

# Resource Integration Strategies for Elder Education Organizations: A Case Study in Taichung, Taiwan

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Dealing with the aging problem has been a global issue. One of the keys to help successful aging is to implement elder education. The government in Taiwan has invested a lot of budget in elder education, but in practice, there are two independent and diversified elder education systems in Taiwan, which had led to a lack of resource integration, in turn, causing duplicity in investment and wastage. The aim of this study is to explore some suitable strategies for resource integration by investigating the organization and implementation of elder education in Taichung. From the results of this study, a total of 23 strategies for the resource integration of elder educational organizations were identified, including mutual support of manpower and material resources, certification of teaching staff, conducting joint classes and setting up a shared Website, and so on. These strategies could be grouped based on the five categories of resources: human, financial, material, knowledge and technical, and marketing.

*Keywords:* resource, resource integration, cooperation, elder education

## Introduction

The issue of aging population is a global one, with its effects extending from the end of the 20th century to the 21st century, and Taiwan is no exception. This phenomenon is mainly caused by some reasons, including declining birth rates, advancing in medical technologies, and increasing life span in human populations. As the proportion of population aged 65 exceeds 7%, Taiwan has entered into “aging society” (Wei, 2008). Accordingly, our government has responded to the elder’s needs to hold many learning activities. It mainly comes from two different government system—social welfare department and education department (Yang, 2008).

In Taichung, about 10 different types of organizations undertake the provision of elder education, including the city and county governments, township offices, public and private schools, colleges and universities, farmers’ associations, community associations, senior citizens’ clubs, foundations and churches. The nature of these various organizations is diverse and each has its own distinguishing features. As of December 2012, there are 24 Evergreen Academies and 16 SCLCs (Senior Citizens’ Learning Centers) in Taichung.

Despite of limited resources, government funding still had to be divided into social welfare and education systems, leading to dispersed resource. Furthermore, there was a lack of communication and coordination, and an absence of an integration mechanism between the two systems. Consequently, the same types of educational

services were often provided within the same area, causing wastage of resources. The aims of the various elder educational institutions, whether set up under the social welfare or education systems, were essentially the same: Provision of educational and learning services to the elderly. There was actually a very high degree of similarity in terms of the course contents provided by the various institutions, making resource integration necessary. Considering the limited resources available for elder education in the first place, the needless operational overlaps inhibited these resources from generating their full benefits, and also led to much wastage.

As a result, the purpose of this study is to explore resource integration strategies by interviewing operators and practitioners in elder educational organizations. Also, the findings will provide better insight and understanding of the issues faced by elder educational organizations over resource integration, and could serve as a reference to various government departments during future attempts at resource integration of these organizations.

## Literature Review

### Definition of Resource

Wu (1994) assimilated the views of several scholars and grouped resources into two main categories: assets and abilities (see Figure 1). Assets refer to the stock of elements, both material and non-material that an organization owns or is able to control. Abilities are the means by which resources can be built up and allocated, and can be further divided into those belonging to the organization or the individual.

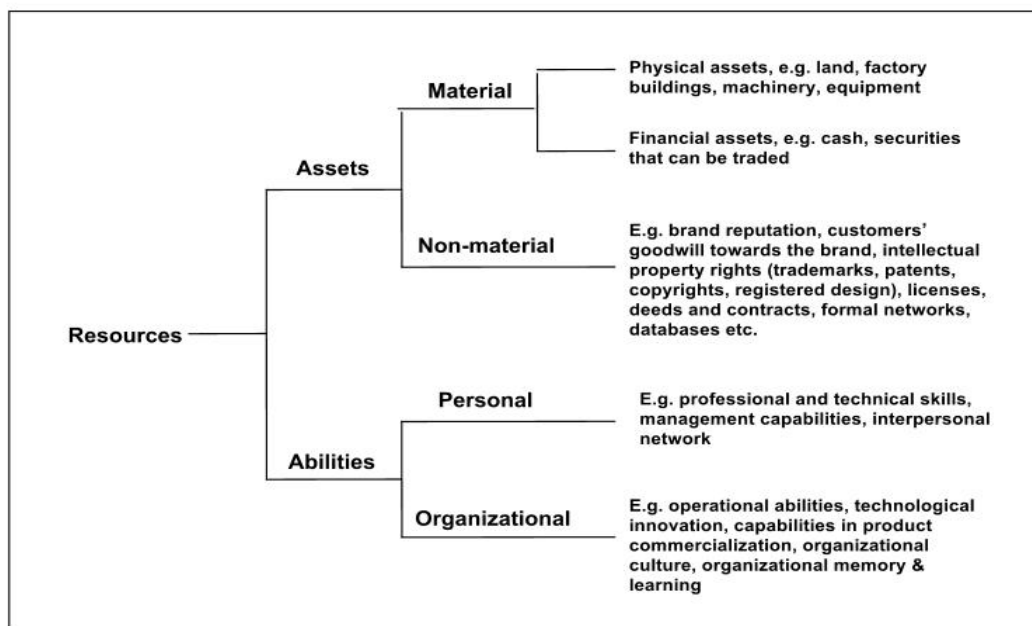


Figure 1. Classification of resources. Source: Wu (2000, p. 128).

From the reviewing literature, it was found that resources can be categorized into seven types: human, material, information, marketing, public relations, performance appraisal, and digital technology (hardware and software). Some researchers in the education field further classified resources as human, material, finance and information, etc., with information resources generally referring to all intangible assets (Zhou, 2009). On the other hand, Wei (2007) highlighted the 5Ps related to marketing resources: product, price, promotion, place,

and people. These 5Ps correspond with the five main topics in elder education: courses, fees, publicity, venue, and professional staff. Other intangible assets, such as organizational culture, trademark, reputation, etc., can all be grouped under marketing resources.

Therefore, this study tends to see marketing resources as a separate category and integrate with other researcher's view to form the following classification of resources (see Table 1). This classification would serve as the foundation for further discussion on organizational resource integration strategies.

Table 1

*Classification of Resources*

Category		Level		Item for integration	
1	Human	1.1	Professional manpower	1.1.1	Organization leaders
				1.1.2	Professional administrators
				1.1.3	Teaching staff
				1.1.4	Volunteers
		1.2	Professional competence	1.2.1	Organization leaders
				1.2.2	Professional administrators
				1.2.3	Teaching staff
				1.2.4	Volunteers
2	Financial	2.1	Fund raised internally	2.1.1	Income from course fees
				2.1.2	Income from organized activities
				2.1.3	Other incomes (donations, fund, raising, etc.)
		2.2	External funds	2.2.1	Government grants
				2.2.2	Supplementary grants from other government units
3	Material	3.1	Facility	3.1.1	Teaching facilities
				3.1.2	Office equipment
		3.2	Space	3.2.1	Course venues
				3.2.2	Activity venues
4	Knowledge and technical	4.1	Intellectual property	4.1.1	Planning of programs
				4.1.2	Professional knowledge and guidance
				4.1.3	System of learning and information channels
		4.2	Database	4.2.1	Database of learners
				4.2.2	Database of courses
5	Marketing	5.1	Product	5.1.1	Courses
				5.1.2	Activities
		5.2	Price	5.2.1	Course fees
				5.2.2	Method of payment
		5.3	Place	5.3.1	Venue of classes
		5.4	Promotion	5.4.1	Enrolment
				5.4.2	Advertisements
				5.4.3	Publicity
				5.4.4	Gifts
		5.5	People	5.5.1	Teachers
				5.5.2	Other staff

*Note.* Source: Compiled by the authors.

### Theories on Resource Integration

**RDT (Resource Dependency Theory) perspective.** The RDT has three basic assumptions: (1) The success of an organization depends on the maximization of its market network; (2) The source of an organization's power is based on its acquisition of resources to minimize uncertainties within the organization; and (3) When an organization reduces its dependency on external resources and controls more resources, it will

become less constrained by the market. Following these assumptions, an organization will strive to ensure that its supply of resources will not become scarce, and to reduce its level of dependency on its environment for resources. Its decision-makers will also propose a proper operational strategy, which is used to manage the level of resource dependency on other organizations and to enhance the power and status of their own organization (Qiu, 2000).

**Social exchange perspective.** This theory analyzes the structure of, and interactions between reward and cost, the result of which can be used to explain basic social behavior. It postulates that a person's current behavior is affected by a similar behavior in the past and the available means to obtain a reward (Lin, 2008). Blau (1986) believed that social interactions exist within a social group and that people are attracted to a certain organization because of the potential personal rewards that can be reaped from that organization. Hence, once a connection is made, each party will provide their respective intrinsic rewards (e.g., emotions, respect, love, etc.) and extrinsic rewards (e.g., money, physical strength, labor, etc.), to be used to maintain and further strengthen the connection.



Figure 2. Levels of cooperation. Source: Wu (2000, p. 242).

**Transaction cost perspective.** Cost refers to the highest price that is inevitable, while price is the value that one is prepared to pay in exchange for something (Zhang, 2002). This theory was proposed by economics Nobel Prize winner Ronald H. Coase. To him, the theory investigates the issue of coordination between consumers and producers in the decision-making process (Wu, 2011). When discussing this theory, mention is often made of Williamson's discourse on the promotion of development. The main point is that an organization's decision to "manufacture" or "purchase" a needed resource is usually based on the consideration to reduce its transaction cost when interacting with other organizations (Shen, 2000).

**Cooperation and alliance perspective.** Buckley and Casson (1988) defined cooperation as "coordination

affected through mutual forbearance". Coordination refers to the mutual sharing and allocation of resources, which is conducive to each other's development, leading to a win-win outcome. Qiu (1998) pointed out that a strategic alliance is a partnership created when different organizations jointly invest in resources and merge a specific value chain of their business units, in order to achieve a specific goal and to establish competitive advantage. Wu (2000) categorized the types of cooperation into nine levels, with relationships ranging from distant to intimate (see Figure 2).

### **Methodology**

Interviews were chosen as a method to investigate and explore issues related to resource integration for 38 informants including practitioners of elder education in Taichung and officials from related government agencies. Informants were invited to share their personal experiences and opinions through guided and standardized open-ended interviews, which led to the identification of new dimensions that helped to develop and concretize the issues (Patton, 1990).

Interview questions were drawn from literature related to the study, with an aim of obtaining a more in-depth understanding of the resources available for elder education and observing and analyzing informants' ideas and thoughts on the issue. The data gathered from the interviews were transcribed verbatim onto a computer. Interview data supplemented the information from documents published by the various elder educational organizations in Taichung, including enrollment brochures, posters, meetings, annual reports, and press releases.

### **Results**

Based on the literature review conducted, resources were categorized into five main types: human, financial, material, knowledge and technical, and marketing. The data obtained from the interviews and the integration strategies suggested by the informants were sorted based on these categories, and the results are as follows.

#### **Human Resources**

Human resources can be sub-divided into two levels: professional manpower (quantity) and professional competence (capabilities). The items for integration include organization leaders, professional administrators, teaching staff, and volunteers. The organization leaders are the soul behind the operation of the entire organization. The leaders' knowledge, background, attitude, and social network have a strong impact on the general direction of the organization's work.

Based on the data from the interviews, the integration of organization leadership could be achieved either through appointment by the government or self-appointment. For example, Informant A2, who preferred government appointment, stated: "There can be regular rotation of elder education organization leaders, with the posting assignments made by the government department in charge" (Informant A2-9-3). Informant A12, who preferred self-appointment, stated: "After the merger, staff of the new organization can vote internally before the new organization leader is appointed" (Informant A12-12-4).

In terms of integrating professional competence, one suggestion was for the government authorities to appoint specialists. According to Informant A8, "The government authorities can appoint specialists to guide the organization leader, making it mandatory for the organization's operations to be carried out based on the government's directives" (Informant A8-11-1). The suggested strategies relating to the integration of the two

levels of human resources are listed in Table 2.

Table 2

*Resource Integration Strategy—Human Resources (Category 1)*

Level		Item for integration		Suggested integration strategies	
1.1	Professional manpower	1.1.1	Organization leaders	a	Appointed by the government
				b	Self-appointed
		1.1.2	Professional administrators	a	Joint appointment
				b	Mutual support
		1.1.3	Teaching staff	a	Mutual support
				b	Joint appointment
		1.1.4	Volunteers	a	Mutual support
				b	Joint formation of a volunteer corps
1.2	Professional competence	1.2.1	Organization leaders	a	Specialists to provide guidance
				b	Seminars
		1.2.2	Professional administrators	a	Joint formation of book clubs
				b	Joint training of teaching staff
		1.2.3	Teaching staff	a	Certification of teaching staff
				b	Joint training
		1.2.4	Volunteers	a	Joint training
				b	Expansion of services

*Note.* Source: Compiled by the authors.

### Financial Resources

Financial resources can be sub-divided into funds raised internally and externally. The former includes income from course fees and organized activities, donations and fund raising, etc.. The latter includes government grants and supplementary grants from other government units.

During the interviews, it was suggested that the income from course fees be integrated through the joint organization of courses. As stated by Informant C1: “Work together to organize courses and set up methods and procedures to manage the fees and expenses for the joint courses” (Informant C1-10-2). Informant A2 added:

Standardize the issuance of funding, have a designated organization to manage the funds (like a school), then let the original undertaking agency continue its own development. Its success or failure can be left to market mechanisms. (Informant A2-10-2)

For financial resources, the suggested strategies related to the different levels and items for integration are listed in Table 3.

### Material Resources

Material resources can be grouped according to facilities and spaces. The former includes teaching facilities and office equipment, while the latter includes venues for courses and activities.

According to the informants, resource integration for teaching facilities could be carried out through three methods: (1) mutual loaning of equipment; (2) opening up of facilities for use by others; and (3) common usage of facilities. For example, Informant C9 suggested: “Formulate a policy and method for the mutual loaning of teaching equipment” (Informant C9-12-2). While Informant D1 stated: “After the merger, everyone can have common use of all the teaching equipment” (Informant D1-12-5).

Table 3  
*Resource Integration Strategy—Financial Resources (Category 2)*

Level		Item for integration		Suggested integration strategies	
2.1	Fund raised internally	2.1.1	Income from course fees	a	Joint organization of courses
		2.1.2	Income from organized activities	a	Joint organization of activities
		2.1.3	Other incomes (donations, fund raising, etc.)	a	Combined fund raising
2.2	External grant	2.2.1	Government grants	a	All funds to be managed by an appointed school
				b	All funds to be managed by an administrative department in the MOE (Ministry of Education)
				c	Funds to be used to subsidize research and development and to standardize curriculum design
				d	Funds to be exclusively managed by a commissioned trust
		2.2.2	Supplementary grants from other government units	a	Seek sponsorship for activities

Note. Source: Compiled by the authors.

The integration of office equipment could be achieved through mutual loans or mergers, as proposed by Informant D5: “Formulate a policy and method for the mutual loaning of office equipment... there can also be a merger to form a single office” (Informant D5-10-2). The suggested strategies related to the two levels of this category of resources are listed in Table 4.

Table 4  
*Resource Integration Strategy—Material Resources (Category 3)*

Level		Item for integration		Suggested integration strategies	
3.1	Facility	3.1.1	Teaching facilities	a	Mutual loaning of equipment
				b	Opening up of facilities for use by others
				c	Common usage of facilities
		3.1.2	Office equipment	a	Mutual loaning of equipment
				b	Merger
3.2	Space	3.2.1	Course venues	a	Mutual loaning of venues
				b	Assigned by the competent authority
				c	Open up venues for use by others
		3.2.2	Activity venues	a	Mutual loaning of venues
				b	Assigned by the competent authority
				c	Open up venues for use by others

Note. Source: Compiled by the authors.

**Knowledge and Technical Resources**

Knowledge and technical resources can be grouped into two levels: intellectual property and database. The former focuses on the planning of programs, professional knowledge and guidance, and system of learning and information channels. The latter focuses on the databases of learners and courses.

To summarize the information collected during the interview, the informants suggested the joint planning of programs. For example, Informant G5 stated: “Share with one another the survey findings on the educational needs of senior citizens, and jointly plan the contents of elder education” (Informant G5-2-2).

Informant D1 further suggested: “Jointly invite organizations or foundations with expert knowledge in elder education to research and develop programs, then guide frontline and operations staff to conduct these programs” (Informant D1-12-8). Informant C3 added: “Set up a platform managed by the school for the sharing and exchange of practical experiences. Learning points can be circulated via directives” (Informant C3-11-2).

The suggested strategies relating to knowledge and technical resources are listed in Table 5.

Table 5

*Resource Integration Strategy—Knowledge and Technical Resources (Category 4)*

Level	Item for integration		Suggested integration strategies	
4.1 Intellectual property	4.1.1	Planning of programs	a	Joint planning of programs
			b	Joint research and development
			c	Establish an exchange platform
	4.1.2	Professional knowledge and guidance	a	Joint appointment of counselors
	4.1.3	System of learning and information channels	a	Joint development of system
b			Shared system	
4.2 Database	4.2.1	Database of learners	a	Joint development of database
			b	Sharing of information
			c	Shared database
	4.2.2	Database of courses	a	Joint development of database
			b	Sharing of information
			c	Shared database

Note. Source: Compiled by the author.

### Marketing Resources

This category of resources contains five levels: product (courses and activities), price (course fees and method of payment), place (venue of classes), promotion (enrolment, advertisements, publicity, and gifts), and people (teachers and other staff).

In summary, for courses and activities, suggestions for integration included the exchange of course details, as proposed by Informant D1: “Exchange information on courses that have been developed, plan courses systematically to avoid duplication” (Informant D1-12-10). Informant C10 further suggested: “Jointly conduct some of the courses” (Informant C10-11-2).

On the topic of a common platform, Informant F2 suggested: “Establish a common online platform to provide information on course details and a system for online registration” (Informant F2-8-1). Informant C5 commented on the fees and payment method: “Jointly organize a few special courses and activities, preferably charging the same fee, or allow senior citizens to pay the course fees at either side” (Informant C5-11-4). Informant F2 further added: “Set up an online payment system, and have everyone collect fees via this network system” (Informant F2-8-1).

The suggested strategies related to the different levels and items for integration under this category of resources are listed in Table 6.

To summarize the results above, combine those similar suggestions and we got 23 resources integration strategies as shown in Table 7.



Table 6

*Resource Integration Strategy—Marketing Resources (Category 5)*

Level		Item for integration		Suggested integration strategies	
5.1	Product	5.1.1	Courses	a	Exchange of course details
		5.1.2	Activities	b	Conduct joint classes
				c	Set up a shared Website
5.2	Price	5.2.1	Course fees	a	Joint charges
		5.2.2	Method of payment	b	Standardized fees
				c	Establish an online payment system
5.3	Place	5.3.1	Venue of classes	a	Sharing of community spaces
				b	Joint enrolment
				c	Online registration
5.4	Promotion	5.4.1 5.4.2 5.4.3 5.4.4	Enrolment Advertisements Publicity Gifts	a	Joint printing of enrolment brochures
				b	Standardized publicity
				c	Joint enrolment activities
				d	Online network
				e	Joint offering of gifts
				f	Standardized production of gifts
5.5	People	5.5.1	Teachers	a	Create a platform for sharing of personnel-related information
		5.5.2	Other staff	b	Publication of specialized journals

Note. Source: Compiled by the authors.

Table 7

*Resources Integration Strategies in Summary*

Category		Level		Strategies for integration	
1	Human	1.1	Professional manpower	1.1.1	Organization leaders appointed by the government
				1.1.2	Professionals joint appointment
				1.1.3	Mutual support
		1.2	Professional competence	1.2.1	Professionals joint training
				1.2.2	Certification of teaching staff
2	Financial	2.1	Fund raised internally	2.1.1	Joint classes
				2.1.2	Combined fund raising
		2.2	External funds	2.2.1	All funds to be managed by an appointed organization
				2.2.2	Funds to be exclusively managed by a commissioned trust
3	Material	3.1	Facility	3.1.1	Mutual loaning of equipment
		3.2	Space	3.2.1	Mutual loaning of venues
4	Knowledge and Technical	4.1	Intellectual property	4.1.1	Joint planning of programs
				4.1.2	Establish an exchange platform
				4.1.3	Joint appointment of counselors
		4.2	Database	4.2.1	Joint development of database
5	Marketing	5.1	Product	5.1.1	Conduct joint classes
				5.1.2	Set up a shared Website
		5.2	Price	5.2.1	Standardized fees
				5.2.2	Establish an online payment system
		5.3	Place	5.3.1	Set up a shared online registration
		5.4	Promotion	5.4.1	Joint printing of enrolment brochures
				5.4.2	Joint offering of gifts
		5.5	People	5.5.1	Publication of specialized journals

Note. Source: Compiled by the authors.

Many informants from the elder educational organizations clearly expressed their unwillingness to have any form of integration with other organizations, or expressed that it was not necessary to do so. From the perspective of transaction cost theory, an elder educational organization would not have the intention to integrate unless the inevitable price (i.e., the cost of forming an alliance or cooperation with other organizations) was lower than its income. Only under this scenario would it be possible for resource integration to succeed. This study found that many elder educational organizations simply refused to integrate with others, because it would be difficult to forecast potential income after integration. Sometimes, the issue was not even about income: If an organization was confident of achieving its goal to obtain the largest amount of grant, it would not matter even if integration were to result in a higher number of learners because that would not translate to additional income. Hence, there was no motivation to seek integration with others.

However, research finding shows that existing elder educational organizations paid relatively less attention to the category of marketing resources. Based on observations, this could possibly be due to the existing system and supplementary regulations on elder education. Currently, the operational target of elder educational organizations receiving government grants is not to strive to enroll the most number of senior citizens. Rather, they aim to enroll just the right number of learners based on the qualification standard and budget set for a basic government grant in order to obtain the largest grant amount.

On the other hand, organizations that did not rely on government grants to survive, such as the Xiaoming and Songbai Evergreen Colleges, often strived to enroll the maximum number of learners possible to achieve survivability and profitability. Consequently, the number of actual classes held and learners enrolled by these organizations far exceeded that of most organizations dependent on government funding.

### Conclusions

According to above strategies for integration, four conclusions were derived as follows:

(1) Using integration strategies to integrate the existing resources, including mutual support of manpower and material resources, certification of teaching staff, conduct joint classes and set up a shared website and so on. These could be helpful to implement elder education in the future;

(2) Transaction cost was an important consideration affecting resource integration. Many informants clearly expressed their unwillingness to have any form of integration with other organizations, or expressed that it was not necessary to do so if the price is higher than income;

(3) Professional leadership in elder education should be highly-valued. Many interview subjects did not believe that the government had the capabilities to carry out resource integration properly. Many of them expressed that if a unit were to be assigned to facilitate and carry out resource integration, the most appropriate organization would be a professional elder educational organization;

(4) A competitive system would create the pressure for elder educational organizations to integrate. To ensure survivability and profitability, the number of actual classes held and learners enrolled by organizations that did not rely on government funding far exceeded that of most organizations dependent on government funding. Accordingly, a system must be created that allows for free competition and increase enrolment and participation rates.

Lastly, we suggest that the findings of this study be taken into consideration and the highlighted issues be

addressed when the relevant government departments and elder educational organizations carry out resource integration. Future researchers can then carry out empirical research on the outcomes in order to ascertain the best strategy to use for resource integration.

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