties were. 83.3% of the students expressed that they had problems understanding their teacher's comments. The most common problems they had included: (a) they did not understand the correction codes and symbols (43.3%), (b) they could not see their teachers' handwriting (33.3%), and (c) they did not agree with their teachers' comments (30%). The findings do not show that there are significant differences in the problems encountered by the junior and senior forms students, but a higher percentage of the junior form students had difficulties understanding their teacher's handwriting, while more senior form students did not understand their teacher's comments about ideas and organization (See Table 11).

<b>Table 11</b>			
<b><i>Question 8: Are there ever any comments or corrections that you do not understand?</i></b>	<b><i>F.2</i></b>	<b><i>F.7</i></b>	<b><i>Average Percentage</i></b>
1. No	13.3%	20%	16.7%
2. Yes	26.7%	6.7%	16.7%
3. Yes; I can't read teacher's handwriting	46.7%	20%	33.3%
4. Yes; I understand but sometimes disagree with the comments	33.3%	26.7%	30%
5. Yes; I don't understand grammar items, and symbols	40%	46.7%	43.3%
6. Yes; I don't understand the comments about ideas or organization	0%	26.7%	13.3%
7. Yes; comments are too general	20%	13.3%	16.7%
8. Yes; others	0%	0%	0%



Question 10 examined whether the students felt teacher feedback was helpful and the reasons behind their answers. Although only a small percentage of the subjects expressed that teacher feedback was not helpful (See Table 12), not many subjects thought that their teacher's feedback could help them, either. Most of the

students thought teacher feedback was helpful because they could avoid their mistakes (46.7%) and they would know where their mistakes were (63.3%). It seems that the students felt their teacher's feedback was more effective in helping them deal with surface errors than global or semantic errors.

<b>Table 12</b>			
<b><i>Question 10: Do you feel that your teacher's comments and corrections help you to improve your writing skills?</i></b>	<b><i>F.2</i></b>	<b><i>F.7</i></b>	<b><i>Average Percentage</i></b>
1. No; I need more help to correct my errors	20%	6.7%	13.3%
2. No; my teacher's comments are too negative and discouraging	20%	0%	10%
3. No; my teacher's comments are too general	13.3%	6.7%	10%
4. No; others	0%	6.7%	3.3%
5. Yes; I know what to avoid/improve next time	33.3%	60%	46.7%
6. Yes; I know where my mistakes are	60%	66.7%	63.3%
7. Yes; the comments help me to improve my writing skills	20%	46.7%	33.3%
8. Yes; the comments help me to think more clearly	26.7%	33.3%	30%
9. Yes; some positive comments build up my confidence	13.3%	46.7%	30%
10. Yes; I can see my progress because of the comments	6.7%	26.7%	16.7%
11. Yes; I respect my teacher's opinion	20%	46.7%	33.3%
12. Yes; the comments challenge me to try new things	20%	13.3 %	16.7%
13. Yes; others	0%	0%	0%

## Interview Results

In the interviews, all the subjects expressed that teacher feedback was important; however, they did not read over their composition again very often. One of the subjects responded that she felt frustrated and bored reading her compositions over and over again as they were the same old mistakes. Another subject expressed that reading the compositions again did not help her very much because she did not fully understand the comments and corrections. She even said although she could make corrections, sometimes she did not understand why the corrections were right. This shows that their teacher's comments and corrections failed to help them internalize

the knowledge and skills involved in their writing. In short, they could not learn effectively from the corrections or feedback.

All the interviewees indicated that feedback on grammar was more important than content and organization in their questionnaires. However, interestingly, when they were asked to think about what kinds of feedback were more important to them in the interviews, all of them expressed the view that comments on content and organization were more important. When they were asked to reflect clearly on why there were differences in their answers, they came up with two reasons. One of them was that they thought

grammatical mistakes would hinder them from expressing what they wanted to convey. Another one was that their English teachers in their junior and senior forms had been emphasizing grammar was the most important element. This thus affected the way they viewed grammar.

They were also asked what kinds of teacher feedback they paid more attention to and all of them said they paid more attention to grammar. When asked why they would do so, they expressed that their teacher's feedback mainly focused on this linguistic aspect. They said they would pay attention to comments involving content and organization, but their teacher's feedback in these areas was usually very general. They pointed out that most comments related to content and organization were non-specific, such as "your ideas are not very organized", "this point is not clear" and the teacher did not give clear explanations. They found it unhelpful to their improvement in content and organization, and so they did not pay much attention to it. Since their teacher's comments focused more on grammar, they paid more attention to grammar in return.

When asked what their problems were when they read their teacher's feedback, the interviewees expressed three main problems: a) they did not agree with their teacher's comments because they thought that their teacher misunderstood what they wrote, b) they did not understand their teacher's comments as they were too general and lacked explanations, c) they did not understand the grammar terms and correction codes. When they were asked to what extent they were familiar with the correction codes, they said that they only understood some basic codes, such as tenses, and prepositions. When asked why they did not understand the codes, they expressed that they had never been explicitly taught what the correction codes referred to. What they had was just a checklist of correction codes on the composition sheets. Worse still, they said different

teachers tended to use different codes, and sometimes the codes had never been explained to them clearly.

When asked whether they felt teacher feedback was helpful, all of them responded that it helped them to avoid and make surface-level mistakes. Again, they explained the reason why teacher feedback did not help much with content and organization was that it tended to be too general. The researcher ended the interview by asking what they hoped teacher feedback would be like. All of them hoped that the teacher would point out their weaknesses and strengths in their compositions. They expressed that teachers tended to give negative comments and a lot of corrections, which was very discouraging and frustrating. Although they did not indicate that their teacher's comments were too negative and discouraging in their questionnaires, their responses in the interviews show teachers need to pay attention to affective factors when giving feedback.

## **DISCUSSION AND IMPLICATIONS FOR TEACHING**

The results of the study indicate that there are several issues writing teachers need to be aware of. In the following, these issues will be addressed and their implications for teaching will be discussed.

The results of the study show that the students did not pay as much attention as they should when compared to how much they valued their teacher feedback. It is contended that there are some plausible reasons for such a contradictory picture.

First, it is suggested that the students' teacher has been over-emphasizing grammatical feedback. However, the linguistic feedback has failed to help the students to internalize their linguistic knowledge effectively, so the students do not read over their compositions with feedback carefully. Second, the

students felt frustrated because they found that they made the same grammatical mistakes again and again, so they would skip the corrections in frustration. In other words, it is plausible that the students may be familiar with the mistakes they have made but they cannot learn from the mistakes or master the linguistic knowledge involved. This may explain why more senior form students tended to read over their compositions less often as they thought they knew the mistakes. This also explains a common phenomenon that teachers keep giving linguistic feedback, but at the same time, they complain that their students keep making the same mistakes.

The issue arising from the above contradictory picture boils down to another question: Why do students fail to learn from their teacher's linguistic feedback? To investigate why linguistic feedback is not effective, the way that linguistic feedback is given comes into play.

In Hong Kong, most teachers employ corrections codes or editing symbols to give linguistic feedback, and this is actually most teachers' usual practice (Bates et. al, 1993). However, research has shown that some techniques may not be as effective as teachers think.

The study carried out by Ferris et. al (2000) shows that students who received coded error feedback after a semester did not outperform those who only receive error feedback that was underlined. Likewise, it is found in other studies that giving students coded indirect feedback cannot bring about immediate advantage (Ferris et. al, 2000; Robb et. al, 1986). What's more, it is contended that "written error corrections combined with explicit rule reminders ..... is ineffective in improving students' accuracy or the quality of ideas" (Kepner, 1991, p.310).

Despite the above findings, it is too early to conclude that students do not benefit from feedback with correction codes or editing symbols at all. It is believed that there are some reasons for the failure to learn from

corrections. First, it is possible that students may not be able to understand the grammatical rules and metalinguistic terms that the teachers use, even though they are provided as cues (Ferris, 1995; Ferris & Roberts, 2001; Lee, 1997). Second, students basically do not have adequate linguistic and pragmatic knowledge for error correction (Ferris et. al, 1997). Third, the use of coded feedback "may not give adequate input to produce the reflection and cognitive engagement that helps students to acquire linguistic structures and reduce errors over time" (Ferris & Roberts, 2001, p. 177). It could also be that students are overwhelmed and confused by the large number of correction codes.

Under such circumstances, the problem of failure to learn from corrections may not lie in the use of correction codes and editing symbols, but in the way they are implemented in the classroom. Teachers, thus, need to employ different strategies to rectify the situation. Firstly, it is important that error feedback given with a marking code be handled very carefully, especially when the marking codes are grammar-based (Lee, 1997). To make full use of the marking codes, teachers need to ensure that students are clear about the grammar rules involved and that metalanguage used is shared between teachers and students. The use of terminology also needs to be reconceptualized in case students have difficulty understanding it. Teachers then may need to come up with a list of correction codes that students can manage and make better use of. This, on the one hand, can help teachers cater for the needs of students of various forms and different proficiency levels more appropriately. On the other hand, this avoids causing students to become demotivated in reading and learning from the marked compositions. In addition, students are usually taught by different English teachers throughout the secondary school years and different teachers may use different methods to give error feedback. Therefore, teachers should not presuppose that

students understand the codes or symbols they use or that they are able to learn from the codes or corrections by themselves. Instead, teachers need to teach them explicitly and provide students with ample practice until they can master the metalinguistic terms and knowledge to understand the corrections. As suggested by (Ferris & Roberts, 2001), students will be able to develop accuracy if a system of marking codes is used consistently throughout the term and their knowledge about the system is reinforced through lessons.

It is also recommended that students should be taught metacognitive strategies to deal with linguistic feedback. It is found that the subjects did respond to their teacher's feedback, but they seldom made use of dictionaries and grammar books to deal with the feedback that they did not understand. Teaching metacognitive strategies will let students know that there are other ways to learn from feedback and that they are responsible for their own learning to a certain extent. It can also promote autonomous learning.

In this study, it was revealed that the students did value teacher feedback, but they had difficulty in making use of the feedback. It is supported by the students' answers in the questionnaires and interviews that they had problems understanding their teacher's feedback because of misunderstandings between them and their teacher.

Various research studies have in fact indicated (e.g. Ferris, 1995) that students do encounter problems in understanding their teacher comments because the instructions or directions are not clear. Ferris & Hedgcock (1998) gave an example illustrating that students may fail to interpret a teacher's question as a suggestion or request for information, and it is not surprising to find that students ignore it when they do revision. It is, therefore, suggested that teachers should explain their responding behaviour to their students (Zamel, 1985). They should spend time specifically on

explaining "their overall philosophy of responding (as well as specific strategies and/or symbols or terminology used) to the students" (Ferris, 1995, p.49).

Teachers should also promote class discussions on response and encourage students to read and ask questions about the feedback given by them. It is especially helpful for students, such as students in Hong Kong and China, who feel that they should not challenge teachers' authority though they disagree or do not understand the comments given by teachers (Ferris, 1995). This idea is also supported by Hyland (1998), who suggests that a fuller dialogue is needed in order to avoid miscommunication between teachers and students.

This kind of dialogue is highly recommended to be extended in teacher-student conferencing, which "is a face-to-face conversation between the teacher and student.." (Reid, 1993, p. 220). As it has long been pointed out that miscommunication imposes difficulty on students and teachers approaching revision and giving feedback, teacher conferencing is a good opportunity for both of them. It helps students and teachers understand each other's expectation concerning feedback. It also helps teachers understand more about the students' perspective, past learning experience (Hyland, 1998), which will enable them to give better and more personalized feedback to individual students more effectively.

Based on the research findings, it is recommended that teacher-student conferencing is more important for senior form students, as there is a higher percentage of the senior form students who complained that they did not understand or disagreed with their teacher's comments. The senior form students are of a higher proficiency level, and they need more sophisticated skills to write their compositions. Teachers, thus, need to give more feedback to help them with their writing, and exchange of ideas will certainly be more necessary.

Teacher-student conferencing is a good opportunity for students and teachers to exchange their

ideas. However, there are numerous constraints in reality that make it difficult to carry this out because teachers may not have time to conduct conferencing with every student after every composition. To address this problem, teachers need to pay close attention to students who exhibit difficulties in making use of teacher feedback. They can conduct editing workshops or post-writing grammar clinics with those particular students, so as to demonstrate an instructional approach that fosters closer links between feedback and grammar instruction.

It is apparent from the findings of the study that the students did want to learn from the comments, but because the comments involving content and organization were not specific enough to help them improve their writing, the students did not read over their compositions with care.

It has been pointed out that vague comments should be replaced with text-specific comments (Fathman's & Whalley's, 1990; Zamel, 1985) - "feedback that is directly related to the text at hand, rather than generic comments that could be attached to any paper" (Ferris & Hedgcock, 1998, p. 133). The example given by Bates (1993) is that it is preferable for teachers to write down "I like the example about your sister" than "Good example". Fathman and Whalley (1990) contended that the reason why students did not make substantive revision on content is that the content feedback given by teachers was not text-specific enough. Therefore, teachers should avoid giving vague comments if they want students to make use of their comments to improve their writing.

In order to let students better understand how they can improve their writing, Lee (2002) suggested vague comments like 'the text doesn't hang together' could be replaced by specific comments like 'inappropriate conjunctions' or 'unclear reference'. By doing this, teachers will need to share the metalanguage they use

when giving feedback to students who can then make use of the comments to revise and improve their writing.

Apart from the above issues, another problem in teacher feedback in the present study seems to lie in the over-emphasis of grammar. A great number of the students thought that feedback on grammar was the most important and they usually paid more attention to linguistic feedback. Nevertheless, the students realized that feedback involving content and organization was more important when they give it second thoughts in the interviews. Their reaction to linguistic feedback seems to be subconscious. It may reflect that their perceptions towards linguistic feedback was affected by the priority of their teacher's response to writing.

It has long been said that teachers of writing are more concerned with providing error feedback and sentence-level feedback than other important elements (Cumming, 1985; Kassen, 1988; Idhe, 1994). It is not surprising to infer that the students' teacher in this study also focused more on local errors. If this is the case, it reveals that is important for teachers to reprioritize their responses so as not to give their students a false message that feedback on local errors is more important than global ones.

Leki (1992) suggested teachers pay more attention to global than local errors, as global errors have a greater impact on understanding. This is in line with the idea of Lee (1997), who recommends teachers to focus on more meaning errors than surface-level errors. Although students do express that they want all of their errors to be corrected (Leki, 1991; Ferris et. al, 2000; Ferris & Roberts, 2001), it may sound necessary for teachers to prioritize the errors that their students need to focus on most (Lee, 1997).

In addition, in the interviews, the students shared that they felt discouraged when they received too much negative feedback, which would adversely affect how they read over teacher feedback. Therefore, it is essential

for teachers to take affective factors into account when giving feedback. Fathman & Whalley (1990) suggested that even general positive comments and suggestions help students improve their writing through revision. However, a study carried out by Cardelle & Corno (1981) finds that only positive comment is not sufficient enough to motivate students to improve their writing. While criticism only can lead to some improvement, it is reported that the most effective way is a combination of praise and criticism. Teachers, thus, are reminded that when giving constructive criticism, it is also important to place encouraging comments as well.

However, teachers in Hong Kong may have to pay more attention to giving positive comments, as it is found that “students may distrust praise if it is not frequently given in their own culture” (Hyland, 1998, p. 280), and “too much praise may confuse, mislead, or demotivate students” (Cardelle & Corno, 1981). This alerts Hong Kong teachers on how and when to give positive comments to students. Teachers should look into the role of affective factors in giving teacher feedback and understand more about their students’ world before they give positive and negative comments.

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## **CONCLUSION**

This study aimed to investigate both Hong Kong students’ preferences for and responses to teacher feedback and the differences between junior form and senior form students. Although there are very few observations made on the different behaviors among the senior and junior forms students, the study has provided some insights into giving effective feedback in the Hong Kong context.

There is quite a lot of literature from research done on giving feedback on error, but one big limitation is that most of the studies did not last long enough to prove how students benefited from teacher feedback. More longitudinal studies are needed to find out how teacher feedback can help students understand and internalize what they have been provided and taught, and how this can help them to produce better quality writing.

In addition, being an EFL teacher, what concerns me is that the factors involved in teaching writing in an ESL and EFL context are very different, not to mention the biggest difference in the purposes for writing for EFL and ESL students. It is hoped that more research can be conducted in an EFL setting so as to provide EFL teachers with more insights into giving effective feedback.

## Questionnaire Survey

## Appendix 1

1. Form \_\_\_\_\_

2. Sex : \_\_\_\_\_

3. How often do you read over your composition again when your teacher returns it to you?

always	usually	sometimes	not very often	never
1	2	3	4	5

4. Do you think about the teacher's comments and corrections carefully?

always	usually	sometimes	not very often	never
1	2	3	4	5

5. Do you pay attention to the comments and corrections involving:

*a. Organization*

always	usually	sometimes	not very often	never
1	2	3	4	5

*b. Content/Ideas*

always	usually	sometimes	not very often	never
1	2	3	4	5

*c. Grammar*

always	usually	sometimes	not very often	never
1	2	3	4	5

*d. Vocabulary*

always	usually	sometimes	not very often	never
1	2	3	4	5

*e. Mechanics (e.g. punctuation, spelling)*

always	usually	sometimes	not very often	never
1	2	3	4	5

6. How important is it to you for your English teacher to give you comments on :

*a. Organization*

Very important	Quite important	Okay	Not important	Not important at all
1	2	3	4	5

*b. Content/Ideas*

Very important	Quite important	Okay	Not important	Not important at all
1	2	3	4	5

**c. Grammar**

Very important 1	Quite important 2	Okay 3	Not important 4	Not important at all 5
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**d. Vocabulary**

Very important 1	Quite important 2	Okay 3	Not important 4	Not important at all 5
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**e. Mechanics (e.g. punctuation, spelling )**

Very important 1	Quite important 2	Okay 3	Not important 4	Not important at all 5
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**7. Describe what you do after you read your teacher's comments and corrections (check all the things which you do)**

- |  |  |
|--|--|
| <input type="checkbox"/> Ask teacher for help          | <input type="checkbox"/> Make corrections myself |
| <input type="checkbox"/> Ask classmates for help       | <input type="checkbox"/> Check a grammar book    |
| <input type="checkbox"/> Think about/remember mistakes | <input type="checkbox"/> Check a dictionary      |
| <input type="checkbox"/> Nothing                       | <input type="checkbox"/> Others:                 |

**8. Are there ever any comments or corrections that you do not understand? If so, What is the reason?**

No (Please go to question 10)

- ☐ Yes;
- ☐ Yes; I can't read teacher's handwriting
- ☐ Yes; I sometimes disagree with the comments
- ☐ Yes; I don't understand grammar terms, abbreviations, and symbols
- ☐ Yes; I don't understand the comments about ideas or organization
- ☐ Yes; comments are too general
- ☐ Yes; others \_\_\_\_\_

**9. What do you do about those comments or corrections that you do not understand?**

- ☐ Nothing
- ☐ Ask my teacher to explain them
- ☐ Look corrections up in a grammar book or dictionary
- ☐ Ask classmates/friends/family for help
- ☐ Try to make the correction regardless of whether I understand or not
- ☐ Others \_\_\_\_\_



**10. Do you feel that your teacher's comments and corrections help you to improve your composition writing skills?**

**Why or why not?**

- \_\_\_\_\_ No; I need more help to correct my errors
- \_\_\_\_\_ No; my teacher's comments are too negative and discouraging
- \_\_\_\_\_ No; my teacher's comments are too general
- \_\_\_\_\_ No; others \_\_\_\_\_
  
- \_\_\_\_\_ Yes; I know what to avoid/improve next time
- \_\_\_\_\_ Yes; I know where my mistakes are
- \_\_\_\_\_ Yes; the comments help me to improve my writing skills
- \_\_\_\_\_ Yes; the comments help me to think more clearly
- \_\_\_\_\_ Yes; some positive comments build my confidence
- \_\_\_\_\_ Yes; I can see my progress because of the comments
- \_\_\_\_\_ Yes; I respect my teacher's opinion
- \_\_\_\_\_ Yes; the comments challenges me to try new things
- \_\_\_\_\_ Yes; others \_\_\_\_\_

N.B. Questions 3-5, 7-10 by (Ferris, 1995:45, 53)

Question 6 by (Leki, 1991;213)

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# *Peer Tutoring in Pure Mathematics Subject*

## 於純粹數學科引進「學生同儕教學」

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### **Abstract**

Students need to be endowed with generic skills so as to meet the challenges of an ever changing and knowledge-based information society like Hong Kong. Traditional education systems that focus on memorization and examination cannot satisfy these new demands. So there is a need for the shift of learning and teaching (L&T). This paper shares the experience of launching “Peer Tutoring” in Advanced-Level Pure Mathematics subject in one school. It focuses on how peer tutoring influences students’ learning behaviors and attitudes, learning effectiveness and skill promotion. The change of roles for students and teachers, advantages and limitations of peer tutoring will also be discussed.

### **Keywords**

Peer tutoring, Learning behavior, Learning attitudes, Learning effectiveness, Skill promotion

## **INTRODUCTION**

Educational reform in an information society like Hong Kong in the 21st century focuses on equipping students with self-learning skills and broadened knowledge. According to the Curriculum Development Council, the paradigm of “imparting knowledge” is shifting to that of “fostering students to learn how to learn”, which involves reform of roles of students and teachers in the processes of learning and teaching (L&T). It is important to teach students generic skills in order to help them learn how to learn. These generic skills namely

communication, critical thinking, creativity, collaboration, information technology, numeracy, problem solving, self management and study skills, should be developed through L&T in the contexts of different subjects. Hence, teachers should no longer be merely knowledge transmitters, but also facilitators of the independent learning process of their students (Curriculum Development Council, 2001). In response to the above-mentioned reform, peer tutoring can be a cultural change in L&T.

## WHAT IS PEER TUTORING?

“Peers” is defined as someone belonging to the same group, in terms of status, in society. Here “peers” refers to the students in the same class taking the same subject. Peer tutoring involves one or more students teaching other students in a particular subject area. This provides one-on-one attention, immediate feedback, and active “discovery learning”, which are especially effective in science education, in a non-threatening environment. Being a mathematics teacher, I have been attracted to catering students’ individual difference using “peer tutoring” in my lesson plan. Peer tutoring seems to be a good solution to help minimize individual differences.

### Theoretical Bases of Peer Tutoring

According to the basic cognitive developmental theories of Piaget and Vygotsky, human development can be viewed as constructive or socio-genetic processes. In the views of Piaget’s constructivism, “human beings are capable of extending biological programming to construct cognitive systems that interpret experiences with objects and other persons...Peer interactions provide rich and necessary contexts for students to revise their current cognitive system. Such revisions would, in turn, lead students to make new meanings.” (O’Donnell and King, 1999, p.5) Vygotsky’s theory views human development as a socio-genetic process by which children gain cognitive growth by interacting with others who are often more competent. Such process will be effective if the interaction occurs within one’s “zone of proximal development”. Instead of being a passive learner, students should be encouraged to have more interaction with others.

It is known that verbal interaction is important for cognitive change and knowledge construction (Forman and Cazden, 1985), and students would have better cognitive growth if they were working with each

other than working alone (Bell et. al, 1985). Students can also learn skills, beliefs and behaviors by imitating peers and adults without interacting with them (Bandura, 1986). They can figure out their misconceptions and thus correct them by observing others (models). A number of studies supports that modeling can promote subsequent performance on the observed task (e.g. Kuhn, 1972; Murray, 1972; Zimmerman, 1974). However, modeling is ineffective when models function far in advance of the participants (Kuhn, 1972). Hence, a peer model is better than an adult model because students, observing a peer completing a task successfully, would probably increase their self-concept and believe that they could also succeed in the same task.

On the other hand, many researchers find that teenagers inhabit cultural worlds far different from those of their teachers (e.g. Murdock and Phelps, 1973). As students communicate at the same levels of knowledge background and use the same language, they are more likely to accept one and others’ opinions (Piaget, 1976) and are generally more willing to challenge each other than to challenge teachers. Besides, compared with those, like most of the teachers, who had had no difficulties in learning, students who had struggled themselves to understand a concept may be advantaged in providing “scaffolding” - the process of enabling one to carry out a task that he /she would not be able to perform without assistance. It is because peer students are more sensitive than teachers to non-verbal cues given by other students to indicate that they do not understand something (Allen, 1976), and they are better able to explain concepts in much familiar terms (Noddings, 1985). Thus, students will learn better from tutors who are their peers, or who are similar in general culture and background, than from teachers.

Most students find that Advanced-level Pure Mathematics is, to a certain extent, quite abstract, and

so do my students. They always reflect that after observing my solving some mathematical problems, they can learn new skills in tackling similar problems, but this may not necessarily enhance their problem solving confidence. I have tried to launch peer tutoring in teaching some of the topics, aiming at strengthening students' problem solving confidence.

## **General Benefits to Participants in Peer Tutoring Scheme**

### ***Benefits to Tutees***

According to Doise et. al (1975), when children are presented with a solution that contradicted their own, even if the contradiction is not a correct one, will promote children's progress. In peer tutoring, students are exposed to a more challenging mode of class interaction. As interaction may produce cognitive conflicts and disagreement among students, to resolve, students have to discuss, understand, try and accept new ideas. Such a process makes students to reflect, justify and explain their own beliefs and thus help students to learn through seeking and comprehending alternate solutions. Student tutees gain from the process of understanding others' ideas, correcting previous misconceptions and filling the gaps between prior knowledge and new ideas. Finally, students work together to invent their own problem-solving procedures and discover their own solutions, creating an atmosphere of social stimulation and support (Damon and Phelps, 1989), resulting in enhancing students' communication and collaboration skills.

As a matter of fact, many research findings showed that peer tutoring produced significantly greater achievement than normal classroom instruction (e.g. Bausell, Moody and Walzl, 1972; Russell and Ford, 1983). Allen and Feldman (1973) found that children learned better by peer tutoring in science-related topics

than by studying alone. Horan et. al (1974) and Mevarech (1985) also showed that pupils who are tutored in mathematics improve mathematics achievement and classroom behavior more than control groups who are not tutored.

### ***Benefits to Tutors***

When student tutors are temporarily adopting the teacher's role, their behavior will be constrained by the expectations of peer students, leads to develop sympathy with their teachers and began to cooperate with them. This results in improved behavior in tutors' own classrooms, a better attitude towards schoolwork and a deeper respect for learning (Geiser, 1969; Allen, 1976). Tutors will also learn responsibility, caring for others (Coleman et. al, 1974), gain the experience of being needed, valued, and respected. Such an experience produces a new view of self as a worthwhile human being (Hedin, 1987), develops tutors' sense of personal adequacy, enhances their feeling of self-esteem, and improves their self-concept (Mainiero et. al, 1971).

In order to convince others, students who teach others have to struggle to make the material meaningful to the learners, thereby have the opportunity of reflecting upon their own learning process and reinforcing tutors' knowledge of fundamentals (Bruner, 1963). In the process of giving explanations and justifying their ideas to student tutees, student tutors may review and restructure the knowledge they possess, clarify or recognize material in new ways in their own mind, recognize and fill in gaps in their understanding to see how their subject area "all fits together", identify and resolve inconsistencies, and construct more elaborate conceptualizations (Yachel et. al, 1991). Student tutors then could be benefited from the process of reorganizing and restructuring their thinking for nothing clarifies their ideas as much as explaining them to others. In fact, the

tutor receives the most gains in peer tutoring scheme. What is more, Goodlad and Hirst (1989) suggested peer tutoring could give tutors a chance to make direct use of the knowledge they already possessed and might, consequently, inspire them to seek more of it.

### ***Benefits to Teachers***

As mentioned previously, students who are mobilized with the role of a tutor will sympathize their teachers and improve their classroom behavior, this may reduce discipline problems and create an atmosphere of cooperation that make teacher's job pleasanter. Peer tutoring can also free teachers from routine tasks, giving them more time on planning the curriculum and arranging conditions in which students can learn (Goodlad and Hirst, 1989).

Furthermore, according to a Stanford University study, peer tutoring is consistently more cost-effective than computer-assisted instruction, reduction of class sizes or increased instructional time for raising both reading and mathematics achievement of both tutors and tutees (Levin, 1984), which means, teachers can use their resources more effectively.

## **IMPLEMENTATION OF PEER TUTORING**

### **Target Students**

All Matriculation (Form 6-7) Mathematics Group students in Stewards Pooi Tun Secondary School, sitting for the 2003 Hong Kong Advanced Level (HKAL) Pure Mathematics Examination participated in the peer-tutoring scheme. There were 15 students, with average grades of about B and C respectively in the Hong Kong Certificate (HKCE) General Mathematics and Additional Mathematics Examinations (2001).

### **Duration of the Peer Tutoring Scheme**

In order to keep pace with the teaching schedule, the peer-tutoring scheme was first launched as a pilot in the term break period (Form 6) from mid-June to August in 2002, when both the teacher and the students were less busy and were more capable of accepting such a challenging shift of mode of learning. The scheme was taken place in the post-examination classes (before the summer vacation started) and the summer tutorial classes, twice a week in about two-month time. Each class lasted for three hours. After that, students were encouraged to use peer tutoring regularly in the new semester (Form 7).

### **Topics included in the Peer-tutoring Scheme**

As the students had to adopt the teaching role, topics included in peer tutoring should not be too difficult for them. Two topics, namely "Indefinite Integrals" and "Definite Integrals", were chosen in the pilot classes because all the students had already acquired the basic knowledge and skills in tackling problems involving "integration" when they were in Form 5. The teacher first tailored the chosen topics into several sub-topics. Then divided the class into five groups, each of three students. The groups were allowed to choose the sub-topics on their own free will. Each group prepared their own teaching material or lecture notes and took turn to deliver lectures. For the audience, they had to take an active part in class discussion. Later in the new semester (Form 7), instead of delivering lectures, students were only asked to use peer tutoring regularly in solving mathematics problems, especially those in the past HKALE papers.

### **Teacher's Role in Peer Tutoring**

In launching peer tutoring, in which students shared teacher's duty in delivering lectures doesn't mean freeing teacher from lesson preparation. Instead, it shifts teacher's role in lesson design. Teacher's new roles are mainly focused on the following:

1. Preparations

Teacher should help students to form groups, considering factors like gender, abilities and pre-existing social relationship of students so as to maximize their performance. He/she then breaks down the teaching materials into a series of digestible snippets, and helps to set clear objectives and goals. It is also necessary to provide material needed in presentation and help to set preparation schedule to make sure that student tutors have sufficient preparation time.

2. During Students' Presentation

Teacher should be responsible for monitoring and supervising students' presentation, offering instantaneous feedback like giving praises and comments, correcting mistakes, strengthening and reorganizing key points. Besides, teacher should engage and challenge students to arouse discussion, and teach critical thinking and questioning skills.

3. Lesson Enrichment

Teacher is also expected to provide intellectual inspiration and leadership to arouse interest, and finally, to focus on teaching new or supplementary information.

## **EVALUATION ON THE EFFECTIVENESS OF PEER TUTORING**

In order to assess the effectiveness of peer tutoring, students' perception of their dispositions and outcomes in learning were measured for both the "teacher-as-instructor" and the "student-as-instructor" modes of study. The main questions investigated in this study were, "Did the students benefit from the change in modes of study towards student-as-instructor learning style?" and "What are the advantages and limitations of peer tutoring?"

### **The Instrument**

A self-developed questionnaire was introduced to measure four subscales of students' dispositions and outcomes in learning as listed below:

1. Learning Behaviors - it measured students' perception of their behavior in learning like how concentrated and actively involved during class discussions, and how well they collaborated in learning.
2. Learning Attitudes - it measured students' perception of their disposition in the dimension of motivation, confidence in problem-solving, self-concept, and how challenging they found the lessons.
3. Learning Effectiveness - it measured students' perception of their disposition in the dimension of



effectiveness, learning climate, understanding of concepts, and catering individual difference.

4. Skill Promotion - it measured students' perception of their disposition in the dimension of independence and autonomy in learning, mind broadening, critical thinking skills and organization.

All the 15 Pure Mathematics students sitting for 2003 HKALE were asked to rate the items of the questionnaire on a six-point Likert scale, ranging from 1 to 6, in which 1 indicating "strongly disagree" and 6 indicating "strongly agree". In addition to the item-rating questions, two open-ended questions concerning students' opinion of the advantages and limitations of peer tutoring were also introduced in the questionnaire.

Finally, students' HKALE result, in terms of passing rate and value-added index in Pure Mathematics, will be analyzed in reviewing the overall effectiveness of the scheme.

## Results and Discussions

Before going on to the data analysis, there are two important things to point out: first, since the sample is non-random and convenient with only 15 subjects, the results might not be statistically reliable nor significant, however, they still reflected something to a certain extent; second, 5 out of the 15 subjects (33%) had attended private tutorials, therefore their overall HKALE results cannot be simply attributed to the peer-tutoring scheme.

### *Students' Overall Perception of Peer Tutoring Scheme*

Students' perception of their dispositions in the four subscales are summarized in the following:

**Table 1 Means of the subscales of the questionnaire**

Subscales	No of cases	Mean	
		Teacher-as-instructor	Student-as-instructor
Learning behaviors	15	4.42	4.55
Learning attitudes	15	3.97	4.25
Learning effectiveness	15	4.55	3.87
Skill promotion	15	4.14	4.17

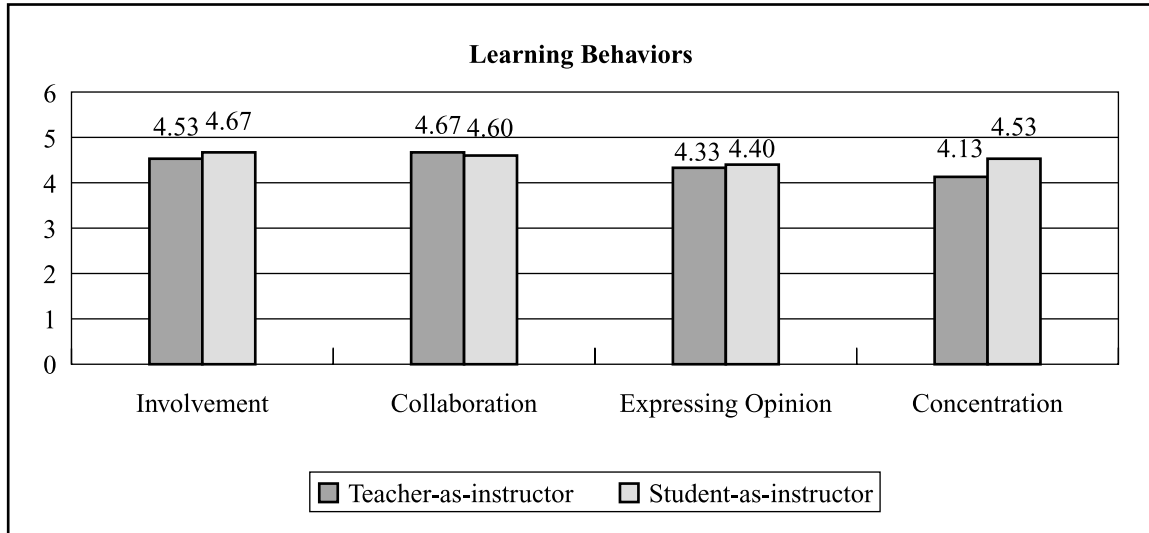
Results from the questionnaire indicate that students perceived that the "learning attitudes" in the student-as-instructor mode of study was higher than that in the teacher-as-instructor mode of study by 0.28, while

their "learning behaviors" and "skill promotion" were just slightly better in peer tutoring. Interestingly, they reflected that peer tutoring was far less effective than conventional classroom instruction by 0.68.

Let's go into details of each of the subscales:

1. Learning Behaviors:

**Table 2 Bar Chart indicating the Means of Sample Items of the Subscale: Learning Behaviors**

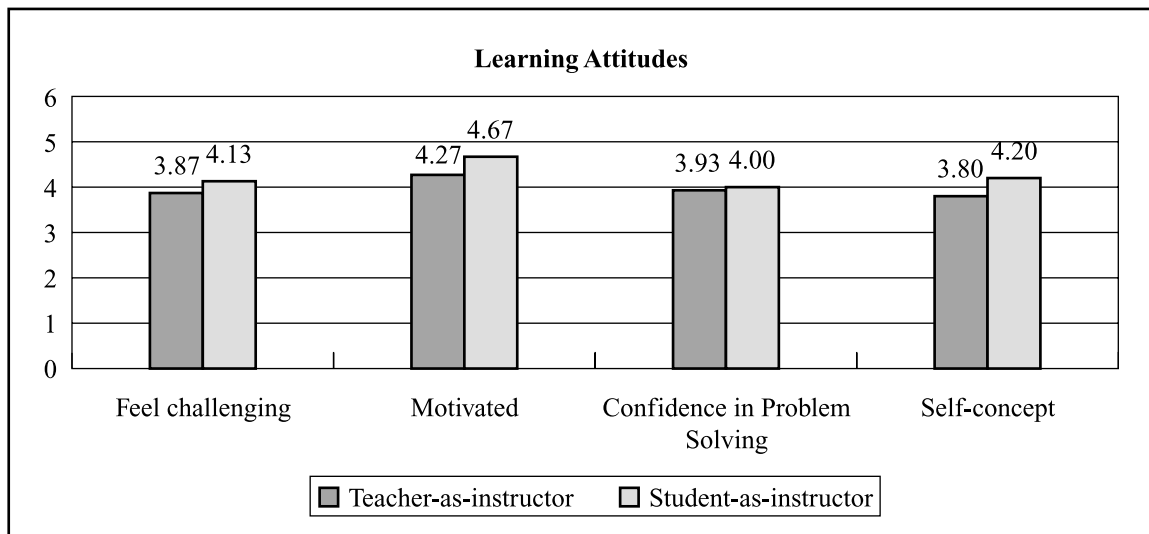


Students showed greater “involvement” and had more “collaboration” in peer tutoring, but they didn’t find much difference in terms of “concentration” and

chances of “expressing opinion” in both modes of learning.

2. Learning Attitudes:

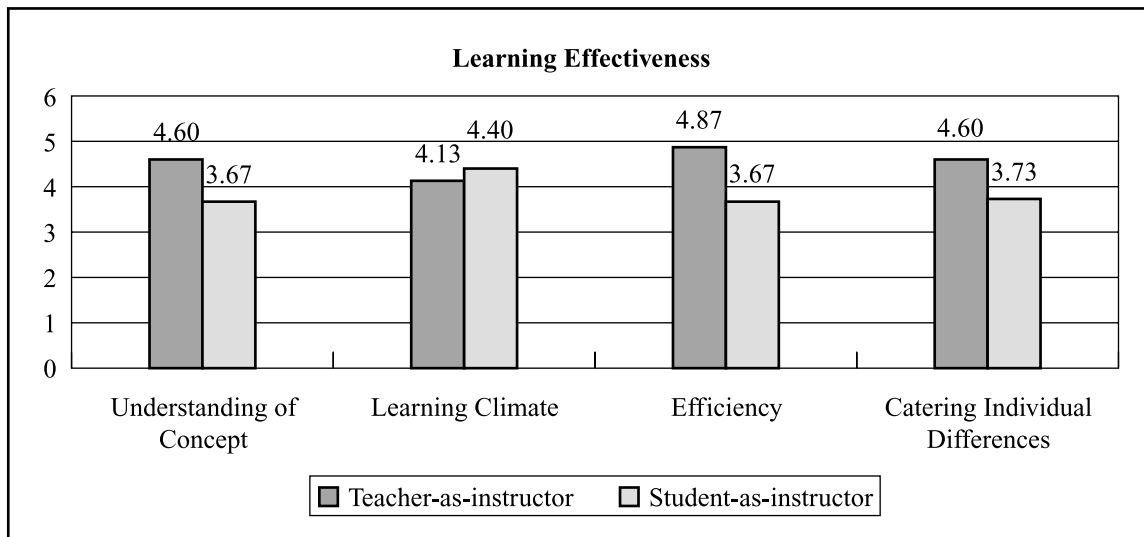
**Table 3 Bar Chart indicating the Means of Sample Items of the Subscale: Learning Attitudes**



Students found that peer tutoring was much more “challenging”. It was better able to “motivate” their studies and improve their “self-concept”. However,

watching their peer tutors solving various problems successfully might not necessarily upgrade their “confidence in problem-solving”.

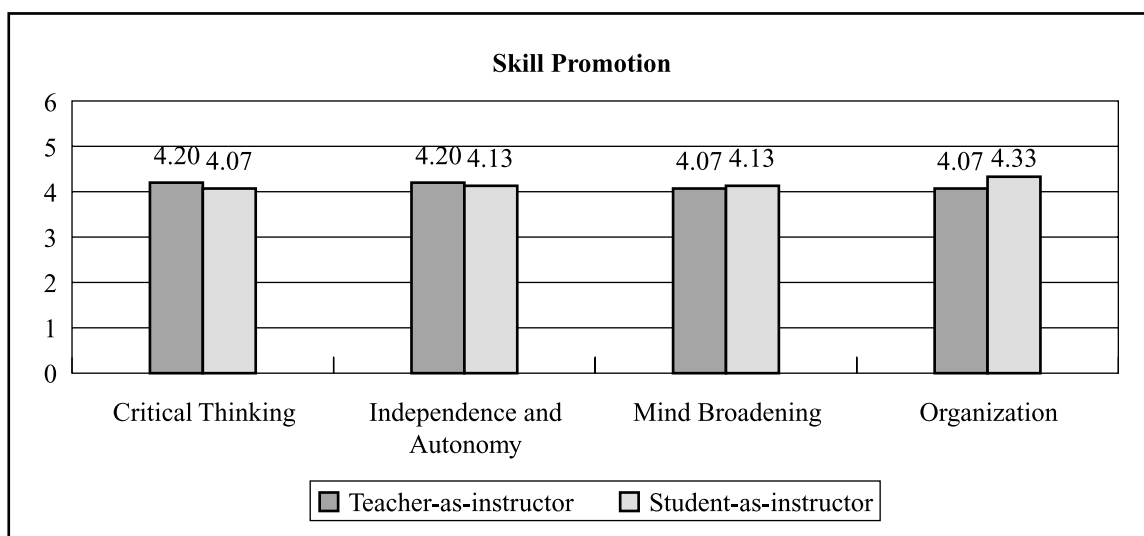
## 3. Learning Effectiveness:

**Table 4 Bar Chart indicating the Means of Sample Items of the Subscale: Learning Effectiveness**

Though students agreed that peer tutoring could enhance “learning climate” in class, they pointed out that it was rather time-consuming, and that’s why they rated “efficiency” in the student-as-instructor mode far lower than that in the teacher-as-instructor mode by 1.20. They

too strongly reflected that with pedagogic training and rich teaching experience, teacher was more professional and experienced than peer tutors in “catering individual differences” and explaining “concepts”, especially those abstract ones.

## 4. Skill Promotion:

**Table 5 Bar Chart indicating the Means of Sample Items of the Subscale: Skill Promotion**

The results indicate that in peer tutoring, students would have better growth in “organization”. Contradicting to the research review, students showed that they learnt “critical thinking” skill more in the teacher-as-instructor mode of learning. This might be attributed to the fact

that the teacher used to prepare teaching materials intended for training students’ critical thinking. For example, the teacher often presented examples of different problem-solving methods, some were even conceptually wrong, and asked students to criticize or modify them.

## Result Summary

Most of students, taking the role as student tutees, agreed that they were more motivated and actively involved in class for they had to listen extensively and attentively because, unlike in the “teacher-as-instructor” mode of study, they could not take for granted that whatever student tutors taught were all correct. They tended to be more critical-minded and learned to challenge their peer tutors, making the lessons more challenging and thus promoting learning climate. Besides, through peer tutoring, students had more opportunities to collaborate and organize their learning material and to share with their peer, meaning that every one could contribute to the learning outcomes of the whole class, resulting in an increase in self-concept and organization skills. In spite of this, students found that peer tutoring was less efficient, in terms of understanding new concepts and catering individual differences.

## Students’ Opinions in the Two Open-ended Questions

### 1. What did you like best about peer tutoring?

- *“In order to participate in class discussion, I had to prepare for the lessons. This helped me to build a habit of reading teaching materials before class.”*
- *“We had to prepare lessons in groups, this helped us to develop learning bonds with student peers.”*
- *“During peer tutors’ presentation, I was less likely to accept all what they presented, this sometimes aroused conflicts among us. To resolve, I was encouraged to develop a tolerance for uncertainty and conflict.”*
- *“The learning climate was much more challenging, and consequently increased my motivation, concentration and involvement in class.”*

- *“As all of us had the opportunities to teach and to challenge our peers, we could make significant contribution to every student’s knowledge construction. This not only increased our self-esteem, self-confidence and leadership, but also built up our spontaneity in learning.”*
- *“Peer tutoring helped us to move away from dependence on teachers’ authority toward belief in our own ability to seek knowledge and figure out solutions.”*
- *“Peer tutoring promotes cooperation, friendliness, positive social behavior like giving praise and encouragement, and hence improve our communication and interpersonal skills.”*

### 2. What are the limitations in peer tutoring?

- *“Without pedagogic training, students able to understand a concept well does not necessarily imply that they can teach the concept equally well.”*
- *“We may have to pay extra effort in adapting ourselves to the different teaching styles of different student tutors.”*
- *“It may cause disciplinary problem if the students are not mature and disciplined enough.”*
- *“Peer tutoring is in overall much more time-consuming than traditional classroom teaching. This may cause difficulty in keeping pace with the teaching schedule, especially when there is an existing syllabus for public examination.”*
- *“We may learn wrong concepts if the teacher is not alert enough in correcting mistakes made by the student tutors immediately.”*
- *“Not every topic is suitable to implement peer tutoring. Some topics may be too abstract and require much of teacher’s elaboration, or some may be too hard to break down into a series of digestible snippets.”*

### ***Students' Hong Kong Advanced-Level Examination Result in Pure Mathematics (2003)***

The passing rate of the fifteen students in 2003 HKAL Pure Mathematics Examination was 93.3%. Three students (20%) got “distinctions”; all these three students were the most active ones involved in peer tutoring and only one out of them had attended private tutorials.

According to the Value-Added index released by the Education and Manpower Bureau (Table 6), the target students had an overall estimate of 5.71 value added. Since factors affecting learning outcomes are too complex, we cannot simply attribute the value added to the launching of peer-tutoring scheme. Nevertheless, peer tutoring indeed created a self-learning atmosphere and promoted students' generic skills that are essentials of effective learning.

**Table 6 Value-Added Index of 2003 HKAL Pure Mathematics Examination**

2003	Value-Added			Stanine
	Low	Estimate	High	
Pure Math	2.2	5.71	8.86	8
Ref. Range	-9 to 9			1 to 9

## **CONCLUSION AND SUGGESTIONS**

Hong Kong is now developing towards an information society in which students need to be endowed with generic skills so as to meet the challenges of such an ever changing and knowledge-based environment. Traditional classroom's board-and-chalk teaching that focuses on memorization and examination can merely contribute to these new requirements. So there is an undeniable need for the shift of teaching mode. Peer tutoring provides an alternative for both learning and teaching. It helps to upgrade students' learning behaviors and attitudes, enhances critical thinking and organization skills, and promotes communication and collaboration. These lead to a self learning climate in which students move away from the dependence on teachers' authority toward self-confidence in problem solving.

In order to yield greater benefits from peer tutoring, it is suggested that as the pre-requisite for both

the student tutors and tutees, they should be considerably disciplined and have to be taught some bases on certain topics before they can teach. For the topics chosen, they should not be too abstract nor far beyond students' grasp, because presenting students with difficult problems will not necessarily result in productive discussion and cognitive change. Instead, a decline in correct responding and more deeply entrenched misunderstanding may result (Levin and Druyan, 1993). Last but not the least, the teacher should be alert enough throughout student tutors' presentation so as to correct any misconceptions immediately.

Peer tutoring should be seen as one of the many teaching strategies available in education reform. It is not intended to replace other teaching techniques, but rather to complement them. It will always remain the teacher's privilege and responsibility to decide wisely which teaching method is beneficial and desirable for a given group of students and given subject matter.

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# 意象訓練——加強學生中文作文的創造力

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## 撮要

現今學生普遍缺乏創作靈感，使寫作倍感困難。根據基模理論(Schema Theory)及多元互動創意想像的意象模式(Multidimensional Interactive Creative Imagination Imagery Model)，意象訓練(imagery training)可以有效地使學生寫作時更具創意。我們是次研究，就是將意象訓練應用於三班，合共一百二十三個中學二年級的學生身上。該批學生於訓練前及訓練後都會參與一個中文作文評核，以了解他們的作文在訓練後會否更具創意。創意的評核準則包括：流暢力、獨創力、文法及文章內容。

## 意象訓練—— 加強學生中文作文的創造力

現今學生普遍都有寫作上的困難(Cameron, Hunt, & Linton, 1996)，其中主要的困難包括缺乏題材、缺少適當的詞彙、使用錯誤的文法及沒有良好的組織力。就組織能力而言，學生因花很少時間草擬、訂定題旨及覆閱文章，最終行文往往變得欠說服力、前文不對後理，以致文章難於被人明白。透過這個研究，我們試驗意象訓練能否協助學生解決以上的問題。

## 寫作

有學者 (Leung, 2001)形容寫作的過程就是主觀地去解釋個人的想法，而且每個人的腦中都有一套屬於自己的詞彙和對每個詞彙的解釋 (mental

dictionary)，以及使用詞彙去解釋不同觀念的獨特法則(Pinker, 1995)。

Hayes & Flower (1980)說過，寫作可以歸納為構思、轉譯及覆閱三個過程。構思就是製造及組織意念；轉譯就是將預備論述的意念化成文字 (Bock & Levelt, 1994)；而覆閱則是閱讀文章，找出其中的問題和錯處。而其中轉譯的過程，更起著一個重要的角色。Bourdoin and Fayol (1994)則指出，寫作比說話要求更高的集中能力，而兒童集中力較弱，因此他們寫作所能引用的詞彙，往往比說話時為少。

在技術的層面上看，學生往往缺乏腦力激盪、自由寫作、使用聯想及記憶等解決問題的技巧。因此要提升學生的寫作能力，訓練便需要包括有關的技巧。解決問題的技巧易學難精，而學



生又缺乏人生經驗及閱歷，使學到的只會是一些較粗略的基本技巧。有經驗的作者在籌備及覆閱文章時，都會有效地運用不同的認知策略。而有關的策略有助他們於寫作時作出適當的自我規限。在切合讀者的需要、便於覆閱和修改、以及能完成整個寫作等大前題上，作者更需要有策略地去取捨文章的素材(Albertson & Billingsley, 2001)。

文章要寫得好，作者必須對寫作的準則及題目有足夠的認識。所以，學生除了需具備詞彙運用、文法及句子結構等知識外，對作文題目的了解也是必需的(Pinker, 1995)。前者能從課堂上學到，而後者則關乎學生對週遭環境的感受及其閱讀習慣。總括而言，這都和學生的態度有密切關係。

學生的學習態度及寫作動力均是教學上要顧及的重點範圍。但當學生未能有效地運用文字去表達時，學習的動力便會相應下降。字數和時間的限制，對分數的擔憂或老師其他的要求，都會減低學生的寫作動力(Sharples, 1978)。在壓力下，學生亦較難進行創作，所以學生須於一個有安全感，且沒有壓力的工作環境內寫作。

## 創作力

要有良好的寫作能力，學生需要掌握不同的技巧，學習知識和改善態度。雖然現今學校已提供相關的訓練，但相對之下，學校都較少著重提升學生的創作力。以下我們將討論創作力是如何有助於寫作。

我們會就著 Wallace (1926)有關創作力的四個階段，即準備期、醞釀期、頓悟期和創作期，討論提升創作力如何能幫助學生寫作。有關創作力的訓練，主要集中於準備期。首先，學生對其寫作题目的背景有更深切的認識，會有助於開始他們的寫作。此外，使用視聽器材的刺激及促使同學間的討論，則有助於發展學生的解決問題技巧，這些技巧，亦有助他們提取及運用腦內有用

的記憶。另一方面，在準備期間，老師與學生討論他們的作文題目，將有助提升學生對作文的興趣，達至推動寫作的作用。但如果學生處於一個具威嚇性的氣氛下寫作，例如過份擔憂引用錯誤的意念，或於未能完成作文時會受罰等，都會因恐懼、失敗而失去寫作的動力。

學者 Dawe (1993)指出文學老師在教授小說時，應鼓勵學生想像其中角色的形象。他亦證明了提升學生的想像力和語言表達力，會有助提升學生的閱讀、寫作與批判思考等能力。此外，亦有學者(Sadoski, Kcaly, Goetz, & Paivio, 1997)發現，有否引用一些具體的語句及有否運用意象化，均能解釋一些語言運用上的差距。使用一些具體的字、詞、句，會比抽象的易被人形象化、了解、記憶及感覺有趣(Sadoski, et. al, 1997)。學生透過對身邊世界細心的觀察，再結合已有的概念，便能發展具創意的新意念(Ward, 2001)。透過聯想，將這些新意念與接收回來性質近似或不同的資訊互相組合而成新概念，已可以算是運用創作力的開端。學習了創作力及橫向思考，學生的意念將會更深和更廣。

在第二及第三個階段，即醞釀期及頓悟期，學生需身處於一個被支持及鼓勵的環境當中。要創造他們個人的想法，需要有足夠的時間，因此在訓練的起步階段，學生不會被要求有一個很高的寫作效率。況且當學生能掌握意象化後，他們的寫作速度自然會比以往快。

在最後的一個階段，即創作期，學生會在老師的支持及協助之下，與同學討論及表達他們的想法。完成作文後，亦應容許及鼓勵同學間互相給予意見，使寫作有進步。

## 甚麼是意象？

意象是指物質訊息的輸入，也是腦部如何對這些訊號的處理及怎樣去理解有關的訊息(Broudy, 1987)。這些物質訊息可以是圖像、聲音、觸覺或

情緒感受，而每個人的腦部如何去處理這些訊息的方法亦不相同。接著，這些訊息會轉化為意識、知覺、感受及推動力，最終成為行動。而在完成這種種之前，腦內亦會先形成一個心理圖像 (Khatena, 2000)。

## 意象與語言的運用

現今有很多理論去解釋意象如何有助於語言運用，而基模理論 (Schema Theory) 及雙碼理論 (Dual Coding Theory) 便是其中兩個。基模理論假設我們的記憶中存在著一些抽象的架構，用來表達知識 (Dawe, 1993; Kaufmann, 1980)。基模理論將注意力集中於文章上有意義的地方及讀者已有的知識上，誘發了不同的研究，豐富了我們對閱讀本質的理解。當學生在寫作或閱讀時，新的概念會根據他們過往的經驗和知識而產生。而當學生拿到一個作文題目後，他們會用固有的記憶去理解題目，接著按他們腦內已有的資源，去寫他們的文章。

然而，基模理論卻忽略了學生的情緒反應，因而不能解釋何以同一個學生於不同的狀態下，會對同一件事有不同的理解。此外，這理論亦不能解釋為何學生能構思他們已有知識範圍以外的意念。而且，有好的意念，學生亦未必能把它們組織成文章。

至於雙碼理論則提出處理非語言及語言的資訊，分別是由兩個系統去處理，而這兩個系統是獨立但有連繫的 (Dawe, 1993; Kaufmann, 1980; Riding & Cheema, 1991)。處理非語言的系統是指意象系統，因為該系統的其中一個作用，就是使腦部產生影像 (包括視覺、聽覺、感觀及情緒)。而處理語言系統，則是指專門處理語言的次系統或口語系統。

以上提到的兩個系統有不同組織及運作特徵 (Dawe, 1993)。在接收到語言訊息後，該訊息會被連續性地及依據句法整理。對於非語言的訊息，

則會被整理為一個包括視覺、聽覺、感觀及情緒的結合。透過語言或是影像的刺激及聯想，接收到的詞句會與其他詞句連結，而近似地，接收到的影像亦會喚起腦內其他相關的影像。

雖然接收語言及非語言模式是透過兩個不同的系統，但正如前文所述，該兩個系統是互相關連的。因而詞句訊息能引發其他詞句的聯想外，亦能同時喚起能聯想到的影像，反之亦然。舉個例說，當一個學生將「雪糕」儲存於語言與非語言模式的記憶內，他看到「雪糕」後，便會聯想到他喜愛的雪糕味道、顏色、吃的感覺等等。而他亦能在見到「雪糕」一詞後，聯想到雪糕的影像及其他有關雪糕的特徵。此外，該學生亦可從雪糕上，進而聯想到其他的味道、感覺或食物。

根據雙碼理論以及多元互動創意想像的意象模式 (Multidimensional Interactive Creative Imagination Imagery Mode)，意象訓練能幫助學生從一個圖像，連鎖反應地喚起一連串其他的圖像，這可以有助他們去寫更豐富和更有創意的文章 (Hutton & Lescohier, 1983; Sommer, 1978)。因此，訓練會集中使用書面語，幫助學生透過意象化，去描寫他們所看到、聽到、感覺到及想到的事，從而促使學生寫一些有創意的故事。

## 研究方法

參與訓練的學生需要出席六堂共五小時的意象訓練，其中內容包括提升學生的動力、意象化能力、有關寫作的技巧及知識和改善寫作應有的態度等。另一方面，教導學生如何放鬆自己亦是訓練的重點。學生於輕鬆的環境及鬆弛的狀態下，除了感到舒適外，也能提升他們的寫作動力、想像力及意象化的能力。

學生在訓練中，會加深了對創造力的認識，有助他們掌握及運用創造力。一篇有創意的文章，會有較多及較原創的意念、較好的內容及更有組織。此外，訓練亦會包含提升觀察力的技

巧。因為就算學生具有創意而想到一些有趣及獨特的意念，寫出來的文章也不一定會使讀者感到有意義或產生共鳴。要增加對這個世界的認識，使寫的文章容易與人產生共鳴，是需要透過對週遭細心的觀察。

是次研究，我們除了考試分數外，亦就著其他四個方面作評分，即流暢度、獨創性、內容及文法。我們會以學生文章意念的多寡去量度流暢度，而獨創性則是計算文章上的意念，是否較少於其他文章上出現 (Lissitz & Willhoft, 1985; Plucker & Runco, 1998)。至於內容及組織力的分數，則取決於學生如何去闡釋他們的意念。

### 假設

研究中，共有 123 位學生參與了意象訓練。而我們會透過事前及事後測試，了解研究的成效。在研究中，因變量分別有文章的內容、流暢度、獨創性及文法的評分，和中文作文的考試分數。獨立可變物則分別有性別及有否參與了意象訓練。我們假設學生參與了意象訓練後，他們的創意及中文作文的表現均會有所提升。

### 研究對象

該 123 位學生來自同一所第二組別的中學，他們來自中學二年級的三個班別，由同一位中文老師任教，而該老師亦是是次研究的研究員之一。而有關研究的事宜，學生事前是不知道的。他們被選中參與這個研究，是因為他們同時被該研究員所教。參與訓練的三個班別中，其中一班 (共 41 人) 成績較好，考試排名在全級二百四十個學生的前八十位。而參與研究的男女生比例如下：

	人數
男生	59
女生	64
總數	123

### 研究設計

是次研究的設計，為一個事前與事後對比的測試。123 位學生於接受意象訓練的前後，都會參與一個測試，以評核四項有關創意及作文的評分，從而評估他們在訓練前後是否有分別。

此外，研究亦會利用有參與訓練的學生的中文作文考試成績，對比 84 位沒有參與訓練的學生，以評估訓練的成效。至於學校的編班情況，學校會根據學生的學業成績，將學生編進成績較平均或成績較好等兩種班別。參與研究的三班學生，其中兩班為成績較平均的班別，一班為成績較好的。我們在對比考試分數時，會從有參與訓練與沒有參與訓練的班別裡，各揀一班成績平均及成績較好的班別來作比較。

### 材料及步驟

#### 事前測試

所有有參與意象訓練的學生，都會於接受訓練前，為一篇題目為「我在學校年終的頒獎禮中獲獎，情況會是這樣的……」寫一個結尾。文章需在七十分鐘內完成，沒有字數限制，亦容許學生於寫作時與同學交流意見。

## 意象訓練

教節	目標	活動	教具	課業及評估
1	令學生明白創意的特性	i. 利用圖片和簡報，向同學展示有創意的圖片和文章。 ii. 老師讀「創作」兩字，讓同學把在腦內浮現的影像記在工作紙一上。	i. 簡報一 ii. 工作紙一	
		iii. 引導同學說出創意的四個特性：流暢力、彈性、獨創性、精進力。		工作紙二：九宮畫
		i. 請同學分享工作紙二，溫習創意的特性。		
2-3	腦海圖像思維、創意和中文寫作	ii. 利用簡報二及三解釋潛意識及靈感的由來： 甲、鬆弛法：讓腦內記憶從潛意識浮現； 乙、漸進式鬆弛法。 iii. 在音樂的襯托下，老師說出一些物件，引導同學把腦海內浮現出來的影像在工作紙三上。 iv. 請同學用聯想的方法，把所想的影像豐富起來。 v. 溫習鬆弛法和冥想。	i. 音樂 ii. 簡報二：冰山 iii. 簡報三：令人鬆弛的圖畫 iv. 物件 v. 工作紙三	工作紙四：請同學把工作紙上所寫的物件，用腦海圖像法，想像一個故事。可用圖畫或文字。
4-6	流暢力及靈活性訓練	i. 溫習鬆弛法和冥想。 ii. 利用簡報四介紹假象、模稜兩可的圖像和一些創意實例。 iii. 利用簡報五介紹創作四個過程：準備期、醞釀期、頓悟期、創作期。 iv. 現在的訓練在準備期。第一、二種訓練是流暢力和靈活性。 工作紙五：拼字練習 工作紙六：面罩的用途 v. 利用簡報六，介紹橫向思維。	i. 簡報四：假象、模稜兩可的圖像和一些創意實例 ii. 簡報五：用漫畫解釋創作的四個過程。 iii. 工作紙五 iv. 工作紙六 v. 簡報六：橫向思維	
7-8	訓練獨創力	i. 利用簡報七，介紹獨創力。 ii. 講解觀察力的重要。 iii. 利用簡報八及工作紙七，完成觀察力訓練。 iv. 重溫鬆弛法和冥想。 v. 完成工作紙八：故事創作。 vi. 請同學與鄰座交換工作紙八，有與人不不同的意念得1分。 vii. 老師再抽其中一位同學，將他的意念朗讀出來，再與全班同學比較，帶出要獨創並不容易。	i. 簡報七 ii. 簡報八 iii. 工作紙七 iv. 音樂、氣味 v. 工作紙八	
9	訓練精進力	i. 利用簡報九，講解精進力。 ii. 重溫放鬆的技巧。 iii. 完成作文(家課) 續寫：十五年後的今日，我看著自己的孩子，心裡想著……	i. 簡報九 ii. 原稿紙 iii. 音樂、氣味	
10	互評	i. 重溫放鬆的技巧。 ii. 利用評改量表，每位學生分別評量3位同學的作文。	i. 音樂、氣味 ii. 評改量表	

## 事後測試

在完成整個訓練後，會要求學生續寫一篇文章，題目為「十五年後的今日，我看著自己的孩子，心裡想著……」。

## 評分

一個於香港大學主修翻譯及比較文學三年級的學生，會充當研究助理，協助為研究中的作文評分。四個會被評分的範疇包括文章的流暢度、獨創性、內容及文法，評分的標準如下：

### 1. 流暢度

流暢度會以文章上意念的多寡來計算，而同一個主題的不同意念，會以同一個意念作計算。例如：「輝看看東，只因為這是他的夢境」與「突然，東消失了。輝醒後，發現這

只是一場夢」是相同的意念。此外，文章風格是不會計算分數。

### 2. 獨創性

一個意念的獨創性的分數計算方法如下：以 1 除以所有提及相同意念學生的數量。(例如：有位同學在事前測試中提及學習過程或回憶上課情況，那麼該 75 位同學每人可獲  $\frac{1}{75}$  分)，而一個學生的獨創性分數，則是他所有意念的獨創性分數的總和(例如：有同學寫出 3 個意念，而每個意念的分數分別是： $\frac{1}{75}$  分、 $\frac{1}{50}$  分和  $\frac{1}{4}$  分，那麼他在獨創性方面，共獲得  $\frac{17}{60}$  分)。

### 3. 內容 (文章內容及組織力)

分數	內容評分			
	組織力	背後的意義	直覺	故事性
0	沒有	沒有	沒有	沒有
1	弱	沒有	沒有	簡單
2	一般	不明顯	沒有	簡單
3	好	有	有	較充實
4	非常好	有	強	非常充實

### 4. 文法

分數	文法評分				
	文字運用	表達能力	語文能力	流暢	標點符號
0	很多的錯字	難以理解	沒有用書面語	不流暢	較多的誤用
1	較多的錯字	用簡單句子	使用較多口語	較差	較少的誤用
2	一般多的錯字	較清晰	使用較少口語	普通	較少的誤用
3	較少錯字	良好	全為書面語	好	很少的誤用
4	沒有錯字	非常清晰	全為書面語	優異	沒有誤用

## 結果

參與這個研究的 123 個學生，就讀於同一所中學的二年級。其中有效的個案為 118 個，男生佔 56 個（即 47.5%），而女生則佔 62 個（即 52.5%）（見表一）。

表一 性別分佈

	頻數	百分比
男生	56	47.5
女生	62	52.5
總數	118	100.0

學生分別於意象訓練之前和之後參與一個測試。在有效個案當中，有 110 學生出席了訓練前的測試，而出席訓練後的測試則有 111 人。在測驗試中，老師及研究助理會就流暢力、獨創力、文法及內容四方面作出評分。由於有部份學生缺席了訓練前或訓練後的測試，故此有七個個案的分數被取消。

表二及表三分別顯示了訓練前及後的測試中，四個評分的最小值、最大值、平均數及標準差。在訓練前的測試，流暢力、獨創力、文法及內容的平均分數分別為 1.62、0.05、8.28、1.49，而在訓練後，這四方面的平均分數則分別是 2.23、0.08、9.41、1.80。

表二 事前測試創意作文分數的統計

	N	最小值	最大值	平均值	標準差
流暢力	110	0	3.00	1.6182	0.8238
獨創性	110	0	0.3180	0.0545455	0.0715288
文法	110	0	16.00	8.2818	3.0564
文章內容	110	0	3.00	1.4864	0.7706
N	110				

表三 事後測試創意作文分數的統計

	N	最小值	最大值	平均值	標準差
流暢力	111	0	5.00	2.2252	0.9213
獨創性	111	0	0.2836	0.0810811	0.0593378
文法	111	0	16.00	9.4054	2.7614
文章內容	111	0	3.00	1.8018	0.7725
N	79	30.00	90.00	61.5696	11.8913

大致上，四方面的分數，即流暢力、獨創力、文法及內容的評分，於訓練後均有進步 (表四)，而且都達百份之五的顯著水平 (表五)。

表四 事前測試和事後測試分數的平均值和標準差

	平均值		標準差	
	事前測試	事後測試	事前測試	事後測試
流暢力	1.6182	2.2252	0.8238	0.9213
獨創性	0.0545455	0.0810811	0.0715288	0.0593378
文法	8.2818	9.4054	3.0564	2.7614
文章內容	1.4864	1.8018	0.7706	0.7725

表五 事前測試和事後測試分數分別的 t 檢驗

配對樣本 (Paired Samples Test) 的 t 檢驗

事前測試和 事後測試中的比較	配對差值 (Paired Differences)							
	平均值 (Mean)	標準離差 (Std. Deviation)	方差 (Std. Error Mean)	95% 信賴度 (Confidence Interval of the Difference)		t 檢驗	自由度 (Df)	P 值
				上 (Upper)	下 (Lower)			
第一組 流暢力	-.5728	1.1167	.1100	-.7911	-.3546	-5.206	102	.000
第二組 獨創性	-2.5E-02	8.50158E-02	8.38E-03	-4.1E-02	-8.0E-03	-2.939	102	.004
第三組 文法	-.9806	2.8318	.2790	-1.5340	-.4271	-3.514	102	.001
第四組 文章內容	-.2767	.8364	8.242E-02	-.4402	-.1132	-3.357	102	.001

表六 事後測試中的流暢力、獨創性、文法、文章內容和考試分數不同性別的結果

事後測試		N	平均值	標準差	標準誤差
流暢力	男	52	2.0577	.9164	.1271
	女	59	2.3729	.9078	.1182
	總數	111	2.2252	.9213	8.745E-02
獨創性	男	52	6.51694E-02	4.79666E-02	6.65177E-03
	女	59	9.51049E-02	6.50196E-02	8.46483E-03
	總數	111	8.10811E-02	5.93378E-02	5.63209E-03
文法	男	52	9.0000	3.1060	.4307
	女	59	9.7627	2.3877	.3109
	總數	111	9.4054	2.7614	.2621
文章內容	男	52	1.7692	.8311	.1153
	女	59	1.8305	.7228	9.411E-02
	總數	111	1.8018	.7725	7.332E-02
考試分	男	38	58.5789	14.1663	2.2981
	女	41	64.3415	8.5866	1.3410
	總數	79	61.5696	11.8913	1.3379

於事後測試的各項分數上女生的流暢力 ( $X_{\text{girl}} = 2.37$ ,  $X_{\text{boy}} = 2.06$ )、獨創力 ( $X_{\text{girl}} = 0.1$ ,  $X_{\text{boy}} = 0.07$ )、文法 ( $X_{\text{girl}} = 9.76$ ,  $X_{\text{boy}} = 9.00$ )、文章內容 ( $X_{\text{girl}} = 1.83$ ,  $X_{\text{boy}} = 1.77$ ) 及考試分 ( $X_{\text{girl}} =$

$64.3$ ,  $X_{\text{boy}} = 58.6$ ) (見表六), 平均分都比男生為高。但在統計學上, 於比較變異數(variance)後, 只有獨創力及考試兩方面的分數, 於不同性別上有較明顯的差別(表七)。



表七 性別的多組樣本均數比較 (ANOVA) 檢驗

事後測試		離均差平均 (Sum of Squares)	自由度 (Df)	平均值 (Mean)	F- 值	顯著水平
流暢力	組間變異 (Between Group)	2.746	1	2.746	3.303	.072
	組內變異 (Within Group)	90.624	109	.831		
	總數	93.369	110			
獨創性	組間變異 (Between Group)	2.477E-02	1	2.477E-02	7.447	<b>.007</b>
	組內變異 (Within Group)	.363	109	3.326E-03		
	總數	.387	110			
文法	組間變異 (Between Group)	16.079	1	16.079	2.130	.147
	組內變異 (Within Group)	822.678	109	7.548		
	總數	838.757	110			
文章內容	組間變異 (Between Group)	.104	1	.104	.173	.679
	組內變異 (Within Group)	65.536	109	.601		
	總數	65.640	110			
考試分	組間變異 (Between Group)	654.884	1	654.884	4.861	<b>.030</b>
	組內變異 (Within Group)	10374.483	77	134.734		
	總數	11029.367	78			

表八 事前測試和事後測試的配對樣本積差相關分析 (Paired Samples Correlations)

事前測試和事後測試		樣本數值 (N)	積差相關分析 (Correlation)	顯著水平
第一組	流暢力	103	.204	.038
第二組	獨創性	103	.203	.040
第三組	文法	103	.518	.000
第四組	文章內容	103	.403	.000

## 意象訓練與考試分數的關係

在研究中，我們亦發現有參與意象訓練的學生，和沒有參與訓練而於中文作文考試時，能獲得較

佳成績的學生作比較( $X_{imagery}=60.98$ ,  $X_{non-imagery}=50.61$ ,  $p=0.000$ )(見表九及十)。

表九 考試分

	樣本數值	平均值	標準差	標準誤差
沒有參加訓練的	83	50.61	10.52	1.15
參加了訓練的	81	60.98	12.64	1.40
總數	164	55.73	12.69	.99

表十

	離均差平方	自由度	平均值	F- 值	顯著水平
組間變異	4400.582	1	4400.582	32.627	.000
組內變異	21849.613	162	134.874		
總數	26250.195	163			

## 討論

第一，現有實例證明，意象訓練有助學生改善其寫作的流暢程度、文筆風格、內容及文法習慣。首先，意象訓練相信能讓學生創作出更多「埠」來接通不同的知識，「埠」(port) 類似電腦中用來連接外界資訊的連結點，「埠」的數量越多，連結點也越多，亦即可處理和接收更多資料和功能。在寫作上，「埠」使他們能建構出各類寫作上的知識框架，如詞彙、文法、認知能力及與主題相關的資料。一個擁有越多「埠」的學生，於同一個刺激下，能接收更多。此外，學生透過將影像在心裡形象化，從而具體掌握到他們準備要寫的內容，而非停留於發展概念的階段。

第二，一個具創意的頓悟往往於課堂間的休息期間浮現於腦中(Ford & Ford, 1992)，所以進行創意寫作前，需事先發展概念和鞏固所學習之

意象化技能。再者，學生應爭取機會多加寫作，因日常課堂學習為他們進步所需。因此，可見意象化技能的訓練、個人鬆弛和思想的形象化三者於學生寫作的創意上發揮作用。

第三，鬆弛運動也可喚起學生內心深處的意識，這類運動能將他們想寫的情景形象化。一句句子能誘發出另一句，當他們興致盎然，文句會情不自禁般不斷湧現。在此情形下，他們的寫作動力亦提高了。

第四，這訓練已包括了作業動力及與創意相關的技能如觀察、自由聯想及水平思考在內。已有學者提出這些技能對提高學生寫作表現極有幫助 (Amabile, 1983)。

在整個訓練過程期間，參與的學生顯得享受課業。每當老師說「一起做鬆弛運動」時，同學

們便立刻準備就緒，並閉起雙眼，而且沒有人入睡。此外，他們均很熱烈回答問題及做運動。相信對這些方面可作更深層次的詳細研究。

此研究有著一定局限。基於研究期間碰巧遇上非典型肺炎疫潮，使教學時間表排得過緊，以致未能將訓練節目套入其中，該老師只能一方面催促學生應付課程，一方面努力騰出時間進行此研究。建議日後再作同樣的研究時，可每星期進行一次訓練，以便讓學生於課堂以外抽空實踐所學之技能。此外他們也可歸納這些技能用於其他語言學習上，而額外的練習亦能改善學習的效果。

第二個不足之處，乃於此研究中缺乏對照標準。基於其他中文教師有公務在身，只有一名研究者參與該訓練。由於目前已展開了這個訓練計劃，將來執行此計劃時可邀請更多教師參與，他們可作不同程度的參與，如批改作文、執行訓練、改良訓練物資、觀察學生表現等。有些班級則可招募作對照標準。

第三個不足之處，乃是探討雙碼理論及意象訓練兩者，以一個更接近心理語言學的角度看意象化如何提高掌握語言的口語部分的研究不足。將來再進行此研究時，可引入五感教學法，因為它們是直接與人們腦裡對外圍刺激的認知有關。

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# ***Formative Assessment in General Studies Classrooms***

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## **Abstract**

In the era of education reform in Hong Kong, on various government documents, different concepts and functions of assessment were introduced to the community. The importance of formative assessment was emphasized. This paper aims to study the student teachers' implementation of formative assessment in General Studies lessons during their teaching practise. Commonly used assessment methods, alignment of learning and assessment activities, student teachers' intervention after receiving feedback from pupils, difficulties encountered, perception of the student teachers on formative assessment and pupils' feedback are reported in this study. It is hoped that the study will provide insight into the practice of formative assessment in primary General Studies classrooms as one aspect of the professional development of General Studies Teachers.

## **INTRODUCTION**

As the new educational goals of Hong Kong schooling are to enhance student-centred learning and pupils' ability to learn how to learn (Curriculum Development Council, 2001; Education Commission, 2001), this calls for reform in the assessment system. Ridgway (1998) commented that appropriate assessment scheme can be powerful levers to support reform; assessment schemes that do not reflect new educational ambitions are barriers to progress. Different concepts and functions of assessment were introduced to the community on recent education reform documents (Education Commission, Sept 2000; Curriculum Development Council, 2001). Assessment was proclaimed as an integral part of education process. The formative assessment was stressed as a way to improve teaching and the learning of pupils.

Research on formative assessment provides examples of how learning and teaching was improved (Black, Harrison, Lee, Marshall & Wiliam, 2003). The aim of the present study is to examine the student teachers' implementation of formative assessment in General Studies lessons during their teaching practice. It is to study student teachers' perception of formative assessment after the conducting formative assessment in General Studies lessons, the commonly used methods of formative assessment, the alignment of assessment activities with learning activities, student teachers' intervention after receiving feedback from pupils, difficulties encountered in the classrooms and feedback from their pupils. By studying the implementation of formative assessment in local primary school classrooms, it is hoped that the present study will provide

some insight for the practising teachers when they plan to conduct formative assessment in General Studies lessons as one aspect of their professional development in order to enhance the learning of the pupils and their own teaching.

## **SUMMATIVE VS FORMATIVE ASSESSMENT**

Assessment is conducted to serve different purposes: supporting of learning, reporting the achievements of individuals and satisfying demands for public accountability. Formative assessment serves the first purpose while summative assessment serves the latter. It is important to match the selection and the use of assessment methods to the particular purpose which the assessment is to serve (Black, 1998).

Bloom, Hastings & Madaus (1971) defined 'summative evaluative tests' as the assessments conducted at the end of units, mid-term or at the end of a course. They were designed to judge the extent of students' learning of the material in a course for the purpose of grading, certification, evaluation of progress or even for researching into the effectiveness of a curriculum. Moreover, aggregation of the results of pupils' performance in various public examinations also serves as an economic way to show the public that the schools do promote the learning of their pupils (Black, 1998).

On the other hand, teachers have the need of constant information about what the students know and the strategies being used to process and comprehend new concepts (Shepard, 1992). Formative assessment provides short term feedback to teachers so that learners' strengths and weaknesses in relation to their progression can be identified. Then teachers can use the feedback

in planning what to do next in order to enhance learning as well as teaching. Hence, formative assessment is essential to effective teaching and learning (Black, 1993).

Formative assessment is carried out by all the agents in the classroom. A pupil needs to know where she/he is and understand, where she/he wants to be and also how to "fill the gap" between her/his current knowledge and understanding and the desired level. This involves both the teacher and the pupil in a process of continual reflection and review about progress (Qualifications and Curriculum Authority <http://www.qca.org.uk/ca/5-14/afl/>). Thus, formative assessment focuses on dialogue between the teacher and the pupils.

Torrance (1993) suggested that formative assessment fits into the constructivist approach to learning with the teacher-pupil interaction supporting the pupils in moving towards Vygotsky's zone of proximal development (ZPD). Black & Wiliam's finding (1998a) reported a strong link between effective formative assessment and an appropriate and supportive pedagogy. The essential elements of any strategy to improve learning through the implementation of formative assessment are the setting of clear goals, the choice, framing and articulation of appropriate learning tasks, the deployment of these with appropriate pedagogy to evoke feedback and the appropriate interpretation and use of that feedback to guide the learning trajectory of pupils. Teachers should therefore involve pupils in the process of self- and peer-assessment, underpinned by a constructive approach to learning. That is, teachers should make use of the previous knowledge of the pupils to design different learning activities to help pupils to construct knowledge, provide assessment activities to assess the learning of the pupils, and provide feedback to pupils and intervention when necessary.

Stiggins (2001) remarked the artistry of classroom assessment requires teachers to orchestrate a careful alignment among purposes, achievement targets and methods. In this way, the relation among teaching, learning and assessment was emphasized. The alignment of teaching objectives, learning and assessment activities, and intervention conducted by the co-researchers are reported in this study.

Stiggins (2001) introduced four basic classroom assessment methods: selected response assessment, essay assessment, performance assessment and assessment that relies on direct personal communication with pupils.

### **Selected Response Assessment**

This includes all of the objectively scored paper and pencil written formats. Format options include multiple choice items, true/false items, matching exercises, short answer fill-in items, and different sorts of worksheets with an inquiry nature. The index of achievement is the number of questions answered correctly. The teacher is not to give grades or marks but to give descriptive comments on the answers or the work of the pupils.

Other types include the following:

*“Quick Check-in” (Trimarchi, 2002)*

The teacher hands out slips of paper in the middle of the lesson and asks pupils to answer a probing question directly related to the discussion. The papers are written anonymously and collected immediately. The teacher examines the papers, reads aloud examples of correct answers, picks out misconceptions and addresses them on spot.

*“Teacher Letter” (Trimarchi, 2002)*

The letter includes the following items:

- Here is what I understood to be the MAIN IDEA of today’s class.

- These are a few IMPORTANT POINTS I learned about the main idea.
- These are things you talked about today that I DID NOT “GET”.

Pupils write it at the end of the lesson and the teacher responds to the letters the following day, reading aloud correct answers and correcting misconceptions.

### **Essay Assessment**

Pupils have to prepare an original written answer to questions about the content knowledge or provide an explanation of the solution to a complex problem. The teacher reads the original written response and evaluates it by applying specified scoring criteria.

### **Performance Assessment**

Pupils carry out a specified activity under the watchful eyes of the teacher. Performance assessment can be based either on observation of the process while pupils demonstrate skills, or on evaluation of products created, e.g. debate, role play, mini survey, case study and presentation, or carrying out a laboratory experiment, etc. The purpose is to let pupils show different abilities and learning outcomes. Scoring guides may be negotiated with pupils.

### **Personal Communication as Assessment**

One of most common ways that teachers gather information about day-to-day pupils’ achievement in the classroom is talking to them. This includes questions posed and answered during instruction, interviews, conversation, listening during class or group discussion, oral examination and conferences with pupils after lesson. Pupils’ responses and answers can show their understanding; therefore teachers should ask more open-

ended questions and allow more time for pupils to respond (Black & Wiliam, 1998b). This is also classified as interactive formative assessment (Bell & Cowie, 2001) which takes place during the pupil-teacher interactions. Teacher and pupils interact in the whole class, the small group and one-to-one situations.

Each of the above methods provides its own special form of evidence of pupil proficiency, such as knowledge and understanding, reasoning proficiency, performance skills, ability to create products and dispositions (e.g. attitudes, values, interests, self-concepts and motivation) (Stiggins, 2001). This study is to examine the common assessment activities employed by the student teachers and difficulties they encountered in General Studies classrooms.

## **SELF-ASSESSMENT AND PEER ASSESSMENT**

The development of formative assessment implies changes in roles for both teachers and pupils. Self-assessment and peer assessment of the pupils are the major characteristics of the formative assessment. Therefore, they should be promoted among pupils to enhance effective learning. Self-assessment involves both reflection on one's learning strategies, and analysis or critique of one's work. In order to make self-assessment successful, not only the teachers but also the pupils should hold the belief that the process of assessment helps learning (Sutton, 1995). Thus teachers should train pupils on self-assessment, explain the learning objective(s) of each task and provide encouragement to pupils through planned strategies and dedicated time. On the other hand pupils may work in pairs or in groups, make suggestions about each other's work, or ask questions about the peer's thinking or reasoning (Qualifications and Curriculum Authority

<http://www.qca.org.uk/ca/5-14/afl/>). Rubrics of assessment may be negotiated with pupils in order to promote learning. Pupils' feedback on the assessment activities and the student teachers' perception on formative assessment are also reported in this study. In short, teachers should align the assessment activities with learning activities in order to help pupils achieve the learning objectives that include the acquisition of knowledge and skills, and value learning. This not only helps to promote the learning of the pupils but also the teaching.

## **General Studies**

General Studies, an integration of Science, Health Education and Social Studies, was introduced in 1995. It is proclaimed in the syllabus for Hong Kong General Studies (Primary I-VI) (1994) that through meaningful activities children understand the inter-relationship and interdependence between people, things and their environment. They are also helped to develop values and attitudes in order to become rational and responsible citizens. The curriculum consists of four strands, i.e. healthy living, living environment, natural world, and science and technology. The integrated approach claims to allow pupils to look at issues from different perspectives, hence making their learning experiences more holistic and less fragmented (Curriculum Development Council, 1994, 1997).

In the era of education reform, the new curriculum (Curriculum Development Council, 2002) moves away from content-focused approach to a learner-focused approach. It emphasizes the enhancement of pupils' inquiry and investigative skills for construction of knowledge. Schools are encouraged to adapt the central curriculum in developing their school-based curriculum and promote life-wide learning. Teachers are encouraged to use different modes of assessment and provide quality



feedback on the strengths and weaknesses on pupils' learning in order bring about improvement in learning and teaching.

### **Co-researchers**

Oldfather (1997) invited the student participants of his study of student motivation (Oldfather, 1993) to be engaged as co-researchers. The study, interpretive study, was based on the interactions which took place between the students and the researcher in order to construct understanding about the research questions. It was reported that the explicitly collaborative relationship in the inquiry increased students' sense of ownership and involvement, therefore led to greater depth in the findings.

Simpson (1998) also involved his students in the research, participatory research, of the Contemporary Aboriginal communities in Canada as the philosophy of adult education places learners in the center and focuses on the learners' control over their learning process (Tandon, 1988). It is trusted that experiential knowledge is valid as people best know their own situations and can best solve their own problems (Colorado, 1988)

## **RESEARCH ON FORMATIVE ASSESSMENT IN GENERAL STUDIES CLASSROOMS - OBJECTIVES AND METHODS**

The research was conducted to see how formative assessment was conducted in General Studies classrooms in primary schools. Nine student teachers of the Post Graduate Diploma in Education (Primary) (Full-time) programme were invited to be co-researchers

of the study. During their teaching practice the co-researchers planned and wrote the lesson plans to show how they aligned the assessment tasks with the learning activities. They also wrote weekly reflection reports to report the following:

- Events in which they succeeded in helping pupils to understand the lessons.
- Difficulties that they encountered in implementing "Learning, Teaching and Assessment" during the week.

During the whole teaching practice block, they videotaped a lesson with the focus on the study of the interactive formative assessment. By the end of the teaching practice block each of the co-researchers interviewed five of their pupils in order to collect feedback on their learning and the teaching of General Studies in the classrooms. They asked the pupils the following questions:

1. Did you like General Studies lessons? Why?
2. What activities did you like most in the lessons? How did they help your learning?
3. Did you answer any questions in the lesson? How did it help your learning?
4. Did you know how to do the worksheets in the lesson? If you did not know how to do, what did the teacher do?

Furthermore, after their teaching practice, the co-researchers were interviewed by the researcher so as to make supplements on their weekly reflection reports. They answered the following questions:

1. Please tell your learning experience of formative assessment in your previous education and your ideas of formative assessment. What are the methods to implement formative assessment?
2. During the teaching practice, how did you prepare the lessons (learning activities, assessment activities)?

3. What learning activities and assessment activities did you provide to your pupils?
4. When did you use questioning to assess the learning of your pupils? Did you ask probing questions? Did you provide enough wait time? If yes, how long was it?  
Did you name pupils to answer your questions? Did you ask those who raised their hands? Did you ask those who did not raise their hands? If yes, what were their responses?
5. When did you use worksheet to assess the learning of the pupils? Did you give them grades, marks, or comments only?
6. Did you encounter any difficulties? If yes, what were they?

Transcription of the interviews with the pupils and the co-researchers were made by the researcher so that their identities were kept anonymous.

## FINDINGS

During the teaching practice, the co-researchers taught the following units: Leisure Activities (Primary 2), Basic necessities of Life (P3), Electricity and Life (P4), The History and Geographical Setting and History of Hong Kong (P4), Reproduction (P 5) and Environmental Protection (P6).

The findings reveal the co-researchers' perception on formative assessment, the commonly used methods of formative assessment, the alignment of learning and assessment activities, intervention undertook and the difficulties encountered during the implementation period. Finally, pupils' feedback is reported in this study.

## The Co-Researchers' Perception on Formative Assessment

During the interview, all the co-researchers claimed that they did not have any experience of formative assessment in their previous education. They stated that formative assessment was different from summative assessment. It could be conducted at different intervals of the lesson. For example, when it was conducted at the beginning of the lesson, the purpose was to test pupils' previous knowledge or misconceptions. It may be conducted after a teaching point was taught in a lesson. At the end of a lesson it is to test the understanding of the pupils and to provide help if the pupils did not learn the major concepts in the lesson. On the video-taped lesson, a co-researcher tested the previous knowledge of her pupils when they started to learn leisure activities. After pupils shared their experiences, she made use of the matching activity to collect feedback from the pupils in order to assess the learning of her pupils so that she might either provide help to them or proceed to the other activity. By the end of the lesson, most co-researchers provided a worksheet to assess pupils' learning of the lesson.

A co-researcher remarked that the self assessment activity helped pupils to assess their own learning after learning a unit. The peer assessment activity helped to assess and promote the attitude and the skills needed in the group work.

## Some commonly used methods of formative assessment

Among the four basic classroom assessment methods proposed by Stiggins (2001) which were mentioned in

the earlier section, all the co-researchers often used personal communication with pupils which includes questioning, observation, and conference during recess or lunch time, selected responses assessment in the format as a worksheet, and performance assessment which mainly included pupils' presentation or role play after group discussion, and matching task on the blackboard. Essay assessment was not employed because in Primary General Studies lessons, pupils were helped to develop knowledge, generic skills, and values and attitudes (Curriculum Development Council, 2002). Therefore, essay assessment was not considered to be an essential element in the classroom assessment of General Studies. The following will explain the methods commonly employed by the co-researchers.

### **Direct personal communication with pupils: Questioning**

During the interview, most co-researchers stated that they made use of questioning to assess the previous knowledge of the pupils at the beginning of the lesson. In the lesson after pupils doing various learning activities, such as observing diagrams of the world population, photos of the animals and plants, studying cases or newspaper cut-outs on different kinds of pollution in Hong Kong, they frequently asked pupils questions or discussed with the class, especially in the lower primary, to help them assess their own learning. When they had to be in a hurry to finish the lesson, they asked questions to consolidate the learning of the whole lesson.

When pupils could not answer the questions or could only give partially correct answers, the co-researchers raised probing questions to help pupils learn. For example: in a video-taped lesson, a co-researcher asked her pupils, "Was the pair of scissors drawn to the magnet?" She did wait about 5 seconds

for pupils to answer. When the pupil frowned, she probed, "Which part of the scissors was drawn to the magnet?" As the pupil did not provide any answer, she allowed him to sit down and asked the other pupil to answer. Usually the wait time worked well because most pupils could give correct answers with the help of the teacher or the classmates. It was also found on a video-taped lesson that the pupils were too enthusiastic that they shouted the answers without waiting for their classmate to answer. The situation was discussed with the co-researcher during the interview. She confessed that at the beginning of the teaching practice block she accepted the shout-out answers because she did not want to discourage the pupils from providing responses. Without responses from the pupils, it would be difficult to have interaction with them and collect feedback from them. After she was more acquainted with the pupils, she trained them to show respect and patience with the classmates so that everyone in the class did think about the questions and waited for the invitation to answer questions. Furthermore, when the other pupils were answering, they had to assess the answers to see whether they could provide supplements or different opinions. Afterwards, the performance of the class was very satisfactory.

Most of the co-researchers remarked that they did call names to invite pupils to answer questions. Usually at the beginning of the teaching practice block, they called those who raised their hands or those at the front because they did not know the pupils well. Later, when the pupils were accustomed to their styles of teaching, they called those who did not raise their hands to answer to check their understanding and the efficacy of their teaching. Some of them could give correct answers; they had been very attentive in the lesson so they were encouraged to raise hands to answer questions. But some of them could not; the co-researchers had to ask probing questions to help them. One co-researcher reported that

in the middle of the teaching practice block, some who had not raised hands did put up their hands to answer, because they knew that they would be called upon during the lesson. She found it encouraging as pupils learned to take an active role in the lesson.

### **Direct personal communication with pupils: Observation**

All the co-researchers did observe the pupils to assess their learning. They observed the pupils when they were answering questions, doing matching activities on the blackboard or role play, holding group discussions or doing group activities. During questioning, they observed the whole class or individual pupil to see if they should ask any probing questions to inspire the thinking of their pupils. During group activities, e.g. the classification activity, they circulated in the classroom, listened to the pupils, offered advice if they sought help or clarified their misconceptions. They usually provided feedback on the performance and achievement of the pupils after the group presentation or role play in order to encourage the pupils to learn effectively and continue to do well.

Most co-researchers reflected that it was easier to observe individual pupil during group activities than during the whole class activities. They developed better relationship with the pupils while moving around, assessing pupils' learning and providing them with immediate assistance.

### **Direct personal communication with pupils: Conferences with pupils after lesson**

During the interview, most of the co-researchers reported that it was difficult to cater for individual differences in the whole class activities. In order to conduct the lesson smoothly, when they noticed only a

few pupils had not learned the concept, they conferenced with them during recess or lunch time to assess their learning and provide immediate intervention when necessary.

### **Selected response assessments:**

#### **Doing worksheets**

During the interview, all the co-researchers reflected that providing worksheets to pupils was another common method to conduct formative assessment. Pupils were asked to do worksheets after doing or observing experiments during the lesson. They also completed worksheets after learning some major concepts or at the end of the lesson. Most co-researchers reported that on the worksheets they gave grades and wrote remarks to encourage pupils to do better the next time or commented on the misconception of the pupils. Only two co-researchers did not give grades or marks on the worksheets; they just wrote comments, e.g. very creative, good work, etc. They considered that would help the pupils more. Furthermore, the grades on worksheets were not counted in the formal assessment.

One co-researcher stated that some of the pupils did not like to do worksheets too often. They complained, "Worksheets again!" On the reflection report, she confessed that sometimes she provided two to three worksheets in a lesson. Therefore she designed different types of assessment activities, e.g. matching activity, role play or group presentation, to assess the understanding of the pupils and pupils welcome such changes. Another co-researcher reflected that she did ask pupils to do a lot of explanation in black and white when they learned the problem of solid waste. After listening to the feedback of the pupils, she made a change by asking pupils to just present their ideas about noise pollution to the class. During the group presentation on her video-taped lesson, two pupils were

holding an A3-size sheet of paper on which major points were written while the third pupil was presenting their ideas on the solution to the noise pollution problem to the whole class. The pupils appeared to enjoy this kind of writing and presentation and the class atmosphere was very good.

### **Performance assessments**

Most of the co-researchers remarked after group discussion if there was sufficient time, they invited the pupils to present their ideas to the whole class. On a video-taped lesson, pupils made use of the microphone to do their presentation and the presentations were well received by the class. When learning how to care the toys, a co-researcher asked the pupils to present their ideas in a role play. In learning the science topics, such as magnets and electricity, the pupils did the experiment and completed worksheets. Pupils also did experimental activities on filtering the polluted water and reproduction of plants, and then they reported the results to the class.

### **Self and peer assessment**

On the video-taped lessons, all the co-researchers provided pupils group discussion/work so that they could assess each others' understanding and provide a better learning outcome, e.g. presentation. During pupils' presentation, matching or classification work on the blackboard, the co-researchers also asked the other pupils to assess whether they would make some

supplements or corrections so that all the pupils were engaged in such activities.

Only one co-researcher invited pupils to fill in the self-assessment form after finishing a unit. They were asked to state the major points that they learned and what they did not understand, and evaluate their own performance in the lessons. She also invited the group leaders to conduct the peer assessment. They had to assess the performance of the group members during the group discussion. The assessment items included group members' participation, cooperation and understanding of the discussion question and observance of discipline. The co-researcher reported that the whole class performed well during the discussion and presentation. It is trusted that in doing the self and peer assessment, pupils started to think about their learning and learn to manage themselves which helped to enhance pupils' learning.

### **Aligning assessment activities with learning activities**

All co-researchers tried to provide different learning activities to help pupils to learn the major concepts. In preparing a lesson, they first read the textbooks to check what should be taught. Then they read other textbooks and references to see what learning activities the pupils should undergo. In order to check whether the pupils learned the major concepts or not, then they aligned the assessment tasks with the learning activities. Table 1 shows the alignment of learning and assessment activities.

**Table 1 The alignment of learning and assessment activities**

Learning Activities	Assessment Activities
Group work, e.g. matching activity	Matching activity on the blackboard and explanation to the class
Group discussion	Pupils' presentations or role play
Doing experiments or watching teacher's demonstration	Doing worksheets
Observing photos, pictures, diagrams or maps	Questioning or class discussion, or colouring the map
Studying cases / newspaper cut-outs	Doing worksheets and pupils' presentations or class discussion

All the co-researchers also checked the learning of individual pupils by marking answers on worksheets, their textbooks or workbooks which were completed after doing experiments, observing the demonstration or finishing a chapter.

## Intervention

Intervention is an important element in formative assessment. All the co-researchers remarked that when they found most of the pupils did not understand, they told other examples or cases and discussed with the class, drew a simpler map and explained to them, did another demonstration or gave hints and asked them to try again, showed other photos or newspaper cut-outs and explained once again to the pupils. They also asked them questions in order to clarify their alternative

concepts. One co-researcher stated that she changed the lesson plan of the next lesson when she found most of the pupils did not grasp the major concept.

## Difficulties encountered when implementing formative assessment in General Studies lessons

On the Reflection Reports the co-researchers stated difficulties they encountered when they carried out formative assessment activities in General Studies lessons. These include the difficulty in assessing individual pupils, different agendas of the teacher and the pupils, classroom management problem and tight teaching schedule.

### *Difficulty in assessing individual pupils*

One co-researcher stated that she often asked some pupils questions in the classroom. It was only when she marked pupils' workbooks, she found that about one third of the class did not grasp the concept. She reported that it was difficult to ask all the thirty-five pupils questions and assess their learning in a lesson of thirty minutes. Several co-researchers remarked that they noticed that some pupils did not participate in the group discussion even when they had urged them to take part in the group activities. These pupils might be intimidated by the more assertive pupils, therefore the group report was only the contribution of some active members and it did not effectively assess the learning of the other pupils. Sometimes, they were busy in managing the class and helping some other active pupils. Thus, they were not sure whether each pupil of the group understood and heavily depended on the worksheets to assess the learning of individual pupils.

### ***Different agendas of the teacher and the pupils***

During the interview, one co-researcher reported that during recess one girl told her that she preferred to sit in her place and listen to the teacher. Another co-researcher also stated that some of her pupils did not like the activities and complained that their classmates were too noisy in doing the activities. These pupils of upper primary were accustomed to the traditional way of learning - listening attentively to the teacher to “receive” knowledge and work hard to complete the workbooks. They considered that was all that they had to do to be good pupils. It was witnessed from a video-taped lesson, the pupils were very excited and noisy in making a periscope. According to the experience of the co-researcher, the noise level was acceptable but the pupils might not be accustomed to these kinds of learning and assessment activities.

### ***Classroom management problem and tight teaching schedule***

Several co-researchers stated that the classroom management problem and the tight teaching schedule affected the implementation of assessment activities. They found it difficult to manage thirty five pupils in the classroom. All co-researchers remarked that the major difficulty was the time constraint. They found that they had to be in a hurry in order to finish the topics assigned by the Supporting Teachers because it took time to allow pupils to do different learning and assessment activities. Therefore, it is not surprising that only one co-researcher invited pupils to fill in the self and peer assessment form after finishing a unit. One co-researcher remarked that because of the tight teaching schedule and his inexperience in time management in the classroom, by the end of the teaching practice block

some major teaching points on the textbook were just told to the pupils and only a few questions were raised to assess pupils’ learning.

### **Feedback from pupils**

When interviewed by the co-researchers, most pupils could tell the major topics that they learned in the lessons. They all claimed that they liked General Studies lessons because there were different types of activities in the lesson, e.g. group discussion and presentation, doing experiments, etc. In all the video-taped lessons, most pupils actively participated in various activities, such as doing experimental activities or class discussion.

Some pupils claimed that they understood the lesson because they could answer the questions raised by the teacher. Some said that when they had revision with their mothers at home, they could answer the questions. Most of the pupils remarked that the questions raised by teachers helped them to think, to know more about the lesson, and to be brave and to have more confidence in answering questions. When they did not know the answers, the teachers helped them or asked others to answer. Some pupils disliked writing too much but enjoyed different designs of activities on the worksheets.

## **IMPLICATIONS AND CONCLUSION**

This paper reports the implementation of formative assessment in General Studies lessons by the student teachers, the co-researchers of this study, during their teaching practice in local primary schools. When they planned the lessons, they aligned assessment activities with learning objectives and activities. The assessment

activities included direct personal communication with pupils, selected response assessment, performance assessment, self-assessment and peer assessment. Most co-researchers admitted that they became more aware of the effectiveness of the learning of the pupils when they implemented formative assessment in their day to day teaching in the classrooms. Although formative assessment was advocated in the education reform documents as the essential element in learning and teaching, difficulties encountered by the co-researchers illustrate that conducting this new assessment practice is not a simple or easy task.

In order to make the implementation, first of all, there should be reform in pedagogy and curriculum as formative classroom assessment is learner-centred (Boyd, 2001). Thus, The practice of school-based curriculum, which was advocated in the education documents, may be adopted so that the rich content of General Studies may be trimmed down according to the abilities and needs of the pupils. Then in the lesson, teachers can provide pupils with various learning activities in line with the inquiry approach (Curriculum Development Council, 2002), have more interaction with the pupils, and carry out different assessment tasks to evaluate individual pupils not only on knowledge and understanding but also on skills, values and attitudes (the Curriculum Development Council, 2002). Furthermore, teachers should also be empowered to have the freedom and flexibility to make adjustment to the 'agreed' teaching schedule so that they can take interventions or re-design the lessons according to the information collected in order to enhance the learning of the pupils.

Therefore, such educational change cannot be implemented successfully by individual subject teacher in the school. As professed by all the co-researchers that they did not have the knowledge and experience of

formative assessment in their previous education, all the subject teachers should be supported by different staff development programmes so that they may receive on-going support from experts to learn and challenge the conceptual bases behind intended reforms (Shepherd, 1995) and re-visit their views and beliefs about their role in the classroom. When they have the shared vision to promote the learning of the pupils who should play an active role in the learning process, they may plan the implementation with great care and thus make the implementation successful. "Schools should have the culture that there is joint lesson preparation in alignment of learning, teaching and assessment. Teachers worked together to decide the major teaching points to be covered, design worksheets to assess the learning of pupils," remarked by a co-researcher who witnessed the teachers preparing lessons together during her teaching practice. Black and Wiliam (1998b) highlighted that the success of formative assessment needs the contribution of all teachers.

Secondly, when formative assessment is accepted and to be implemented by all teachers in a school, school heads and teachers should educate the pupils about the major characteristics of formative assessment, especially their role in the process of learning. Thus, as the pupils proclaimed in the present study, they not only enjoy and learn through the different activities in the lesson, they also realize an active role in their own learning. In the lesson, teachers should also inform pupils the learning goals of different activities and to discuss with them the criterion of good work or show them the exemplars of good learning outcomes. Then pupils know how to take the initiative to learn and answer questions during class discussion, do the worksheets and co-operate with their peers in various group work. Furthermore, after receiving quality feedback on learning from teachers, pupils can make adjustment to



their learning approaches or skills so that they can learn better and fill the gap between their current understanding and the desired level. Gradually, pupils may change their mindset and become an active agent in the learning process. They may see the benefits they receive from the practice of self and peer assessment, not just by filling in the assessment forms but also during the group work/presentation, and some assessment activities on the blackboard. In this way, assessment becomes an integral part of the learning-teaching-assessment cycle (the Curriculum Development Council, 2002).

Thus, the effectiveness of implementation of formative assessment depends on the involvement of different agents in the school, i.e. teachers, school heads and pupils. As mentioned at the beginning of this section, the implementation is not a simple or easy job, teachers may work together to conduct the action research to study the abilities and needs of their pupils, their implementation practice, the difficulties they encountered in their classrooms or school context. Then they can make improvement accordingly, and share their experience with other subject teachers when they start to conduct formative assessment in their own subjects.

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# 香港學校公民教育：學生公民參與學習的反思

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## 摘要

現代公民的發展，重視公民的積極民主參與，學校公民教育亦逐漸以主動公民取代被動公民的教育。香港回歸後的學校公民教育政策，開展公民積極參與的學習環境和機會，學校開始重視有選舉性參與的學生會活動。本文嘗試從探討學校學生會選舉，了解香港學校「參與性公民」教育的發展，並指出其中困難所在。

## 引言

九七回歸後的香港，學校公民教育肩負發展新時期本土公民的責任，並協助塑造香港特區市民的身份。新公民建基於國家根本，伸展到整個國際社會，能夠適應社會向知識型社會的轉型和經濟全球一體化的發展。新公民的未來發展方向會是主動公民(active citizen)的參與性民主(participatory democracy)教育。在公民參與的學習中，有選舉成分的學生會活動是學校公民教育非正規課程的主要組成部分。本文嘗試從探討學校學生會的選舉參與(electoral participation)，了解香港學校參與性公民(Participatory citizenship)教育的發展。

## 參與性公民的概念

Dividson (1997) 指出全球化下的公民發展，分殊治理(management of diversity)是公共參與的重點，民主參與不再只局限於社會或國家層次的代表性民主制度(representative democracy)，只靠定期選舉(periodic election)的民主參與，被認為過於被動和力量微弱，此種被動公民(passive citizenship)的參與不再適合於高流動、高動力的後

工業社會的發展需要。Dividson認為社會應容許市民參與影響他們日常生活的公共事務，政府需要開放和下放公共政策權力到個人生活的層次。為使公共服務更能有效滿足他們的個別需求，市民的公共參與要能夠發揮常日公投(everyday plebiscite)的效能。換言之，社會需要積極開展並實踐主動公民(active citizenship)的參與性民主，否則不能滿足地方社會朝向國際化和全球化的發展和競爭。

Sandercock (1998) 和 Sassen(1996) 相信在今的自由民主大都會社會，當地政府須要確保每個人擁有平等使用城市空間的權利(right to public space)，他們在現有的法律制度下，自由組合，通過積極的公共參與，爭取最大使用城市的政治空間，用以改善他們居住的社區和個人生活質素。所以全球化下的新社會，如要人、貨、財的流通暢通無阻，便需要擴大民主參與到公民個人生活的公共事務的層次上，以確保他們能夠自由選擇每人喜愛的生活和文化方式的權利(Kress, 1996)。簡而言之，今天的公民教育應是參與性公民的教育。在學校實踐方面，Print等(2002)指出學生會是學生學習民主參與的重要場所，學校的民主文

化和環境，例如，學校是否願意開放決策權力讓學生參與部分學校事務，直接影響參與性公民教育的發展。Print 等(2002)認為北歐的丹麥透過立法，規定學校成立有選舉成分的學生會是進步的措施，學校的民主教育不單能夠確保學生體驗民主參與的機會和權利，更幫助學生認識負責任的公民參與的重要及更能夠鞏固丹麥民主政治體制的跨代發展。

## 香港參與性公民教育的課程發展

自八零年初至今，香港學校的參與性公民教育，無論在知識、方法和態度方面的教學，都出現明顯的改變(見《表一》)。一九九九年，特區政府在《廿一世紀教育藍圖——教育制度檢討》的諮詢文件中，提出教育要培育一群對社會、國家、民族作出承擔和面向國際社會的國民。《教育目標諮詢文件》(教育統籌委員會，1999)期望教育能推展香港的政治發展，包括民主的發展和協助完成國家建設的工作：

" 回歸祖國代表了香港人的中國國民身份得到確認，我們的青年人需要多認識祖國的文化、現況和未來的發展，在「一國兩制」及「港人治港」的大原則下，充分發揮香港獨特的地理和政治特色，兼收中西文化所長，建立一個面向世界、有深厚文化基礎、團結、自由和民主的社會。" (頁9)

自香港政治過渡開始後，學校公民教育有關參與性公民理念的發展，出現漸進式改進。八五年，政府發出《學校公民教育指引》(《85指引》)，

宣示學校課程需要加入民主教育，可惜較多學校教學卻充斥非政治化(de-politicization)和德育化(moralization)的意識和舉動(Leung, 1997; Morris & Chan, 1997)，忽視民主政治在民族國家公民發展的深層意義和價值，公民教育未能幫助學生處理複雜的政治轉變、建立正確的態度和認識民主與國家主權的關係，也解決不到民主追求與國家統一的矛盾及其引發的政治衝突。九六年，政府頒發新的《學校公民教育指引》(《96指引》)，修正過往的偏執，嘗試從國家本位和世界格局入手，重新定義香港公民，指出現今的公民發展，民主參與和其他政治價值，包括國家民族主權和統一、國際化等是互相依存的關係，需要適當平衡。二零零零年的《香港教育制度改革》報告書(《教改》)進一步深化參與性公民的教育，指出在全球化的世界格局下，每一獨立主權的政治社會在朝向開放的知識型社會的發展時，民主參與是必不可少的。報告書並鼓勵學校開設獨立的公民科及在非正規課程中，成立有選舉參與的學生會，培育學生成為由具民主公民能力和熱愛他們學習及成長的學校社區，從而擴大到關心香港的社會。

香港參與性公民的發展，在「一國兩制」的政治框架下，傾向選取以公民多向(multi-dimensional citizenship) (Cogan, 1997) 的公民發展模式，參與性民主政治定位於維持國家的領土完整和主權統一(He & Guo, 2000)之下，公民的民主不能高於國家主權，參與性公民的分殊管理，需要服膺於對民族國家的認同和承擔。故此學校施行公民教育時，避免直接觸及民主與國家統一的矛盾關係，民主和愛國主義的教育多分開處理，例如：學生會選舉參與的學習，多集中學生公民民主能力的培育，而不會涉及愛國主義教育的課題。

表一：課程革新(公民教育)(摘錄自：賴柏生(付印中)，香港學校的課程革新、公民教育與公民的發展：一個社會學的分析)(供公民教育部分參考)

相關文件 課程項目	1985學校公民教育指引	1996學校公民教育指引	2000香港教育制度改革建議	2001課程發展路向文件
課程目的	<ul style="list-style-type: none"> <li>• 民主價值、運作</li> <li>• 社會有用成員</li> <li>• 社會及政治技能</li> <li>• 理性判斷</li> </ul>	<ul style="list-style-type: none"> <li>• 熱愛香港、中國</li> <li>• 民主、自由、平等、人權、法治</li> <li>• 理性判斷</li> </ul>	<ul style="list-style-type: none"> <li>• 貢獻社會、國家和世界</li> <li>• 五育、個性發展</li> <li>• 繁榮、進步、自由、民主</li> <li>• 自學、創新、思考</li> </ul>	<ul style="list-style-type: none"> <li>• 國民身份：熱愛家庭、社會、國家、香港作為亞洲國際城市</li> <li>• 批判思考、自我管理、解決問題</li> <li>• 人際溝通</li> <li>• 健康生活</li> </ul>
課程內容範圍	<ul style="list-style-type: none"> <li>• 知識、態度、技能</li> <li>• 個人、個人與群體、社會、國家、世界</li> </ul>	<ul style="list-style-type: none"> <li>• 知識、反思、行動、價值、態度、信念、能力</li> <li>• 家庭、鄰里社會、地區社會、國家民族社會、國際社會</li> </ul>	<ul style="list-style-type: none"> <li>• 品德、健康生活、可持續發展、國家、社會、公民</li> <li>• 人際溝通、兩文三語、資訊科技</li> </ul>	<ul style="list-style-type: none"> <li>• 學習領域(知識/概念)、共通能力、價值觀和態度</li> <li>• 個人與群性發展(例：品德、人際關係)</li> <li>• 社會體系與公民精神(例：公民權利和義務、法治、多層公民身份)</li> </ul>
教學方略	<ul style="list-style-type: none"> <li>• 正規課程、非正規課程、校風(隱蔽課程)</li> <li>• 全校參與</li> </ul>	<ul style="list-style-type: none"> <li>• 滲透式(正規+非正規)、獨立學科、綜合學科、混合模式</li> <li>• 全校參與</li> </ul>	<ul style="list-style-type: none"> <li>• 整合性學習、專題研習、多元化學習(例：教學跑出課室)、校風、家教</li> <li>• 社會支援教育</li> </ul>	<ul style="list-style-type: none"> <li>• 獨立學科、綜合學科、混合模式</li> <li>• 全方位學習(正規+非正規)</li> <li>• 獨立學習、專題研習、探究式學習、生活事件的研習</li> </ul>
課程評估	<ul style="list-style-type: none"> <li>• 知識：正式評估(例：學科測驗)</li> <li>• 態度：非正式評估(例：紀錄卡)</li> </ul>	<ul style="list-style-type: none"> <li>• 持續的、多元化的、雙向互動的</li> <li>• 表現指標、自我評估、專家意見、設定評估準則</li> </ul>	<ul style="list-style-type: none"> <li>• 多元化、廣闊性、減少量化評估</li> </ul>	<ul style="list-style-type: none"> <li>• 多元化的評估</li> <li>• 多形式的進展性評估(例：自我評估、專題研習反饋)</li> </ul>
課程發展	<ul style="list-style-type: none"> <li>• 全校參與</li> </ul>	<ul style="list-style-type: none"> <li>• 學生為本</li> </ul>	<ul style="list-style-type: none"> <li>• 校本課程</li> </ul>	<ul style="list-style-type: none"> <li>• 校本課程</li> </ul>

摘錄自：香港課程發展議會(1985)。《學校公民教育指引》。香港，香港教育署。

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## 學校參與性公民學習的施行

香港大多數中學施行公民教育時採用跨科目 (cross disciplinary) 和全校參與的策略 (whole-school approach)，亦透過正規課程、非正規課程和隱蔽課程的學習，三者並行兼用，相互補充。學生會的選舉參與，是學校參與性公民教育非正規課程的主要學習活動。香港在八十年代正式進入政治過渡的時期，學校開始重視學生會民主公民參與的學習，紛紛成立有選舉參與的學生會，教育學生自我管治的能力，為將來「一國兩制」、「港人治港」、「高度自治」培育愛國愛港的良好公民和管治人才。香港自開埠到八四年期間，祇有約20%的中學成立有學生會，但自八四年到九七年回歸時，有學生會的學校數目已增加至52% (教育署，2000)。二零零一年的《課程發展路向》報告書《課改》建議改變過往「知識學習」的路向，開始著重「生活事件」和「學習者為中心」的教學，「專題研習」與「閱讀中學習」兩者並重，學校生活實踐的學習，如學生會的選舉參與等，逐漸成為參與性公民學習的重要媒介。隨著《教改》和《課改》的校本化，香港社會如何落實廿一世紀「整體教育目標」的公民教育，取決於個別學校的辦學理念、學校政策、傳統文化及專業教師的協作，透過對檢視學校如何施行學生會的選舉參與，我們可以深入了解學校參與性公民教育的情況和問題。

### 從學生會選舉看參與性公民教育的隱憂

學生會的選舉參與，是學校每年最大規模和最受重視的參與性公民學習活動。學校的學生會競選活動，多在學年初段進行，時間會長達一整個月。高年級同學 (主要是中六同學，部分來自中四年級) 聯結志同道合之士，籌組班子，競逐學生會各執事職位。重要的競選活動是候選內閣向學校同學介紹他們的計劃或政綱。學生會會長及幹事

多透過直接選舉產生。學校在選舉日會儘量協助投票順利完成，安排時間、場地，讓全體同學選出他們的學生會會長和幹事。學生會的監議組織 (代表會或監議會) 隨後亦會產生，成員多由間接選舉選出，候選同學主要來自各個學會、會社的領導代表。一般而言，學生會肩負統籌及協調各個學生組織的活動，多會採用協商及妥協方式解決會社間的糾紛和衝突。另一方面，學生會代表會出席部分校方常設的校政會議，代表同學向校方反映和表達意見。賴、胡 (2003) 以人種誌學 (ethnography) 的方法去深入訪問一所有廿多年歷史的津貼中學，跟學生會的領導同學進行了聚焦性小組面談 (focus-group discussion)，談論他們對學校學生會的歷史發展、現行操作、與學校的關係和個人體驗等，發現學生會參與性公民的學習，偏重精英化民主領袖的訓練、強化精英化民主的意識 (democratic elitism) 和代表性民主的公民參與：

"學生會會長級領導全由高年級同學出任，他們在學業成績上，不論是原校生或是外來生，都是出類拔萃的同學。他們經過艱辛的競選活動，成功當選的，同學會非常珍惜他們的成就；落選的同學亦會受到學校的禮待和器重。學校會主動與他們建立良好的工作關係，透過常設機構和顧問老師，就學生日常有關的問題，向學生會或同學代表接觸和磋商。學校民選的學生會代表制配合委任的領袖生制度，建構出整套學生精英的制度，基礎穩固，行之有效，效率奇佳。" (賴、胡，2003，頁163)

"對(同學)個人來說，投身學生會工作，爭取表現，鍛鍊自己，無論勝敗得失，都會是寶貴的公民學習經歷，能夠幫助他們加深認識和了解作為民主領袖所需的基本知識、技能和

態度。他們認為課本學習和課堂學習提供不到這些寶貴的經驗。例如：參與競選學生會職位的同學，尤其外來生，深刻體會空有服務熱誠未必成事；老師、同學等群體的支持和信任方是先要條件。作為民選領袖，他們需要清楚認識個人的知名度、同學的需求和學校的期望。他們要有領袖的魅力、組織能力和決斷力。”（賴、胡，2003，頁163-164）

但是，在新公民思維的學者眼中，大部份學生的公共參與機會受到精英制度的限制或剝削，例如：有學校不接受中一同學在學生會選舉中投票選取他們的學生會幹事（賴柏生，2001）。在開放、自由、民主、發展的知識型社會下的公共事務治理，民眾需要「代表」，不需要「代辦」，更需要直接和理性的參與。學校應該提供相應的機會讓普通同學學習公民的參與，讓他們在參與日常學校事務中學識運用基本的公民權利和應盡的義務，讓學生體驗民眾常日公投(everyday plebiscite)的力量。學校要教育學生建立主動公民的參與觀念，確保他們會於未來實踐公民的參與，能夠取得個人與社會的雙贏發展。簡言之，學校公民教育需要與時並進，提倡精英(elite)、民眾(mass)共同參與的公民教育，新世代的參與性公民教育是精英與民眾的政治教育，學校需要兩者平衡兼顧，不可偏執。

作為非正規課程的學習，學生會的選舉參與存在一定的問題。首先，學校未有發展參與性公民的開放民主氣氛和管理風格（Leung, 1997）。謝均才（1999）指出權威的學校組織和管理削弱民主的教育，在階層化的科層治事架構下，學生會的代表性和自主性存有相當多的限制；學生校政的參與，流於形式。另一方面，學生會活動在傳統的課堂學習觀念下，未被視為正常的學習，它的學習價值和地位常被忽視和矮化。同學視學生會活動為學科學習以外的學習；家長將之看待為課餘的

興趣活動，課堂學習是正業，其他學習皆為次。在勤讀為尚、考取功名（大學學位）為大的學習氣氛下，同學在參與學生會活動的同時，多憂慮耽誤學業，心理負擔很大，他們大都恐懼日後成績真的變壞，會招致父母責難，或後悔自責。此外，賴、胡（2003）指出，“學生會選舉參與的公民學習是開放式的學習，學習環境不全受督導老師的控制，老師未必能夠有效防止負面的學生學習經歷和學習成果”（頁162），例如：（一）同學常會強烈感覺“校方的干預”，不滿負責老師的“專權”和“偏私”；感覺學校對他們信任不足，不太願意開放校政，不希望他們過多的參與；（二）在醞釀組閣競選及競選期間，同學個人心理和同儕關係變得複雜，同學之間會產生猜疑，他們有時感覺適應不來。有同學承認，若果處理欠妥善，會出現“後遺症”，影響同學間的關係；（三）當選後的學生會工作，幹事會同學有時感到“無助和氣餒”。他們發現同學選舉熱潮過後，參與冷感、逃避和欠缺承擔。他們大都對學生會事務漠不關心，對學生會舉辦的活動，欠缺支持和參與。有幹事會同學埋怨有“被出賣”的感覺。因此假如學校和社會不改變課堂學習的傳統觀念，及重新確立非正規課程的學習價值和地位，會嚴重影響著重生活實踐的參與性公民教育的正面發展。

## 學校參與性公民教育的前路

九七回歸後，香港進行教育制度改革，培育新公民是未來學校教育發展重點之一。《教改》、《課改》啟動校本改革，《96指引》倡議參與性公民的教學，用以迎接回歸後的政治整合、未來知識型社會的發展以及全球一體化的挑戰。學校學生會的選舉參與學習，逐漸發展成為正規課程以外一重要的公民學習經歷。但從我們的觀察，現時很多學校的參與性公民教育仍落後於時代發展的需要：（一）參與性公民的課程內容、教學重點，連接不上《教改》、《課改》對社會新公民的要求。學校仍然偏重被動的代表性民主的培育，窒礙了

主動公民的參與性民主發展；(二)學生會選舉參與的重要性未被學校和教師充分理解，影響以非正規課程為主的參與性公民學習，確保不了學習成效，影響香港學校參與性公民教育的發展。

香港的中學應與時並進，改革課程使顯性和隱性課程相結合，加強生活活動的學習，把學生會選舉參與的實踐活動，引入課堂學習部分，如專題報告、個人或小組反思及分享等。另外，學校需要讓負責公民教育的教師接受在職進修，使能充分掌握參與性社會的政治發展，及以正面、

開放的態度看待學生學習主動公民參與的活動。學校可以借鑑丹麥學校公民教育的發展模式，開放更多渠道讓學生參與學校事務，使學生會更能發揮參與性公民學習的功能。香港未來的建造，如要與國際社會融合，在全球一體化的競爭下發展，香港學校需要進一步提倡及培育參與性公民的教育，重新建立以《96 指引》和《教改》為藍本的參與性公民教育，發展如 Dividson (1997) 所言的公共事務公民直接參與的特質，藉此培育年青人成為富參與性、具包容性及國際視野的新公民。

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# 啟導經驗如何促進幼兒教育工作者的專業成長

## *The Importance of Mentoring in the Professional Development of Kindergarten Practitioners*

歐凱鑫

聖羅撒幼稚園

### 摘要

本文旨在探討師徒制對幼兒教育工作者專業發展的重要性。筆者因應一次當上啟導教師的經歷，分析師徒制的影響因素，檢討成效，並提出具體建議，以鼓勵本港幼教機構嘗試和實踐師徒制，從而促進香港幼兒教育發展。

### Abstract

This paper discusses the importance of mentoring in the professional development of kindergarten student teachers and mentor teachers. The paper identifies some key factors that influence successful mentoring and suggests ways that kindergarten practitioners could put into practice. The paper aims to encourage practitioners in early childhood settings to practise mentoring in order to contribute to the development of Hong Kong's early childhood education.

### 導言

教學啟導體現師徒制(mentoring)，它建基於啟導教師(mentor)與啟導學員(protege)的夥伴合作關係，可以促進教師效能及學生學習(Smith&West-Burnham Eds, 1993；Wilkin, 1992)，應用於幼兒教育，有助提升幼兒教育學與教的成效(Yip,

1999；葉香玲，2000)。筆者於二零零三年首次當上香港教育學院的啟導教師，指導一名在我校實習的學生，為期七周。本文建基該次啟導經驗，探討啟導經驗如何促進實習教師及啟導教師的個人專業成長，引証文獻的理念。

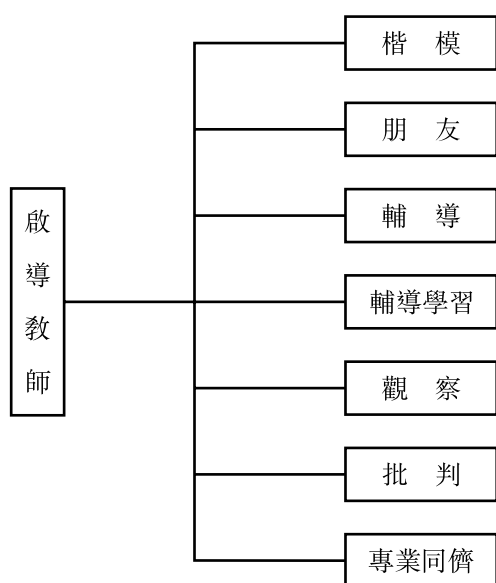
## 理念架構

教學啟導建基於師徒制，學者 Anderson & Shannon (1988)指出，學界對師徒制的理解不一。他們對師徒制的定義如下：

「(師徒制)是培育的過程，由較具經驗及技能者作為榜樣，對經驗及技能較淺的同工給予教導、支持、鼓勵，輔導，視之如朋友，目的是提升後者的專業與個人發展。師徒制的成效，建基於啟導者對學員毫不間斷的關懷。」(筆者譯)

引文指出啟導教師是實習教師的「榜樣」，這正是香港教育學院啟導課程提及的「楷模」角色。圖一顯示啟導教師身兼七個角色：

圖一 啟導教師角色 (香港教育學院，2003)



以上七個角色，我在啟導過程中全部實踐了。

教學啟導有賴啟導教師與實習教師共同付出，它為雙方提供學習、反思的機會，有助個人成長，也有助不斷提升教學效能，為學生提供高素質的學習，達致專業成長 (Killion, 1990；李婉玲，2002)。

## 啟導經驗對實習教師的影響

### 促進實習教師的專業成長

Gordon & Maxey (2002) 指出，初任教師的困難來自疏離、角色轉變、工作艱辛、指引不清、支援不足等。我關顧的實習教師首次來校面談，亦表示上述憂慮，教學啟導正可助她克服困難。

為免實習教師有疏離感，我發揮朋友角色。我待她如好友，向她主動提供精神支援，例如：與她一起午膳，協助她融入學校環境。此外，我擔當輔導者角色，給予勉勵，例如：觀課一天前，我與她分享自己首次接受觀課的經驗和心情，減輕她的焦慮。實習教師獲得心理支持，有助她投入實習工作，提升專業效能。

教學方面，實習教師亦獲得支援。由於她缺乏教學經驗、技巧不熟練，我擔當楷模角色，作為她的教學借鏡。例如：首三天實習，她觀察我上課，從中學習和反思，改善她的教學信念與方法。

整個啟導過程，我擔當輔助學習者與專業同儕角色。我向實習教師提供具體建議，例如：她要教授非典型肺炎的常識，我提供網址及小冊子，協助她備課。實習教師得以解決教學疑難，逐步提升教學能力。

為求更有效幫助實習教師，我擔任觀察者與批判者角色。我進行觀課，觀課前、後均安排會談，並作會談紀錄。會談時，我多作引導、善用提問，留心用語，這使實習教師更能得益 (薛添信等，2002)。觀課一天前會談，我向她展示觀課表現評核表，讓她明白觀課目的和要求；從她提交的教案，我得知課節安排，並就此給予意見，師徒共同討論。觀課後，我們隨即進行會談，就課堂的表現詳細討論，實習教師可作澄清及提問，而我可給予回饋，師徒共同分析，有助提升教學效能。

觀課活動讓我體現觀察者與批判者角色，實習教師獲得具體建議及反思機會。觀課結束後，實習教師即日就課節表現，撰寫檢討與反思日誌。透過反思，她可以檢討自己的表現，從中改進教學方法，並掌握評鑑課堂表現的方法，日後可評核自己的表現。這些經驗為實習教師投身教師事業作好準備，有助她專業成長。

### 促進實習教師的個人成長

啟導經驗讓實習教師經歷角色轉變。這是她首次到學校工作，由學生變成教師，要學習履行教師的職責。此外，她面對陌生環境，要學習適應，要學習如何化解困難；縱使她選擇向我求助，也要思考場合、措辭、禮儀等。對實習教師而言，啟導過程讓她體驗現實校園工作環境，學習新的生活態度與技能。

角色轉變使實習教師清楚幼稚園的實際運作。啟導前，她對這方面的認識，來自書本、傳媒、師長和親友。今次她走進校園，參予日常教學及行政工作，工作日程與全職教師無異，並與前線教師交流，可以引証所學知識。這些全新體驗，讓實習教師增廣見聞、刺激思考，有助她個人成長。

### 啟導經驗對啟導教師的影響

#### 促進啟導教師的專業成長

教學啟導除了有利實習教師外，亦有助啟導教師專業及個人成長。專業成長方面，我首次當上啟導教師，香港教育學院提供十八小時專業課程，探討啟導教師必備技能，包括溝通技巧、會談技巧、觀課技巧、教學分析評鑑技巧等。這些知識和技能，既可促進啟導成效，也可拓展我的眼

界。在日常教學及行政工作，可以發揮所學，提升專業水平。

我任職幼師至今九年，本以為經驗豐富。與實習教師接觸前，沒有期望從這名「老師」身上學到半點東西。然而對她加深認識後，我卻徹底改觀。雖然她的專業知識和技巧有待改進，但是她認真備課，仔細編寫教案，積極搜集教具，處處表現敬業樂業的精神。為了加深幼兒對抗炎方法的知識，她自製彩色精美的抗炎紙板作為教具，幼兒反應甚佳。可見她亦有可取的教學技巧，可供我學習。

與實習老師相處，我獲得很多啟發。觀課前，我仔細思考一節出色課節的要素，以便評核實習老師的表現。觀課後，我思量若自己是授課者，我會怎樣教授相同課節？如何改進？我回想以往處理課節的手法，並與實習教師表現互相比較。她的教學亦有可作參考之處，例如：構思傳染病的主題網，她的設計與我任職學校的原有設計不相同，但是各有千秋。她的教學產出：學生作品，絕不遜色於我任教的學生，也令我反思自己教學的成果。觀課後，我回家把她的教學錄影反覆細看，獲益良多。啟導教師角色為我帶來同儕學習的機會，培養我對教學工作的反思能力，讓我有機會思考優劣、得失，謀求改善之道，促進我專業成長（羅厚輝等，1997）。

#### 促進啟導教師的個人成長

從實習教師身上學到很多新見解和技巧。由於師徒制要求啟導教師對實習教師採取尊重和包容的態度，所以我變得樂於接受新嘗試，培養廣闊的胸襟和尊重別人的態度。我身為啟導教師，職責上必須樂於協助實習教師，這使我的思想和性格產生改變。以前我較被動，但是啟導開始後，我逐漸變為主動友善待人，這有助我改善人際關係，使我與校內及校外人士增進友誼，促進個人成長。

## 檢討與建議

是次教學啟導存在兩個困難：第一個困難是時間不足。教學啟導適逢非典型肺炎肆虐，任教學校因此停課。這大大打亂啟導日程，其中實習教師到校觀摩導師授課的時間，縮短為三日。她在三月二十四至三月二十六日來校觀摩後，直至五月十九日才繼續進行啟導，中間相隔甚久。啟導未能連貫，不免影響成效。此外，日常學校工作繁重，師徒難以騰出時間詳細討論。

面對時間不足，只能設法有效運用時間。停課期間，我透過電話與電郵，主動聯絡實習教師，詢問是否需要協助。復課後，我在午膳時間，主動坐近她的身旁，爭取時間分享。此外，我跟她協議在下班後留校討論，觀課前、後的會談正是如此。利用有限的時間發揮最大效益，這是我進行啟導的願望。

第二個困難是實習教師在啟導過程欠缺主動。停課期間，我主動聯絡實習教師，她卻顯得

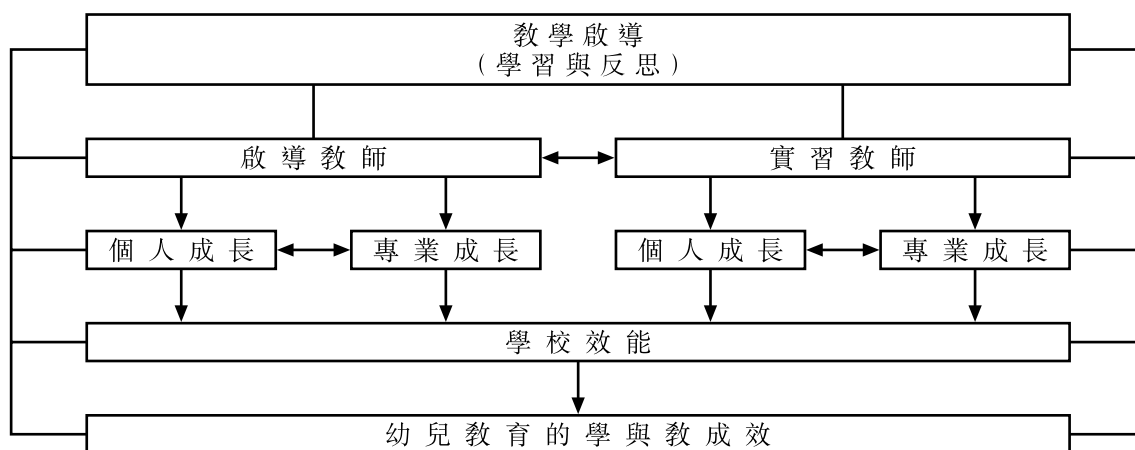
較被動，沒有向我尋求協助。在校內，她的表現沉默，很少跟啟導教師以外的同工談話交流，未能爭取前線教師的額外支援。

面對實習教師表現被動，我更加提醒自己要貫徹主動、友善的態度，打破隔膜，不斷向她施以援手，希望她終能打開心扉。我做好本份，無奈她的反應始終未如我所願，有時難免洩氣。只有寄望實習教師明白及認同啟導的價值，主動為自己個人與專業成長而付出努力。成功的師徒關係，建基於啟導者與學員的共同投入參予，缺一不可 (Gehrke, 1988)。

## 結語

除了大專院校與幼稚園合作層面外，幼稚園可以實行校本師徒制，讓校內教師互相借鏡，使師徒制成為校本教師發展的策略。我嘗試把這次啟導經驗總結為圖二：

圖二 啟導經驗總結



正如圖二顯示，教學啟導兼具學習與反思兩個功能，透過啟導教師與實習教師互相激勵，有利雙方個人與專業成長，塑造雙方為終身學習者，既提升學校效能，也提升幼兒教育學與教的

成效。然而這並非單向發展，而是雙向回饋。教育領域環環緊扣，師徒制讓教師、學校與教育三者均提升效能，營造優良的學習文化，有助促進幼兒教育學與教的成效。

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