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## EXPLORING MATURE-AGED STUDENTS' MOTIVES FOR DOCTORAL STUDY AND THEIR CHALLENGES: A CROSS BORDER RESEARCH COLLABORATION

Annabella S K Fung \* Monash University, Melbourne, Australia [annabella.fung@monash.edu](mailto:annabella.fung@monash.edu)  
Jane Southcott Monash University, Melbourne, Australia [jane.southcott@monash.edu](mailto:jane.southcott@monash.edu)  
Felix Siu University of Hong Kong, Hong Kong, China [flcsiu@hku.hk](mailto:flcsiu@hku.hk)

\* Corresponding author

### ABSTRACT

Background	This cross-border research collaboration investigated the first international higher-research forum between two education faculties in Hong Kong and Australia.
Aim & Methodology	Interpretative Phenomenological Analysis (IPA) was used to explore participants' self-reported experiences concerning the motivations and challenges of 15 mature-aged doctoral students.
Contribution	The findings have important implications for global doctoral program development, international exchange forum organizations, intercultural capacity building, academic enhancement and cross-border research collaboration.
Findings	From interview data four overarching themes emerged: Taking calculated risks, Determination to succeed, Financial stress, and Balancing life and research.
Recommendations for Practitioners	Recommendations include mentoring schemes, greater support for isolated students, and more opportunities for students to complete their PhD by publication.
Recommendation for Researchers	More research is needed to investigate mature-aged students' motives for embarking on study in diverse cultural contexts among different ethnic groups.
Impact on Society	This study recognized the merits and potentials of mature students whose research contributes to their societies.
Future Research	Future research directions include using multiple case study design, thus exploring diverse aspects of the existing sample in greater depth, as well as tapping into a new sample of students at risk of attrition at both faculties.

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Keywords mature-aged doctoral students, motivation, doctoral program design, cross border research collaboration, Interpretative Phenomenological Analysis

## INTRODUCTION

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In 2015, the two Faculties of Education of Monash University (Monash) in Australia and the University of Hong Kong (HKU) became strategic partners to pilot an exchange forum among their higher degree-research (HDR) students. This annual grant enables two research students to take part in the postgraduate conferences of both universities to disseminate students' research, and possibly make connections for future project collaboration. While this program aimed at strengthening the ongoing partnership between the two universities; it also met a key priority of the Australian government. Educational engagement with other countries in Asia and the Indo Pacific region was encouraged to foster the nation's capacity building in Asian Literacy stated in the Asian Century White Paper (Australian Government, 2012). In response to this initiative, the New Colombo Plan (Australian Government, 2014) has been connecting many Australian tertiary students with study exchanges in Asian universities since 2014.

As a doctoral candidate (at that time) and research-teaching associate at Monash, Chief Investigator Fung initiated a joint project about mature doctoral students' lived experiences between the two faculties apart from her own PhD. This article reports on the findings from the combined data set of eight students from HKU and seven students from Monash including Fung herself. This project aimed at exploring the diverse experiences of non-local and local students above age 35 during their programs. Specifically, it examined students' personal, interpersonal, and professional motives to pursue higher-research and the challenges they encountered. Different doctoral program designs attract different international students across the globe. The findings of this study have important implications for global doctoral education program development, international exchange forum organization, intercultural capacity building, academic enhancement, and cross border research collaboration.

### ***PROGRAMS AT MONASH AND HKU: SIMILARITIES AND DIFFERENCES***

There are institutional similarities and differences in the doctoral programs of the two faculties. The similarities include the following: (1) both universities require some compulsory training and general skill development among their HDR students for capacity building; (2) the PhD thesis comprises about 80,000 words and students should have prior thesis writing skills and experiences; (3) the degree is to be completed within two to three years full-time, and four to six years part-time; (4) there are three major milestones in doctoral programs: confirmation, progress, and submission; once students pass confirmation, their probationary status ends; (5) both faculties provide at least two supervisors per doctoral student.

The program differences include the following: (1) Monash offers only PhD, but HKU has both PhD and Doctor of Education (DEd) programs. In the industry-based DEd program, students are required to complete more course work; (2) Concerning funding support, only full time PhD students with sponsored scholarships are admitted at HKU. Their DEd students do not have scholarship provisions. Most Monash students are self-funded because scholarships are extremely competitive. Monash offers equity scholarships for students with disabilities, as well as a range of scholarships for international students; (3) HKU has *viva voce* examination, which is a thesis defense in the presence of a panel of experts including thesis examiners. In contrast, Monash has a pre-submission seminar where the student defends his/her research for a panel before the thesis is submitted for examination; (4) HKU requires principal doctoral supervisors to be at a professorial level, Monash is more flexible; (5) HKU has a model of offering students individual and group consultation with their supervisor/s. In group supervision, students meet monthly to present research in progress to their peer group and the supervisory team. Individual consultation between supervisor-supervisee can be arranged based on needs and can be as frequently (daily) or infrequently (bimonthly) as the pair wish-

es to be. Full-time Monash students individually meet their principal supervisors fortnightly, and part-timers see their supervisors every three to four weeks.

One further difference is that Monash students can submit a traditional thesis or a ‘Thesis including Published Works’ where students write scholarly journal articles that are framed by an exegesis and a concluding discussion. HKU students normally complete theses in the traditional format and students later write journal articles for publication. Globally universities have varying requirements about how many published papers should be included, the possibility of sole or joint authorship by the candidate and others, and the presentation and examination of the final thesis (Bradley, 2009; Lee, 2010). The decision to attempt a thesis including published works must be taken early in the candidature and data collection may need to be begin early. Once collected, data need to be analyzed and shaped into articles that require time to move through the stages of submission, revision, and final acceptance. For the purposes of the thesis, at Monash University articles need to be submitted for review, under review, under revision, accepted, and/or in press. The final thesis contains a cohesive suite of proposed and published articles that are framed by an extensive exegesis, linked by short explanatory comments, and concluded with a rigorous discussion. Ultimately a thesis including published works is “a juggling act between maintaining coherence and focusing on publishable segments” (Nethsinghe & Southcott, 2015, p. 167). Presenting a folio of published works has long been common practice for academic staff (Wilson, 2002), and more recently this option has been made available to students. Undertaking a doctorate including published works allows candidates to disseminate their research, which can be helpful in the current climate of institutional pressure for research productivity (Jackson, 2013; Kamler, 2010).

#### ***GRADUATE STUDENT COHORT AND THE INTERNATIONAL EXCHANGE PROGRAM***

The graduate student cohorts between the two education faculties are distinctively different. In terms of enrolment, Monash has 360+ both part-time and full-time doctoral students, and HKU has about 300 mostly full-time students in the PhD and DEd programs combined. Both education faculties have large numbers of non-local students; these include students normally residing in different parts of the country as well as international students. HKU’s doctoral students are mostly Chinese normally living in Hong Kong (Cantonese speakers) and from other parts of mainland China (Mandarin speakers), whereas about half Monash students are international scholars. There is a global trend that mainland Chinese students are sent out to all parts of the world to receive higher education (Altbach & Knight, 2007; M. Li & Bray, 2007). Enrolments at both universities reflect this trend. Among the international students, both HKU and Monash have enrolled students predominantly from south-east Asian countries, including Vietnam, Indonesia, Sri Lanka, Bangladesh, India, Malaysia, Singapore, Japan, and Korea, and some African countries. Many international students choose to immigrate to their new host countries at the completion of their higher studies (Altbach, 2004).

There is a diverse mix of ethnicities in these two universities; but the official language used for the Postgraduate Research Conferences at both faculties is English. Exchange participants should not feel disadvantaged because all materials were printed in English and presenters spoke English within the conference rooms. As a host at Monash and a guest at HKU, Fung noted in her diary that, during breaks in proceedings, most attendees began to converse in their mother tongues. This informal observation was recorded in the researcher journal. It was already daunting for exchange participants to get to know new people in these social situations, the additional language barrier simply could not be ignored. This concern was also reported in a recent study by Flynn et al. (2015) about crossing international boundaries through a doctoral research forum partnership between an Australian university and a mainland Chinese university.

## **LITERATURE REVIEW**

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Over the past 40 years, there has been a rapid increase in research concerning doctoral studies. In an extensive meta-analysis, Jones (2013) found six prevalent themes in the literature that shaped our re-

search questions. The themes are doctoral program design, student experience, student-supervisor relationships, student research and writing, student career and unemployment, and student teaching readiness for academic positions. Our research focuses on the challenges encountered by doctoral students and their motives for embarking, continuing, and persevering in their studies.

### ***CHALLENGES EXPERIENCED***

Although recent research on student experience has focused on students' coping mechanisms when faced with hardship and isolation (Byers et al., 2014; Johnstone & Marcucci, 2010; Pash, 2014; Spaulding & Rockinson-Szapkiw, 2012), few studies have examined cross border higher education partnerships (Flynn et al., 2015; Knobel, Simoes, & de Brito Cruz, 2013; Mu et al., 2016). International students encountered additional challenges in their socialization into foreign settings and experienced identity transformation (Bøgelund & de Graaff, 2015; Phelps, 2016). Internationally doctoral completion rates across all disciplines are a major concern for universities with an attrition rate between 33 and 70 per cent (Lovitts, 2008). Factors contributing to attrition included the high cost of pursuing graduate studies and salary lost, misfit of supervisor-supervisee pairing, mismatch of student expectation and program delivery, students experiencing social-emotional isolation, and their failure to socialize to institutional culture (Ali & Kohun, 2007; Golde, 1998, 2005; Lott, Gardner, & Powers, 2009; Lovitts, 2008; Powell & Green, 2007). Crucial factors that enabled timely doctoral completion included students' persistence and resilience, and support from family and friends (Ali & Kohun, 2007; Gardner & Gopaul, 2012; Ivankova & Stick, 2007; Jairam & Kahl, 2012; D. Kim & Otts, 2010; Manathunga, 2005; Marshall & Green, 2006). The current study addresses engagement and completion, focusing on students' initial motives for embarking on doctoral studies and the challenges that arose during candidature (Brailsford, 2010; Churchill & Sanders, 2007; Gardner, 2008; Gill & Hoppe, 2009; Grover, 2007; Leonard, Becker, & Coate, 2005). As will be evident from this study of engagement, there are early warning signs of challenges encountered including students' demographics, fields of study, attendance mode, funding/scholarships, duration of candidature, and employment (Jiranek, 2010; Manathunga, 2005). Through psychosocial lenses, this study explored the decision-making process of education graduate students before enrolment, and how different program designs in different cultural contexts alleviated/exacerbated the challenges students faced, leading to timely completion or difficult progression.

### ***MOTIVES FOR EMBARKING AND CONTINUATION***

Motivation was identified as important in determining an adult learner's commitment, learning and achievement outcomes (J. H. Park & Choi, 2009; Rothes, Lemos, & Goncalves, 2017; Swain & Hammond, 2011). Most prior research concerning mature-aged students' motives to enroll in graduate studies focused on the emerging market of students between 25 and 45 years-old (Jancey & Burns, 2013; Lauzon, 2011; McCulloch & Thomas, 2013). Very few studies targeted students 55+ or those in retirement (Brownie, 2014; A. Kim & Merriam, 2004; Stehlik, 2011). For mid to late career professionals giving up well-established careers and returning to study was a high-risk decision, because of the expense with little economic return. The initial impulse to re-enter university as mature students, sustain passion throughout candidature, and coping with identity change remains a very complex phenomenon (Brailsford, 2010; Cramer, 2004; Lachman, 2004; Mowjee, 2013). The sociocultural background of students adds complications because learning takes place through cultural lenses that occur when interacting with others and following the rules, beliefs, values skills, and abilities shaped by culture (Vygostky, 1978, 1986). Most of the participants in this research are influenced by Confucianism. In collectivist cultures like the Chinese and Vietnamese, learning was considered as a lifelong striving for self-perfection and moral cultivation; the ultimate goal of acquiring knowledge was to contribute to society as a role model (C. Li, 2000; J. Li, 2001, 2002). Such societies have a hierarchical structure where the extended family/clan operates on the principle of filial piety. Each person is encouraged to learn from good familial and societal role models, as well as be accountable to and interdependent on others (Ames 2010; J. Li, Holloway, Bempechat, & Loh, 2008). Career-driven motives

were linked to collectivist thoughts where individuals wanted to improve socioeconomic status and wellbeing of the entire family, and bring glory to one's ancestors through reaching the summit in higher-education (Tu, 1979, 1996).

Collectivist ideologies are part of the interpersonal motives for embarking on doctoral studies regardless of students' ethnicities. Demonstrations of gratitude to family members who invested emotionally and financially in students' learning journeys were one result of collectivism (J. Li, 2002). In addition, success in doctoral studies enabled family migration (Gribble, 2008; King & Ruiz-Gelices, 2003; Xiang & Shen, 2009), supported advocacy for social justice concerns (Salmon, 1992; Stehlik, 2011), and allowed reciprocal social contribution (Valencia, 2015). Individualism was also detected, for example some mature students had further study on their 'bucket list' (Gill & Hoppe, 2009) and sought intellectual stimulation (Boulton-Lewis, 2010; Jamieson, 2007; Waller, 2006). Professionally some students were pressured at work into doing HDR, some wanted to improve their career prospects (Churchill & Sanders, 2007; Osborne, Marks, & Turner, 2004), others needed to escape from routines, dissatisfying careers or institutional politics, and hope to transition to new jobs (Gill & Hoppe, 2009). The reasons why a person decides to pursue HDR are complex and regardless of cultural origin, individuals may possess a range of these motives.

Based on the literature review, this study attempted to answer three research questions:

1. What were the participants' motives to embark on doctoral studies?
2. What were the arising challenges the participants encountered?
3. How did different program designs and research infrastructures help to alleviate the challenges participants face?

## METHODOLOGY

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### *INTERPRETATIVE PHENOMENOLOGICAL ANALYSIS*

Interpretative Phenomenological Analysis (IPA) is an inductive approach to research (Brocki & Wearden, 2006) that resides within an interpretivist or constructivist paradigm of inquiry in which understanding is generated by multiple cycles of inductive reasoning (Heidegger, 1996; Smith & Osborn, 2007, 2014). IPA evolved as a qualitative research approach in psychology (Smith, 1996, 2004, 2007). The underpinning tenets of IPA are phenomenology, hermeneutics and, idiography. IPA is phenomenological in that it undertakes deep exploration of the meanings that particular experiences and events hold for participants (Southcott, 2009). In this research the phenomenon is the participants' understandings of their experiences of doctoral study. IPA initially involves a double hermeneutic in which the "participant is trying to make sense of their personal and social world; the researcher is trying to make sense of the participant trying to make sense of their personal and social world" (Smith, 2004, p. 40). IPA is idiographic, seeks particular experiences of individuals (Finlay, 2013; Johnson & Christensen, 2004), and builds fine-grained case studies of purposively selected homogeneous small participant groups. Employing IPA, researchers give voice to people who otherwise might not be heard (Kirkham, Smith, & Havsteen-Franklin, 2015; Smith, Flowers, & Larkin, 2009). The use of a researcher diary, interview notes, audio recordings, and verbatim data transcripts underpins IPA research (Butler, 2015; Larkin, Eatough, & Osborn, 2011).

In investigating the motives for engagement and challenges encountered by our participants, we considered IPA to be a suitable way to explore lived experiences and understandings (Smith & Osborn, 2009). IPA studies do not begin with a strong "well-delineated conceptualization of the phenomenon; rather, this conceptualization emerges from the interaction between participants and researcher" (Sidani & Sechrest, 1996, p. 297). In IPA it is essential that researchers put aside (or bracket) their own beliefs and pre-existing knowledge about the phenomenon being investigated throughout the data collection and analysis (Chan, Fung, & Chien, 2013; Findlay, 2013). In this study, the analysis of data involves prolonged engagement and careful reflection. The transcriptions are shared between

the researchers for individual analysis that involves making initial notes, developing emergent themes, searching for connections across themes, moving to the next case, and looking for patterns across cases. Once the data from individual participants are individually analyzed by each researcher, understandings are shared. From this composite analysis, findings are constructed and verbatim quotations embedded to give voice to the participants. Ultimately the analysis is the joint product of the participants and the researchers who, while writing, retain a hypothetical reader in mind, contributing to three lenses of interpretation which constitutes a triple hermeneutic.

### ***ETHICAL CONSIDERATIONS***

It is impossible to hide the names of the universities because this paper is a product of the joint venture of two education faculties. Methodologically, it is challenging for the team to report the collected data as truthfully while simultaneously adhering to ethical research practice. Confidentiality was a top priority in this project. To mask the identifiable information of the participants, their country/city of origin, the commencing year of their HDR, and the actual topics of their projects were concealed. Instead, generic fields or streams of research were used to represent the combined sample, not the individual student. Personal pronouns were removed for all participants and their family members, gender-neutral terms were used (Plummer, 1983).

### ***REFLEXIVITY AND THE TEAM OF REFLEXIVE RESEARCHERS***

Reflexivity is self-appraisal throughout all phases of research; it is recognized as a crucial strategy in generating knowledge through qualitative methods across disciplines (Berger, 2015). It is the process of a continual researcher self-talk and critical self-evaluation of researcher's positionality, and the acknowledgement that this position may affect the research process and outcome (Bradbury-Jones, 2007; Stonach, Garratt, Pearce, & Piper, 2007). Examples of relevant researcher's positioning include gender, age, race, linguistic tradition, value systems, beliefs, affiliation, personal biases, and experiences (Hamzeh & Oliver, 2010; Padgett, 2008). These positions play different roles and can impact the research in three ways. (1) Access to the field can be easier if participants think that the researchers are insiders as culture-bearers who understand their experiences (De Tona, 2006). (2) A good researcher-participant relationship occurs when researchers are aware of their own thoughts and reactions to the conversations; this can facilitate data collection in which participants are more willing to disclose personal information, thus generating deep and meaningful data (Valentine, 2007). (3) Findings and conclusions are shaped by the worldviews of the researchers, and their filtering of the data gathered (Kacen & Chaitin, 2006). The goals and functions of reflexivity are to monitor the tension between involvement and detachment in the researcher-participant relationship in order to enhance credibility, rigor and ethics in research (Gemignani, 2011).

As a fellow student, Fung was in a similar situation to her participants travelling along the doctoral journey (Wan, 2016) and keeping a researcher journal to record and monitor her thoughts (Frisina, 2006). Two Co-Investigators brought different lenses and experiences that enriched the analysis and interpretation of the data. Southcott is a very experienced IPA researcher who has supervised many mature doctoral students who come from diverse cultural backgrounds. Siu is a senior academic who has worked hard to establish and maintain higher education collaborations across international borders. He brings an insider perspective to data collection and interpretation. Fung and Southcott undertook independent analysis of the interview transcripts and then engaged in a robust discussion about the interpretation of the data. Both researchers brought their own perspectives to the analysis which supported the process of sense making (Fade, 2004).

### ***RESEARCH DESIGN, DATA COLLECTION AND ANALYSIS***

Fung took the insider-outsider position. As an insider she investigated fellow Monash students and as an outsider she researched the HKU students. Without power and hierarchical struggles, she could gather rich data regarding the educational processes and differential lived experiences of both stu-

dent cohorts (Reinharz & Davidman, 1992). Fung could detect implied content, hear the unsaid, and probe her participants more efficiently. She was mindful that she might overlook certain aspects of the participants' experiences, block out other voices, or impose her own beliefs on the data due to such familiarity (Cloke, Cooke, Cursons, Milbourne, & Widdowfield, 2000). Another advantage was that participant recruitment was easier for Fung than an outside researcher. Knowing that the HKU participants had to be interviewed on her first trip, Fung devised a call-for-participants email with explanatory statements and consent forms, and had these documents sent out to the HDR office in HKU. The faculty administrator dispatched this bulk email to all their enrolled doctoral students. When Fung arrived at HKU, she met the potential participants at the conference; the ones who responded positively to research participation were those who learned about the project announcement. In the first phase of data collection in 2015, two HKU participants took the initiative to publicize this project. Consequently, the second phase of data collection was executed smoothly a few months later when Fung revisited Hong Kong.

There were limitations being the student-researcher because there was no established hierarchy between interviewer-interviewees since all were fellow students. As a trained therapist, Fung possessed good communication skills but an extra level of empathy was required of her (Josselson, 2007). The participants expected her be empathetic and understand their joy, tears, and struggles. During interviews several participants became interested in Fung and wanted to find out about her doctoral experiences. It was crucial to keep the interviews flowing smoothly and certain diversions were allowed in conversational interviews (Smith, 2007). Furthermore, the relational aspect between interviewer-interviewee must be fostered and maintained.

The Monash participants comprised three doctoral graduates and four current doctoral students (three at pre or post-confirmation stages and one at mid-candidature). Fung matched this cohort amongst the HKU students as closely as possible. Fung extended personal invitations to Monash doctoral students who were situated at the three different stages of their candidature including local and non-local students. Recruitment of participants was smooth because she had built prior relationships and stayed connected with many fellow students. Ethical approval was successfully granted to the research team by both universities. As the culture-bearer, Fung conducted all interviews (in Chinese when appropriate) at both universities between 2015 and 2016. The interview schedule consisted of open-ended questions exploring the decision-making processes of students choosing to return to HDR after working, and on what basis they chose their doctoral programs and host universities. Comments were invited from both local and non-local students about their experiences as candidates at the faculty, including success and setbacks, and how they viewed their future, including life/career directions, family migration, socialization to new cultures, and identity changes. Interviews conducted at HKU in Chinese were translated into English by Fung and shared with co-author Siu. The transcripts of the fifteen interviews were transcribed and sent to the respective participants for amendment and approval. Subsequently the researchers shared their analyses and interpretations to enhance the rigor of the findings and ensure the credibility, fairness, and trustworthiness of the research (Rolfe, 2006; Shenton, 2004).

## RESULTS AND DISCUSSION

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In IPA research, it is not uncommon to combine results and discussion into a more integrated presenting of findings. After a brief discussion of participant profiles, verbatim data will be used to show how the four overarching themes emerged from the semi-structured interviews and the simultaneous interpretations of the researchers.

### *PARTICIPANT PROFILES*

Acculturation to a new country was a major issue among the participants. Table 1 presents the local and international student ratio in this study with a combined sample of 15 students (13 females and 2 males), showing that two-thirds were local students. Since participation to research was voluntary, the

investigators had little control over participant recruitment. The only criterion was that he/she was 35 years-old or above at the commencement of his/her doctoral program and responded to the email or accepted an invitation to take part in research. The mean age of this sample is 44.2 years-old, which is congruent with existing literature (and our research premise on mature students) where there is a global trend for mid to late career professionals to embark on HDR including PhDs.

**Table 1: Age of Commencement and the Spread of Local and International Students**

Age range	Local Students	International Students
35-40	3 from HKU	1 from Monash
41-45	1 from HKU	2 from HKU, 3 from Monash
46-50	2 from Monash	
51-55	1 from HKU, 1 from Monash	
56-60	1 from HKU	

Table 1 shows that there were six (1/3) international students in this sample. Among them, three Monash students indicated that they would like to immigrate to Australia. The remaining three students had to go back to their own countries due to prior contractual agreements with their funding bodies. Other important variables in this study contributing to engagement included ethnic background, funding, attendance mode, progress, and employment. These are shown in Table 2.

**Table 2: Participant’s Country of Origin, Funding, Progress, Attendance, and Employment**

Participant	Country of origin	Funding	Progress	Attendance	Employment
HKU1	SARS China	yes	pre-confirmation	part-time	full-time
HKU2	SARS China	yes	pre-confirmation	full-time	part-time
HKU3	Mainland China	yes	pre-confirmation	full-time	nil
HKU4	SARS China	no	Complete	full-time	nil
HKU5	SARS China	no	Complete	part-time	full-time
HKU6	SARS China	no	Complete	part-time	full-time
HKU7	Singapore	yes	passed confirmation	full-time	nil
HKU8	an African country	yes	passed mid-candidature	full-time	nil
Monash1	SARS China	yes	Complete	full-time	part-time
Monash2	an African country	no	passed mid-candidature	full-time	part-time
Monash3	Australia	Yes	pre-mid-candidature	full-time	part-time
Monash4	Vietnam	Yes	Complete	full-time	nil



Participant	Country of origin	Funding	Progress	Attendance	Employment
Monash5	Vietnam	yes from 3 <sup>rd</sup> year	passed confirmation	full-time	nil
Monash6	Sri Lanka	yes	Complete	full-time	part-time
Monash7	India	no	passed confirmation	full-time	part-time

NB: SARS (special administrative regions Hong Kong and Macau)

Table 2 shows that two-thirds of the participants came from a collectivist culture influenced by Confucianism, two-thirds were funded, and two-thirds had to work to generate income regardless of their full-time or part-time candidature. Among the five non-funded students, three of them were doing DEd at HKU where funding provision was absent in this program. In terms of milestones, six students completed their PhDs, six were in pre/post-confirmation, and the remaining three were in mid-candidature/progress.

Although all 15 students were enrolled at the Faculty of Education, they had diverse industrial experiences including secondary and tertiary teaching, continuous education and vocational training, counselling, management, public service, and human resources. This sample consisted of five projects in language teaching, four in psychology, three in policy and management, one in IT education, one in pre-school education, and one in gifted education.

There are predictable struggles among all HDR students throughout their candidature, for example, getting back to study routine after working for a long time and being socialized into institutional culture. For many the research process itself involved new skills and understandings. Procedural matters can be challenging, such as obtaining ethics approval, recruiting participants, designing questionnaires, collecting and analysing data, reporting and disseminating research findings in conferences, journal publications, final writing-up, and preparing for final examination. The mode of attendance, funding, employment, marital status, parenthood, age, gender, residency status, country of origin, and culture can combine to intensify challenges. The findings are discussed under four broad themes: taking calculated risks, determination to succeed, financial stress, and balancing life and research.

***TAKING CALCULATED RISKS***

Many participants were first generation graduates and they really valued knowledge acquisition (HKU1, HKU6, HKU2, Monash4, & Monash7). During the decision-making processes, all participants discussed matters thoroughly with their families and took considerable personal, financial, and professional risks before enrolment. HKU6 had a self-efficacy issue related to his age, but felt he needed to continue with his research because it was part of his work as a school leader. He explained that “I was at retirement age, and felt that I was slow in learning new things...It took me seven years part-time to complete my doctorate.” Other younger participants saw studying in a new country as an opportunity to experience cultural exchange (Monash7), explore new career opportunities (Monash1, Monash2), and to prove to herself and others that “high school teachers are capable of getting PhDs” (Monash5).

A number of the participants were mothers who considered carefully the effect of their returning to study on all members of their family. Participants believed that their diligence as HDR students would provide a role model for their children. HKU5 stated that, “as a mother, I wanted to demonstrate lifelong learning to my two teenage sons; I studied hard along with my boys.” Monash1 asserted that she “wanted to study alongside my children at university to demonstrate lifelong learning.” Their engagement with education was understood as an extension of their role as mother. Further participants identified that they in turn had been influenced by their own parents. HKU4 explained

that, “My doctor father and social worker mum are both lifelong learners, I was inspired by them to become an example for my children.” Other participants (Monash4, Monash7) were the first in their families to complete a degree. For example, Monash4 recounted that, “My parents were very proud because I was the first generation graduate in my family.”

Related to this was the role of HDR in offering opportunities to their families. Participants described that while they were studying in overseas institutions, their children were able to access “good schools” (Monash4) and “are receiving good tertiary and secondary education here” (Monash5). Participants also planned for the future of their children. Monash7 wanted her adult children to eventually come to do postgraduate studies in Australia. Only the participants studying in Australia mentioned a hope for permanent residency after their studies were complete. Monash4 encapsulated this idea: “My young family could come so I picked Australia for my PhD, I completed my PhD, and we are in the process of applying permanent residency.” One participant did not take her family with her while she studied. HKU8 explained that, “I have a family of four, but left them back home. I share a room with someone and realize no one needs to talk... I’ve a greater mission beyond my family needs; I must make the necessary sacrifice to achieve my goal. Women have to be aggressive, we struggle inside and outside home in my country.” This decision was not easy for her but she felt that it was a necessary sacrifice. HKU8 continued to say that she “missed too much of my children growing up although I buy them gifts when I go home in Christmas.” Monash7 said that she missed her family and hoped that her children will “grow to become self-reliant in my absence”. Both mothers exhibited a sense of regret and guilt because they were not physically around for their children.

For the female participants, the views of their husbands were influential in their choices. The husband of HKU5 allowed her “to do whatever [she] wanted”. Other husbands were more proactive. HKU4 explained that, “My husband encouraged me to take a higher degree while being a full-time mother.” It appears that the experience of the husbands who accompanied their wives while they studied in Australia, were less positive. They were constrained by their lack of English proficiency which limited their employment opportunities. Monash4 stated that, “My husband doesn’t speak good English and it’s affecting his ability to find good jobs.” Some husbands were forced to take employment out of their sphere of expertise. For example, Monash5 said that, “My husband doesn’t speak much English, not working in his field anymore here.” He had to take a job as a laborer in a juicing factory. Monash4 explained that, “Even with a scholarship, the money was not enough for my family of four living in Australia. My husband was an accountant but he knew little English. He ended up getting unskilled manual work to provide for our needs.” Monash6 explained that her scholarship to Australia “allowed me to bring my husband along; he couldn’t find work here matching his qualifications.” She felt lucky to be accompanied by her husband while studying in Australia: “my research didn’t create problems for my marriage, but his career was disrupted and he made considerable sacrifice for me.” For the husbands, it appears that they suffered a loss of professional identity, which impacts their sense of self and pride. This added tension to the households of the participants, particularly those in Australia where the wife was more fluent in English. Due to the language barrier, acculturation issues and lack of local work experience, none of these husbands could practice what they were trained for in their own countries. While their children were integrating relatively easily into Australian culture through regular schooling, these men were finding it difficult to adjust to sudden changes from company executives to housekeepers, chefs, and drivers with their loss of national, professional and masculine-marital identities.

### ***DETERMINATION TO SUCCEED***

Five of the participants were tertiary educators who felt pressured at work to upgrade their qualifications because PhDs were becoming mandatory in higher education globally (HKU3, HKU4, Monash4, Monash6, & Monash7). There was no turning back for these students, if they did not complete their doctorates, they would have to consider voluntary retirement. HKU3 and Monash4 had both been tertiary educators for twelve years and described feeling pressured to do a doctorate. Monash7 captured this feeling: “I had been a lecturer for a long time and felt the need to get a PhD.”

HKU4 explained that most of her colleagues had started doctoral studies which added to the pressure and stated that “I was an industry-based educator in continuous education, and disillusioned with teaching students who were not motivated to learn.” Monash4 felt ashamed and that she was “surrounded by younger academics with master’s degrees who were her former students.” She decided to pursue HDR in an English-speaking country to explore a new learning environment and that would provide the added caché of English language skill.

Other forms of pressure were experienced by the participants. Several mentioned the influence of their family. Monash6 stated that “My father is a professor, mother a teacher, for a lecturer to become a senior lecturer, I have to do a PhD.” HKU6 came from a large family that were poor: “my dad didn’t want me to study at university, but my mum believed in me and financially supported me through...I owe it to mum to prove that she was right.” Monash7 wanted to prove her family wrong. She explained that “My parents were not educated, mum said girls don’t need much education. I wanted to emulate my professor relative and prove my mum wrong.” The role of gender was also apparent in HKU3’s statement: “During a recruitment interview, a potential supervisor said he felt that I would not have 100% commitment because I am a mother with a kid. Women’s voices in mainland China are weak...so I came to Hong Kong.” Monash1 also added gender to her reasons for pursuing HDR: “I was not treated the same way as my brother. I had to prove them wrong by becoming a high achiever. I need a mental breathing space from routine teaching.” All of the participants recounted feeling some pressure to pursue a doctorate, this came from employers, colleagues, and family.

Several participants saw HDR as an escape from a current situation with the possibility of a better future for themselves and for others. HKU2 summed this up: “I hate politics, I do a higher degree to escape from my current post in higher education administration work, hopefully it will lead to something new, or I can do private consulting with a better credential later.” HKU8 undertook HDR because of “a bad education system; I have been in the Ministry of Education for a long time to know that I can’t work with politicians. I do a PhD as a way out, hopefully work for a non-government organization later to push for changes from outside.” Monash1 and Monash2 needed a break from their virtually static and less-than-ideal careers and used the PhDs as stepping stones for future opportunities. Monash2 said “I need a break and have pressure to upgrade my credentials in my line of work, I think academia broadens and adds back to the professional world. My PhD might lead to tertiary teaching later.” HKU1 also thought that the PhD might “lead to new career opportunities.” For Monash3 the decision to pursue HDR was based on her strong ethical position inculcated by her family: “I was brought up in a household with strong ethics. There is only one race, the human race, so equality is incredibly important. I consider myself as a human rights activist, and I do my PhD for social justice, I want to push for policy changes.” Once committed to HDR, participants felt pressure to complete. HKU1 had a strong drive to be successful, while HKU6 felt obliged to finish his degree to “protect the reputation” of his supervisors who he thought had been very kind to him. Monetary concerns were also a key source of pressure.

### ***FINANCIAL STRESS***

In our sample, financial issues are a major concern, particularly among the Monash participants who were less likely to be supported by scholarships. None of the HKU participants reported having a specific financial problem although one did mention needing to work. Of the eight HKU participants only three did not receive any scholarships. This was because one of them was a DEd student who did not qualify for scholarships *per se* and the other two were doing doctorates part-time and thus were not entitled to a scholarship. All three financially unsupported students completed their doctorates successfully. Although the remaining five scholarship students from the HKU sample did not make explicit statements about whether their financial sponsorships were sufficient (or not) to sustain their research; it was reasonable to assume that their income from scholarships could not be higher than their earnings from their former full-time work. HKU7 did mention that she had signed a bond to complete her degree and resume work immediately. Nevertheless, the HKU policy of allo-

cating scholarships to full-time PhD students before admitting them is a preventive measure that can reduce later arising financial challenges among their students. HKU1 explained the system and its effect on her at her institution:

The regulation in my university is that full-time PhD students will automatically receive scholarships to begin candidature. It's a strange system. People who are rich don't care about scholarships, but they still can't begin candidature until the university finds scholarships for them. I waited for nine months after the approval of my proposal, and began in September which is normally the beginning of the academic year in Hong Kong. I nearly lost my passion to pursue higher research by then.

The participants attending Monash considered financial concerns the most prominent stressor affecting candidature progression regardless of scholarship provisions. Monash2 and Monash5 worked long hours and much of their energy would have been devoted not on research endeavor, but fulfilling basic needs living away from home in a new country. Those participants missing scholarships had to find money to cover living cost. Monash2 was not supported by a scholarship. She stated that, "I realized I was just too busy with trying to earn money, so my study rhythm was often interrupted... Toward the latter part of my journey, I had to convert to part-time to buy more time for the remaining candidature... I struggle to motivate myself to move on." Monash7 described taking a low level job to supplement financial support from her family, she had to work "about 20 hours a week, and more during the holidays... I was a lecturer in my country, but I don't mind doing hard labor here." The financial support of Monash5's family left them in "huge debt." She brought her "family of four, and spent AUD 100,000 for the first two years on tuition fees and living cost; I spent all my savings and borrowed a lot of money from friends and families... I was very glad that I finally received a scholarship from my third year on."

Even when a scholarship was gained, it was rarely adequate. Monash1, Monash3, Monash4 and Monash6 indicated that the scholarship money was just the bare minimum for one individual's basic living cost; they still had to work part-time to make up the loss of family income due to their studies. Their spouses had to work more inside and outside home to cater for the needs of all family members. Monash6 "sold land" to finance her Australian studies and eventually received a scholarship which she considered generous. Even with the scholarship, she had a casual household cleaning job and her husband was paid to umpire cricket. Monash3 had the added expense of data collection and translations of interviews which "were just unbelievable, I paid for them out of my own pocket." Worrying about money and being forced to take manual jobs to supplement income tarnished the HDR experience for participants. They were unable to give their complete attention to their studies due to current difficulties and incurred future debts. HKU5 found working full-time while studying extremely demanding. Her candidature was extended and ultimately she quit her job for the final write-up.

### ***BALANCING LIFE AND RESEARCH***

Besides financial and research-centered issues, such as navigating supervisor-supervisee relationships, learning to be a researcher, and establishing a writing and publishing track-record, students experienced many other challenges including familiarizing themselves with the unwritten rules and values of academia, socialization to research and institutional culture, and building networks to establish future career opportunities and research collaboration. The participants showed many of these generic issues.

Even among fluent English users, academic English was a new skill to acquire for mature-aged students re-entering universities after decades of working in the labor market. HKU1 said she "was good at business English, but needed a new brain for academic reading and writing." The burden of using English on a daily-basis was another challenge for Monash7 to overcome, although she specialized in English literature back home. Learning new research skills was another hurdle to be over-

come. HKU7 found learning to use statistical programs difficult and HKU1 knew nothing about sociological research. Monash1 summed it up, stating:

I am not a patient person, learning to persevere with the long haul of academic culture in journal writing, review, revision, re-revision, publication, in addition to being asked to do reciprocal blind review and assistant editing created unforeseen disruptions to my research. I learned the rules for this ping-pong match...back and forth, a never-ending game.

Supervisors could add pressure in a range of ways. HKU1 described her supervisor as “very demanding who only wants quality work and consistent high performance.” For her this is very difficult but she refuses to quit. Monash6’s supervisor discovered serious problems with her doctoral framework on the point of submission. Her time had run out and she had to resume work at her university. She had no choice but to complete her writing-up away while working full time. Some supervisors were very supportive but this did not necessarily alleviate stress. HKU2 explained that, “My supervisor is helpful and he sends me reminders and answers my emails within 24 hours. I see my peers in group supervisions as well. I usually get home at 8 pm, feel exhausted by 10 pm and don’t play much with my kids. I often take naps in my office at lunch time due to extreme fatigue.”

Non-local students in both institutions faced additional problems because they were uprooted from their comfort zones. Monash7 experienced isolation and racial discrimination, and found it difficult because she was “a colored person who was constantly treated as an outsider.” She found this troubling:

In the past few years, I had constant doubts and wondered if all these were necessary. It’s hard to manage long-distanced relationships although I talk to my children everyday through social media. I also think finding work for colored people is harder, I can’t even get past the face problem, we are constantly treated as outsiders, visitors, foreigners...I now work in disability services.

International students spoke about desperately missing home, their country, and their families and friends. International student HKU7 spoke fluent Cantonese; she could participate in local Hong Kong activities if she wanted to, yet she confessed that her social life was minimal. The doctoral journey can perhaps be described as one of the most lonesome journeys of human experience, especially for non-local students who were not accompanied by significant others to their new host countries. These isolated students were not integrating well into their local or institutional cultures. HKU3 explained that her environment was very restricted that she only interacted with other research students, and was not exposed to mainstream Hong Kong people. She said she focused on research and had little social life.

The HKU flexible individual and group supervision program was found helpful in alleviating the problem of loneliness and isolation among their research students. HKU8 said she could see her supervisor anytime, almost daily. HKU1, HKU2, HKU4, HKU5 and HKU6 reported that they enjoyed having and benefited from group supervision where they were forced to present their research in progress monthly which sharpened their presentation skills and critical thinking and writing. Group supervision provided some social interaction with their peers. In contrast, Monash does not have group supervision, but Monash2, Monash3, Monash5 and Monash7 attended an existing student-formed peer study group to receive extra academic and social support.

Balancing between life and research was indicated explicitly or implicitly by most students (HKU2, HKU4, HKU5, HKU6, Monash1, Monash2, Monash3, & Monash6). HKU2 clearly stated “As a part-timer with two young children, I have difficulties balancing work, family and course work.” Monash2 explained further that, “the difficult thing with the PhD is, our lives don’t stop; it’s how to balance all those things. I didn’t know what was expected, every time I got lost, I got upset, or worried that I got upset. I didn’t know what and how to ask for help, I needed to learn academic relationships.” Doing HDR had the potential to disrupt existing relationships which had to be put on

hold. HKU6 commented that his “wife didn’t mind me doing a PhD, but my social life was affected seriously because I also worked full-time. After I completed my PhD, I began catching up with long lost friends and family.” The participants felt that HDR both a positive and a negative experience. The positives included opportunity, personal growth, and future career benefits; the negatives included loneliness, stress, and financial difficulties.

## RECOMMENDATIONS

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This article documented the first international higher-research forum between two education faculties, in Hong Kong and in Australia. A pilot study resulted from this cross-border research collaboration that has important implications for both faculties. Arising from Fung’s HKU conference presentation, many participants became interested in how a ‘Thesis with Published Works’ can be done in a PhD. Although a tangential item of discussion, the participants evinced interest in this option. Undertaking a doctorate including published works has become increasingly popular in the UK, in Australia and specifically in the Faculty of Education at Monash University (Nethsinghe & Southcott, 2015; C. Park, 2007). The rapid increase of publications through doctoral students’ research contributions can be seen both as beneficial to universities and candidates. Students also became socialized into academia at the earliest stage of their candidature through establishing a research track-record (Jackson, 2013). All these add to capacity building for early career researchers. The HKU students were hopeful that they would soon be given the opportunity to choose to do a thesis including published works. Particularly the more mature participants who still hoped to become academics, saw this option as an effective way to enhance their future job applications.

A language barrier was identified during the international exchange forums Fung witnessed at Monash and HKU. The participants and the researchers thought that future participants attending these conferences and research forums would benefit from having pre-application talks and pre-departure briefings organized by faculty experts including lessons on intrapersonal communications and intercultural awareness about specific cultural-religious taboos to be avoided in the prospective host countries. Students, particularly those isolated by language and culture from the mainstream culture of their institution, require additional support, both formal and informal to facilitate engagement, successful progress, and completion. Furthermore, it might be helpful to partner exchange students with local students during their conferences in both cities. In addition to intellectual development, the cultural exchange element could be reinforced. More commonly found in schools, creating a ‘buddy system’ in which students can connect, share information, and experience a peer-based support system can foster exchange (Brooks, 2016). Such partnering of students can be mutually helpful, cultivate closer networks, and thus strengthen wider partnerships between institutions.

## CONCLUSION AND FUTURE RESEARCH

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Based on the current findings, mature-aged students possessed a mixture of personal, interpersonal, and professional motives for embarking on doctoral studies. The collectivist cultural ideologies were embedded in many of the participants’ decision-making processes regardless of their racial-ethnic backgrounds. Students in this small sample faced many challenges that were related to their research directly, including supervisor-supervisee relationships, participant recruitment, catching up on new technologies, and academic writing and publishing. The more prominent concern for non-local students was adaptation to a new culture in their host universities. Financial concerns (present or future) continued to be a major stressor for most participants, which affected their study progress; scholarships holders were not exempted from financial worries, negative economic gains and future career uncertainties. Overall, it was most important to be able to balance work, family, life and research in order to navigate the doctoral journey successfully. The HKU doctoral program designs were found to contribute to successful transition; group supervision and frequent close contact between supervisor-supervisee and peers helped to combat isolation and research procrastination. Allocating scholarships to potential full-time PhD candidates before admission was a proactive policy to adopt that

could reduce later financial issues among students. Unfortunately, Monash is presently unable to match HKU's funding provision for HDR students since there are only a very small number of merit-based scholarships allocated to the faculty each year by the university which cannot meet demand.

More research is needed to further investigate mature students' motives for embarking on higher degree research. An exploration of motivations may reveal early warning signs for later challenges affecting completion in diverse cultural contexts. This study recognized the merits and potentials of mature students whose research contributes much to their societies. Future research can explore different participant cohorts in isolation, for example, focusing on international students to investigate their acculturation, settlement, and identity changes; exploring part-timers' strategies to balance between full-time work and research; examining doctorate graduates' perception of and experiences with their supervisors and other academic relationships. Many questions remained unanswered, for example, the Hong Kong participants never complained about financial loss or lack of money to support their HDR. Was it just a face issue in Chinese culture that they did not want an outside researcher (Fung is also a Chinese) to know, or financial issue really was not their concern given the provisions of scholarships? To extend this joint project further, as attrition remains constantly high, it will be good to recruit a new cohort of students currently studying. It would be interesting to focus on those at risk of dropping out or who have already quit, although recruiting such participants can be difficult particularly when they are in the process of ceasing their studies.

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## BIOGRAPHIES

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**Dr Annabella Sok Kuan Fung** is an experienced educator, internationally published composer, and psychologist. She has been an academic staff member in the Faculty of Education at Monash University since 2014. Fung is a recipient of numerous scholarships, grants, and community and research awards. As a transdisciplinary researcher, she focuses on the psychological, sociocultural, and philosophical aspects of learning, teaching, and being. Fung is working on longitudinal cross border projects, drawing on her former experience as a counsellor, and secondary school teacher of music, languages, and social sciences.



**Dr. Jane Southcott** is an Associate Professor, Faculty of Education, Monash University, Australia. Jane is a hermeneutic phenomenologist researching community engagement with the arts and education across the lifespan. Her research explores cultural identity with a focus on positive ageing. Jane supervises many postgraduate research students. She is President of the Australian and New Zealand Association for Research in Music Education and on the editorial boards of international refereed journals.



**Dr Felix Lai Chung Siu** is a senior lecturer in the Division of Information and Technology Studies, Faculty of Education at The University of Hong Kong. Felix specializes in multimedia, mobile and ubiquitous technology, designing shared virtual environment, research methods, information behavior, and information policy. As a respected colleague, Felix has been awarded with the Faculty Outstanding Teacher Award in 2010 and 2014. He is keen in establishing and strengthening existing cross border higher education collaborations.