

**EDUCATION  
COMMISSION  
REPORT NO. 5**

---

**(RETYPE DOCUMENT)**

**JUNE 1992. HONG KONG**

EDUCATION DEPARTMENT HEADQUARTERS LIBRARY

EDUCATION  
COMMISSION  
REPORT NO. 5  
THE TEACHING  
PROFESSION

---

JUNE 1992 • HONG KONG

## MEMBERSHIP OF THE EDUCATION COMMISSION

The membership of the Commission since 1 January 1991 has been as follows -

Chairman	The Hon Mrs Rita FAN HSU Lai-tai, OBE, JP
Vice Chairman	Secretary for Education and Manpower (Mr K Y YEUNG, JP: 1 January - 31 April 91 Mr John CHAN, LVO, OBE, JP: from 1 May 91)
Ex-officio Members	Chairman, Board of Education (The Hon Timothy HA Wing-ho, MBE, JP)  Chairman, University and Polytechnic Grants Committee (Mr Andrew LI Kwok-nang, QC, JP)  Chairman, Vocational Training Council (The Hon Stephen CHEONG Kam-chuen, CBE, JP)  Director of Education (Mr Y T LI, CBE, JP)
Members	Mr Remuel AU YEUNG Ying-cheong (from 1 September 91)  Dr K E Barker, MBE, JP (from 1 January - 31 December 91)  Sister Dorothy CHENG Man-ling (from 1 January 92)  Mrs Angela CHEUNG WONG Wan-yiu, JP  Mr David CHEUNG Chi-kong (1 January - 31 July 91)  The Hon Mrs Selina CHOW LIANG Shuk-yee, OBE, JP  Mr HO Sai-chu, OBE, JP (1 January - 31 December 91)  Dr Paul J T Morris  The Hon SZETO Wah (1 January - 31 December 91)  Mr James TIEN Pei-chun, JP (from 1 January 92)  Mr TSIM Tak-lung, JP
Secretary	Principal Assistant Secretary for Education and Manpower (3) (Ms Anne Shepherd: 1 January - 31 December 91 Mr C D Godwin: from 1 January 92)

## **TERMS OF REFERENCE OF THE EDUCATION COMMISSION**

The terms of reference of the Commission are as follows -

- (a) to define overall educational objectives, formulate education policy, and recommend priorities for implementation having regard to resources available;
- (b) to co-ordinate and monitor the planning and development of education at all levels; and
- (c) to initiate educational research.

2. In carrying out these tasks, the Commission is to co-ordinate but not seek to direct the work of the Board of Education, the University and Polytechnic Grants Committee and the Vocational Training Council.

# CONTENTS

	Page
List of Tables and Annexes	
List of Abbreviations	
<b>Introduction</b>	
<b>1 The Focus of this Study</b>	
Our Approach 1.3	2
Strategic Issues 1.8	4
<i>Teacher education and development; Human resources in the primary schools</i>	
Other Important Issues 1.19	6
<i>School environment; Workload; Career paths; Teacher professionalism</i>	
Resources needed 1.27	7
<b>2 The Working Environment in Schools</b>	
Induction of New Teachers 2.2	10
<i>Induction provision at present; A systematic induction programme</i>	
Home-School Cooperation 2.9	14
<i>The present situation; Problems identified; Proposed solution</i>	
Management in Schools 2.21	17
<i>Implementing the School Management Initiative</i>	
The Physical Environment 2.29	19
<i>Schedules of accommodation; Upgrading existing schools; Non-teaching spaces</i>	
Administrative support 2.47	23
Computerisation 2.50	24
Non-salary grants 2.55	25
<i>School and class grant; Furniture and equipment grant; major repair grant</i>	
Teacher Workloads 2.61	27
The Case for Improved Staffing Levels 2.65	29
<i>Secondary school staffing; Primary school staffing</i>	
Senior teacher ratios 2.73	31
Class sizes 2.75	31
<b>3 Career Opportunities for Teachers</b>	
Primary and Secondary Teachers 3.2	33
<i>The graduate stream; The non-graduate stream</i>	
Fringe Benefits for Aided School Teachers 3.11	36
Kindergarten Teachers 3.13	37
<i>Statutory staffing requirements; Fee remission scheme</i>	
Special Education Teachers 3.27	41

<b>4</b>	<b>Graduate Posts in Primary Schools</b>	
	Option 1 In-service Development at Nongraduate Level 4.2	43
	Option 2 Graduate Posts in Primary Schools 4.5	44
	<i>Number of graduate posts; Target date</i>	
	What Sort of Degree? 4.16	46
	<i>In-service degrees in primary education; Pre-service degrees in primary education</i>	
	Providing Degree Places 4.22	50
	The Primary Graduate Stream 4.32	53
	Filling Graduate Posts 4.35	54
	<i>All-graduate primary heads</i>	
<b>5</b>	<b>Improving the Teacher Education Programme</b>	
	The Infrastructure of Teacher Education 5.2	57
	<i>"Teacher Training University"; Links to existing UPGC institutions; Institute of Education</i>	
	Goals of the Teacher Education Programme 5.14	60
	<i>Initial training; Professional development</i>	
	Measures to Improve Teacher Education 5.20	61
	<i>Policy on professional training and development; Formal professional development qualification; Advice on teacher education</i>	
<b>6</b>	<b>Upgrading the Colleges of Education and the Institute of Language in Education</b>	
	The Institute of Education 6.2	66
	The Upgrading Process: General Approach 6.4	66
	The Upgrading Process: Resource Aspects 6.8	67
	<i>Staff norms; Staff structure; Space norms; Facilities; Resource implications</i>	
	The Upgrading Process: Academic Aspects 6.28	
	<i>All Secondary 7 entry; Specialising by level; Language issues</i>	
	Degree Work in the Institute 6.38	
	<i>Pre-service degree in primary education; In-service degree in primary education; Language education courses; Specialist areas</i>	
	Progress Towards Degree-Awarding Status 6.44	76
	Key Stages in the Upgrading 6.47	77
<b>7</b>	<b>Advice on Teacher Education and Qualifications</b>	
	Advice on Teacher Education 7.3	78
	<i>New advisory committee</i>	
	Assessing Demand and Supply 7.10	81
	Assessing Teacher Qualifications 7.12	81
	<i>Problems with the present assessment system</i>	
	Advice on Non-Standard Teacher Qualifications 7.21	83
	<i>Graduate-level qualifications</i>	
	New Assessment Mechanism for Nongraduate Qualifications 7.24	84
	<i>Assessment procedure</i>	
	Advisory Committee on Teacher Education & Qualifications 7.34	86

<b>8</b>	<b>Teacher Professionalism</b>	
	Background 8.3	87
	<i>Hong Kong Teachers' Centre; Draft Code of Practice; Submission proposing a General Teaching Council</i>	
	Our Response to the Submission 8.10	89
	Council on Professional Conduct in Education 8.19	91
	<i>Advice on professional conduct; Professional code of conduct; Terms of reference and composition</i>	
<b>9</b>	<b>The Impact of this Report</b>	
	Education investment for the 21st century: the difference made by ECR5 9.2	95
	Resource implications 9.4	96
<b>10</b>	<b>Progress in Implementing Previous Education Commission Reports</b>	
	Report No. 1 (October 1984) 10.4	103
	Report No. 2 (August 1986) 10.20	105
	Report No. 3 (June 1988) 10.30	107
	Report No. 4 (November 1990) 10.36	108

## List of Tables

Table	Title	Page
1(i)	Profile and Number of School Teachers	3
1(ii)	Investment in Education under Three Scenarios	8
2(i)	Wastage Rates of Teachers by Years of Service and by Reason	11
2(ii)	Comparison of the Old and New Standard Design Primary and Secondary Schools	20
2(iii)	Noise Abatement Programme in Schools	22
2(iv)	Clerical Staff Provision in Schools	24
2(v)	Pupil/Teacher Ratios for Primary and Secondary Schools	28
3(i)	Ranking Structure of Education Grades	35
3(ii)	Enrolment Situation of Kindergarten Training Courses Offered by the Education Department	38
3(iii)	Distribution of Kindergarten Teachers by Type of Teacher and Type of Kindergarten	40
4(i)	Teacher Qualifications	47
4(ii)	Number of Teachers Required under Three Scenarios	51
5(i)	Comparison of the Colleges/ILE and Tertiary Institutions	58
5(ii)	Present and Future Professional Development Opportunities for School Teachers	65
6	Secondary 5 Enrolment (1991-1994)	73
7	Teacher Education Courses and Providers	79
9(i)	Summary of Additional Annual Cost of this Report	97
9(ii)	Average Cost Per Pupil under Three Scenarios	98
9(iii)	ECR 5 Financial Implications at March 1992 Prices (\$m)	99

## **List of Annexes**

Annex	Title	Page
A	Submissions, Panel Discussions and Visits Relating to the Preparation of ECR 5	111
B	Induction Provision in Local Secondary Schools	115
C	Proposed Terms of Reference and Membership of New Committees: - Committee on Home-School Cooperation - Provisional Governing Council of the Institute of Education - Advisory Committee on Teacher Education and Qualifications - Council on Professional Conduct in Education	117
D	Proposed Duties of All Senior Posts in Schools	120
E	The Colleges of Education/ILE	123
F	Extract from Education Ordinance, Cap 279	127
G	Qualifications for Appointment as a Teacher	129
H	Extracts from Education Commission Report No. 1	131
I	Main Recommendations in ECR 1-4, by Level and Aspect	132

## LISTS OF ABBREVIATE

A-level	Advanced Level
ACTEQ	Advisory Committee on Teacher Education Qualifications
AM	Assistant Master/Mistress
AS-level	Advanced Supplementary Level
ATC	Advanced Teacher's Certificate
B Ed	Bachelor of Education
BA	Bachelor of Arts
BPS	Brought Place Schools
CA	Clerical Assistant
CDI	Curriculum Development Institute
CM	Certificated Master/Mistress
CO	Clerical Officer
CUHK	Chinese University of Hong Kong
DSS	Direct Subsidy Scheme
ECR 1	Education Commission Report Number 1
ECR 2	Education Commission Report Number 2
ECR 3	Education Commission Report Number 3
ECR 4	Education Commission Report Number 4
ECR 5	Education Commission Report Number 5
F & E	Furniture and Equipment (Grant)
FTE	Full-time Equivalent
GM	Graduate Master/Mistress
GTC	General Teaching Council
HKCAA	Hong Kong Council for Academic Accreditation
HKCEE	Hong Kong Certificate of Education Examination
HKSSC	Hong Kong Special Schools Council
HKU	University of Hong Kong
ICTT	In-service Course of Teacher Training
ILE	Institute of Language in Education
JSEA	Junior Secondary Education Assessment
JUPAS	Joint Universities and Polytechnics Admission Scheme
KG	Kindergarten
MPS	Master Pay Scale
OLI	Open Learning Institute

P 1	Primary 1
PAM	Principal Assistant Master/Mistress
PGCE	Post Graduate Certificate in Education
PGM	Principal Graduate Master/Mistress
PRC	People's Republic of China
PSRC	Private Schools Review Committee
PTA	Parent-Teacher Association
QAKT	Qualified Assistant Kindergarten Teacher
QKT	Qualified Kindergarten Teacher
S 1	Secondary 1
S&C	School and Class (Grant)
SAM	Senior Assistant Master/Mistress
SEM	Secretary for Education and Manpower
SGM	Senior Graduate Master/Mistress
SMC	School Management Committee
SMI	School Management Initiative
TRAs	Target Related Assessments
TTC	Technical Teachers' College
UPGC	University and Polytechnic Grants Committee
VTC	Vocational Training Council

## Introduction

Since the Education Commission was established in 1984, we have identified a wide range of existing and emergent needs in the education system at a time of rapid change. We have formulated detailed policy proposals for meeting those needs, and have issued four reports for public consultation.

In this way, community support has been secured for many important initiatives which have subsequently become Government policy. Among our achievements are the setting of a unified point of entry to tertiary education, the creation of the Open Learning Institute (OLI), the introduction of the Direct Subsidy Scheme (DSS), the broadening of the sixth form curriculum, an increase in the proportion of trained kindergarten (KG) teachers, and the expansion of full time education and training opportunities beyond Secondary 3.

Proposals from our last report which are now approved policy include the creation of the Curriculum Development Institute (CDI), the development of learning targets and target-related assessments (TRAs), the adoption of the whole school approach to guidance and counselling, and improvements in language in education. The Government is proceeding to implement these and other measures, which will make a major impact on the quality of education over the coming years. Chapter 10 of this report provides a fuller account of progress in implementing our previous recommendations.

This, our fifth report, is the outcome of an 18-month study into the teaching profession. As *Annex A* shows, we received written submissions from many groups and individuals, and benefited from several panel discussions with teacher educators, schools councils, teacher unions, and trainee teachers. We visited teacher education institutions in Hong Kong, and a number of educational bodies in North America and the United Kingdom. We also received helpful information from the Organization for Economic Cooperation and Development about the teaching profession in other education systems.

## **CHAPTER 1 The Focus of this Study**

The education system has undergone enormous development and change since the policy of nine years universal schooling was introduced in the late 1970s. Our previous reports have reflected priorities at different stages during this period - to provide large numbers of school places in modern, purpose-built premises; adapt the curriculum to meet a wider range of needs than before; coordinate student progression paths from one level to the next; improve language in education; and tackle behavioural problems.

1.2 The time has now come to look in detail at teachers, the human resources who account for about nine-tenths of all recurrent spending on schools. As *Table 1(i)* shows, universal education requires large numbers of well educated and trained staff. Nowadays career choices are more varied than ever before: how then can the teaching profession continue to attract and retain people of good quality? To sustain economic and social progress, the community expects a high quality education for every child: how then should we prepare our teachers, and develop their professional skills to meet these expectations as fully as possible?

### **Our approach**

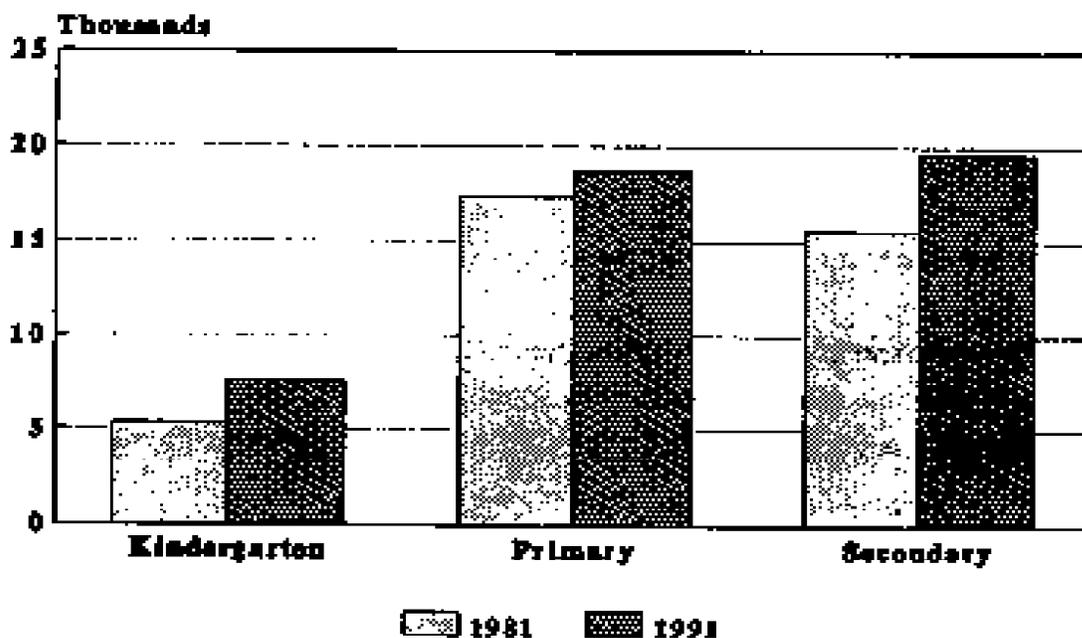
1.3 We see education spending as an investment, and we believe the community shares this view. If resources are invested wisely within a well-managed education system, the social and economic returns for both individuals and the community can be substantial, as Hong Kong's recent history has shown. But it is also possible to spend large amounts on education to very little obvious effect.

1.4 To maintain its position in the world's most rapidly developing region, Hong Kong must ensure, through sound investments in education, that the level of knowledge and skills among our people continues to rise. The investment strategy should, we believe, have two main aims: to bring about quality improvements which will meet the challenges of the 21st century; and to ensure coordinated development at all levels of education.

**Table 1(i)****Profile of School Teachers <sup>1</sup>, 1991**

	<i>Primary School</i>	<i>Secondary School</i>
Establishment	19,065	20,120
Strength	18,752	19,637
Vacancy rate (%)	1.6	2.4
Average age	39	34
Sex ratio (men:women)	25:75	50:50
% trained	85.8	73.3
% degree holders <sup>2</sup>	2.3	60.4
Wastage rate (%)	9.4	11.8
% new teachers <sup>3</sup>	5.5	8.9

- 1 Permanent teachers only
- 2 Holders of recognized degrees only
- 3 Excluding teachers rejoining

**No. of School Teachers, 1981 & 1991**

1.5 Since this strategy will be applied in an environment of rapid change, there will be some opportunities for redeploying resources within the education budget from areas of reducing needs to new priority areas. We hope that the Government will continue to identify such opportunities, to ensure that the education budget is spent cost-effectively. However, we firmly believe that additional investments will be essential if the education system is to meet Hong Kong's needs adequately over the coming decades.

1.6 Since quality in education depends greatly on educators themselves, in particular classroom teachers, we believe that the most effective investments are those which help to attract, develop and motivate teachers, and which enable them to give of their best in a supportive school environment. The recommendations in this report all arise from this belief.

1.7 We have identified two issues of strategic importance to the future of the teaching profession, and a number of other issues which bear on its ability to provide the quality of education Hong Kong will need in years to come. We outline these issues below. In later chapters we set out in more detail the often complex considerations on which our recommendations are based.

## **Strategic issues**

1.8 The two strategic issues are both related to the development of human resources in education. The first issue concerns the institutional framework for teacher education and professional development. The second concerns the need to provide our schools, in particular our primary schools, with the quality of human resources they will need to meet future challenges.

### ***Teacher education and development***

1.9 To prepare teachers for a career and help them to develop the professional skills which schools need, a comprehensive programme of teacher education and development should be in place. We have identified some weaknesses in this area.

1.10 Firstly, there is no overall policy to ensure that initial teacher education and in-service professional development are provided in a coordinated and systematic way, with clearly set out routes for teachers to upgrade their qualifications to the next higher level.

1.11 Secondly, the colleges of education, which prepare nongraduate teachers, occupy an anomalous position within the structure of post-secondary education. Their status as units of a Government department hampers their academic development; and they are finding it increasingly hard to compete for good quality school leavers.

1.12 Thirdly, there is at present no single source of authoritative advice on the needs of schools for professional skills, and the resources required for meeting those needs.

1.13 Our proposals for remedying these weaknesses are set out in Chapters 5 to 7. Chapter 5 outlines the needed improvements; Chapter 6 describes how the colleges of education and Institute of Language in Education (ILE) should be upgraded into an autonomous Institute of Education; and Chapter 7 sets out the functions of a new committee to advise on teacher education and qualifications.

### *Human resources in the primary schools*

1.14 All teacher posts in primary schools are in the nongraduate grade, for which the standard professional qualification is a teacher's certificate from a college of education. In the past, when few degree places were available, a teacher's certificate bestowed a considerable status on the holder. Many of the men and women who began their careers as nongraduate teachers ten, twenty or thirty years ago would, if they were today's school leavers, have secured a place on a degree course.

1.15 Expansion of opportunity at tertiary level is reducing the attraction of a nongraduate teaching career, particularly at primary level. New education policies are placing greater demands on primary schools: to implement TRAs; improve language teaching; lay a stronger foundation for the later stages of education; tackle problems of behaviour; and reform school management.

1.16 To meet these challenges successfully, primary schools need professional and managerial skills of a high order. Can the present nongraduates provide the higher level of skills we need? Will future nongraduates be able to provide these skills, when more and more young people will pursue graduate-level career opportunities?

1.17 We believe that primary schools can best meet the challenges they face if a substantial proportion of their teachers have a level of education normally associated with a first degree. We set out in Chapter 4 the case for upgrading about 35% of primary teaching posts to graduate status within 15 years. The provision of graduate posts will encourage serving teachers to acquire a degree relevant to the needs of the schools, and attract people of good quality into primary teaching.

1.18 Several of those who have shared their thoughts with us during the preparation of this report have argued for an all-graduate teaching profession. We agree that this is a desirable goal; but it cannot be reached quickly. We believe that our proposals define a realistic first stage towards the goal.

### **Other important issues**

1.19 Attracting good quality people into the profession, providing them with a satisfying career and enabling them to contribute their best: all this depends greatly on the school environment, workload, career paths, and professional commitment.

#### ***School environment***

1.20 The working environment in schools has a major effect on the job satisfaction and effectiveness of teachers. In Chapter 2 we identify several areas for improvement. A more systematic induction programme is needed, to help new teachers through the difficult first years and instil the confidence and positive attitudes so important to good teaching. Cooperation between schools and families must be improved, so that teachers and parents can work together in promoting the child's education. Systems of school management must enable teachers to play a part, as professionals, in planning, implementing and evaluating the work of the school.

1.21 The schedule of accommodation for school buildings has recently been improved, and there are works programmes to add rooms to existing buildings and to re-provision schools in substandard premises to new buildings. Even so, the physical environment in schools provides little space for activities other than teaching and administration. To provide better for the full range of activities that now take place, we recommend changes to the schedule of accommodation to

include a student activity centre, a staff common room and an interview room. We also recommend a programme to provide classrooms and special rooms in schools with below-standard provision.

### ***Workload***

1.22 We have considered the present workloads of teachers, and conclude that new demands now being placed on schools justify an increase in the number of posts, and the upgrading of some posts to senior rank. Our recommendations and their justifications are set out in Chapters 2 and 3.

### ***Career paths***

1.23 *Kindergarten teachers* To sustain the momentum of improvements in KG education, we recommend in Chapter 3 that minimum proportions of trained teachers be required by law, and that funding for fee remission should be increased.

1.24 *Primary teachers* In Chapter 2 we recommend an increase in senior teacher posts, to help primary schools provide leadership across the full range of their activities. The need for this is increased by the introduction of TRAs.

1.25 *Secondary teachers* In Chapter 3 we recommend the upgrading of two graduate posts to senior teacher rank.

### ***Teacher professionalism***

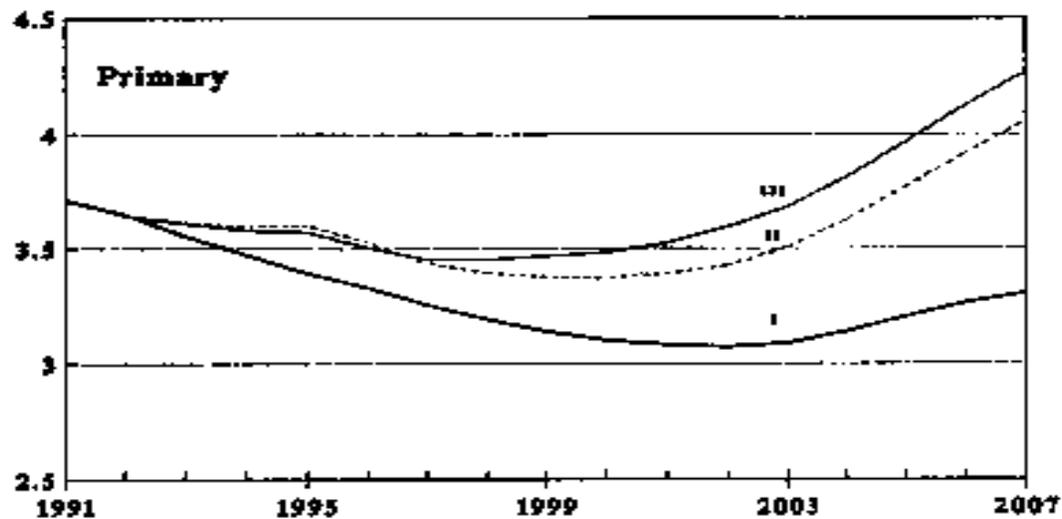
1.26 We have considered the role which might be played by a body set up specifically to promote teacher professionalism and ethical conduct. Our proposals are set out in Chapter 8.

### **Resources needed**

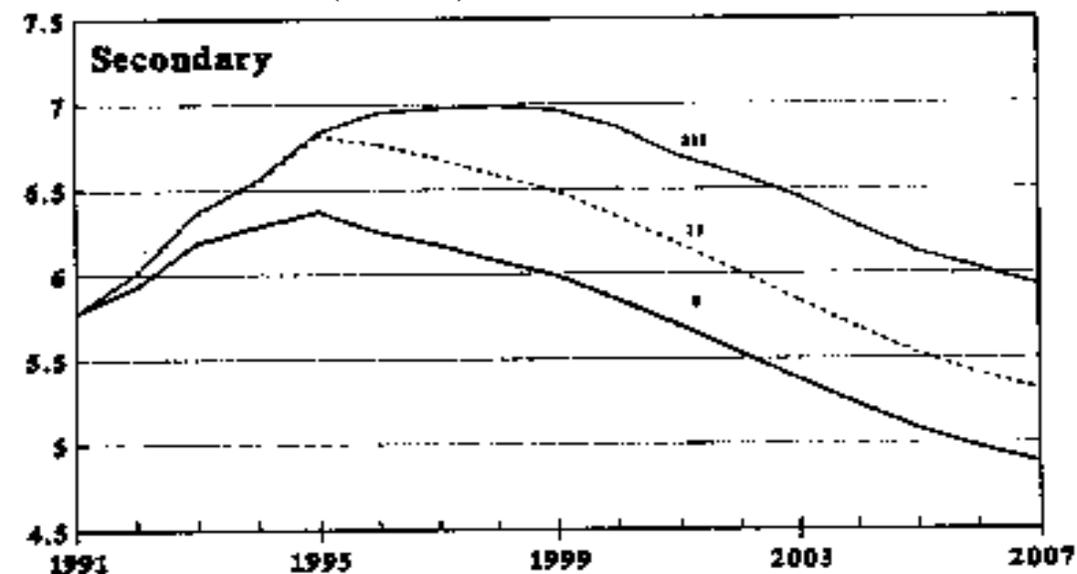
1.27 *Table 1(ii)* shows the investment needed each year under current policies; with this report implemented in full; and with implementation of all our recommendations *except* those relating to class size. Full implementation of all the recommendations in this report will require, by the year 2007, an additional investment in the recurrent education budget of almost \$2.2 billion a year at March 1992 prices. Capital costs arising from the report will amount to about \$1.9 billion.

**Table 1 (ii): Investment in Education  
under Three Scenarios**

**Total Annual Costs (HK\$bn)**



**Total Annual Costs (HK\$bn)**



Scenario I : Present policies (including those arising from ECR 4)

Scenario II : ECR 5 fully implemented except for recommendation on class size

Scenario III : ECR 5 fully implemented, including recommendation on class size

Throughout the 15-year period which we envisage for full implementation, the total additional investment needed will amount to some \$23.5 billion at March 1992 prices.

1.28 We believe that investments of this order, though large, are by no means extravagant if Hong Kong is to develop the knowledge and skills of its people to meet the challenges of the 21st century. We believe that the community will support this level of new investment in education, provided that the right systems are in place to ensure the greatest possible return, in the form of school leavers who can play a full part in Hong Kong's further social and economic progress.

---

## CHAPTER 2

### The Working Environment in Schools

The success of an education system depends heavily on its ability to attract enough young people of good quality into the profession, encourage them to make a lifelong career as educators, and enable them to develop their skills to the full. Two broad sets of issues affect the attraction and retention of teachers. One set, covered in later chapters, relates to the career: do terms of service, promotion prospects and professional development opportunities provide a worthwhile career? The other set, the subject of this chapter, concerns the working environment in the school: how well does it foster job satisfaction and support teachers in their key task of helping students to learn?

#### Induction of new teachers

2.2 In some professions, the responsibilities and range of duties of new entrants build up gradually to match their growing experience. But new teachers, from the start, must face the class alone and accept the same level of responsibility as more seasoned colleagues. This is daunting enough even for professionally trained teachers, let alone those who enter teaching without the benefit of prior training. The initial period may often be unsatisfactory for both teachers and their students.

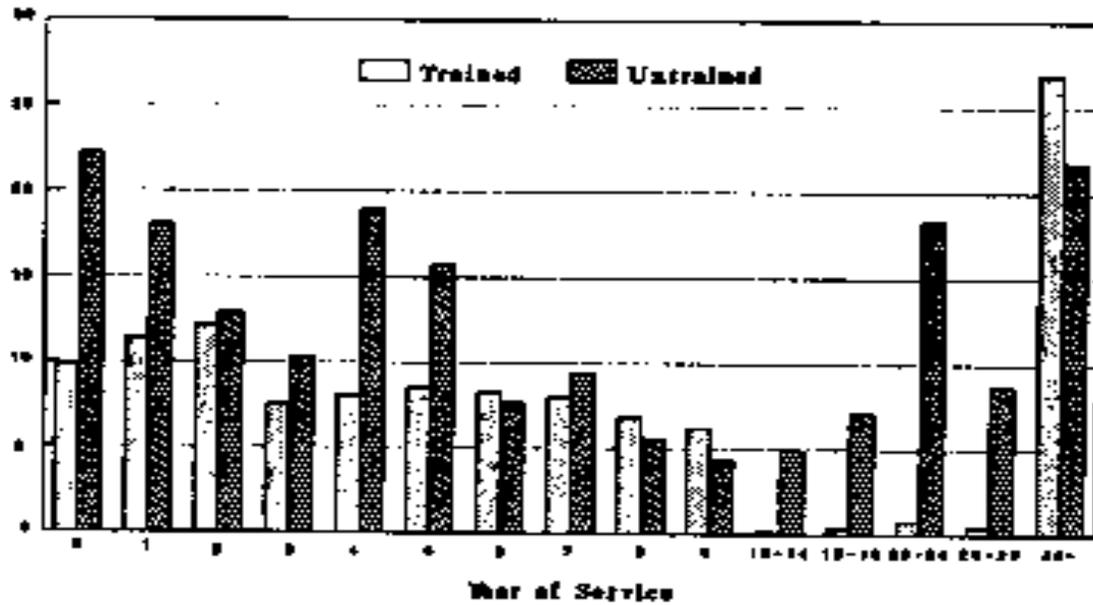
2.3 The initial period of classroom teaching is widely seen as a crucial stage in a career. It strongly influences the teacher's subsequent professional competence, and plays a major part in a decision to remain in the profession. The first year, in particular, is often associated with high levels of stress and uncertainty, which may cause frustration and a sense of failure. Successful early experiences, on the other hand, can enhance commitment, enthusiasm, and positive feelings for the profession.

2.4 In recent years, substantial numbers of new teachers have left the profession within a short time of joining. *Table 2(i)* shows wastage rates by years of service, and by reason. While some new teachers may have no strong commitment to teaching and will leave irrespective of any new measures, others could be encouraged to make a career in teaching. We have therefore examined current practices relating to the induction of new teachers, to see whether changes might be

Table 2(i)

### Wastage Rate of Certificated Masters/ Mistresses (CM) for 1990/91

Wastage rate (%)



### Wastage Rate of Certificated Masters/ Mistresses (CM) for 1990/91

Wastage rate (%)

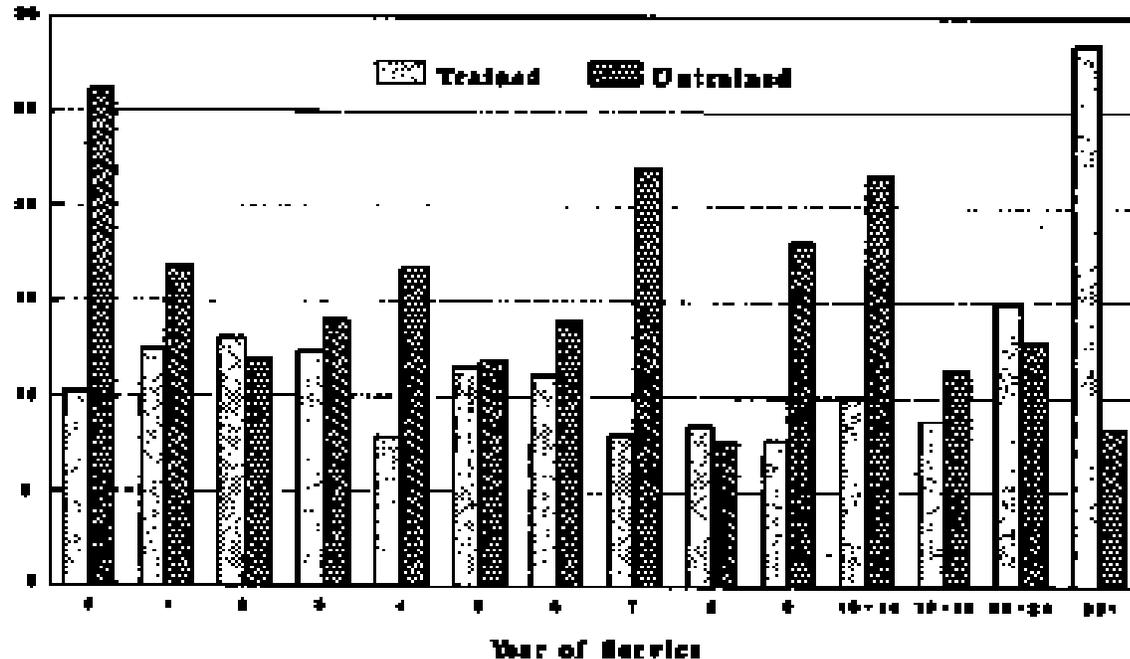
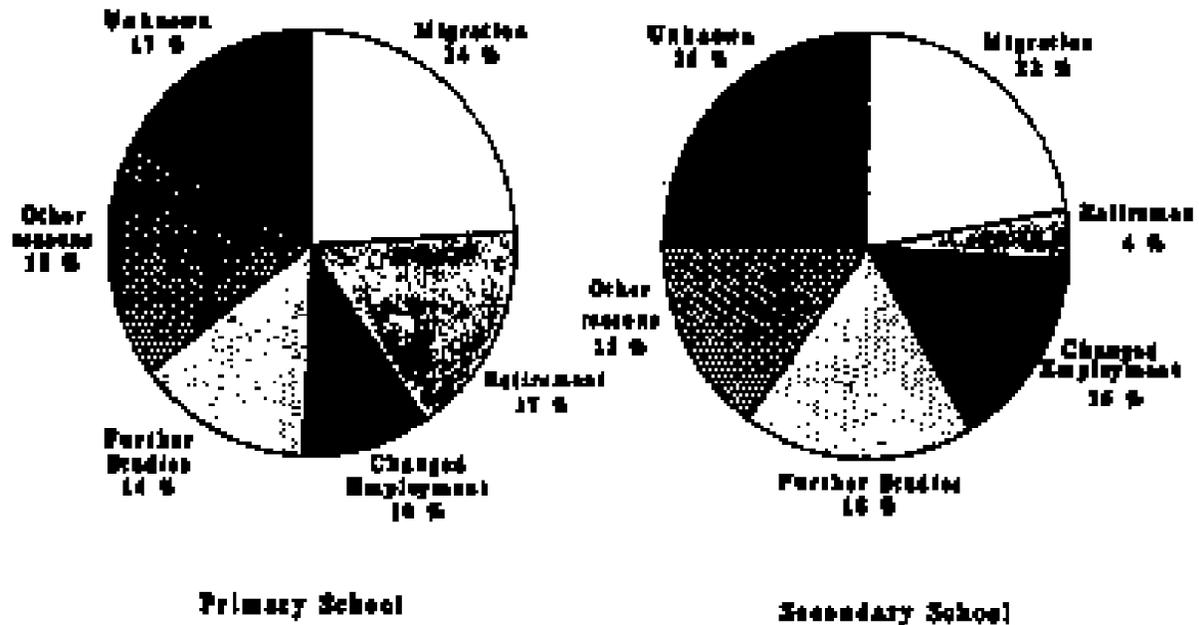


Table 2(i)

## Teacher Wastage by Reason, 1990/91



made to improve retention rates and lay the foundation for a satisfying and productive teaching career.

### *Induction provision at present*

2.5 Recent research in local secondary schools\* reveals, in general, little formal induction activity. Those activities which are provided usually take place before the start of the first term, and comprise mainly familiarization meetings and information on facilities and resources. Few induction activities take place after term starts. New teachers seldom have a close, regular source of help in solving problems. Although schools often exempt new teachers from administrative duties or examination class teaching, few concessions are made for beginners in terms of teaching load or time off to attend courses.

---

\* "Beginning to Teach in Hong Kong - A Guide to Induction in Schools" by B L Cooke and K C Pang. Extracts are at *Annex B*.

## *A systematic induction programme*

2.6 To remedy this unsatisfactory situation, we RECOMMEND that a systematic induction programme be developed in schools to support and guide new teachers during the difficult first year, encourage positive attitudes, aid professional development, enhance commitment, and reduce wastage in the early years. The programme should provide: -

- *information* - about the education system; the school; its pupil profile; and the teacher's duties;
- *professional guidance* - lesson observation, with follow-up meetings for discussion and advice; ad hoc meetings to analyse and deal with teaching problems and issues;
- *care and concern* - support from a designated experienced colleague to help the teacher obtain timely information, and overcome problems and anxieties arising from school duties and personal circumstances;
- *concessions* - duties and workloads which allow time for beginners to reflect on and improve their knowledge and skills;
- *professional development* - regular meetings with experienced teachers to discuss, analyse and develop ideas.

2.7 The programme should draw on the efforts of sponsors, heads, teachers, teacher education institutions, the Government, and professional bodies. We believe the focus should be on school-based induction activities supported by training, resource materials and seminars where ideas can be exchanged. Support activities could be provided by the Education Department, which should provide advice, publicise good practice, and subvent appropriate support activities; and by the teachers' centre, major sponsors, and other interested bodies.

2.8 Every school should plan and conduct systematic induction activities for new teachers joining at any time of year, including student teachers. A senior member of staff should have specific responsibility for induction and staff development. Two posts of Assistant Principal were recently provided in secondary schools, and one

senior teacher post in primary schools has been designated as Deputy Head and provided with a responsibility allowance. We consider that one such post in each school should have overall responsibility for professional and academic matters, including induction.

## **Home-school cooperation**

2.9 Cooperation between schools and the parents of their students can bring important benefits to the education process, as we noted in our Report No. 4 (ECR 4): paragraph 8.2.3. We believe the time has come for a sustained effort to improve cooperation. Our approach is based on five assumptions: that -

- parents have a right to be informed about, and a responsibility to be involved in, the education of their children;
- parents' knowledge and understanding of their children complements the knowledge and skills of the professionals;
- schools could, with the right approach, obtain valuable help and support from parents in the education process;
- parents are sensitive to both success and failure in their child's schoolwork or behaviour. They need to know the achievements, as well as the problems; and
- mutual understanding and appreciation by teachers and parents of each other's role could contribute positively to the child's education.

### ***The present situation***

2.10 Home-school contact takes a number of forms. Most schools provide an opportunity for parents to discuss the child's progress at least once a year. Most organise an annual open day, sports day and prizegiving day. Many schools, particularly at primary level, provide a pupil's handbook in which teachers and parents can convey messages to each other. Some schools issue regular newsletters. Meetings or group sessions with expert speakers may be held to discuss topics of interest to parents, such as guidance or adolescent problems. Parents may be invited to school functions such as picnics or music festivals. But only 70 or so schools have

a Parent-Teacher Association (PTA) to foster home-school contact in a sustained way.

2.11 A series of booklets on good parenting was published by the Education Department between 1988 and 1991 and extensively promoted, with the aim of improving home-school cooperation. All schools have been urged to discuss the booklets with parents, and a separate note on school-parent liaison has been issued to schools, suggesting ways to improve contacts and maintain a positive dialogue with parents. Feedback from parents and the public has been encouraging. The booklets are distributed every year to parents of pupils newly admitted to schools.

2.12 Some support services introduced into schools in recent years (notably the primary student guidance scheme, the school social work service and the secondary school guidance service) aim to strengthen links between home and school. As well as offering guidance to parents of individual students when appropriate, professionals in these services organize activities to promote parental involvement in education.

### ***Problems identified***

2.13 While the activities noted above are all positive, they are by no means universal. They take place in an atmosphere which does not on the whole encourage home-school cooperation. This may be due partly to heavy teacher workloads, and to the fact that in many families both parents have full-time jobs. But closer cooperation is also hampered by unhelpful attitudes. Teachers sometimes feel they can do their job best without parental "interference". Parents sometimes expect schools to take an excessive share of responsibility for raising their children. Both parents and teachers may have unrealistic expectations of what a child can achieve at a particular stage of development.

2.14 Our experience as parents and educators suggests to us that many schools do not do enough to develop a good working relationship with parents. The tone of messages in pupils' handbooks and report cards, and the atmosphere at parent days, group discussions and meetings with staff, may inadvertently make parents feel that they are being called to account for the failings of their children.

2.15 Communication between school and home often takes place only when something is wrong. Schools then find that some parents ignore attempts to contact them, while other parents may respond defensively. Since a call from the school usually implies a problem, it may cause even reasonable parents to feel anxious, and unsure how best to communicate their concerns to the teacher.

### *Proposed solution*

2.16 The solution lies, we believe, in improving the communication process. Most parents and teachers are reasonable people, who would like to be able to discuss the child's progress in a rational manner. Communication should take place not just when problems arise, but as a matter of course. In this way parents and teachers can learn to talk to each other about the child's progress in a positive atmosphere, which helps to promote the child's education by enabling both home and school to play their part.

2.17 The initiative for better communication must come from the schools. Ways must be found to clarify the scope for home-school partnership, change attitudes which hamper positive communication, and identify measures which are useful but not too onerous for either teachers or parents. With the right encouragement, school principals and management committees could develop innovative approaches in their schools, which could serve as models for other schools to consider. This is likely to be more effective in the long term than attempting to impose on all schools a single, central model for home-school cooperation.

2.18 We therefore *RECOMMEND* that a new standing committee should be set up, with members drawn from school councils, teacher organisations, parents' groups and the Education Department, to advise on ways to stimulate and coordinate sustained progress in home-school cooperation. Its proposed terms of reference and composition are at *Annex C*.

2.19 We also *RECOMMEND* that the new committee should: -

- (a) conduct a survey to investigate current perceptions of home-school relationships, attitudes of parents and teachers, and views on possible improvements. This would help in formulating a strategy;

- (b) draw up and issue for discussion a statement of the rights and responsibilities of parents, schools and students in the education process;
- (c) produce multi-media training materials on the skills and psychology of communication, for use by teachers and interested parents at discussion evenings and training sessions; and
- (d) disburse grants to schools for specific projects aimed at improving home-school cooperation, monitor the results, and publicise successful projects.

2.20 Funds to promote closer home-school cooperation should be provided by the Education Department. As an initial target, we consider that a budget of \$5 million would enable a good start to be made on the above activities.

### **Management in schools**

2.21 Solutions to the two issues discussed so far in this chapter depend mainly on changes in the process and style of school management, so this is an appropriate place to discuss the School Management Initiative (SMI), launched by the Government in March 1991 and being implemented in 21 secondary schools\*.

2.22 SMI has three main aims. The first is to give more flexibility to schools to define their own needs and deploy resources as they see fit to meet those needs. From September 1992 the first batch of schools will be funded by a block grant for expenditure not related to teacher salaries.

2.23 The second aim is to ensure that the roles of sponsors, managers, supervisors and principals are clearly defined. Each SMI school draws up a formal constitution for its school management committee (SMC), setting out procedures and practices for managing the school, and providing clear definitions of the various management roles.

-----

\* *The School Management Initiative: setting the framework for quality in Hong Kong schools*: Education & Manpower Branch and Education Department, March 1991

2.24 The third aim is to encourage schools to plan and evaluate their activities more systematically, by means of an annual School Plan defining programmes of activity, detailing the resources to be provided for each activity, and indicating the goals expected to be achieved during the year. This should enable all members of staff to play an active part in planning activities; give managers a clear picture of the school and its work, and provide a more objective basis for staff and managers to assess achievements during the year.

2.25 The overall aim of SMI is to help schools use all their recurrent resources effectively in the task of providing quality education. Teacher costs make up about 90% of these resources. Motivating and guiding teachers to develop their professional strengths is thus an important aspect of school management, which should involve every senior member of staff. To promote this more extensively, all SMI schools will adopt a formal staff appraisal scheme, such as already applies in all Government schools and some aided schools. We support this measure, and urge all SMCs to review their procedures for staff appraisal.

### *Implementing SMI*

2.26 We firmly support the principles of SMI. If implemented successfully it should help greatly to attract, retain and motivate teachers, and enable schools to introduce the quality improvements the community so keenly wants to see. Successful implementation will depend on positive attitudes and goodwill on the part of the Education Department, school management, teachers and sponsors, and on the actual experience of the first SMI schools.

2.27 We are aware of different views on the membership of the SMC. The SMI booklet proposed that each SMC should include teacher, parent and alumni members. Some school authorities are unsure how to provide for this in a way which can enable such members to contribute fully to the management of the school. We note that this issue is being discussed by sponsoring bodies and the Education Department, and look forward to progress.

2.28 There is some concern among teachers, principals and managers that SMI will mean more paperwork, detracting from efforts to provide quality education. We consider this below, under computerisation.

## **The physical environment**

2.29 Following the massive building programme of the past fifteen year, almost all public-sector schooling now takes place in purpose-built premises. Many schools were built to standard designs introduced in 1983; a new standard design was introduced in 1990. In this section we consider whether the physical environment provides adequately for teaching, out-of-class activities and support activities.

### *Schedules of accommodation*

2.30 Since the older designs were approved, changing needs have increased the demand for space for both teaching and other uses. New areas of study such as sex education, moral education and civic education need storage space for teaching kits and materials. New approaches to teaching generally need more space than the traditional "chalk and talk" approach. New teaching posts require staff room space. The greater emphasis on guidance and counselling has shown the need for small rooms where teachers, students and parents can talk privately. Space must be found to process large numbers of documents, including application forms for various financial assistance schemes, and to store examination papers.

2.31 To meet changing needs, planning standards were reviewed in the late 1980s and new designs were prepared which provide a larger site area, larger building area, more classrooms and special rooms, more remedial teaching rooms, larger covered playground, and more space for staff rooms and office administration. The first new design primary school was completed in 1990. *Table 2(ii)* compares the old and new standard designs.

2.32 The new standard design seems to cater reasonably for current teaching and administrative needs. Two questions, however, concern us regarding school accommodation:

- how far can existing school buildings be upgraded to reflect the latest standard? and
  
- are non-teaching needs adequately provided for?

**Table 2(ii)****Comparison of the Old and New Standard Design Primary and Secondary Schools**

	<i>Primary School</i>		<i>Secondary School</i>	
	<b>Old Design</b>	<b>New Design</b>	<b>Old Design</b>	<b>New Design</b>
<b>Site Area</b>	3900m <sup>2</sup>	5005m <sup>2</sup> (77mx65m)	5800m <sup>2</sup>	5850m <sup>2</sup> (90mx65m)
<b>Building area</b>	900m <sup>2</sup>	1500m <sup>2</sup>	1500m <sup>2</sup>	1500m <sup>2</sup>
<b>Open Playground</b>	1560m <sup>2</sup>	1810m <sup>2</sup>	1940m <sup>2</sup>	1990m <sup>2</sup>
<b>Basketball Court</b>	420m <sup>2</sup>	420m <sup>2</sup>	840m <sup>2</sup> (2 nos.)	840m <sup>2</sup> (2 nos.)
<b>Classrooms</b>	24	30	24	26
<b>Special Rooms</b>	3	4	12	14
<b>Remedial Teaching Rooms</b>	0	3	0	3
<b>Students/Session</b>	960	1200	1160	1160
<b>Covered Playground</b>	446m <sup>2</sup>	766m <sup>2</sup>	446m <sup>2</sup>	766m <sup>2</sup>
<b>Administrative Area</b>	86m <sup>2</sup>	126m <sup>2</sup>	105m <sup>2</sup>	140m <sup>2</sup>
<b>Staff Room Area</b>	106m <sup>2</sup>	168m <sup>2</sup>	106m <sup>2</sup>	169m <sup>2</sup>
<b>Gross Floor Area</b>	4590m <sup>2</sup>	6057m <sup>2</sup>	6850m <sup>2</sup>	7866m <sup>2</sup>
<b>Open Play Area per Student</b>	1.63m <sup>2</sup>	1.52m <sup>2</sup>	1.67m <sup>2</sup>	1.72m <sup>2</sup>

***Upgrading existing schools***

2.33 When the new standard design was developed in the late 1980s, a programme was initiated to provide in secondary schools of the old standard design, if they so wish, an additional classroom and two remedial teaching rooms, at the expense of the covered playground. These spaces have so far been provided in 53 schools, and another 60 projects are in the programme.

2.34 Many older schools, however, were built to non-standard designs. In some cases these provide better accommodation than the standard; but in many cases

the buildings lack some facilities now considered standard, such as remedial teaching rooms and some special rooms. Two approaches are adopted to upgrading such schools: re-provisioning them to standard buildings in developing areas; or adapting the buildings to meet current standards more closely.

2.35 To bring all Government and aided secondary schools fully up to the latest standard of provision, a total of 187 classrooms and 468 special rooms would need to be added to some 250 buildings. About 70% of these buildings are short of just one or two rooms. Of the remainder, the most serious shortfalls in a few very large schools amount to no less than 14 rooms in each school.

2.36 We *RECOMMEND* that a phased programme be introduced to provide additional classrooms or special rooms in secondary schools, to bring them as far as practicable up to the latest standard of provision. The programme should be phased with due regard to any projected changes in enrolment which might, for example, reduce pressure on space by reducing the number of classes. We also *RECOMMEND* that, where any primary or secondary school falls significantly short of the latest standard but cannot be expanded on its present site, efforts be made to re-provision it to a new building of the standard design.

2.37 Because any change to non-standard buildings requires individual designs, improvements to them tend to lag behind improvements to standard buildings. We *RECOMMEND* that the Government review its procedures for handling projects involving non-standard school buildings, so that they can compete for funding on equal terms with schools in standard buildings.

2.38 New schools are now located away from major sources of noise, but many older schools are still exposed to serious noise pollution. Almost 2 000 rooms in 109 of the worst affected schools have so far been double-glazed and air-conditioned under a noise abatement programme. The phasing of this programme is shown in *Table 2(iii)*.

2.39 We consider that the capital and recurrent costs of the noise abatement programme are small compared to the benefit, in terms of reduced stress on students and teachers and an improved learning environment. We *RECOMMEND* that the Government set a target to provide noise abatement measures in all schools exposed to noise above 65 dB(A).

**Table 2(iii)**

**Noise abatement programme in schools**

<b>Stage</b>	<b>Noise level</b>	<b>Treatment (air-conditioning plus)</b>	<b>Remarks</b>
I	Aircraft noise NEF30 and above	Double glazing	Completed
II	Traffic noise above 75dB(A) LEQ (1 hr)	Double glazing	To be completed in July 1993
III	Traffic noise 71-75 dB(A) LEQ (1 hr)	Sealing existing windows	Funds to be sought in 1993
IVa	Traffic noise 66-70 dB(A) LEQ (1 hr)	Closing existing windows	No fixed timing
IVb	Rail noise 66-70 dB(A) LEQ (1 hr)	Closing existing windows	No fixed timing

*Non-teaching spaces*

2.40 We are concerned at the lack of rooms in schools, even in the latest standard design, for activities other than formal teaching and administration. We would like to see additional space for staffrooms; a staff common room; a student activity centre; and a small interview room.

2.41 *Staffrooms* The staffroom is normally a crowded working area, which becomes even busier as more teachers are added to the school's establishment. Since recommendations later in this report will increase the number of teachers in most schools, more space must be provided to enable essential out-of-class work to be done.

2.42 *Staff common room* The staffroom normally offers little opportunity for teachers to talk together quietly and discuss professional matters without interruption. We see a need for a common room where teachers can relax, talk together and share experiences. This would help to develop a team spirit; and would also provide space for school-based teacher development activities.

2.43 *Student activity centre* Students have no dedicated space where they can store club property, hold meetings, and conduct activities after school or at weekends. An activity centre could foster a sense of belonging to the school.

Bisessional primary schools, which are to continue for some years, have a particular need for such rooms to develop extra-curricular activities. These are severely restricted now, since classrooms are in use all day for formal lessons.

2.44 *Interview room* No standard design provides for a small room where teachers can talk to individual students or parents. Interviews usually take place in corridors, sometimes to the embarrassment of those involved. A small room for private interviews could help maintain a good atmosphere in the school.

2.45 We *RECOMMEND* that the schedule of accommodation for new school buildings be revised to provide additional staffroom space; a staff common room; a student activity centre; and an interview room. The additional floor area should amount to about 330m<sup>2</sup>. Wherever possible, such rooms should also be provided in existing schools. We envisage that the additional rooms, apart from their designated non-teaching uses, will provide schools with more flexibility in meeting their space needs generally.

2.46 The additional floor area should be provided as far as possible without reducing the amount of the school's open space. Play space in the standard design amounts to 1.51m<sup>2</sup> per primary student and 1.72m<sup>2</sup> per secondary student. If the extra accommodation we recommend above is provided on the present size of site, this area might have to be reduced. We are conscious of the acute pressures on land use in Hong Kong, but *RECOMMEND* that the Government examine the case for a slightly larger site area for new schools. If a standard play area of 2m<sup>2</sup> per student were adopted, the site for a primary school would need to be about 15% larger; and for a secondary school about 10% larger.

### **Administrative support**

2.47 All public sector schools are provided with clerical staff on the scales shown in *Table 2(iv)*. Aided secondary schools have slightly better provision than Government schools, on the grounds that the latter are also served by Education Department headquarters. The same argument applies to primary schools, so it is not clear why clerical provision for larger aided primary schools is a little less than in Government schools. To remedy this, we *RECOMMEND* that aided primary schools with 36 classes or more (including bisessional schools with 18 or more classes per session) should be provided with 2 Clerical Officer II posts instead of one CO II and one Clerical Assistant (CA).

Table 2(iv)

**Clerical staff provision in schools**

<b>Classes</b>	<b>Government primary</b>	<b>Aided primary</b>
60 +	2 CO II	1 CO II, 1 CA
36-59	1 CO II, 1 CA	1 CO II, 1 CA
12-35	1 CO II	1 CO II
6-11	1 CA	1 CA
below 6	no such school	no clerical provision
	<b>Government secondary</b>	<b>Aided secondary</b>
16 +	1 CO I, 1 CA, 1 Office Assistant (OA)	The Administration Grant for a 29-class school assumes a notional clerical establishment of 1 Secretary, 1 CO I, 1 CO II, 1 Typist, 1 OA.

2.48 Secondary schools have flexibility within their Administration Grant to decide on the allocation of resources between janitor and clerical posts. Primary schools have no such flexibility, since each janitor and clerk post is individually funded in the same way as teacher posts. We *RECOMMEND* that primary schools be given an Administration Grant, calculated in a similar way to the grant for secondary schools, provided that this would not lead to any reduction in their current provision.

2.49 The adequacy of administrative support is reviewed from time to time. To strengthen such support, secondary schools were recently given new posts of Assistant Principal, and a responsibility allowance was introduced for Deputy Heads in primary schools.

**Computerisation**

2.50 In 1990 a survey was conducted in 21 Government and aided schools to find out how computers might reduce clerical work and improve efficiency in school administration. The survey identified tasks which could be made easier by computers, and showed that computerising school administration is both feasible and desirable.

2.51 Analyses of time spent on administrative tasks by teachers and clerical staff indicate that considerable clerical and teacher time could be saved by using computers. With these time savings, teachers could devote more attention to professional tasks, including new tasks arising out of initiatives such as the SMI; and the pressure on clerical staff at peak times could be reduced. The actual extent of the benefit from computerisation will depend partly on such matters as standard software packages for school administration, and adequate training for clerical and teaching staff.

2.52 Some frustration felt by teachers at the extent of their non-teaching duties relates to the processing of students' applications for financial assistance at the start of the school year. Computers should enable schools to print out basic student data, reducing the need for manual checking. We *RECOMMEND* that the Student Financial Assistance Agency liaise with the Education Department and schools in designing forms which take full advantage of computers.

2.53 We would like teachers to have readier access to curricular resources. Through the school-based curriculum project scheme, the development of TRAs, and the introduction of innovative subjects at Advanced Supplementary (AS)-level, teachers are being asked to play a more active role in curriculum development. A central curriculum database, to which all schools could be linked by computer, could enhance the school's ability to deliver quality education. We therefore *RECOMMEND* that a computer database and network of curriculum resources should be established.

2.54 We note that the Government will spend \$28.9 million over the next three years to provide all primary and secondary schools with computers for administration, together with standard software and training. The use of the computers will be monitored, and their impact assessed. We also note that a consultancy on all information needs of schools and the Education Department is in progress. We hope that this will lead to more efficient data-gathering, dissemination of information, and access to useful databases.

### **Non-salary grants**

2.55 Non-salary expenses in a school are met mainly from the school and class (S&C) grant; furniture and equipment (F&E) grant; and the major repair grant. (The block grant for SMI schools incorporates the S&C and F&E grants.) The S&C grant

is calculated according to school size: a standard 24-class primary school receives about \$140 000 a year; a 30-class secondary grammar school receives \$337 000. F&E and major repair grants are provided to meet specific needs.

### ***S&C grant***

2.56 The S&C grant is reviewed every year in the light of relevant inflation indicators; but before any adjustment is approved, the Government surveys the utilisation of the grant since the last adjustment. As a result the grant is adjusted only at intervals of two years or more, by which time inflation has already eroded its real value. In recent years some schools have had to supplement the grant from their own funds in order to meet basic needs. This goes against the spirit of the codes of aid. To ensure that the S&C grant maintains its real value over time, we *RECOMMEND* annual adjustments in the light of relevant inflation indicators, with utilisation surveys every three years to monitor the adequacy of the grant.

2.57 To ensure that schools make full use of the grant once annual adjustments are introduced, we *RECOMMEND* that all school managements introduce basic procedures for planning and monitoring their expenditure. This would also help them to prepare for the more formal budgeting procedures which take effect once a school joins the SMI.

### ***F&E grant; major repair grant***

2.58 These grants are provided from block votes held by the Director of Education. The votes generally increase each year in line with inflation, but may be squeezed at times of budgetary constraint. Grants are allocated to schools in line with their prior bids for funds, adjusted as necessary to fit the amounts available. (For SMI schools, the F&E element of the block grant is calculated with reference to the average amount spent on the relevant type of school in each of the previous three years.)

2.59 The size of the block votes may reflect what the Government is able to afford, rather than the actual needs of schools. We are concerned that standards of furniture, equipment and maintenance in schools should remain acceptable over time, and have considered two ways to assess the actual level of need. The first way would be to calculate F&E grants, and grants for predictable repair items such as rewiring or

repainting, by reference to depreciation factors. An appropriate annual sum could then be provided to each school without requiring prior bids for specific items. Each school would plan its own maintenance and equipment replacement programmes.

2.60 This approach would entail complex and probably controversial calculations, and would require budgeting skills which many schools may feel they do not possess at present. We therefore favour a second way to assess the adequacy of the block votes; namely, to survey bids from schools over the past three years, and compare the amounts requested (after suitable adjustments for any bids considered excessive) with the sums actually provided. We *RECOMMEND* that the Director of Education undertake a survey within the next 12 months. If the survey indicates a need, the Director should seek a more realistic level of funding for these block votes.

### **Teacher workloads**

2.61 We have noted how computers might reduce teacher workloads by enabling administrative tasks to be handled more efficiently. In this section we examine the general question of workloads.

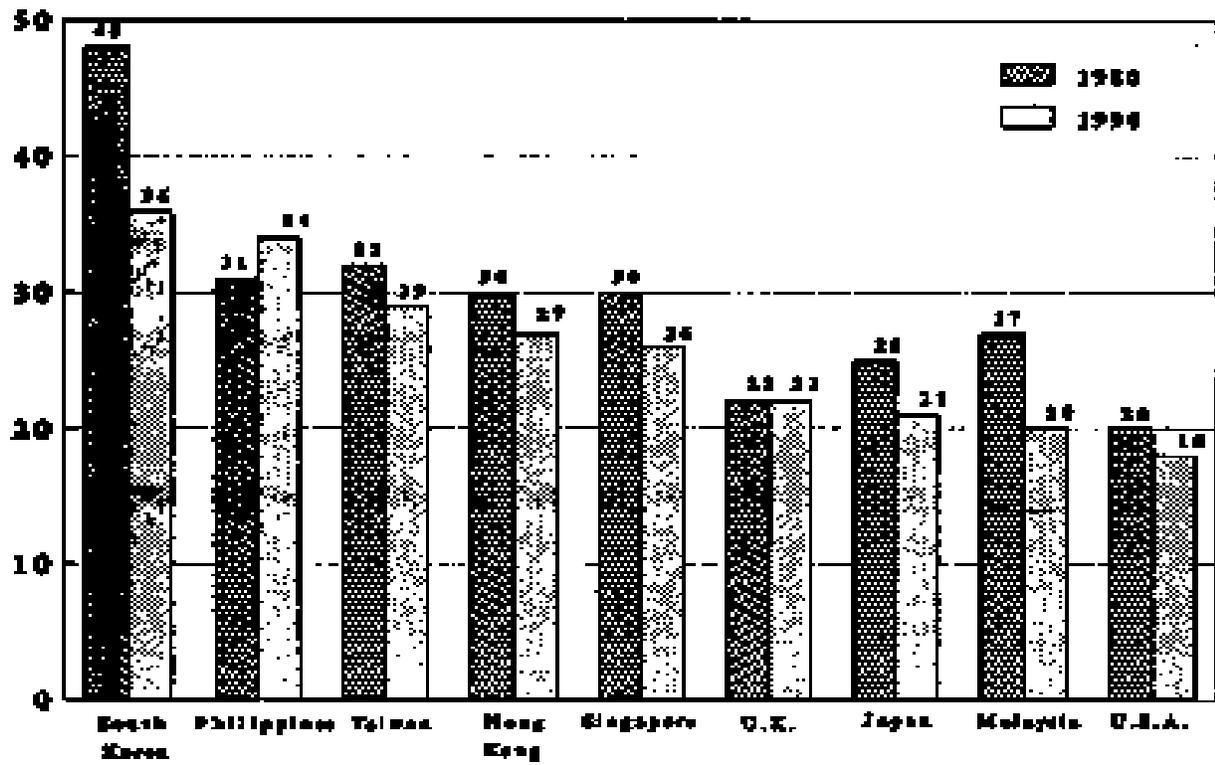
2.62 A useful measure of teacher workload is the teacher: student ratio. This can show change over time in the local school system, and provide a comparison with other education systems. As *Table 2(v)* shows, overall teacher: student ratios in Hong Kong have improved over the past decade at both primary and secondary levels, with the greatest improvement at secondary level. The ratios compare reasonably with regional neighbours such as Singapore, Taiwan and South Korea, though they are still less favourable than in Japan, USA and UK.

2.63 We have considered carefully whether further improvements in the teacher: student ratios could be justified in terms of challenges facing the schools and the community demand for quality in education. We have been acutely conscious, as we considered this question, of the resource implications. The cost of adding just one nongraduate post to each primary and secondary school, for example, would amount to \$330 million a year.

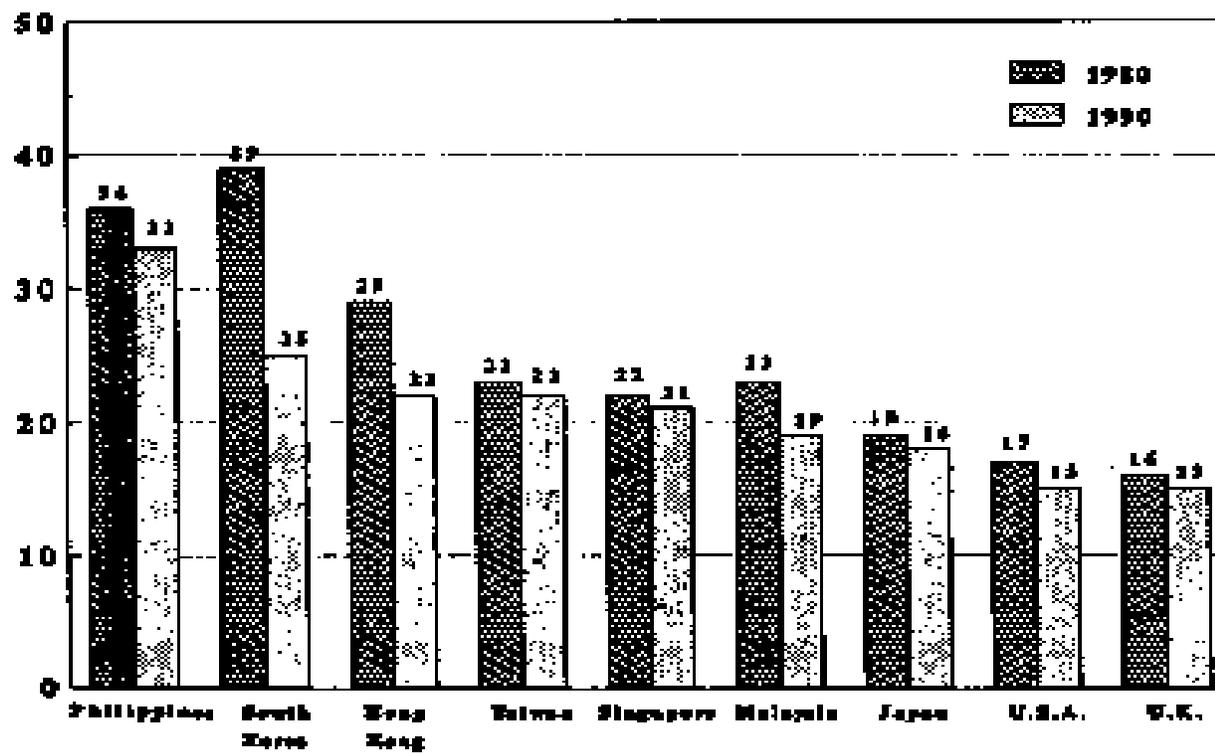
2.64 Additional teachers can be justified only in terms of enhanced quality of education. Smaller classes or reduced teaching loads do not by themselves auto-

Table 2(v)

### Pupil/Teacher Ratio for Primary School



### Pupil/Teacher Ratio for Primary School



matically lead to improvements in student performance; they only facilitate improvements. Quality, we believe, depends first and foremost on the expertise of teachers, and the extent to which good management in the school ensures that this expertise is deployed and developed to the best effect.

### **The case for improved staffing levels**

2.65 The manning scale for teachers in public sector schools is based on posts per class. Primary schools have 1.2 teachers per class; secondary schools 1.3 teachers per class for S1-S5, and two per class in the sixth form. Fractions of a post in a school's total establishment are rounded up to the nearest whole number. Since 1982, secondary schools have been provided with additional posts to improve language teaching, counselling, guidance, library services and extracurricular activities.

#### ***Secondary school staffing***

2.66 With the additional posts provided during the 1980s, and provision from 1992 for more split-class teaching in the sixth form, the staffing level in secondary schools has improved considerably in recent years. We have noted the possibility of efficiency savings once computers are provided for school administration; but believe that additional tasks arising from ECR4 and this report, such as the whole school approach to guidance; school-based induction programmes and, in particular, the introduction of TRAs in junior secondary classes, will impose an additional workload equivalent to one nongraduate post in a standard school. We therefore *RECOMMEND* the provision by September 1995 of one additional Certificated Master/Mistress (CM) post in each secondary school with 30 classes or less, and two such posts in larger schools.

#### ***Primary school staffing***

2.67 A case for improved primary school staffing levels has been building up for some years. More responsibilities have been placed on schools since the present staffing scales were set in 1982; notably a demand from the community for more attention to guidance and personal contact with pupils. New policies will add work in coming years; in particular the TRAs, which will be introduced in primary schools in 1994. Adapting teaching methods to TRAs, and conducting assessments, will increase present workloads.

2.68 To meet tomorrow's needs for knowledgeable and skilled citizens, today's primary schools must be able to lay a solid foundation on which secondary and higher education can build. Three main factors contribute to that foundation: the curriculum, which was the concern of ECR4; the expertise of the teachers, on which we have much to say in later chapters; and staffing levels. Improvements in curriculum and the professional development of teachers, to be fully effective, must be backed up by staffing levels which provide adequate numbers of teachers to deliver the required services.

2.69 We therefore believe that a substantial increase in the primary teacher: class ratio is justified. The ratio in whole day classes is to be raised to 1.4 per class over the next few years, following policy approval of measures arising out of ECR4 as modified in the light of public response. This differential of 0.2 posts per class over the present 1.2 ratio will enable whole day schools to make good use of the longer contact time with their students.

2.70 We now *RECOMMEND* that a ratio of 1.3 teachers per bisessional class be phased in as soon as possible, to enable schools to respond effectively to the new demands being placed on them. To maintain the differential of 0.2 posts per whole day class, we *RECOMMEND* that the whole day ratio should rise to 1.5 teachers per class once the 1.3 bisessional ratio is fully phased in.

2.71 The extra 0.1 post per class will add three posts to a school of 24 or 30 classes. To enable funding to be secured and training to be provided for the additional new teachers, we *RECOMMEND* phasing as follows:-

*stage 1:* to provide, by September 1993, one extra post in each bisessional school of 18 classes or more, to provide needed extra staff for TRAs. (Whole day schools should by then be securing the first of their additional teachers under the programme to raise their ratio to 1.4 teachers per class);

*stage 2:* to extend the 1.3 ratio in full to all bisessional schools by September 1995;

*stage 3:* to improve the whole day ratio to 1.5, following the full implementation of the 1.3 bisessional ratio.

## Senior teacher ratios

2.72 Policy approval has been given to improve the senior teacher ratio in whole day primary schools, from one Assistant Master/Mistress (AM) to four classes to one AM to three classes, largely to help the schools respond effectively to the opportunities for extended contact with pupils.

2.73 We believe that the introduction of TRAs presents a need for greater co-ordination in primary schools in the core subjects of Chinese, English and Mathematics. A senior teacher should take responsibility for each of these subjects; but under the present ratio, which provides six AM posts in a 24-class school, it would be difficult to reallocate duties to release the necessary amount of AM staff time. We therefore *RECOMMEND* that, starting in 1993 and over a period of no more than five years, additional AM posts be provided in bisessional primary schools until the ratio reaches one AM to three standard classes.

2.74 The new ratio will enable two posts in a 24 or 30 class school to be upgraded to AM. A slight reallocation of duties will enable all senior teacher responsibilities to be distributed equitably. *Annex D* sets out a possible distribution.

## Class sizes

2.75 The recent controversy over removal of the repeater allowance has focussed attention on class size as a factor in teacher workload and the quality of education. We note the Government's undertaking to restore the allowance by September 1996, and have considered the need for a policy on class size thereafter, taking account of the forecast decline in school-age population.

2.76 Research suggests that small changes in class size have little measurable effect on student performance; marked improvements arise only with a substantial reduction. In Hong Kong, space constraints make it unrealistic to envisage large reductions in class size; but we have considered whether declining enrolment could allow a reduction of five places in each standard class.

2.77 The forecast decline in primary school enrolment would allow the standard class size to be reduced gradually from 40 to 35 for conventional classes, and from 35 to 30 for Activity Approach classes, with this target achieved for all Primary 1

(P1) classes by 1997. At secondary level, the standard class size of 40 for S1-S5 could be reduced to 35, with the target achieved for all S1 classes by 2002. After these dates, the target could be achieved in successively higher classes each year.

2.78 *Effect on accommodation* These reductions could in theory be achieved without needing to add more classrooms, although at the primary level, since places are provided to meet local needs, a slight expansion of the school building programme might be needed once enrolment rises again.

2.79 *Effect on teacher demand* The reductions in class size would require, by 2007, about 950 more primary teachers in addition to those arising from other recommendations in this report. About 1850 additional secondary teachers would be needed. With the improvements to the school environment and career paths recommended in this report, we believe that these additional teachers could be found. Teacher supply should therefore not be an obstacle to a reduction in standard class sizes.

2.80 *Effect on the budget* We estimate that the cost of adopting smaller class sizes would reach about \$740 million a year in 2002, and about \$820 million a year by 2007.

2.81 Having considered the opportunity provided by the reduction in enrolment, the possible constraints of accommodation and teacher supply, and the trend in other places with highly developed economies, we have concluded that a firm goal should now be set for achieving smaller standard class sizes. We therefore *RECOMMEND* a reduction in the standard class size of five places at each level from P1 to S5, to be achieved in phase with reductions in enrolment. If enrolment rises after the end of the planning period, it might be necessary to build some additional schools.

## CHAPTER 3

### Career Opportunities for Teachers

In this chapter we consider whether career opportunities for teachers in public sector primary and secondary schools are adequate to attract and retain good quality teachers in the numbers needed. We identify the need for changes, particularly in the nongraduate stream; and recommend measures to increase the proportion of trained teachers in KGs and improve the professional training of special education teachers.

#### Primary and secondary teachers

3.2 All primary school teaching posts are in nongraduate ranks. (Graduates from the Bachelor of Arts (BA) course in primary education at the Chinese University of Hong Kong (CUHK) will be awarded additional salary points within the nongraduate stream). The manning scale for secondary schools allows for 70% of posts to be filled by graduates, and 30% by nongraduates.

3.3 The overall proportion of graduates in secondary schools is still a little below 70%, mainly because schools which converted from private to aided status during the expansion of the past 15 years were allowed to retain the services of nongraduate staff, even if these exceeded 30% of establishment. The proportion of graduate posts in the standard scale will increase to a maximum of 75% as teachers of practical and technical subjects acquire relevant degrees. We welcome these additional graduate posts, and *RECOMMEND* that schools be given flexibility to decide how to allocate graduate posts to meet their own defined needs. In particular, schools should consider suitably qualified teacher librarians for appointment to graduate posts.

3.4 Starting salaries for teachers in Government and aided schools are set by reference to civil service benchmarks for holders of Higher Diplomas (nongraduates) or degrees (graduates). Since the teacher's certificate is a professional qualification, no further formal qualification is required in order for a nongraduate teacher to progress to the highest rank of Principal Assistant Master/ Mistress (PAM). But since a degree is normally an academic rather than a professional qualification, graduates without a postgraduate certificate or diploma in education

may not advance beyond point 27 on the Master Pay Scale (MPS), and are ineligible for promotion. Similar professional training provisions apply in other careers, such as engineering, accountancy and law. The ranking structure of the teaching and other education grades is shown in *Table 3(i)*.

### *The graduate stream*

3.5 The graduate stream has five ranks. The top two are headship ranks for secondary schools of different sizes. A graduate teacher with a professional qualification may join the Education Department's Inspector, Lectures or Administration grades. Within a school the highest point a graduate can reach is MPS 49, the top of the Master Pay Scale.

3.6 It has become harder in recent years for schools to recruit graduate teachers, and an increasing number of those recruited have chosen one to acquire a postgraduate qualification in education, but leave the profession after a few years. This problem, we believe, has two causes. Firstly, the restructuring and growth of Hong Kong's economy has led to a growing mismatch between the demand for graduate manpower and the supply of new graduates. This has affected schools as much as other employers. Secondly, graduates now have a much wider choice of careers than in the past.

3.7 The current expansion of tertiary education will increase the supply of new graduates from 1994, to the benefit of all professions including teaching. Whether schools can attract sufficient new graduates, and provide enough job satisfaction to retain them in the profession, will depend on improvements in the working environment and on career opportunities for graduate teachers.

3.8 The rank of Principal Graduate Master/Mistress (PGM) was created recently to provide Assistant Principal posts in each school; it overlaps the top of the Senior Graduate Master/Mistress (SGM) scale and the bottom of the Principal II scale. While this has improved promotion prospects for the SGM rank, we note that the PGM rank was created by regrading two SGM posts; hence the number of senior posts did not increase. We consider that the range of senior duties in a secondary school now justifies additional senior posts, and so *RECOMMEND* that two Graduate Master/Mistress (GM) posts be upgraded to SGM.

### Ranking Structure of Education Grades

Table 3(i)

Non-graduate				Graduate					
MPS	(1)	(2)	(3)	(4)	(1)	(2)	(3)	(4)	MPS
49					PI	VP	PI	SEO(A)	49
48									48
47									47
46									46
45									45
44						P II	PL	SI	44
43									43
42									42
41					SEO/ PGM				41
40									40
39	PAM				EO/ SGM			EO(A)	39
38									38
37		L	I	SEA		SL	I		37
36									36
35									35
34									34
33a-c									33a-c
33	SAM								33
32									32
31									31
30									30
29									29
28						L	AI	AEO(A)	28
27	AM	AL	AI	EA	AEO/ GM				27
26									26
25									25
24									24
23									23
22									22
21									21
20	CM								20
19									19
18									18
17									17
16									16
15									15
14									14

Education grades:  
 (1) School teachers  
 (2) Lecturers  
 (3) Inspectors  
 (4) Administrators

Remarks  
 CM - Certificated Master/Mistress, AM - Asst. Master/Mistress  
 SAM - Senior Assistant Master/Mistress  
 PAM - Principal Assistant Master/Mistress  
 AL - Asst. Lecturer, L - Lecturer (Non - graduate)  
 AI - Asst. Inspector (Non-graduate), I - Inspector (Non-graduate)  
 SEA - Senior Education Assistant, EA - Education Assistant  
 PI - Principal I, PII - Principal II, SEO - Senior Education Officer  
 PGM - Principal Graduate Master/Mistress, EO - Education Officer  
 SGM - Senior Graduate Master/Mistress, AEO - Asst. Education Officer  
 GM - Graduate Master/Mistress  
 VP - Vice - Principal, PL - Principal Lecturer, SL - Senior Lecturer  
 L - Lecturer  
 PI - Principal Inspector, SI - Senior Inspector, I - Inspector  
 AI - Asst. Inspector  
 SEO(A) - Senior Education Officer (Admin)  
 EO(A) - Education Officer (Admin)  
 AEO(A) - Assistant Education Officer (Admin)

## *The nongraduate stream*

3.9 The nongraduate teacher stream comprises four ranks. At primary level, two ranks are for headship posts in schools of different sizes, so no more than three ranks appear in the establishment of larger primary schools. Smaller schools are staffed at only one or two ranks, with the head receiving an additional responsibility allowance. In a secondary school, nongraduate posts cover all four ranks. Apart from teaching, a nongraduate with a teacher's certificate may follow a career in the Education Department's nongraduate grades. The highest point in any of the nongraduate career streams is MPS 36.

3.10 We consider that major changes in the nongraduate career path are needed, in particular at primary level, if schools are to be properly staffed to meet the challenges they face. Our detailed proposals and recommendations are set out in Chapters 4 and 5.

### **Fringe benefits for aided school teachers**

3.11 We are pleased to note that the Government has accepted in principle the need to narrow the gap between fringe benefits for Government school teachers and those for their aided school counterparts; in particular, housing benefits. A proposal has been formulated for a subsidy to cover one-third of the interest on a mortgage (up to 4%) for staff on MPS 22 and above with 10 years or more continuous service, and for those below MPS 22 with 20 years continuous service. Such a scheme would cost about \$115 million a year if all eligible staff were to join within ten years. The Government has also set up a working party to study the housing needs of the sandwich class, and has been urged by the Legislative Council to introduce measures within twelve months.

3.12 We believe that a mortgage interest subsidy scheme would be helpful to aided school teachers as an interim measure, and support its early introduction on that basis. However, because such schemes, by their nature, contribute to some extent to property-price inflation, we consider that the long term approach to a housing benefit for the aided sector should be based on measures to provide relief to the sandwich class, of which teachers form a significant proportion. We therefore *RECOMMEND* that the Government devise a meaningful scheme of housing benefit for teachers in the aided sector, as an integral part of its study into the housing needs of the sandwich class.

## Kindergarten teachers

3.13 The main concern at the KG level is to improve the quality of education. This depends mainly on increasing the proportion of trained teachers, which in turn is affected by the salaries offered to trained teachers. If pay is inadequate, few teachers will have an incentive to come forward for training.

3.14 All KG education in Hong Kong is in the private sector. In 1989 the Government approved a package of measures to upgrade the quality of KG teaching. The aim was to encourage operators to employ a larger proportion of trained teachers, and pay them according to recommended salary scales. Because fees would have to increase to meet higher staff costs, a new fee remission scheme was introduced to ensure that parents were not deterred for financial reasons from seeking KG education for their children. A Working Party on KG Education was formed to monitor progress and advise on any further measures needed.

3.15 In the first two years of the new package, average teacher salaries rose in real terms, by 19.5% for the senior rank of Qualified KG Teacher (QKT) and 14% for Qualified Assistant KG Teachers (QAKT). The wastage rate of trained teachers dropped from 19.4% in 1988/89 to 12% in 1990/91. Improvements in the training situation were less marked, however, as *Table 3(ii)* shows. While increased numbers enrolled on the 12-week QAKT course, about one-third of available places remained unfilled. Numbers on the QKT course rose slightly in 1990/91, but fell again in 1991/92.

3.16 A survey in late 1991 indicated three possible causes for the slow takeup of training places:

- some teachers were not certain of receiving a salary increase after completing a training course;
- some KGs were unwilling to release untrained teachers to attend a course;
- some KGs were reluctant to employ more expensive trained teachers, particularly QKTs, because of fears that higher fees would reduce their competitiveness.

**Table 3(ii)**  
**Enrolment Situation of KG Training Courses**  
**offered by the Education Department**

Courses:	1989/90		1990/91		1991/92	
	<b>QAKT</b>	<b>QKT</b>	<b>QAKT</b>	<b>QKT</b>	<b>QAKT</b>	<b>QKT</b>
Target Intake	360	240	360	300	360	240
No. of applications	191	470	303	486	323	333
Enrolment in October *	145	237	189	281	241	196
% increase/(decrease) in enrolment	-	-	30.3%	18.6%	27.5%	(30.2%)
Take-up rate	40.3%	99.0%	52.5%	93.7%	66.9%	81.7%

\* **Some applications were rejected due to insufficient teaching experience, late or inappropriate permit, or unacceptable academic qualifications.**

3.17 The Working Party therefore examined the need for further measures to maintain the impetus of improvements in KG education, which would enable operators to pay adequately for properly-trained staff, without fearing that competitors would attract away their pupils; and on the other hand would not result in fee levels which might deter parents from sending their children to KGs. The Working Party submitted two proposals for our consideration: legislation requiring minimum proportions of trained staff in each KG; and an increase in funding for the fee remission scheme.

#### *Statutory staffing requirements*

3.18 Legislating for minimum proportions of trained teachers in each KG should stimulate higher salaries, which in turn should encourage more untrained teachers to come forward for training. To assess the right proportion to legislate for, the Working Party projected the overall supply and demand for teachers, estimated the numbers of already trained teachers, assumed a likely wastage rate for trained teachers, and projected the capacity of training courses. It also studied the range of staffing situations in different KGs.

3.19 At present about 42% of KG teachers overall are trained, and the output from training courses is just sufficient to match wastage. The proportion of

trained teachers in different KGs is shown in *Table 3(iii)*. Projections indicate that it could be possible to stipulate a minimum proportion of 40% trained teachers in each KG in 1993/94, increasing this to 60% in 1996/97. To achieve these targets, it would be necessary to give priority for training to teachers from KGs with below-average numbers of trained staff.

3.20 The Working Party noted that caution was needed not to set too early a target date for these proportions, in case insufficient teachers come forward for training in the years before the law takes effect; but on the other hand, the statutory proportions should not be too far below the actual proportion of trained teachers available, in case this leads to some trained teachers not finding a job. The Working Party then proposed that a statutory minimum proportion of 40% trained teachers, with a minimum proportion at QKT rank, should take effect in September 1994. An announcement in September 1992 would enable operators to prepare to meet the requirements. The possibility of increasing the proportion thereafter would be reviewed by the Working Party in 1995.

3.21 *Effect on fees* The proposed legislation would cause fees to rise, not only in KGs which now employ less than the proposed minimum proportion of trained teachers, but also (because of the increased demand for trained staff) in other KGs which now pay trained teachers less than the recommended scale. The projected rise, in real terms, is estimated to be about 3% a year.

3.22 *Our views on legislation* We consider that the measures approved in 1989 need strengthening if they are to have a sustained effect in raising quality. We therefore support the Working Party's proposal to legislate for a statutory minimum proportion of trained teachers in each KG, but only on condition that the fee remission scheme is improved first. We note that if legislation were to take effect in September 1994, an announcement should ideally be made by September this year. If policy approval for an improved fee remission scheme can be secured by September 1992, this will not present any problem. But if approval is secured later than this, the timetable will need to be modified accordingly.

### *Fee remission scheme*

3.23 The package of measures approved in 1989 included substantial increases in fee remission for KG places, from \$6.5 million in 1989 to \$20.7 million in 1991.

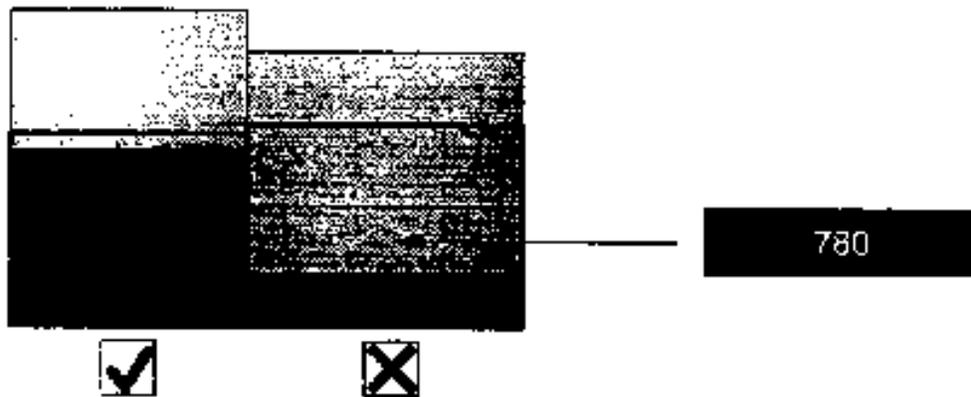
### Distribution of KG Teachers by Type of Teacher and Type of KG

**Minimum % Requirement**  
**(a) 40% trained**

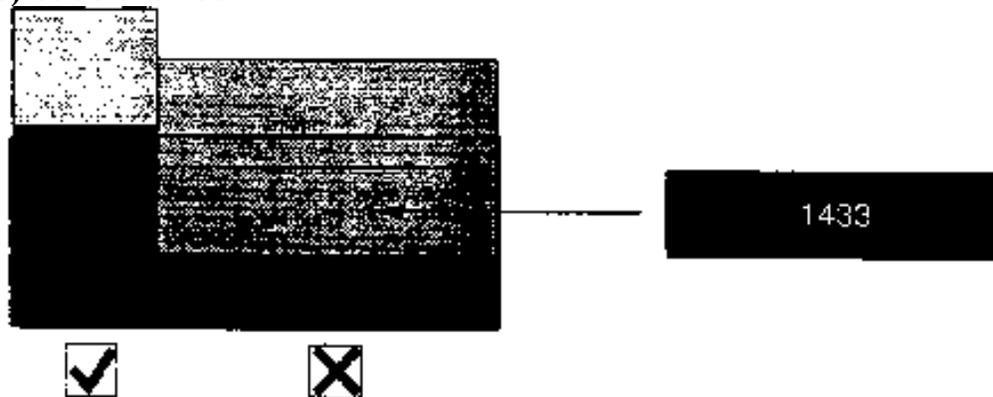
**Additional no. of trained  
KG teachers needed to meet  
minimum % requirement**



**(b) 60% trained**



**(c) 85% trained**



Trained KG Teachers    
 ✓ KGs able to meet minimum % requirement  
 Untrained KG Teachers    
 ✗ KGs not able to meet minimum % requirement

**Note : Based on Teacher Survey 1990**

However, the amount available is still very modest. In 1992, just over 10 000 pupils (slightly more than 5% of all pupils) are receiving fee remission.

3.24 The Working Party proposed that, over a ten-year period, the KG fee remission points system should be brought in line with the points system used for the textbooks assistance scheme and the senior secondary fee remission scheme. This would more than double the proportion of pupils receiving fee remission.

3.25 *Our views on fee remission* We consider that the present level of funding for fee remission is insufficient to sustain improvement in the quality of KG teaching, which was the intended aim of the 1989 package. We support the Working Party's approach, and note that the Director of Education will begin to implement it from September 1993. However, ten years is too long. While we understand the Working Party's caution in a climate of financial stringency, we consider that a determined effort is needed over the next few years to prove that the quality of KG education can be improved while it remains in the private sector. The introduction of statutory requirements for trained staff will increase the urgency of this effort.

3.26 We therefore *RECOMMEND* that funding for KG fee remission be increased annually for five years, starting in September 1993, so that by the end of the fifth year the points system is equivalent to that used for the senior secondary fee remission scheme. We estimate that, in 1991 prices, this will mean an increase from \$28 million this year to \$66 million in 1997. This should enable no less than 11% of KG pupils to benefit from full or half fee remission.

### **Special education teachers**

3.27 At present, teachers in special education receive training on a full time block-release course of 16 weeks, followed by 18 months of supervised teaching. A Working Group recently evaluated the course and noted some unsatisfactory aspects. Course participants found the curriculum too crowded and rushed, while schools found it hard to recruit replacement teachers for the short period of the course. Proposals for a change to a one-year full time course have been supported by a sub-committee of the Rehabilitation Development Coordinating Committee, and by the Hong Kong Special Schools Council (HKSSC).

3.28 A one-year full time course would have three main advantages. Firstly, it would provide more time for the essential components of the course, and participants would generally be under less pressure. Secondly, schools would find it easier to recruit a replacement supply teacher for a full year. Thirdly, there would be sufficient time for trainees to study two electives: a major, related to the category of school in which they work; and another minor subject. Since many children in special education suffer from multiple disabilities, this would help schools to build up a wider repertoire of skills. The longer course would enable a new curriculum to be designed, with the help of the HKSSC, to equip participants more effectively for their work.

3.29 We support the idea of an improved training course for teachers in special education. We note that the cost of additional supply teachers would be about \$14 million a year, assuming that wastage rates remain at their current levels. We hope that the improved training course will help to attract and retain teachers in special education, reducing the present wastage rate and so reducing the additional cost. We *RECOMMEND* that funding be made available to enable the new course to begin in September 1993.

3.30 We note that the Director of Education is consulting the HKSSC on arrangements for a refresher training course for teachers in special education, with a view to offering a course from September 1993.

---

## CHAPTER 4

### Graduate posts in primary schools

Our primary schools face major challenges: to implement TRAs; improve language teaching; tackle behavioural problems; reform school management; extend the Activity Approach to more classes; and in general lay a firmer foundation for the later stages of education. To meet these challenges successfully, they need instructional and managerial skills of a higher order than they have been able to provide up to now. We have considered two options:

- ensuring, by suitable in-service courses, that an adequate range of instructional and managerial skills at the nongraduate level is available in schools; and
- upgrading a significant proportion of primary posts to graduate level, and encouraging all teachers who aspire to senior positions in primary schools to acquire degrees relevant to primary education.

#### **Option 1: In-service development at nongraduate level**

4.2 This option would, in theory, provide an easy and inexpensive way to develop the skills which primary schools need. But, by itself, it would be an inadequate response to the needs of the schools. There are two reasons for this.

4.3 Firstly, the expansion of tertiary education will change the profile of candidates for a nongraduate teaching career. In the past, many nongraduate entrants to the profession had an educational background which today would enable them to proceed to a first degree course. In future, we cannot be sure that the nongraduate stream will attract candidates of the same calibre. As more school leavers obtain places on degree courses, good quality nongraduates are likely to become harder to find, unless steps are taken to improve their career prospects.

4.4 Secondly, because of the additional demands being placed on primary schools by new policies and higher community expectations, there is a growing mismatch between the quality of service expected and the level of expertise available to deliver that quality. If teachers are to keep up to date and provide effective service all

through a career, sustained professional development is needed. A considerable proportion of secondary school teachers acquire higher qualifications during their career; but the current primary school staffing structure offers little motivation for teachers to acquire the level of skills that the schools now need.

## **Option 2: Graduate posts in primary schools**

4.5 All primary teaching posts, including headship posts, are in nongraduate ranks for which the standard qualification is a teacher's certificate. Primary teachers can prepare for the responsibilities of senior rank by taking short courses in education management. Since 1991 they have been required to complete such courses before promotion.

4.6 Concern about instructional and managerial leadership in primary schools led in Report No. 2 (ECR 2) to a recommendation for part time degree courses to upgrade serving heads and deputy heads. A total of 161 primary teachers are now studying for a local BA degree in primary education. The first 39 graduates to emerge in June 1992 will be eligible for additional pay points within the non- graduate stream.

4.7 These short courses and degree courses are welcome, but are on too small a scale to achieve a widespread and rapid impact on the quality of primary education. We believe a substantial number of graduate posts are needed in primary schools, both to enhance the instructional and managerial skills of serving teachers, and to attract into primary teaching good quality new teachers with a higher initial level of professional preparation.

4.8 It has been put to us by some education groups that all teachers should be graduates. We agree that an all-graduate profession is a desirable long term goal, as it is in some other developed education systems. Experience elsewhere suggests that it will take many years to achieve this goal. Large numbers of serving nongraduates must acquire degrees, or else leave the profession through natural wastage or redundancy; a greatly increased number of new graduates must be attracted into teaching; and new resources must be found to meet substantially higher salary costs.

4.9 For these reasons, it is unrealistic at present to consider a firm timescale for achieving an all-graduate profession. Instead we *RECOMMEND* as an initial objective that sufficient graduate teaching posts be provided in primary schools, in as short a time as possible, to make a real difference to the quality of education. We define below how many graduate posts should be provided, by what year.

### *Number of graduate posts*

4.10 There are two factors to consider in quantifying the initial objective: firstly, the need to provide schools with the knowledge and skills required for effective leadership at a time of growing pressure for quality in education; and secondly, the need to maintain the attractiveness of a career in primary education at a time of expanding opportunities at graduate level.

4.11 Since teachers in senior ranks are the instructional and managerial leaders, we *RECOMMEND* that enough graduate posts be provided by the end of the initial period to match the number of AM, Senior Assistant Master/Mistress (SAM) and PAM posts. About 25% of primary teaching posts are in these ranks at present. Our recommendation in Chapter 2 for changes in the promotion ratio will increase this proportion to about 28%.

4.12 To attract good quality people into primary teaching, we *RECOMMEND* that, in addition, each primary school should be given a quota of graduate posts for entry rank appointees holding a suitable pre-service degree. The aim should be for two posts in every standard 24-class school (*pro rata* for larger and smaller schools) to be filled by graduates from suitable pre-service courses. This would enable over 100 teacher's certificate holders each year to proceed directly onto a two-year full time degree course.

### *Target date*

4.13 Overall, our recommendations for the initial objective will enable about 35% of primary teaching posts to be filled by graduates. This can be achieved within a reasonable period only if large numbers of serving primary teachers acquire suitable degrees. How quickly all senior posts can be held by graduates depends on a process of generational change. Some teachers now holding senior posts are unlikely to acquire a degree: they are nearing retirement, and it would be unreasonable to insist on their becoming graduates.

4.14 Assuming two years to develop suitable degree courses relevant to the needs of local schools, and a four-year part time degree course for serving teachers with a professional qualification, the first batch of graduates could emerge six years after a policy decision is made. The initial large scale provision of degree courses should be spread over a number of years, so that the capacity of course providers is not overloaded, and resources for the additional staff costs of graduate posts can be secured in affordable annual amounts.

4.15 Taking a realistic view of these factors, we *RECOMMEND* that the initial target be achieved within 15 years (i.e. by 2007, if a policy decision can be made by the end of 1992). We have used this timescale in working out detailed implications. To assess progress towards the initial goal, and the prospects for further increasing the proportion of graduate teachers thereafter in both primary and secondary schools, we *RECOMMEND* a review not later than ten years after a policy decision is made.

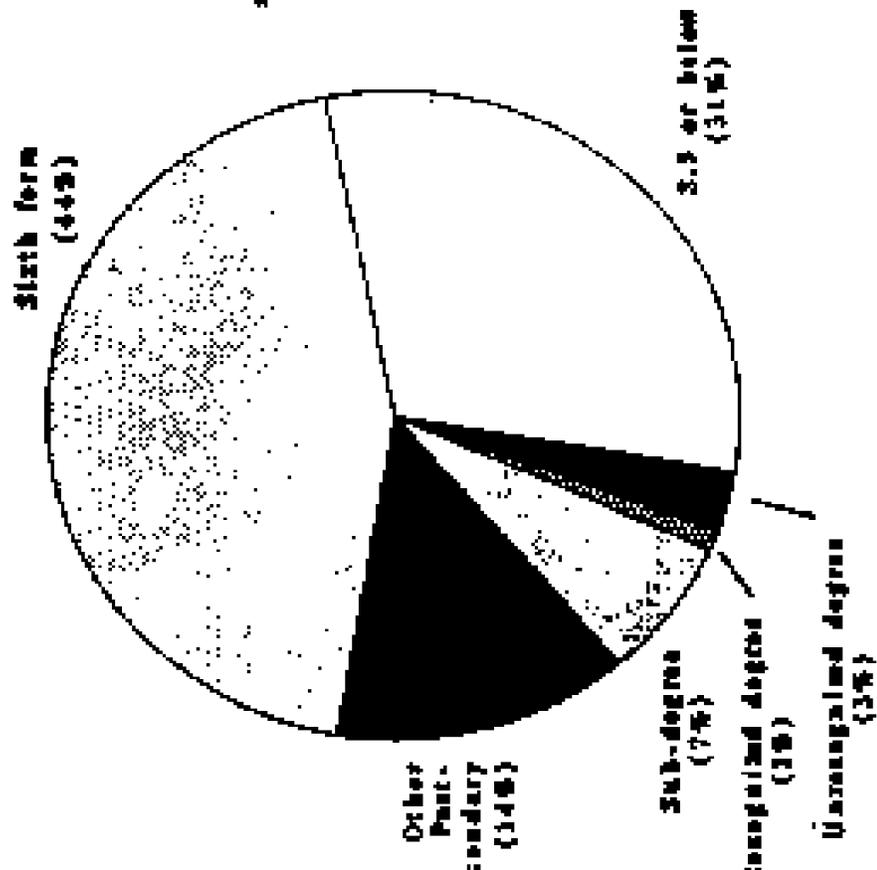
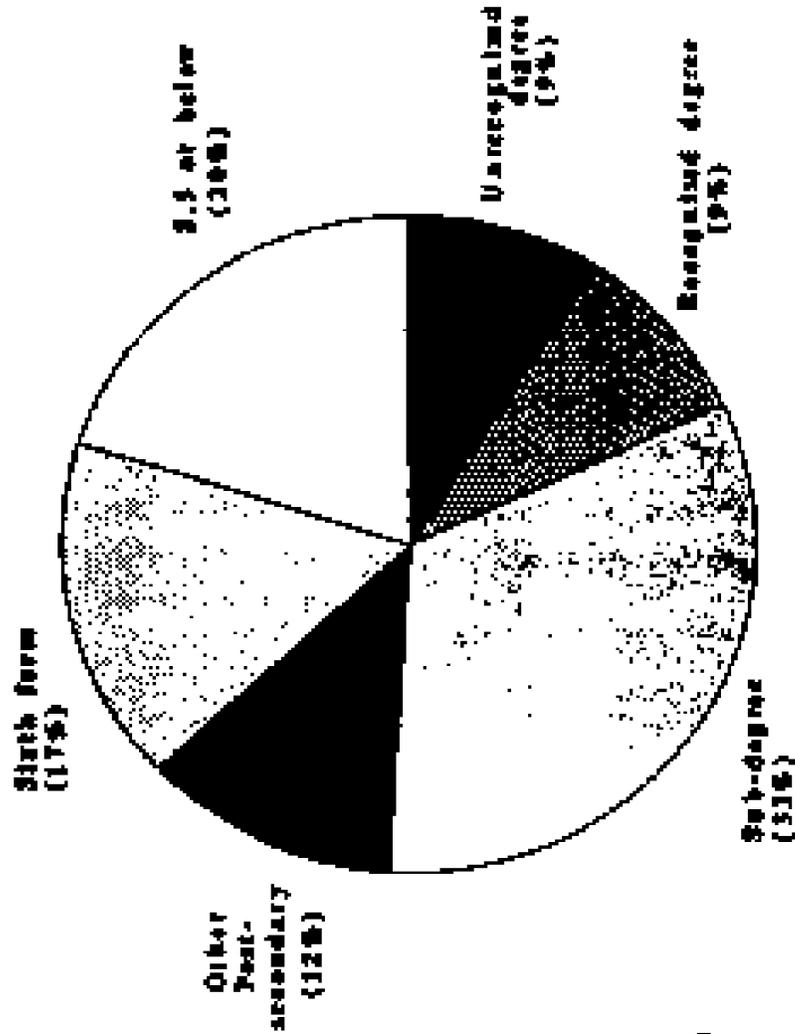
### **What sort of degree?**

4.16 To justify the substantially higher costs of graduate posts, a convincing case must be made that they will lead to improved quality in primary education. We have therefore considered carefully what sort of degree should be recognized for appointment to primary graduate posts.

4.17 Both primary and secondary teaching require good subject knowledge, and professional skills which facilitate learning by students. But the emphasis differs at each level. Secondary graduate teachers with subject-based degrees, who can teach academic subjects in depth, are encouraged but not required to have a professional training qualification before joining the profession. As *Table 4(i)* shows, about 30% of graduates in public sector secondary schools are untrained. At primary level a pre-service professional qualification, such as the teacher's certificate, is considered very important. Over 91% of primary teachers in the public sector have such a qualification; and among the remaining 9%, about a third are taking an In-service Course of Teacher Training (ICTT). Primary teachers with a subject degree but no professional training are treated in the same way as untrained nongraduates, a practice we support.

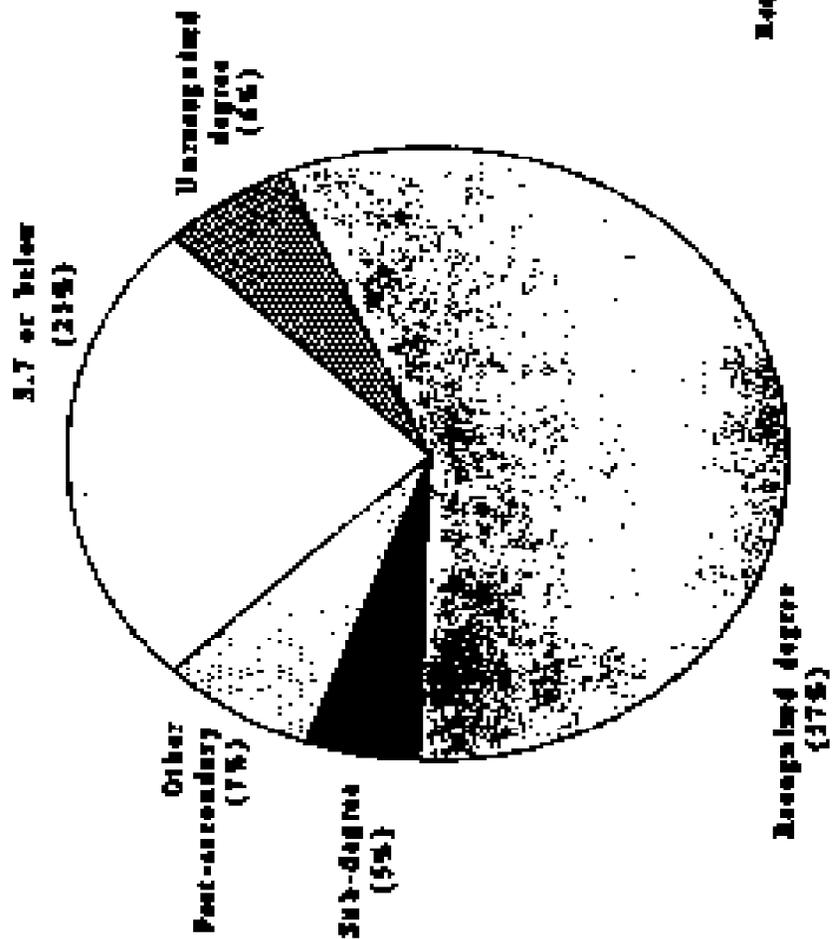
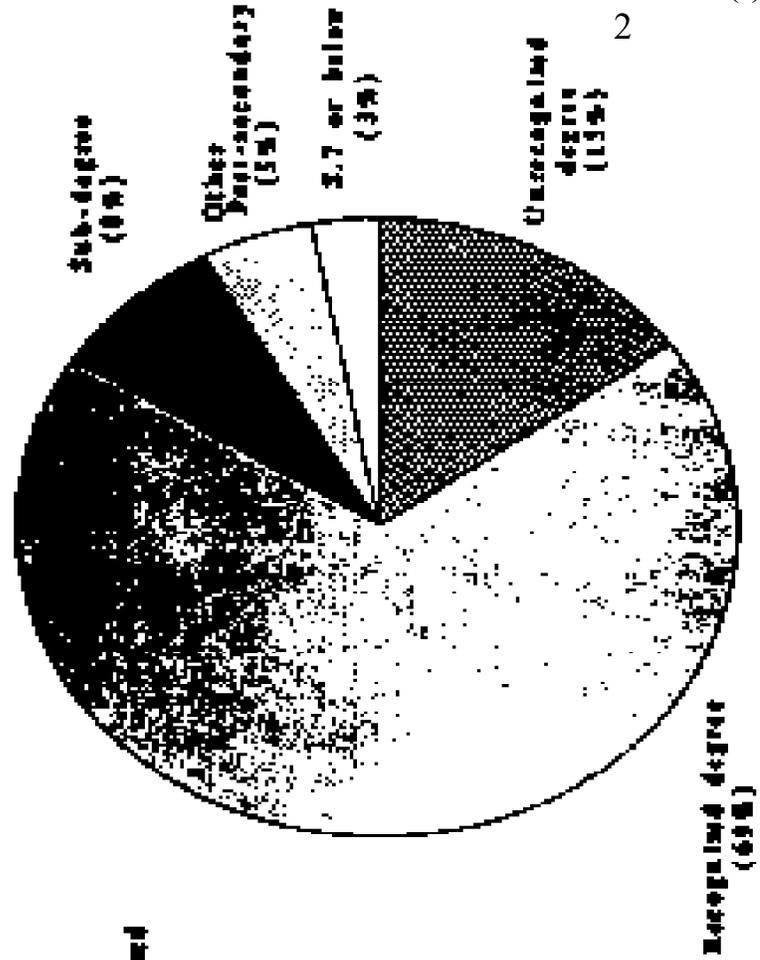
# Academic Qualifications of Primary Teachers, 1991

Table 4(i)



# Academic Qualifications of Secondary Teachers, 1991

Table 4(I) page 2



4.18 Graduate posts in primary schools should be filled by teachers with skills and knowledge relevant to the needs of the schools. We therefore *RECOMMEND* that:-

- a degree in primary education should normally be the required qualification; and
- two types of degree course should be designed for local primary teachers:

a part time in-service course for teachers who have a professional qualification (teacher's certificate), several years teaching experience and probably some in-service training, for which credit should be given in terms of partial course exemptions; and

a two-year full time pre-service course for new teacher's certificate holders.

### *In-service degrees in primary education*

4.19 We envisage that in-service degree courses could be completed over four years of part time study, compared with six years part time for other degree courses. We envisage most courses being offered in the medium of Chinese. They should equip trained and experienced teachers with the knowledge and skills needed for instructional and managerial leadership in primary schools, and could comprise at least the following components: -

- *education theory* - to update and extend understanding of the teaching and learning process at primary level;
- *subject expertise* - to provide a greater depth of knowledge in one or more subject areas relevant to the primary curriculum; and enhance the teacher's ability to think about, analyse and organise the subject area for teaching purposes;
- *education management* - to develop skills in planning and implementing primary level learning programmes, motivating staff and enlisting parental support for the child's learning; and

- *specialisms* - such as language and communication skills, learning difficulties, guidance, learning resources, extra-curricular activities, or other areas of need in primary schools

### ***Pre-service degrees in primary education***

4.20 Students on pre-service degree courses would have little prior experience of classroom teaching and less need to be prepared for managerial responsibilities. These courses could therefore focus on enhancing subject knowledge in an area relevant to the primary curriculum, as well as professional preparation in education theory and practical classroom management issues, with a substantial element of supervised teaching.

4.21 The existing BA degree in primary education is accepted for appointment on an enhanced salary scale in public-sector primary schools, but not for appointment as a graduate in secondary schools. Since the proposed courses would be tailored to meet the needs of primary schools, we consider that graduates from them should not normally be appointed as graduate teachers in secondary schools. They should, however, be qualified for non-teaching graduate posts in the Education Department.

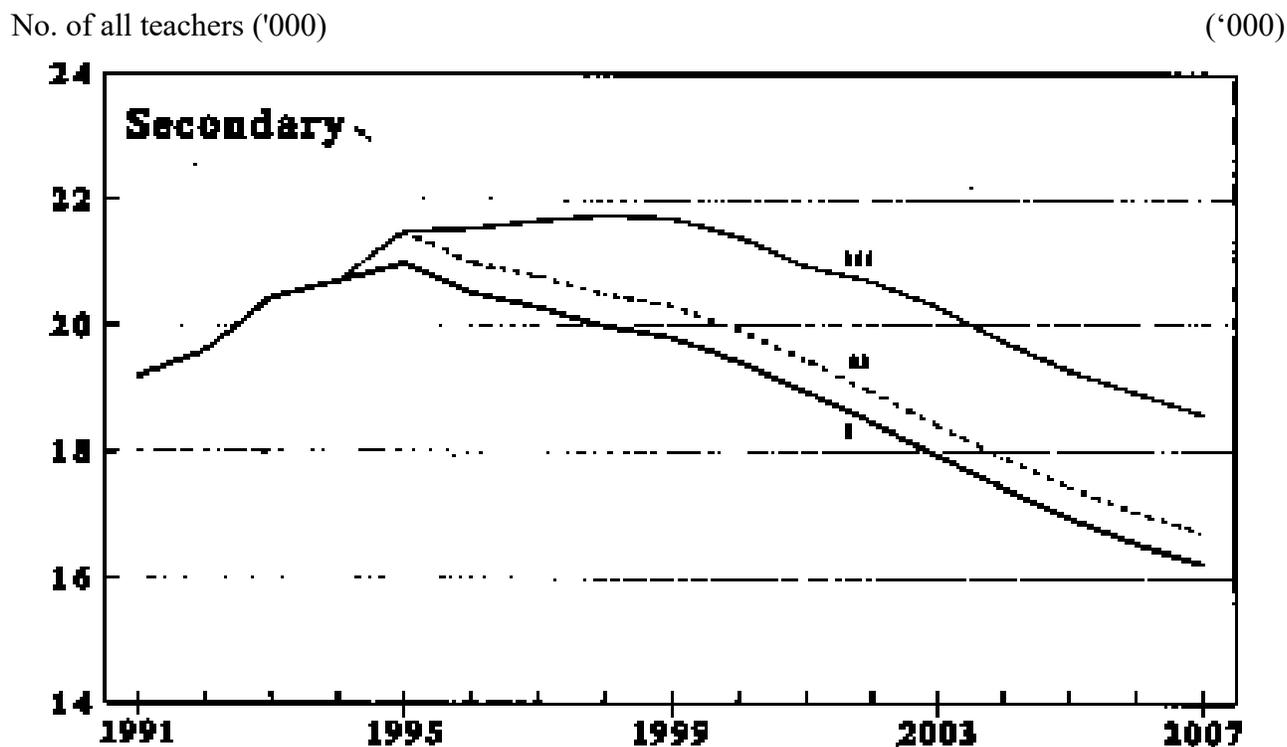
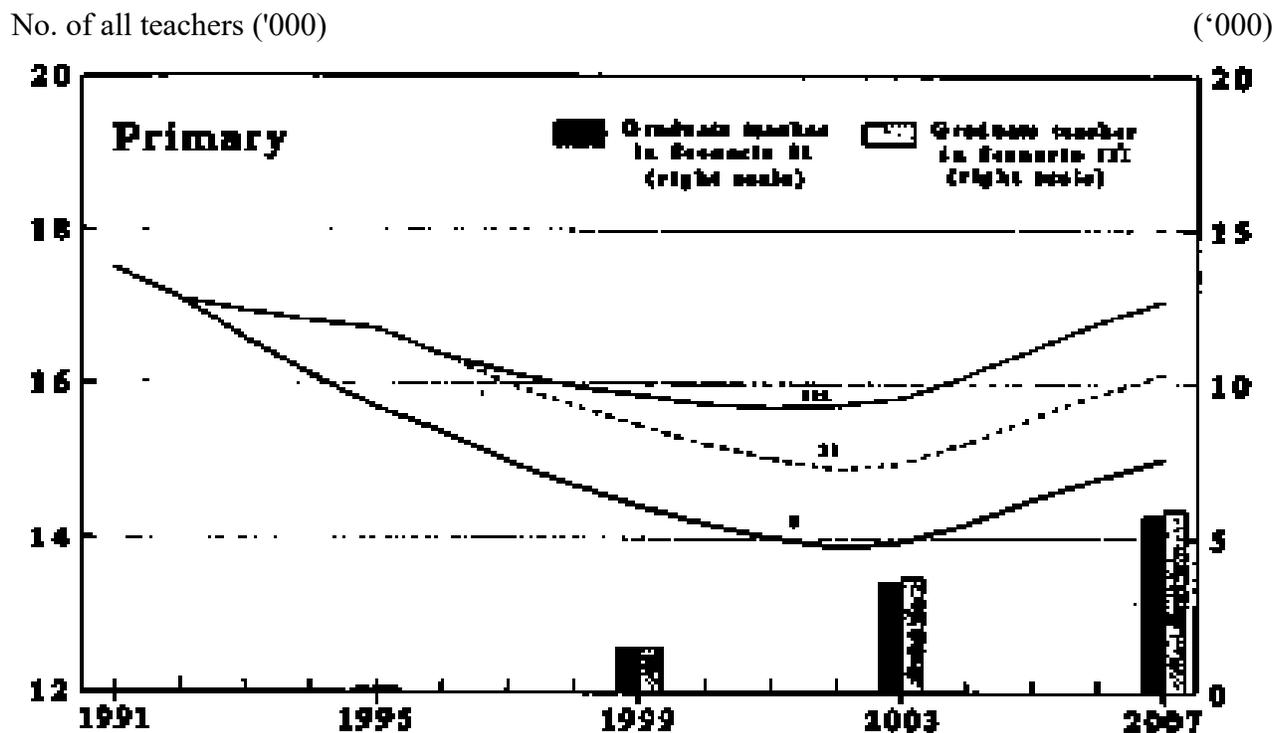
### **Providing degree places**

4.22 We have projected the total numbers of primary teachers in 2007 on the basis of present teacher: class ratios; the higher teacher: class ratios we recommended in Chapter 2; and the smaller class sizes we also recommended in Chapter 2. The projections are given in *Table 4(ii)*.

4.23 By 2007, a total of between 5720 and 5950 graduate posts will be needed. Taking into account wastage during the initial phase, at least 7500 primary teachers will need to have graduated by that year if the initial objective is to be achieved. The output of graduates will need to reach 560 by 1998, and be maintained at between 600 and 900 a year for nine years. About 80% of the output will need to be from part time courses aimed at serving teachers, and 20% from full time pre-service courses.

4.24 The crucial question in the initial phase is: how can we provide enough opportunities, starting as soon as possible, for large numbers of serving teachers

**Table 4(ii): No. of Teachers required under Three Scenarios**



Scenario I : Present policies (including those arising from ECR 4)

Scenario II : ECR 5 fully implemented except for recommendation on class size

Scenario III : ECR 5 fully implemented, including recommendation on class size

to acquire degrees relevant to the needs of primary schools? The tertiary institutions offer some part time degree programmes, including some aimed at serving teachers, but on a much smaller scale than is needed here. A few places on full time first-degree courses are filled by mature adults; but if the numbers of serving teachers envisaged here were to take full time first-degree places, this would substantially reduce opportunities for school leavers. The tertiary institutions will not be in a position to offer any additional first-degree places during the current triennium ending in 1995.

4.25 In Chapter 6 we recommend upgrading the colleges of education and ILE. We have therefore considered the following questions: -

- could the colleges and ILE be upgraded quickly enough to degree-granting status to make a major contribution to the initial objective?
- could they cope, on top of their existing and new tasks at sub-degree level, with a major programme of part-time degree courses? and
- would this be the most cost-effective way to provide the large numbers of places needed?

4.26 Positive answers to these questions cannot be given at this stage. We recommend in Chapter 6 that the colleges and ILE should in due course offer some degree-level courses: but this will take time. To achieve the initial objective, we must therefore look to other ways of providing the necessary courses quickly.

4.27 Given the size of the demand for in-service courses in primary education, the need for an early start, and the fact that most places will be on part time courses for working teachers, the most flexible way to provide suitable courses is by distance learning combined with a substantial component of face to face tuition. One local tertiary body, the OLI, was set up specifically to offer self-funding distance learning degree courses for adults. Other local tertiary institutions have also provided courses on a similar basis.

4.28 We believe that, with adequate preparation and resources for course development, it will be possible to develop suitable degree courses for serving primary teachers which are of good quality; are relevant to local conditions; and offer

the numbers of places needed to meet the demand from teachers, within the timescale we envisage. This approach will, we believe, offer some advantages over conventional courses. For example, the geographical compactness of Hong Kong makes it easy to combine distance learning with face to face tuition. Teacher educators from all relevant institutions could collaborate in developing and running courses, thus ensuring optimum use of all local expertise. Since distance learning courses for working adults are funded by student fees, this approach should not require any substantial amounts of public funding.

4.29 We therefore *RECOMMEND* that local tertiary institutions be invited to develop, either on their own or jointly, self-funding degree courses in primary education which combine distance learning with face to face tuition. In Chapter 7 we propose a new body to advise on and coordinate all teacher education matters. A priority task of this body should be to ensure that adequate and relevant in-service degree courses are developed with the necessary speed, and enough places are available to achieve the initial objective. We *RECOMMEND* that a development grant of \$10 million be provided during 1993, so that potential course providers whose proposals appear suitable to the new advisory body can be helped to develop courses quickly.

4.30 We *RECOMMEND* that pre-service degree courses in primary education be provided by conventional means. Initially such courses will need to be offered by tertiary institutions as a blister programme, but we envisage their transfer in due course to the upgraded colleges of education, once these are assessed as able to offer degree courses.

4.31 We envisage that institutions funded by the University and Polytechnic Grants Committee (UPGC) will continue to offer a range of degree courses in education, within their student number targets.

### **The primary graduate stream**

4.32 The Government is advised on public sector ranks and payscales by the Standing Commission on Civil Service Salaries and Conditions of Service. But it was necessary for us to consider these issues in relation to primary graduate posts, in particular so that we could assess the likely resource implications, as our terms of reference require us to do. We therefore formed a working party to recommend to us an appropriate ranking structure and payscales.

4.33 The working party noted that salary scales are determined by the Standing Commission after basic principles of pay for the job, qualifications and relativity with other grades have been carefully considered; and that simply acquiring a higher qualification does not always justify higher pay. However, we have presented above a clear justification for creating a separate graduate stream in the primary teaching force. The working party proposed that this stream should have a ranking structure and payscales which are attractive enough to motivate teachers to undertake a demanding in-service degree course, but without creating too much overlap between a graduate rank and more senior nongraduate ranks.

4.34 In the light of the working party's proposals, we concluded that a strict application of secondary school graduate ranks and scales would be inappropriate for two reasons. Firstly, the payscale for the GM rank reaches the same maximum MPS point as the nongraduate SAM scale, two promotion steps higher. Such a large overlap is undesirable in primary schools, where nongraduate posts will be in a majority for some time to come. Secondly, we pointed out above that graduate qualifications relevant to secondary education and those relevant to primary education are not generally interchangeable. We have therefore based our assessment of the resource implications on the following structure:-

<b>Rank</b>	<b>Non-Graduate MPS</b>	<b>Graduate MPS</b>
PAM	34-36	38-41
SAM	30-33	34-39
AM	25-29	30-33
CM	14-24	19-29

#### **Filling graduate posts**

4.35 Although our aim is to enable all senior posts to be filled by graduates, we consider that schools should be free, at least during the initial phase, to fill graduate posts at the entry rank also. This will encourage highly motivated teachers at whatever rank to upgrade themselves, enable them to benefit from the higher status of the graduate stream while still in their present rank, and provide school managements with a greater choice of candidates for promotion.

4.36 The buildup of graduate posts should apply equitably to all schools. The first such posts should accommodate graduates from the existing degree course in primary education, and serving teachers with other qualifications which are

acceptable as degrees or degree-equivalents, and which are considered relevant to the needs of primary schools. Once the proposed degree courses are in full swing, graduate posts should build up each year to match the likely output of graduates until the initial objective is achieved. Teachers serving in different schools are likely to acquire degrees at different rates, so we envisage some movement of staff between schools as graduate vacancies are filled.

### *All-graduate primary heads*

4.37 All primary heads should be graduates as early as possible, in order to address the leadership issue, motivate teachers to acquire degrees with a view to improved promotion prospects, and reduce staff problems which might arise with graduates serving under a nongraduate head. We have considered two possible deadlines: a date by which all incumbent heads should be graduates; or a date from which all headship vacancies should be filled by graduates.

4.38 It would be unfair to require all incumbent nongraduate heads to acquire a degree or else retire early. As in past cases when qualifications for a post have been raised, the reasonable approach is to let natural wastage phase out those whose qualifications have been overtaken by new developments. We therefore feel more confident in setting a deadline by which headship vacancies should be filled by graduates, and have considered two options.

4.39 The first option would aim to produce enough graduates at the right stage of their careers to fill headship posts as early as possible in the initial phase. To achieve this, it would be necessary to select certain teachers, offer them an incentive to take the degree course, and persuade school managements to give preference to such teachers in appointing a head.

4.40 In the second option, schools would be free during the initial phase to select the best candidate for head, whether graduate or nongraduate. By the end of the initial period, i.e. by 2007 at the latest, serving teachers interested in acquiring a degree would probably have had the chance to do so. It would therefore be reasonable at that time for all new headship appointments to be at graduate level.

4.41 On balance we favour the latter approach. We are optimistic that a good proportion of those entering degree courses in the early years will be incumbent

heads several years from retirement, or teachers at the right stage of their careers to compete for headship posts. School managements, which under the SMI will become more accountable for the quality of the school's services, are likely in many cases to prefer a graduate candidate for head even before the end of the initial period.

4.42 We *RECOMMEND*, however, that the profile of those taking the degree courses should be monitored during the early years so that, if our optimism proves to be unfounded, the Government can consider measures to attract more incumbent or potential heads onto degree courses in primary education. This would be one aspect of the review we recommended in paragraph 4.15.

---

## CHAPTER 5

### Improving the teacher education programme

In this chapter we propose a new framework for delivering the non-degree parts of the teacher education programme, in which the colleges of education and ILE acquire a new, autonomous status. We also define policy goals for the programme, and propose how it can be improved.

#### The infrastructure of teacher education

5.2 The teacher education programme has two distinct sides. The colleges of education provide nongraduate courses; tertiary institutions provide graduate and postgraduate courses. *Table 5(i)* compares the main features of these two types of institution, and *Annex E* gives basic information on the colleges and ILE. The graduate-level provision appears to us generally satisfactory, but the nongraduate side of the programme, we believe, needs major reform.

5.3 It has been put to us forcefully by teacher educators and student teachers that, compared with other institutions of higher education, the status of the colleges and ILE is administratively and academically anomalous. They have told us that because the colleges and ILE are run directly by the Government, their staffing, equipment, management and funding reflect civil service systems and procedures rather than what is academically desirable or necessary. These administrative problems, we feel, could probably be solved even within the context of the civil service, given a suitable policy initiative. But the disadvantages in academic terms of direct Government management appear to us to warrant a change of status.

5.4 The colleges and ILE are the last institutions of post-secondary education to be directly managed by the Government. In 1972 the Hong Kong Technical College, run by the Education Department, evolved into an autonomous UPGC-funded institution, the Hong Kong Polytechnic. Technical institutes, run at first by the Department, were transferred in 1982 to the Vocational Training Council (VTC), an independent statutory body. After separating from the Government, all these institutions were able to develop and expand their services within a framework of academic planning, advice on resource needs, and external quality assessment.

**Table 5(i)**  
**Comparison of colleges/ILE and tertiary institutions**

	<b>Colleges/ILE</b>	<b>Tertiary institutions</b>
<b>Managed by</b>	Education Department	autonomous statutory bodies
<b>Funded mainly from</b>	annual departmental budget	triennial block grant
<b>Formal awards</b>	teacher's certificate	sub-degree awards; first degrees; postgraduate professional qualifications; higher degrees
<b>Other courses</b>	in-service refresher courses; short train- ing courses; language courses	continuing education courses, including in-service courses for teachers
<b>Progression opportunities</b>	teacher's certificate offers little basis for academic upgrading	each award is a basis for the next higher award
<b>External review</b>	nil	.UPGC (academic development plans; academic review visits; triennial grants); .peer review (quality of degrees and awards); .HKCAA (quality of non-university courses)

5.5 The academic standard of teacher's certificates awarded by the colleges has up to now not been subject to external review in the same way as other higher educational awards. Because of new demands being placed on the education system, and higher community expectations of our schools, it is important that the quality of the teacher's certificate should attract the same wide recognition as other academic awards. As the history of Hong Kong Polytechnic and the technical institutes has shown, academic quality can develop best outside the civil service context.

5.6 A second argument against continued operation of the colleges and ILE by the Government relates to public perceptions. In the past, many entrants to the colleges had qualifications well above the threshold level. With the expansion of tertiary education places, qualifications have tended to drift towards the threshold. If we are to provide schools with the quality of teachers they need to meet community

expectations, the colleges must be able to compete more equitably with other institutions which enrol bright school-leavers.

5.7 We have therefore concluded that, if the teacher education programme is to undergo the same kind of academic growth and development as has already been achieved by the tertiary and technical education programmes, the colleges of education and ILE must be separated from the civil service. We have considered three options: creating a "teacher training university" under the UPGC; linking each teacher training institution to an existing tertiary institution; and converting the colleges and ILE into an autonomous institute of education outside the UPGC system.

### *"Teacher training university"*

5.8 This option, proposed by some educational bodies, would mean creating a full scale tertiary institution offering courses in education, all or mostly at degree level. This may become feasible one day; but since nongraduate teacher preparation will continue to play an essential role for many years, the proposal is premature at this stage. If a "teacher training university" were created, it is not clear where nongraduate courses would be provided. It is important not to disrupt our existing programmes of teacher education.

### *Links to existing UPGC institutions*

5.9 Suggestions have been put to us for linking or merging teacher education institutions with the tertiary sector. Each of the four present colleges and the ILE might be attached in some way to a UPGC-funded institution, with the choice depending partly on location of the campus and the type of courses offered.

5.10 Loose links would mean little more than establishing friendly but informal academic contacts. This could not bring about the upgrading and change of status we consider necessary for the colleges and ILE. More formal links could lead to a complete merger between each college and a tertiary institution. Possible advantages would be enhanced status for the colleges and ILE, the academic stimulus of affiliation to a large multi-discipline institution, and the ability to attract students of the same calibre as those entering other faculties in the institution. These claims are superficially attractive, but we cannot support them, for two reasons.

5.11 Firstly, only two UPGC-funded institutions (Hong Kong University and CUHK) have extensive experience of teacher education, all at graduate and postgraduate level. It would change their nature to attach to them colleges which for some years will offer only sub-degree courses. Once Lingnan College has completed its upgrading, the only tertiary institutions with sub-degree courses will be the polytechnics. In view of their institutional mission and academic profile, we see little advantage in grafting onto the polytechnics a large programme of teacher education.

5.12 Secondly, whether a merger could succeed would depend on the cooperation of autonomous institutions, which would have to believe that the merger made academic sense. Even if we were to recommend this option, there would be no guarantee that successful mergers could be arranged quickly.

### *Institute of Education*

5.13 We therefore consider that the most positive option would be to upgrade the colleges and ILE into an autonomous Institute of Education, operating initially at sub-degree level, but offering a proportion of courses at degree level once a positive academic assessment makes this feasible. In the next chapter we make detailed recommendations for achieving this as soon as possible; but first we consider the goals of the teacher education programme, and how they might be achieved more effectively.

### **Goals of the teacher education programme**

5.14 To talk of teaching as a profession implies that, like other professions, it involves knowledge and skills which can be acquired by formal study and the application of well-founded principles. The teacher education programme is the means for imparting, in a systematic manner, knowledge and skills likely to be useful to teachers in delivering their services to students. A well-designed programme will equip teachers to perform effectively early in their careers, help to reduce wastage, and provide opportunities for professional development.

### *Initial training*

5.15 The belief that professional training can make a difference to the quality of teaching has led to restrictions on career progression for untrained

graduate and nongraduate teachers. We support measures to maximise the proportion of trained teachers in schools, and propose that the first goal of the teacher education programme should be to ensure that all teachers have an opportunity to complete initial professional training before they enter the profession, or as soon as possible thereafter.

5.16 Such opportunities already exist in the form of pre-service and inservice certificate and postgraduate training courses. But until we are in a position to require all teachers to be trained, the extent to which these opportunities are taken up depends on professional motivation and commitment.

5.17 The second goal of the programme, we propose, should be to ensure that initial training courses are as academically rigorous as sub-degree courses in other disciplines; are designed to meet the needs of schools for well-prepared new teachers; and provide a good foundation for the teacher's subsequent professional development.

### *Professional development*

5.18 A large number of in-service professional development courses are offered by various bodies including the colleges, ILE, advisory inspectorate, and some tertiary institutions. Course offerings are varied and flexible: where demand is high, extra places may be provided, while underenrolled courses can easily be cancelled. Some courses are fully subsidised; some are funded by user fees; some attract fee refunds from the Education Department. Completion of an approved inservice course was recently made a requirement for promotion to senior teacher and headship posts, a step we support.

5.19 We acknowledge the good work of those who provide in-service teacher education, and propose, as the third goal of the programme, the development of a structured and systematic range of courses for serving teachers, so that course providers can meet the needs of the schools as fully as possible.

### **Measures to improve teacher education**

5.20 We have identified three measures which could help the teacher education programme to meet these goals more effectively: a formal policy on professional training and development; a more formal status for in-service courses; and an

authoritative source of advice on what courses are needed, where they should be offered, and how they should be funded.

### ***Policy on professional training and development***

5.21 We *RECOMMEND* the development of a comprehensive policy on the professional training and development of teachers, which will: -

- aim for steady progress towards an all-trained teaching profession;
- ensure that the efforts of course providers meet the needs of schools as fully and effectively as possible in all academic and non-academic areas of their work;
- encourage all teachers to enhance their professional competence systematically and progressively throughout their career; and
- increase the importance of professional development as a factor in career progression.

### ***Formal professional development qualification***

5.22 Few professional development courses at present lead to a formal award. Only recently was completion of certain courses made a prerequisite for promotion. We consider that career-long professional development would be helped by creating a comprehensive range of in-service courses, each offering credits related to the duration and level of the course. The accumulation of credits would facilitate acquisition of a higher professional qualification, would play a role in a teacher's career progression, and would enable the academic and nonacademic needs of schools to be met more systematically. These courses could be supplemented by workshops, seminars and short courses not offering credits.

5.23 The only formal upgrading route for nongraduate teachers at present is to obtain a first degree. Because of this, experienced and motivated primary teachers are sometimes lost to secondary schools. The proposed graduate posts in primary schools will for some years be held by a minority of teachers. We therefore see a need for a formal in-service qualification, intermediate between a teacher's

certificate and a degree, to encourage all nongraduates to upgrade their professional knowledge and skills in a systematic way.

5.24 We *RECOMMEND* the development of an in-service professional qualification at sub-degree level, the "Advanced Teacher's Certificate" (ATC). We envisage that the ATC would be awarded by the new Institute of Education on completion of a specified amount of formal in-service professional development; the equivalent of two years part time study, accumulated over a number of years, would be an appropriate amount. Courses leading to the ATC could be provided by various bodies, under appropriate accreditation arrangements. All existing courses, in particular those required for promotion purposes, would be reviewed to see how they could fit into a structure of credit units leading to the ATC. New credit-bearing courses would be designed as needs were identified.

5.25 Courses leading to the ATC would be of three main kinds: -

- *general development courses* - to help serving teachers build on their initial training and classroom experience, upgrade their subject skills, and become more competent professionals and managers;
- *language skills courses* - to help teachers enhance their competence in Chinese (including Putonghua) and English; and
- *specialist courses* - to meet the needs of schools in areas such as guidance, curriculum development, educational technology or learning resources.

5.26 All ATC courses would be externally validated. It would be for the Governing Council of the new Institute (see Chapter 6) to make appropriate arrangements for this. We envisage that course providers will include the new Institute and the tertiary institutions. External validation should enable ATC holders who seek further upgrading to graduate status to gain partial exemption from education-related degree courses.

5.27 We *RECOMMEND* that the award of an ATC should receive tangible recognition in the form of a salary increment in the rank held at the time of award, provided that the teacher is not already at the top of the relevant payscale.

5.28 The Governing Council of the new Institute will probably wish to address the following questions in developing the ATC. Should certain combinations of courses be preferred or required, or should any combination of courses be accepted? Should completion of some courses be required before progression to other courses? Should full ATC credits be earned within a specified period, or should teachers be encouraged to spread attendance over a reasonable period, say at least three years?

5.29 *Table 5(ii)* shows the present career opportunities for graduate and nongraduate teachers, and the new opportunities arising out of our recommendations in this chapter and Chapter 4.

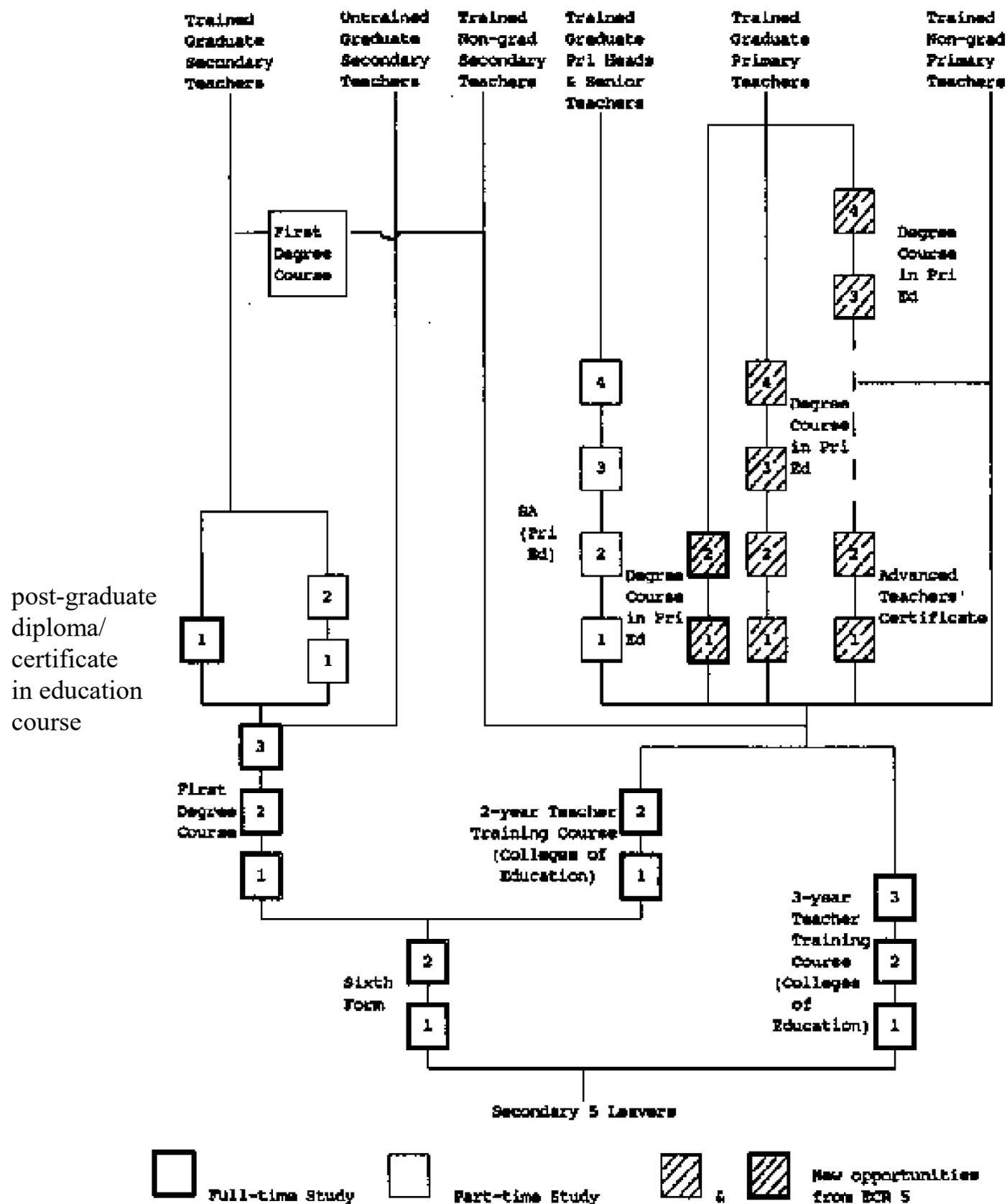
*Advice on teacher education*

5.30 The case for a new committee to advise on teacher education is set out in detail in Chapter 7.

---

Table 5(ii)

Present & Future Professional Development Opportunities for School Teachers



## CHAPTER 6

### Upgrading the Colleges and ILE

In the last chapter we set out a case for upgrading the colleges of education and ILE, and converting them into an Institute of Education run by an autonomous statutory Council. We now describe the opportunities and constraints which will affect the transition, and make recommendations for completing the upgrading process as quickly as possible.

#### The Institute of Education

6.2 We *RECOMMEND* that -

- a new unitary Institute of Education, comprising the colleges and ILE, should be created as soon as the necessary legislative and administrative procedures allow;
- the Institute should be governed by an autonomous Governing Council with statutory powers and duties; and
- a Provisional Governing Council, with the terms of reference and composition shown in *Annex C*, should be set up by early 1993 to plan for the institutional changes.

6.3 Since an all-graduate profession will take some time to achieve, nongraduate initial training and professional development will continue to be needed. We therefore envisage that for some years the main work of the Institute will be at sub-degree level. But, in addition, the Institute should aim for an academic standard which as soon as practicable will enable it to offer some degree courses. This will strengthen academic quality throughout the Institute, and enable it to compete for well qualified staff and students.

#### The upgrading process: general approach

6.4 The aim of the upgrading process should be for the Institute of Education to reach, initially, a standard comparable to a tertiary institution offering

primarily sub-degree work while planning to introduce some degree work. The next stage would be the actual introduction of some degree courses.

6.5 We would like the upgrading process to be completed as early as possible. But in upgrading existing institutions, constraints must be recognized which will affect the timing of the process. In particular, existing services must be maintained while plans for the upgrading are developed and implemented.

6.6 We therefore envisage an upgrading scenario lasting some years. During this period, the Governing Council will need to strike a balance between retaining the services of existing staff in their present grades, in order to provide continuity of service and avoid redundancies; and recruiting, to new grades, highly qualified staff who can help to raise academic standards in the Institute. We envisage that some posts in the new grades will be filled by serving staff who have the qualifications needed for the upgraded role of the Institute, while some will be filled from outside, as natural wastage leads to vacancies.

6.7 We set out below our views on the two main factors in the upgrading process, namely the resources which the Institute will need; and the academic aspects which will affect the capability of the Institute to offer courses at degree level.

### **The upgrading process: resource aspects**

6.8 Resources should be adequate in the first stage to raise the colleges and ILE to a standard comparable to the sub-degree area in UPGC-funded institutions, and to enable them to plan for degree work. Additional resources will then be needed in due course to enable degree courses to be offered.

6.9 In considering the question of resources, we have taken into account the needs and circumstances of the Institute. Firstly, in upgrading an institution a considerable amount of front-end loading is necessary, which can gradually be reduced during the upgrading period. Secondly, a multi-campus institution has substantial resource needs additional to those of a single-campus institution; and further significant costs would be involved in any integration of campuses. Thirdly, the historical circumstances of the colleges and ILE, and the need to avoid redundancies, must be taken into account. Fourthly, the needs of education as an academic discipline

must be considered, such as staff time spent supervising the teaching practice of trainees, and the demand for a wide range of elective subjects which might cater for only a few students at a time.

### *Staff norms*

6.10 We envisage that the Governing Council will devise staff norms appropriate to an institution providing sub-degree work while planning for some degree work, in terms of a lecturer: student ratio; a ratio of senior to junior posts; qualifications for lecturers; and numbers of support staff. These should have reference to relevant norms in comparable UPGC-funded institutions.

6.11 *Lecturer: student ratio* The methodology now used to set manning scales in the colleges and ILE results in an average lecturer: student ratio of about 1:9. (The Governing Council will need to determine the exact present ratio after a critical examination of the factors used in converting part time places and short course places into full-time equivalent (FTE) places.) On the surface, this compares favourably with ratios for academic staff in the tertiary institutions; but the reality is somewhat different. About one in 20 of lecturer grade staff in the colleges and ILE are full time administrators; most lecturers have duties which in other institutions are performed by non-academic staff. The colleges and ILE are housed in several locations, with consequent duplication of some functions. The Governing Council will in due course need to propose a lecturer: student ratio appropriate to its circumstances.

6.12 *Junior: senior ratio* In some UPGC-funded institutions, about four junior posts (Senior Lecturer and below) are normally provided for each senior post (Principal Lecturer and above). In the colleges and ILE there are about six junior posts for each senior post, so the Governing Council should have scope for proposing a structure with better promotion ratios.

6.13 *Qualifications* Uniquely among post-secondary institutions, the colleges have a nongraduate academic grade, which makes up almost 40% of all lecturing posts. (All ILE academic staff are graduates.) This is because the colleges need to recruit lecturers with primary education experience, who are now usually nongraduate teachers. About 25% of those holding nongraduate posts in fact have a first degree. We *RECOMMEND* that nongraduate lecturing posts

be phased out as quickly as natural wastage allows. To hasten completion of the first stage of upgrading, there should be no more recruitment to the nongraduate lecturer grade.

6.14 A large proportion of the Institute's staff will need higher degrees. About 40% of graduate lecturers in the colleges, and two out of every three ILE lecturers, have higher degrees.

6.15 *Support staff* The Governing Council will need to devise an appropriate formula for staffing the support functions in the Institute. The present level of support staff is affected by the scattered nature of the campuses, the unclear dividing line between academic and support functions, and the fact that some services are provided by Education Department headquarters and other Government departments. In general, the provision of support staff appears inadequate even for the present work of the colleges and ILE. For example, in the evenings libraries are either closed, or are inadequately manned.

### *Staff structure*

6.16 The Governing Council will need to devise an appropriate academic staff structure in which all lecturers are graduates. Appropriate salary scales will have to be devised. Conversion formulae will need to be devised for serving staff who are selected to fill new grade posts. New grade posts should be filled by open recruitment from within and outside the colleges and ILE. Serving staff with only basic academic qualifications should be encouraged now to acquire a first or higher degree so that they can compete, if they wish, for new grade posts.

6.17 We *RECOMMEND* that the Governing Council be given sufficient resources to create a temporary training reserve, so that selected lecturers can take paid study leave locally or overseas, and new grade posts can begin to be filled as soon as possible. The Council should select for study leave only those existing staff who, once they graduate, will meet the requirements of new grade posts.

### *Space norms*

6.18 The space per FTE place in the colleges averages about 10.5m<sup>2</sup>. This compares unfavourably with norms applied to UPGC-funded institutions and the new Technical Colleges. We *RECOMMEND* that a norm of at least 14m<sup>2</sup> be adopted

for the Institute, subject to any variation the Governing Council may propose to meet the specific needs of a teacher education institution operating on several campuses. This will require additional space.

6.19 We have given some thought to the Institute's accommodation. The colleges and ILE are each small, and are widely separated. Most have overflowed into annexes away from their main campuses. This unsatisfactory situation adds to the unit cost of places, since academic departments and administrative support must be duplicated in different locations. It provides visible evidence to prospective students that the institutions are of a different standard from a purpose-built, unitary tertiary institution; and generates insufficient "critical mass" in each location to stimulate continued academic excellence in all curriculum areas.

6.20 One important aspect of the upgrading, we believe, will be some consolidation of campus sites. It would not be realistic at this stage to recommend a single campus for the Institute (although the Council might make a case for this in due course); and there may be advantages in providing teacher education opportunities in different regions. But it makes sense to aim for no more than three locations to house activities now housed in ten locations, as well as new activities arising from recommendations in this report, and we therefore *RECOMMEND* that the Governing Council plan on this basis.

6.21 In particular, we *RECOMMEND* that building plans include, at an early stage, the reprovisioning of two present locations: the Technical Teacher's College (TTC), and the Argyle Annex of Grantham College. The former is housed in a converted primary school, the latter in expensive rented premises. The cost of reprovisioning could be substantially offset by the sale value of the TTC site, and by savings on rent.

### *Facilities*

6.22 In the colleges, provision for non-staff expenses (running costs, equipment, etc) in 1991-92 was equivalent to less than 9% of total provision. Even allowing for services provided by other Government departments, the present level of non-staff provision appears far too low. The Governing Council will need to assess in detail the non-staff requirements of the Institute.

## *Resource implications*

6.23 Two main conclusions emerge from the above: that recurrent spending on teacher education will need to rise; and that a building programme is needed to rationalise the present scattered accommodation, improve the space norm, and provide adequately for any increased enrolment arising from recommendations in this report.

6.24 The Provisional Governing Council will need to make a case for appropriate funding levels during the upgrading process. In order to assess the likely cost of our recommendations we have obtained funding data from the UPGC secretariat, and considered them in relation to the colleges and ILE. In so doing, we have borne in mind the factors set out in paragraph 6.9 above. We have assumed an upgrading period lasting nine years, taking into account the need to avoid redundancies.

6.25 We consider that the unit cost per FTE place per year will need to rise from its present level of about \$66 900 to about \$105 000 initially; say for the first three years. In subsequent years the front-end loading element could be reduced so that in, say, years 4-6 the unit cost would be about \$92 000, and in years 7-9 about \$82 000. All these figures are at April 1991 prices. We have assumed, purely for estimating purposes, that in the earlier years the Institute will offer sub-degree work only, while planning for degree work. The front-end loading would allow some resources to be applied to the planning of degree courses.

6.26 At this stage it is not possible to assess fully the effect of some important factors on the costs of the Institute. The broad estimates given above will almost certainly need to be increased in due course in the light of -

- the actual workload involved in planning for degree work;
- the extent of degree work to be offered, once the Institute has reached that stage; and
- the full effect of multi-campus operation and the cost of campus consolidation.

6.27 As for capital costs, in order to re-provision two locations, apply a higher space norm and allow for 20% more FTEs, at least 32 000m<sup>2</sup> of new accommodation would be needed. At March 1992 prices the capital cost would be about \$270 million. This figure does not take into account additional space for degree level work, land costs, site development costs, additional costs of in situ redevelopment of existing campuses, or savings from the release of sites now occupied.

### **The upgrading process: academic aspects**

6.28 There will be two major stages in upgrading the academic status of the colleges and ILE. In the first stage, the Hong Kong Council for Academic Accreditation (HKCAA) will assess the capability of the Institute to offer some degree work. In the second stage, the Institute will develop degree courses in line with the HKCAA's advice, and seek validation of each course by the HKCAA.

6.29 Preparations for an institutional review by the HKCAA should begin as soon as possible. The Provisional Governing Council should obtain expert outside advice on how the colleges and ILE should prepare for upgrading their present courses, and for developing some courses at degree level. The timing of a successful institutional review will depend on the speed with which staff and management can develop academic plans of good quality. The additional resources indicated in paragraph 6.25 should give the Governing Council flexibility to secure the staff it needs to make good progress in academic planning.

6.30 Academic planning would be helped by changes in the course structure at the colleges. At present, two pre-service courses for primary and secondary teachers are offered: a 3-year course for those with Hong Kong Certificate of Education Examination (HKCEE) qualifications, and a 2-year course for A-level holders. Both courses aim to prepare trainees for both primary and secondary teaching, using both Chinese and English as mediums of instruction. This leads to a crowded course, parts of which will not be directly relevant to the trainee's eventual career, and hampers the efficient deployment of college staff and facilities. Three-year courses have a "mixed ability" intake of S5 leavers, sixth form leavers, and even some A-level holders, which is unsatisfactory for both trainees and staff. We have therefore considered whether 3-year courses could be phased out in favour of all-S7 entry; whether trainees could specialise in either primary or secondary education;

and whether some specialisation by language medium could be introduced.

***All-Secondary 7 entry***

6.31 Table 6 shows that, by 1994, the number of S5 students will be 14% lower than in 1991. However, the number of sixth form places is increasing, and this should lead in due course to an increase in A-level holders. Since it might be possible to attract more students with A-levels into the colleges in the next few years, we have considered whether a firm target date for all-S7 entry to certificate courses for primary and secondary teachers can be set.

**Table 6**  
**Secondary 5 enrolment 1991-1994**

<b>Year</b>	<b>S5 day school enrolment</b>	<b>Decrease over 1991</b>
1991	73,571	-
1992	68,400	-7.0%
1993	65,800	-10.6%
1994	63,400	-14.0%

6.32 For two reasons we have concluded that it cannot. Firstly, increased enrolment in S6 may not necessarily lead to a proportionate increase in the number of A-level holders. Secondly, some subjects (such as Physical Education, Home Economics and Typewriting) are not studied in the sixth form, so prospective teachers of these subjects are more likely to be found among S5 leavers. Before implementing an all-S7 entry policy it would be necessary to ensure that enough prospective teachers specialising in all school subjects could be found among S7 leavers.

6.33 We therefore *RECOMMEND* that the proportion of 2-year courses should be increased as far as the pool of qualified A-level holders allows, while the proportion of 3-year courses should be sufficient to meet the needs of schools, by making up any shortfall between the demand for trained nongraduates and the supply from 2-year courses. The Governing Council should monitor the numbers reaching A-level standard each year, and adjust the proportion of 2-year places to take full advantage of any increase in the pool of available A-level holders.

6.34 On the general question of entry requirements, we *RECOMMEND* that the Governing Council set a general admission requirement to certificate courses in the Institute (e.g. 2 A-level passes or equivalent; or 6 HKCEE passes), which could be supplemented by specific requirements depending on the specialisation of the trainee. For example, prospective language teachers could be required to have AS-level English or Chinese.

### *Specialising by level*

6.35 A clearer focus on either primary or secondary education could prepare nongraduates better for their chosen level, but would reduce the flexibility which teacher's certificate holders now have to move between levels. We *RECOMMEND* that one aim of academic planning in the Institute should be to enable students to prepare in depth to teach at either primary or secondary level. Parts of the course which are common to both levels of education could be taken in common. In-service courses might be offered to help any teachers who wanted subsequently to transfer from one level to the other.

### *Language issues*

6.36 From 1994, when schools will be required to indicate their medium of instruction as recommended in ECR4, there are likely to be three main types of school: those teaching entirely through Chinese (virtually all primary schools and some secondary schools); those teaching entirely through English (a minority of secondary schools); and those operating two language streams (probably a majority of secondary schools). The latter category will need teachers able to teach in both streams, to reduce problems of staff deployment; but the other categories will require teachers with skills in one or other language medium.

6.37 We *RECOMMEND* that the Governing Council give priority to developing an academic policy on medium of instruction in the Institute, which will both contribute to its academic upgrading, and ensure that the needs of the schools are met. The policy should cover pre-service courses for new teachers, and in-service courses to help serving teachers upgrade their skills in the relevant medium of instruction.

## **Degree work in the Institute**

6.38 We have said that the Institute should offer some courses at degree level, subject to an external assessment of its ability to do so. We have identified certain areas in which the Institute could be well placed to offer degree programmes: full-time pre-service courses in primary education, for teacher's certificate holders intending to seek a graduate post in primary schools; part time courses in primary education for serving teachers; courses relating to language in education; and courses to meet specific subject needs which are not being met elsewhere. The new advisory body which we proposed in Chapter 5, and which we shall describe in detail in Chapter 7, will decide which provider (the Institute, or a tertiary institution) is best placed to offer degree courses in particular academic areas.

### ***Pre-service degree in primary education***

6.39 We stated in Chapter 4 that the Institute is unlikely to be upgraded in time to play a major part in the initial programme of degrees in primary education. However, we believe that pre-service degree places could suitably be provided in the Institute, once it can offer degree courses. To meet the target for graduate primary teachers, pre-service places should be provided as soon as possible in existing degree-awarding institutions; but to enable the places to be transferred relatively simply to the Institute when the time is right, we *RECOMMEND* that they be provided as a blister programme, for which separate funding will need to be found.

### ***In-service degree in primary education***

6.40 We envisaged in Chapter 4 that every local tertiary institution would be invited to offer self-funding part time degree courses in primary education for serving teachers. The Institute may wish to develop suitable courses on its own, or in conjunction with other bodies.

### ***Language education courses***

6.41 We are concerned about the shortage of competent language teachers. Few tertiary graduates with language degrees become school teachers; so many senior secondary forms are taught English or Chinese by graduates of other subjects.

The Institute might provide a number of courses in language education for graduate teachers.

6.42 Many nongraduates must teach Chinese or English even though they lack relevant training. The current professional development programme for such teachers (a full time 16 or 23 week course at the ILE) leads to no recognised qualification. Each year several of those who complete the courses enrol, at considerable personal expense, on one-year overseas Bachelor of Education (BEd) courses with a language teaching bias. We envisage that there might be considerable interest in local language-teaching first degree courses, and *RECOMMEND* that the Governing Council examine this possibility.

### *Specialist areas*

6.43 Certain needs of the schools for graduate specialists are not being met by the tertiary sector, while expertise in the specialisms exists in the colleges. They include practical and technical subjects, among which Home Economics and Design & Technology have no degree courses at present. We *RECOMMEND* that the Governing Council examine how the Institute could meet these needs.

### **Progress towards degree-awarding status**

6.44 We envisage that the kinds of degree course outlined above could eventually provide an adequate range of subjects and sufficient student numbers to sustain a viable degree-level programme in the Institute's own name. The experience of other institutions that have gone through the upgrading process suggests that it will take some years to reach this goal. In the meantime we would like the colleges and ILE to gain experience of degree level work as early as possible, by collaborating with other institutions on degree courses in education.

6.45 Those institutions which offer the first local in-service degrees in primary education will require contributions from large numbers of experienced teacher educators, beginning quite soon. We envisage that staff in the colleges and ILE will be involved as individuals in planning and delivering the courses. This should help the institutions develop expertise in degree level work at an early stage, and will help to ensure that the distance-learning element of the courses is adequately supplemented by face-to-face tuition.

6.46 The qualifications profile of college and ILE staff suggests that degree courses in some areas might be developed quite rapidly. One such area could be language courses. We *RECOMMEND* that the Governing Council explore the possibilities of collaboration with degree-awarding institutions, to enable joint courses in such areas of strength to be provided even before the Institute is able to award degrees in its own name.

### **Key stages in the upgrading**

6.47 Key stages in the upgrading process will include: creation of the Provisional Governing Council; creation of the Institute under its own Governing Council; improvements in staffing, accommodation and facilities; academic development of existing and new courses; an institutional review to assess the Institute's capability for degree work; and finally validation of any degree courses which are developed. The timing will depend in part on the efforts of the Institute's staff and management, so we cannot propose a definitive timetable. We can, however, recommend steps to ensure that the upgrading begins without delay.

6.48 Firstly, we *RECOMMEND* that the Provisional Governing Council be set up as early as possible, preferably by early 1993. It should draw up plans during 1993 for the creation of the Institute during the 1994/95 financial year. The three main goals during 1993 should be to assess the funding requirements of the Institute and include them in the Government Estimates for 1994/95; to draw up legislative proposals for establishing the Governing Council and Institute; and to devise an action plan for the upgrading process.

6.49 Secondly, we *RECOMMEND* that resources for the upgrading should be provided in step with the needs of the Institute. The Institute should be treated just as favourably in this respect as other institutions which have undergone the upgrading process.

## CHAPTER 7

### Advice on Teacher Education and Qualifications

A basic aim of this report is to ensure that teachers with the right level and mix of skills will be available to provide the quality of education the community expects. To achieve this, a strategy is needed for -

- identifying the present and future demand for teachers, and the current and projected supply of teachers, in terms both of overall numbers and the range of skills; and
- providing a coordinated programme of teacher education and development, to meet the needs of schools in a systematic and cost-effective way.

7.2 For this strategy to be implemented effectively, we believe there should be a single source of authoritative advice on all matters relating to teacher education and qualifications, and more sophisticated mechanisms for assessing the adequacy and relevance of education and professional training acquired overseas.

#### Advice on teacher education

7.3 *Table 7* shows present and proposed types of formal and non-formal teacher education courses offered locally, and the course providers. Courses leading to formal teaching qualifications will be provided in three types of institution: the new Institute of Education (teacher's certificate, ATC, degrees); UPGC-funded tertiary institutions (degrees and postgraduate qualifications), and the OLI (degrees). Courses not leading to a formal qualification will continue to be provided by a large number of bodies. Funding sources at present include the UPGC grant; the Education Department budget; a separate departmental vote for subsidising approved short courses; and user fees.

7.4 A variety of course providers is a good thing. Academic institutions and professional bodies should be encouraged to contribute their expertise to teacher education. But in order to meet needs systematically, ways must be found to coordinate activities and ensure that public funds are spent cost-effectively.

**Table 7**  
**Teacher education courses and providers**

<b>Existing courses</b>	<b>Providers</b>
<i>Formal awards</i>	
Teacher's certificate (pre-or in-service)	ED (college of education)
Advanced Certificate of Teacher Education (practical & technical subjects)	ED (college of education)
1st degree	UPGC-funded institutions
PGCE/Diploma in Education	UPGC-funded institutions
Postgraduate degree	UPGC-funded institutions
<i>No formal awards</i>	
Refresher courses	ED (college of education)
Language courses	ED (ILE)
Short in-service courses (over 200 offerings)	Tertiary institutions on self-funding basis; ED (Training Unit); ED (Advisory inspectorate); Professional bodies
<b>Proposed courses</b>	<b>Proposed providers</b>
Advanced teacher's certificate	Institute of Education; other providers
In-service degrees in primary education	Tertiary institutions; Institute of Education
Pre-service degree in primary education	Tertiary institutions; Institute of Education
Refresher courses (graduate)	Tertiary institutions

We see a need for a single source of advice to the Government on the demand for teacher education activities, the appropriate providers of such activities, and public funding requirements.

7.5 The Government receives advice on the funding needs of other post-secondary education sectors from independent sources: the UPGC and the VTC. The latter body specialises in technical education and vocational training, an area quite distinct from teacher education. But we have considered whether the required advice might be provided by the UPGC.

7.6 The UPGC normally advises only on courses which it funds. It would in theory be feasible for the UPGC to fund the new Institute; but even if this were to happen, other parts of the teacher education programme would still be funded from other sources. Hence the UPGC could not be a unified source of advice on the whole programme. In any case, UPGC funding would not be appropriate while the Institute offers mostly sub-degree courses; and in addition, the UPGC is heavily engaged for the next few years on matters relating to the tertiary expansion programme.

### *New advisory committee*

7.7 We therefore *RECOMMEND* the creation of a new advisory committee to provide unified advice on the whole teacher education programme. This committee should examine the need for teacher education activities in general, having regard to the supply and demand situation and the needs of the schools.

7.8 This new committee would not detract from the existing role of the UPGC. It would identify needs which can best be met by UPGC-funded places, and refer them to the UPGC for inclusion in its own planning process. The Secretary-General of the UPGC should be a member, and should inform the committee if there is likely to be difficulty in providing these places. The best way to meet other needs - by courses in the new Institute of Education, self-funding courses offered by tertiary institutions, distance learning courses, and courses organised by professional groups - would then be considered. We envisage that the committee would consult potential suppliers of courses before drawing up proposals, assessing resource requirements, and advising on any public funding needed for the required range of courses and numbers of places. The Director of the new Institute, and teacher educators from tertiary institutions, would be members.

7.9 We have considered the full range of tasks which might be carried out by this committee, and set out our views in the following sections.

### **Assessing demand and supply**

7.10 Teacher demand can be considered from two angles: in terms of the number of people needed to fill all posts; and in terms of the range and depth of expertise needed to meet in full the community's expectations of the education system. We envisage that the new committee will continually monitor the demand for teacher manpower and the supply of qualified teachers, and will advise on suitable action if shortfalls or surpluses are identified or predicted. Such action would include increasing or decreasing the number of places on initial teacher training courses; developing new in-service courses; and other ways to enlarge the pool of relevant expertise.

7.11 To enlarge that pool, we envisage that the committee will develop more sophisticated ways to assess which academic and professional awards are acceptable for the purposes of teaching in Hong Kong. We want to ensure on the one hand that the education and training of all teachers appointed in public sector schools is as far as possible relevant to the needs of the schools; and on the other hand that we do not exclude from qualified teacher status anyone who could make a useful contribution to our education system.

### **Assessing teaching qualifications**

7.12 A teacher's status is based on provisions in the Education Regulations (reproduced in *Annex F*) relating to registered and permitted teachers and, in the public sector, on the criteria for paying a person as a qualified or an unqualified teacher.

7.13 To be registered, a teacher must meet both educational and professional requirements. Applicants who meet the educational standard but lack professional training (graduates without a PGCE; nongraduates without a teacher's certificate) may become permitted teachers. Upgrading from permitted to registered teacher status may follow an in-service course of teacher training, such as the PGCE or ICTT; or ten years approved teaching experience.

7.14 Broadly speaking, qualified status in the public sector covers all registered teachers; and also permitted teachers other than those whose educational standard is no higher than S5 or S6 (i.e. the minimum level acceptable under the law). The latter may be appointed only as unqualified teachers, at considerably lower salary.

7.15 Because the definition of qualified teacher has changed with the development of our education system, and because large numbers of Hong Kong people complete overseas courses of higher education or teacher training, the criteria for qualified status are now quite complex. To put it simply, qualified status derives from a local teacher's certificate; a local degree with or without a teacher's certificate or diploma; or a qualification accepted as fully equivalent to these local qualifications. These are called "standard qualifications". Over the years a large number of "non-standard" qualifications have also become accepted for teacher appointment purposes in the public sector. *Annex G* lists the various categories of qualification.

7.16 Some overseas degree-level awards are not accepted as graduate qualifications, but are accepted as non-standard qualifications for a nongraduate post. These include some Commonwealth degrees, unaccredited US degrees, and degrees from three Taiwanese institutions whose awards are so accepted for historical reasons. Other awards, including most Taiwanese degrees and all degrees from the People's Republic of China (PRC), are not recognized as qualifications because there is no way to ascertain the academic standing of the course concerned. Holders of such awards may, however, be permitted to teach a specified subject at a specified level in a private school, following an interview in the Education Department to evaluate their subject knowledge.

### ***Problems with the present assessment system***

7.17 We have identified two flaws in the present system for assessing teaching qualifications. First, it operates on the basis of blanket acceptance of awards from certain countries and types of institution, and blanket rejection of awards from other sources. Secondly, it does not differentiate between the academic standing of an award, and its professional relevance for the purpose of teaching. The present system is thus rather a blunt instrument, which might lead to the appointment of some teachers whose expertise is not very relevant to the needs of local schools,

and might exclude some people who could make a useful contribution. Some examples may clarify this point.

*7.18 Suitability of degrees* A growing number of Hong Kong teachers are acquiring overseas awards, which are accepted for the purpose of appointment in the civil service as graduate-level qualifications but which, since they do not equip the holder to teach an academic subject up to A-level, are often not viewed with favour by secondary schools. These include some part time BEd degrees, and membership of the Institute of Linguists. The Education Department has advised schools to consider carefully before regrading serving nongraduates who acquire some such awards (for example a one-year BEd degree), and to hold an open recruitment exercise in which candidates with subject-based degrees should be preferred. While we support this approach, we feel that it should be possible to obtain more sophisticated advice on overseas graduate-level awards. This could help to discriminate more accurately between courses providing adequate and relevant expertise, and courses providing little of professional relevance to Hong Kong schools.

*7.19 Recognition of educational standard* Some teachers are now deemed unqualified because their educational standard, in the absence of formal accreditation procedures in the country or institution concerned, cannot be assessed even for nongraduate qualified status. They include people from Taiwan or the PRC, some of whom might be able to contribute usefully to public sector schools, if it were possible to assess their educational standard and professional knowledge.

*7.20 Recognition of teacher training* People who claim teacher training outside Hong Kong, on a course which is not recognized, must at present complete a local training course before they can be treated as qualified. In some cases this could be a waste of resources, since the training outside Hong Kong might in fact be of a reasonable standard.

### **Advice on non-standard teacher qualifications**

*7.21* Schools must compete for staff with other employers who recruit highly educated people. It therefore makes sense to identify all those whose education and training outside Hong Kong may equip them to contribute usefully to our

schools. At present we have no means to assess the academic standard and professional knowledge of many such people.

### ***Graduate-level qualifications***

7.22 The new committee we have proposed could be a permanent source of advice on both the academic standing and the professional relevance of graduate-level awards held by applicants for teaching posts in Hong Kong. The HKCAA should be represented on it, as an expert resource in the area of academic accreditation with links to many overseas accreditation agencies. This would help the committee to provide authoritative advice on the academic standing of any graduate-level award.

7.23 To help the Education Department assess the professional relevance of a graduate-level award to local schools, we envisage that the committee will draw up and publish a list of those awards considered acceptable for appointment as a graduate teacher, taking into account the range of graduate level functions in a school and the need to maintain the quality of education. The list would be updated as necessary.

### **A new assessment mechanism for non-graduate qualifications**

7.24 To identify a wider pool of potential nongraduate teachers, and enable suitable applicants, including those whose degrees are not recognized, to become qualified teachers once their academic and professional competence can be demonstrated, we *RECOMMEND* the creation of a new assessment mechanism. The mechanism will need to test three aspects: -

- the general education standard of the applicant, including subject knowledge in the subjects to be taught;
- the applicant's ability to communicate in the medium of instruction used in the school; and
- the adequacy of the professional training, if any, claimed by the applicant.

7.25 *General education standard* Claimed completion of a secondary course outside Hong Kong may not be sufficient evidence of educational standard. The mechanism will need to test the standard of the applicant in Chinese or English; the subject or subjects to be taught; and at least one other subject.

7.26 *Ability to communicate* Many candidates for assessment are likely to claim education in either the PRC or Taiwan, but applicants from elsewhere who have an unrestricted right to work in Hong Kong should not be excluded. Hence it is important to ensure that an applicant can communicate effectively in either Chinese or English. The ability to speak Putonghua but not Cantonese would not prevent an applicant from passing the assessment. It would be for a school to decide whether or not to offer employment, bearing in mind the ability of its students to cope with Putonghua-medium teaching.

7.27 *Professional training* Some applicants might claim formal teacher training in their home country. The standard and relevance of such training would be difficult to verify where no formal accreditation system exists. Such applicants should be tested for their knowledge of educational methodology, to find out whether it compares with the knowledge of a locally trained teacher or whether the candidate would need to complete a training course before being appointed as a qualified teacher.

### ***Assessment procedure***

7.28 The purpose of the assessment would be to ensure that teachers appointed through this means have a standard of general education and professional knowledge comparable to the standard expected of local nongraduate teachers. It seems appropriate that the assessment procedures should be operated by the colleges of education at first, and by the new Institute once it is established, in accordance with guidelines laid down by the new advisory committee.

7.29 We propose that the colleges devise a three-part written test and an oral test. Part 1 should cover general education; Part 2 should comprise written and oral tests of language ability; Part 3, which should be open only to candidates who can produce evidence of having undergone teacher training outside Hong Kong, should test professional knowledge. The tests should be pitched at a level similar to that required for the award of a local teacher's certificate.

7.30 Candidates failing Part 1 or Part 2 would not be permitted to teach. Candidates passing Parts 1 and 2 could teach in a public sector school, at a beginning salary on the sub-point of the CM scale (MPS 12 in a primary school; MPS 13 in a secondary school). Those who could not show evidence of teacher training outside Hong Kong, and who therefore could not sit for Part 3, would be required to pass an ICTT course before proceeding beyond MPS 19. Those who failed Part 3 would be given a second chance, and if they failed again would have to take an ICTT course before proceeding beyond MPS 19.

7.31 Candidates passing all three Parts would need to complete a period of supervised teaching, since this is an integral part of local teacher training. The school should assess the teacher's performance during the year, and the Advisory Inspectorate should make at least two visits for classroom observation. Successful completion of the supervised teaching period should lead to the award of an additional salary increment. Those whose teaching during the first year shows some weaknesses should be allowed to continue for a second year of supervised teaching, and should receive the additional increment if their performance is then considered satisfactory. Any teacher still showing weaknesses would be required to complete an ICTT course before proceeding beyond MPS 19.

7.32 The first round of assessment tests would probably attract a large number of candidates, with fewer in subsequent rounds. The tests could be offered once a year, or more frequently if there was sufficient demand. Direct costs should be met in full by entry fees.

7.33 The mechanism must be able to demonstrate that those who qualify to teach through this route are of comparable standard to teachers entering through the standard route. It is important not to encourage the notion of a "back door" into a teaching career.

### **Advisory Committee on Teacher Education and Qualifications**

7.34 Having set out above the need for a new advisory body, we *RECOMMEND* that it be called the Advisory Committee on Teacher Education and Qualifications (ACTEQ), with the terms of reference and composition at *Annex C*.

---

## CHAPTER 8

### Teacher Professionalism

In previous chapters we have recommended improvements in working conditions, career paths and professional development. Our focus has been on providing the infrastructure and opportunities which will attract good quality people into teaching, enable them to acquire professional skills and knowledge, and encourage them to give of their best all through their careers. How teachers respond to these opportunities will be an important factor in the development in Hong Kong of teaching as a profession.

8.2 Codes of practice have been developed in some places with a view to enhancing the professional status of teaching. In a few places, notably Scotland and some Canadian provinces, teachers have a statutory role in regulating the profession. In this chapter we consider what measures, at the present stage of development of our education system, could best help to promote teacher professionalism.

#### Background

8.3 In 1982 an international panel of experts proposed in its report *A Perspective on Education in Hong Kong* that the professional status of teachers be promoted by setting up a Hong Kong Teaching Service. This body, the panel suggested, would control the registration of teachers, lay down minimum conditions of work, influence teacher education and promote professionalism among teachers.

8.4 Public response to the report was unanimous on the need to promote professionalism, but divided on whether the proposed Teaching Service was the best way to achieve it. In 1984, ECR1 set out arguments against a Teaching Service, but recommended that professionalism should be promoted by encouraging educators to draft a Code of Practice, and by setting up teachers' centres to encourage the exchange of experience, promote continuous professional development and enrichment, and foster among teachers a greater sense of unity. The relevant section of ECR1 is reproduced in *Annex H*.

## *The Hong Kong Teacher's Centre*

**8.5** The Hong Kong Teachers' Centre opened in June 1989. It is managed by an advisory committee whose members are nominated or elected by teachers and educational bodies. The Education Department provides premises and support staff. The Centre is a venue for professional development activities run by the committee either alone or jointly with other bodies; and offers facilities and support services for teachers and professional groups to pursue their own activities. It publishes a quarterly bulletin, and maintains a resource library.

**8.6** In its first 30 months the Centre hosted more than a thousand activity sessions, and recorded over 80 000 visits by teachers. Its popularity has stimulated planning for at least two more Centres, in Kowloon and the New Territories, which the Government intends to provide as soon as resources become available.

## *Draft Code of Practice*

**8.7** In response to the ECR1 recommendation, a Preparatory Committee to draft a Professional Code for Education Workers was formed in 1986 by 63 educational bodies, with financial and secretarial support from the Education Department. A first draft Code was issued in October 1989 and revised in the light of comments received. The revised Code was sent to educators at all levels in October 1990. About 10% of the profession, or some 5000 teachers, replied to one or both of two surveys conducted by the Preparatory Committee to solicit views on the Code.

**8.8** The Preparatory Committee also visited other countries to study how similar Codes function in practice. It formed the view that the Code could not be enforced effectively unless a regulatory body was established for the teaching profession. It then proceeded to form a Working Party for the Establishment of the General Teaching Council (GTC).

## *Submission proposing a General Teaching Council*

**8.9** In early 1992, the Preparatory Committee and the Working Party submitted to us a joint proposal, setting out a framework for developing a GTC. This body, the submission proposed, should be established by law as the sole representative of the teaching profession, distinct from all trade unions, government departments

or political parties. It should be governed by an elected body, and should have autonomy in matters internal to the profession, including cases of professional misconduct. It should advise on teacher education and qualifications, and provide professional mediation in conflicts or disputes among teachers or between teachers and other sectors of the community.

## **Our response to the submission**

8.10 We have given serious thought to the joint submission. We applaud the hard work which educators have put into the Teachers' Centre, the revised Code, and ideas for a professional regulatory body. We want to build on this work in a way which encourages steady progress in promoting the profession; secures widespread support among both educators and the general public; and ensures that the functions of other relevant bodies are complemented rather than duplicated.

8.11 We consider that an autonomous governing body for the profession is a worthwhile goal; but several issues will have to be resolved before such a body could be created. For example, the joint submission noted the difficulty posed by underqualified and untrained teachers. It considered that, while they should have the same professional rights and duties as trained teachers, a major concern of the GTC would be the gradual phasing out of untrained teachers. As our recommendations in earlier chapters show, we too want to encourage more professional training; but it will take some time to achieve an all-trained teaching force.

8.12 Another difficult issue is the definition of membership. The joint submission recognized that voluntary membership would make it difficult for a GTC to represent the profession fully, mediate in disputes or advise on disciplinary cases involving non-members. But compulsory membership might not be acceptable to all educators. The joint submission also suggested automatic membership or pre-registration membership as options. Clearly the various options need more discussion before wide agreement could be reached among educators.

8.13 Different views have been put to us concerning procedures for electing the governing body. Some organisations involved in the joint submission favour one person one vote, which would automatically give classroom teachers a majority voice, possibly to the exclusion of other professional interests. Some others have said that they prefer to see all those involved in education represented.

On balance we consider it important for teachers, in promoting the interests of the profession, to work side by side with other education professionals, such as teacher educators and curriculum experts, and with non-professionals who have a formal role under the Education Ordinance, such as school supervisors. We agree with the joint submission that there should also be a role for lay members, as parents and as the employers of school-leavers.

8.14 The joint submission proposed three organs within the GTC: a representative congress; an executive committee; and an advisory council. We believe that whatever structure might be adopted if a GTC were created, it should be simple and effective.

8.15 The powers and duties of a GTC, as proposed in the joint submission, could hardly avoid overlapping with the role of other bodies, such as the Board of Education, which advises the Governor on education matters; the Appeals Board under the Education Ordinance, which hears appeals against deregistration; the Curriculum Development Council and Curriculum Development Institute; and the Advisory Committee on Teacher Education and Qualifications, which we proposed in Chapter 7. Careful thought would be needed on how a GTC might take over or fit in with the roles of such bodies, and how it would affect the present powers and duties of the Director of Education.

8.16 We note that a small proportion of teachers responded to the two surveys on the Professional Code; and about 30 of 172 educational bodies endorsed the joint submission. This indicates that more time is needed for the ideas to gain widespread acceptance. We would prefer to see support for a professional code and regulatory body grow from a clearer understanding among educators of the advantages, rather than being imposed through legislation in the absence of clearly demonstrated and wide support.

8.17 We confirm our support for the development of a Professional Code. We also support a role for educators in mediating in disputes and advising on misconduct cases, which is a major aspect of the role which the joint submission envisages for a GTC. Progress towards both aims could, we believe, be achieved without legislation at this stage. We hope that organizations and individuals in education will continue to pursue the idea of a governing body for the teaching profession, seek wide support for it among all educators, and develop proposals which can gain wide public acceptance.

8.18 Meanwhile, we *RECOMMEND* that -

- the Government should set up during 1993 a non-statutory Council on Professional Conduct in Education, to build on the work already done in developing a professional code of conduct, and enable practising educators to advise on the resolution of disputes or cases of mis-conduct; and
- a few years after the Council is set up (say five years), the possibility of setting up a statutory professional governing body should be reviewed by the Government. The review should assess support for such a body both within and outside the profession and, if its findings are positive, should make recommendations on the legislative framework for establishing the body. These recommendations should cover the proposed powers and duties of the body, membership and election issues, and the relationship of the body to other bodies, including the Education Department, statutory boards and advisory committees.

### **Council on Professional Conduct in Education**

8.19 The Council should have two main tasks. It should first draw up criteria against which, in the eyes of practising educators, the conduct of their peers should be judged. Once such criteria are drawn up, the Council will then be in a position to mediate objectively in conflicts among teachers or between teachers and other sectors of the community; and to offer sound advice to the Director in resolving cases of misconduct.

#### ***Advice on professional conduct***

8.20 At present, disputes and misconduct cases are investigated by Inspectors of Schools appointed under the Education Ordinance, and resolved by the Director. We consider that this practice should continue; but the Council should advise the Director on appropriate action to take in resolving such disputes and cases. The ultimate decision on any penalty should remain with the Director, but he would have to justify any rejection of the Council's advice.

8.21 The only legal sanctions now available to the Director in misconduct cases relate to cancellation or withdrawal of registrations, permits and approvals. We envisage that the creation of a source of professional advice, and the development of a professional code of conduct against which cases of alleged misconduct can be assessed, could help in developing a range of sanctions to suit cases of greater or lesser gravity.

### ***Professional code of conduct***

8.22 The Council's advice in cases of dispute or misconduct should be based on clear, operational criteria defining the conduct expected of an education professional. The revised Code could provide a starting point for developing such criteria; but in its present form it differs in some fundamental ways from what might be expected of a professional code. For example, some provisions appear more suitable for a manifesto:

*"3.2.12 A member of the profession has a right to refuse to perform any non-professional tasks which are irrelevant to his/her duties."*

*"3.3.1 A member of the profession has the right to seek and to be fairly considered for any position commensurate with his/her qualifications."*

*"3.3.10 A member of the profession has the right to join trade unions and to engage in activities designed to safeguard the rights of employees."*

Other provisions, while expressing worthy ideals, could not in their present form easily be used as operational criteria to assess professional conduct:

*"2.1.1 A member of the profession shall strive in every way for any improvement which will help or encourage students' physical and psychological development so as to fulfill society's expectations of a profession."*

*"2.2.16 A member of the profession shall avoid making students feel embarrassed or ashamed."*

"2.6.9 A member of the profession shall do his/her best to nurture in students the concepts of freedom, peace, equality, rationality and democracy."

### ***Terms of reference and composition***

8.23 We *RECOMMEND* the following terms of reference for the Council:

- *in general*, to advise the Government on measures to promote professional conduct in education;
- *in particular*, to draft operational criteria defining the conduct expected of an educator, and through consultation to gain widespread acceptance of these criteria among all sectors of the education community; and
- in the light of the above criteria, to advise the Director in cases of dispute or alleged professional misconduct involving educators.

8.24 Membership of the Council should be drawn from all parts of the education profession covered by the Education Ordinance. We envisage that a majority of members will be practising teachers or principals, and other members will be involved in education as teacher educators, curriculum experts, school supervisors or managers, and school sponsors.

8.25 To help the Council gain wide acceptance and respect in the profession, we consider that most of its members should be chosen by election. Employment as a teacher or in any other professional capacity in school education, and the holding of an office recognised under the Education Ordinance (e.g. registered manager), should confer an automatic right to vote for the Council. We also consider that the Council should include a small number of lay members, to give parents and employers a voice. These would probably need to be appointed *ad personam*.

8.26 Since the Council will be a working body, it should not be too large. We consider that a membership of about 20 would enable it to operate effectively. Since its members would have the task of promoting professional conduct, they

should serve as individuals, not as representatives of any sectoral interest. The Council should be provided with secretarial and other support by the Education Department.

8.27 We believe that questions of size, membership, and appointment mechanisms should be settled through public consultation, particularly within the profession. We have noted the sophisticated mechanism adopted in the Teachers' Centre for electing its management committee, which might serve as a model in this case.

---

## CHAPTER 9

### The Impact of this Report

In this chapter we describe the impact of this report on Hong Kong's schools, and set out broad assessments of the new resources needed to implement it. The report covers a planning period of 15 years. We have attempted to forecast the difference which our recommendations are likely to make to the education budget in each year of the planning period.

Education investment for the 21st century: the difference made by ECR5

9.2 We would like an early start to be made on all our recommendations, in order to bring about as soon as possible the quality improvements which we believe the community wants. This will require a substantially increased level of funding for education.

9.3 Once all our recommendations have been implemented in full, we envisage that the increased investment will enable our schools of the future to provide a quality of education appropriate to a highly developed 21st century society and economy. The following paragraphs describe the difference we believe our recommendations will make to the schools:

*In the standard primary school of the future, at least 35% of the teachers are graduates. Many of the nongraduates have acquired an Advanced Teacher's Certificate, and some are working towards a degree. The ratio of teachers to students is about 1:22, with more teachers and fewer students per class. With its increased complement of senior teachers, all or most of them graduates, the school has developed a full range of academic and nonacademic activities which are planned, implemented and evaluated with the participation of the professional staff.*

*With the additional investment at secondary level - smaller classes, more teachers, a teacher:student ratio of about 1:17, a larger complement of SGM posts - the secondary schools find themselves better equipped to build on the improvements at primary level, and to prepare their students for the opportunities and challenges of further education, work and citizenship in 21st century Hong Kong.*

*Teachers in both primary and secondary schools use their common room for informal discussions on school and professional matters, and for school-based teacher development programmes. The student activity centre houses a lively range of extra-curricular activities. Computers lighten administrative chores, and provide access to large central databases of curriculum materials. With the help of their Parent-Teacher Associations, schools have developed systematic programmes to introduce parents to the work of the school, explain how they can help to promote the child's learning, and encourage them to take an active part in school life.*

*The teachers of the future are almost all professionally trained, or are undergoing initial professional training during the first few years of their career. With the more supportive school environment, and the more systematic provision of professional development opportunities in the light of advice from the Advisory Committee on Teacher Education and Qualifications, new teachers have more encouragement to make a long-term commitment to a career in education. The Institute of Education, housed in upgraded campuses, offers full time and part time courses at subdegree and degree level, and contributes to educational research.*

## **Resource Implications**

9.4 How much new investment will be needed to achieve these improvements? *Table 9(i)* shows our broad assessment of the additional recurrent amounts needed each year between 1993 and 2007. The additional annual amount needed in 2007 will be \$2 189 million. The accumulated total of additional investment in education, recurrent and capital, during the 15 years will reach \$23 500 million.

9.5 *Table 9(ii)* shows the average cost per pupil at primary and secondary levels, in 1991-92 and 2007-08.

9.6 *Table 9(iii)* sets out our projection of the annual additional cost for each recommendation or related group of recommendations.

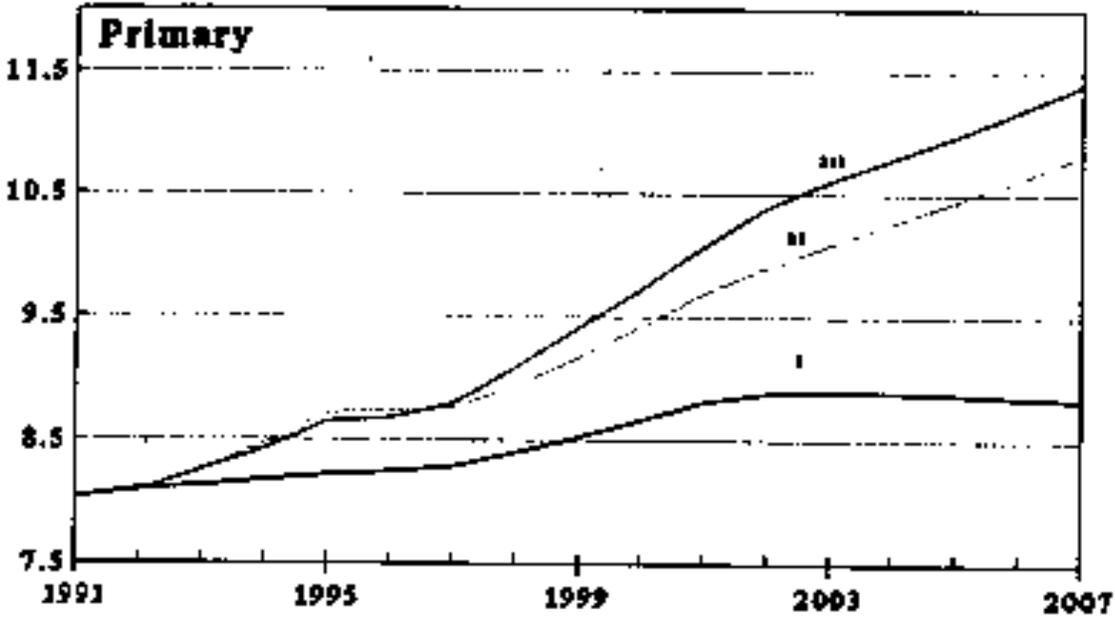
---

**Table 9(i): Summary of Additional Annual  
Cost of this Report (\$m)**

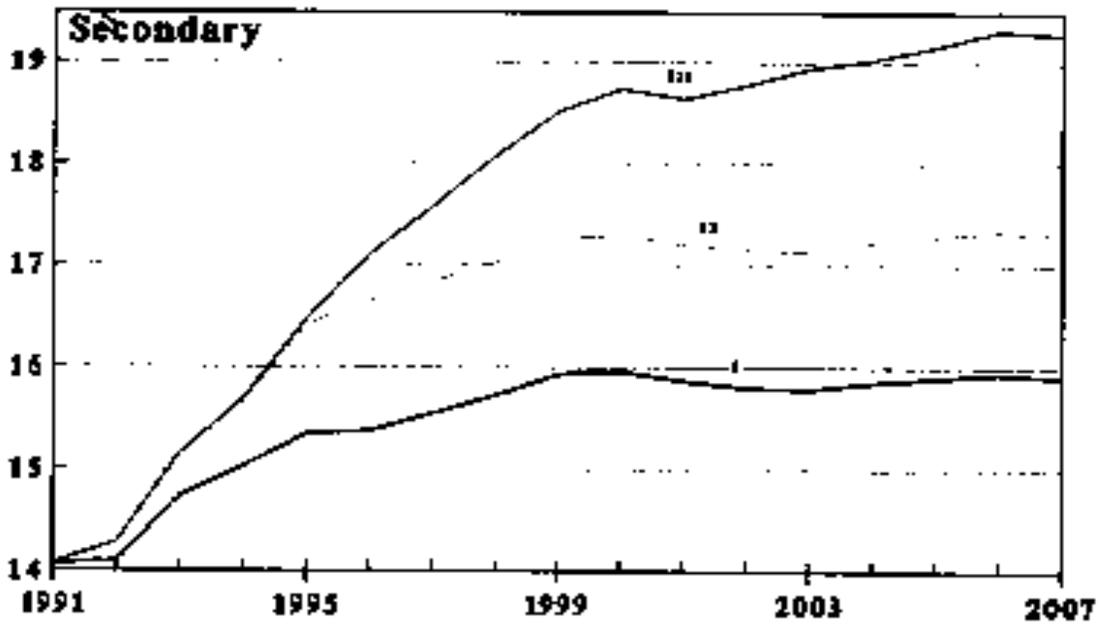
	Recurrent	Non- recurrent	Capital	Total
93-94	280.2	14.7	0.0	294.9
94-95	538.0	2.0	237.4	777.4
95-96	873.8	0.0	399.2	1,273.0
96-97	1,114.6	0.0	399.2	1,513.8
97-98	1,199.5	0.0	264.7	1,464.2
98-99	1,370.6	0.0	164.6	1,535.2
99-00	1,497.0	0.0	164.6	1,661.6
00-01	1,561.0	0.0	137.9	1,698.9
01-02	1,597.2	0.0	137.7	1,734.9
02-03	1,727.8	0.0	0.0	1,727.8
03-04	1,837.8	0.0	0.0	1,837.8
04-05	1,893.3	0.0	0.0	1,893.3
05-06	1,981.4	0.0	0.0	1,981.4
06-07	2,098.1	0.0	0.0	2,098.1
07-08	2,189.5	0.0	0.0	2,189.5

Table 9(ii): Average cost per pupil under Three Scenarios  
 Average cost per pupil (\$'000)

Average cost per pupil (\$'000)



Average cost per pupil (\$'000)



- Scenario I : Present policies (including those arising from ECR 4)
- Scenario II : ECR 5 fully implemented except for recommendation on class size
- Scenario III : ECR 5 fully implemented, including recommendation on class size

**Table 9(iii): ECR5 Financial Implications at March 1992 prices (\$M)**

Proposal	Para.in ECR 5	Type	CASH FLOW															
			93-94	94-95	95-96	96-97	97-98	98-99	99-00	00-01	01-02	02-03	03-04	04-05	05-06	06-07	07-08	
			Development of a school-based systematic induction programme	2.6	R NR CAP	1.3 - -	1.3 - -	1.3 - -	1.3 - -	1.3 - -	1.3 - -	1.3 - -						
To set up a new Standing Committee to promote Home-school Co-operation	2.19	R NR CAP	2.3 2.7 -	2.9 - -	2.9 - -	2.9 - -	2.9 - -	2.9 - -	2.9 - -									
Upgrading of existing schools to the latest standard of provision in classrooms and special rooms over a periods of 6 years	2.36	R NR CAP	- - -	- - 99.5	- - 126.8	- - 126.8	- - 126.8	- - 26.7	- - 26.7	- - -	- - -	- - -	- - -	- - -	- - -	- - -	- - -	- - -
Enhancement to existing schools in respect of the provision of non-teaching spaces.	2.45	R NR CAP	- - -	- - 137.9	- - 137.7	- - -	- - -	- - -	- - -	- - -	- - -							
Upgrading of 1 CA to CO II for Aided Primary Schools with 36 or more classes	2.47	R NR CAP	2.6 - -	4.6 - -	4.8 - -	5.0 - -	5.2 - -	5.2 - -	5.2 - -	5.2 - -	5.2 - -	5.2 - -	5.2 - -	5.2 - -	5.2 - -	5.2 - -	5.2 - -	5.2 - -
Establishment of a computer database and network of curriculum resources	2.53	R NR CAP	- - -	4.3 2.0 -	4.5 - -	4.5 - -	4.5 - -	4.5 - -	4.5 - -	4.5 - -	4.5 - -							
Annual revision to School & Class Grant on basis of inflation rate.	2.56	R NR CAP	23.7 - -	23.7 - -	28.4 - -	28.4 - -	31.2 - -	34.3 - -	37.7 - -	41.5 - -	45.7 - -	50.3 - -	55.3 - -	60.8 - -	66.9 - -	73.6 - -	81.0 - -	

Table 9(iii) page 2

Improvement measures for primary and secondary education:-(For primary schools, these include improving teacher: class ratios and the CM:AM promotion ratio; development and implementation of B.Ed programmes; creation of graduate posts and reduction of class size;  For secondary schools, these include the provision of additional CM posts; improving the GM:SGM promotion ratio and reduction of class size.)	2.71	R	231.0	381.0	645.0	876.0	1000.0	1170.0	1298.0	1403.0	1440.0	1566.0	1671.0	1721.0	1803.0	1913.0	1997.0
	2.72	NR	10.0	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	2.74	CAP	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	4.13																
	4.29																
	4.30																
	4.34																
	2.79																
2.66																	
3.8																	
2.79																	
As from September 1993, the point system for the KG fee remission scheme should be improved over five years to be in line with that for the senior secondary fee remission scheme	3.28	R	3.0	7.0	12.0	15.0	17.0	15.0	10.0	5.0	-	-	-	-	-	-	-
		NR	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
		CAP	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Funding for replacement teachers to release full-time teachers in special education to attend a new one-year training course to be made available w.e.f.9.1993	3.29	R	8.1	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8
		NR	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
		CAP	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Salary increment for teachers awarded with an Advanced Teacher's Certificate (ATC)	5.27	R	-	-	-	6.6	6.6	6.6	6.6	6.6	6.6	6.6	6.6	6.6	6.6	6.6	6.6
		NR	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
		CAP	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Upgrading the Colleges of Education and ILE to a new unitary Institute of Education	6.25	R	0.9	93.4	160.1	160.1	116.0	116.0	116.0	76.2	76.2	76.2	76.2	76.2	76.2	76.2	76.2
	6.27	NR	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
		CAP	-	-	134.5	134.5	-	-	-	-	-	-	-	-	-	-	-

Table 9(iii) page 3

Secretarial support and consultancy service for the the Provisional Governing Council	6.48	R NR CAP	5.0 2.0 -	5.0 - -	- - -												
Creation of a new assessment mechanism for non-graduate qualifications	7.24	R NR CAP	1.3 - -	- - -													
Secretarial support for Advisory Committee on Teacher Education and Qualifications	7.34	R NR CAP	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -	1.0 - -

## CHAPTER 10

### Progress in Implementing Previous Education Commission Reports

In this chapter we review progress made in implementing previous reports. *Annex I* sets out in tabular form the major topics covered in the reports, by level of education.

10.2 The purpose of ECR1, produced within six months of the Commission's creation, was to take forward the most urgent proposals arising from the 1982 review of Hong Kong's education system by an international panel of experts. In view of the urgency and the fact that the panel's report had already been the subject of wide public comment, ECR1 was adopted as Government policy without first going through a further process of public consultation.

10.3 In producing subsequent reports from ECR2 onwards, however, we have operated in the following way:

- *formulation* - the Commission formulates detailed policy proposals together with estimates of their cost, following extensive study of particular issues, and taking into account views expressed by a wide range of interested parties;
- *consultation* - the Commission publishes its proposals in the form of a report, and seeks public views on them;
- *review* - in the light of public comment, the Commission reviews its proposals and, where appropriate, modifies its recommendations;
- *policy submission* - the Secretary for Education & Manpower (SEM) submits proposals to the Executive Council, seeking policy approval for the recommendations;
- *resourcing* - SEM and his heads of department seek resources to implement the approved policies;

*implementation* - the Government implements the approved policies. Resource constraints sometimes lead to slower implementation than the Commission envisaged in its recommendation.

## **Report No.1 (October 1984)**

10.4 ECR1 covered five topics: the Junior Secondary Education Assessment System (JSEA); language in education; teacher preparation and the teaching service; open education; and educational research.

### *JSEA*

10.5 The aim of recommendations under this heading was to expand full time education and training opportunities beyond S3 by providing more full time craft course places; building more schools to expand S4-S5 provision; buying S4 places in private schools of satisfactory standard; devising a new method of selecting students for progression to S4; changing the class structure of some schools to improve chances of progression within the same school; and modifying the curriculum to cater for a wider ability range in senior secondary forms.

10.6 *Provision of places* The target recommended by ECR1 was to provide a public sector S4 place for about 85.6% of the relevant age group by 1991, and a full time craft course place for a further 9.6%. In the 1991-92 school year, the provision of S4 places was 82%, and of craft places 10%. We note that the completion of schools in the building programme should provide S4 places for 85% of the age group by 1993.

10.7 *Progression to S4* A new method of administering progression from S3 to S4, to eliminate pressure on students and reduce the administrative load in schools, was introduced in 1987 and revised in 1991. To ensure a better match between the class structure of a school and the proportion of its S3 students eligible for an S4 place, 38 schools have changed their class structure since 1987 from asymmetrical to symmetrical or vice versa. In September 1991, 72% of S3 students in the public sector were able to progress to S4 in the same school.

10.8 *Curriculum* Since 1985, six new subjects have been added to the HKCEE syllabus: Ceramics; Fashion & Clothing; Government & Public Affairs; Physical Education; Social Studies; and Textiles. Home Economics has developed

into two subjects: Dress & Design and Food, Home & Family. A new subject, Travel & Tourism, will be offered in S4 on a trial basis from September 1993. In 1990 the Hong Kong Examinations Authority began offering Basic Proficiency Tests in Chinese, English and Mathematics for school leavers who have not reached HKCEE standard.

### ***Language in education***

10.9 ECR1 recommendations focussed on providing more language expertise in schools and colleges of education; and encouraging schools to make wider use of Chinese as the medium of instruction. See also under ECR4, below.

10.10 *Language expertise* Secondary schools have been provided with an additional graduate teacher of Chinese since 1989. The colleges of education have recruited 20 native-speaker English lecturers. A permanent scheme to enable secondary schools to employ expatriate English teachers started in 1991 after a two-year pilot scheme.

10.11 *Medium of instruction* In the 1991/92 school year, 166 of 377 secondary schools were using Chinese as the medium of instruction in all or some classes or subjects. Most Chinese-medium classes are at junior secondary level. The colleges of education have adapted their courses to prepare trainees for a wider use of Chinese in their career, and the ILE has run several part time courses to help subject teachers adapt to teaching in Chinese. With advice from the Chinese Textbooks Committee, Chinese-medium textbooks have been produced for 27 secondary school subjects since 1989. In addition, Putonghua has been an optional subject in primary schools since 1986, and in junior secondary classes since 1988.

### ***Teacher preparation and the teaching service***

10.12 The main recommendations under this heading covered degree courses in primary education; teacher involvement in curriculum development; possible need for a new college of education; support for developing a code of practice; and measures to allow schools more freedom and flexibility under the codes of aid.

10.13 *Degrees in primary education* A 4-year part-time BA course in primary education started at CUHK in 1988. The annual intake has risen from 36 to 46. See also Chapter 4 of this report.

10.14 *Curriculum development* Efforts to encourage teacher participation on curriculum development teams were not very successful, so in 1988 the school-based curriculum project scheme was introduced. See also under ECR4, below.

10.15 *New college of education* Revised population projections indicated that a new college would not be needed. See also Chapter 6 of this report.

10.16 *Code of Practice* See Chapter 8 of this report.

10.17 *More flexibility for schools* The School Management Initiative was launched in 1991, and is now being implemented in 21 secondary schools. See also Chapter 2 of this report.

### ***Open education***

10.18 ECR1 endorsed the UPGC's recommendation that no open university be established, and undertook to examine this subject in the next report.

### ***Educational research***

10.19 ECR1 recommended a sustained research effort involving Education Department and the tertiary institutions, which should be coordinated with policy planning. Considerable research has been undertaken since ECR1, in areas such as the Hong Kong Attainment Tests, extensive reading schemes, split-class teaching, and language in education.

### **Report No.2 (August 1986)**

10.20 ECR2 made some further recommendations on language in education; and proposed major initiatives in the area of pre-primary services; the sixth form; teacher preparation; open education; and the financing of education.

### ***Language in education***

10.21 An additional half-post for a nongraduate teacher of Chinese was provided in small secondary schools from 1986. Extra resources for split-class teaching of English were given to secondary schools from 1988. Further research on splitclass teaching, completed in 1988, confirmed that it improved language learning.

### *Pre-primary services*

10.22 ECR2 recommended improvements to KG teacher training; better salaries for KG teachers; legislation for minimum proportions of trained teachers in each KG; an increase in funding for the fee assistance scheme; and a working group to develop plans for unifying pre-primary services.

10.23 Public response to ECR2 did not favour the proposed method for increasing fee assistance, and the Government decided against legislation; but in 1989 a package of measures to take forward the ECR2 objectives was approved. This included a modified fee remission scheme with more funding. These measures have led to improvements in teacher salaries and numbers coming forward for training. See also Chapter 3 of this report.

### *Sixth form*

10.24 ECR2 recommended a target of one S6 place for every three S4 places two years earlier; extending the two-year sixth form course to all types of secondary school; abolishing the Higher Level and introducing a new Intermediate Level exam; developing a wider range of subjects at A-level; and making the A-level available in both English and Chinese.

10.25 With the addition of 3000 places each year in 1991 and 1992, the target for S6 places will be achieved in September 1992. Following public comment, the Intermediate Level exam was modified to become the AS level, taken at the end of S7. The first Chinese-medium A-level exams and the last Higher Level exams are being held in 1992. From September 1992 all sixth form courses last two years. New subjects have been developed at A-level and AS-level, and the coverage of some A-level subjects has been reduced to bring them more in line with the standard of other subjects. New courses in Art & Design and Design & Technology are being taught from 1992; and the first AS level exams will be held in 1994.

### *Teacher preparation*

10.26 ECR2 recommended expanding capacity on postgraduate training courses to achieve a target of 72% trained graduate teachers by 1992 and 80% by 1994; improving the training of technical institute teachers; developing degree courses in practical and technical subjects, with additional graduate posts in secondary schools

for teachers of such subjects; and improving the in-service course for teachers of children with special educational needs.

10.27 Capacity on postgraduate training courses has been expanded, and currently about 69.5% of graduate teachers are trained. Part-time day release courses for technical teachers in technical institutes started in 1987. Degree courses in physical education and music have started; we note in Chapter 6 of this report the need for courses in other practical and technical subjects. Up to four extra graduate posts are being provided from 1991 in schools offering specified practical and technical subjects. The mode of attendance for the special education training course was revised in 1987; see also Chapter 3 of this report.

### *Open education*

10.28 ECR2 recommended a new institution to provide sub-degree and degree courses, drawing on the academic resources of all suitable local bodies. This led to the creation of the OLI in June 1989. In October 1991 the OLI had an enrolment of 17 800 students.

### *Financing of education*

10.29 ECR2 recommended developing a series of linked computer models to help in planning changes to the education system, and monitoring resource requirements. Models are being developed by consultants, and should be completed by July 1992.

## **Report No. 3 (June 1988)**

10.30 ECR3 focussed on two issues; the structure of tertiary education; and the future of private schools.

### *Tertiary education*

10.31 The major recommendations were that the length of first degree courses, to be determined in accordance with educational requirements, should in principle be the same for any given subject at all institutions; that entry to a first degree course should be after S7; and that joint admission procedures should be introduced by all UPGC-funded institutions.

10.32 Policy approval was secured in January 1989. The Government indicated that it wished the Commission's recommended first degree structure, with the resulting common point of entry after S7, to be fully achieved by the end of the 1994-97 triennium.

10.33 Substantial progress has been made in implementing the first degree structure. Six of the seven UPGC-funded institutions already adopt this structure, while the seventh is aiming to achieving it in full by 1994-95, two years ahead of the Government's target date. All seven institutions have introduced joint admission procedures for first degree places. These procedures are being developed into a scheme which will be appropriate for the situation from 1994-95, when all entry to first degree places will be after S7.

### *Future of private schools*

10.34 The recommendations covered phasing out the Bought Place Scheme (BPS) by the year 2000; raising the standards of BPS schools before that date; introducing a Direct Subsidy Scheme (DSS) to create an independent school sector of a high standard; and setting up a Private Schools Review Committee (PSRC).

10.35 The PSRC was set up in 1989. Eighteen BPS schools in 20 premises are being improved under five-year contracts with the Government signed in 1991. Provision is made for their untrained teachers to attend in-service training courses. Their class structure, class size and facilities are being improved to aided school standard, and loans are available for these schools to buy their premises. The DSS was introduced in 1991. Nine schools joined the scheme in 1991, and another will join in 1992.

### **Report No.4 (November 1990)**

10.36 ECR4, on the curriculum and behavioural problems in schools, covered seven major areas: curriculum development; counselling and guidance; enhancement measures for children with special educational needs; attainment targets and related assessments; language in education; mixed-mode primary schooling; and corporal punishment in schools.

### *Curriculum development*

10.37 The recommendations were for a reconstituted Curriculum Development Council (CDC), and the creation of a CDI to be set up within the Education Department but staffed partly by professionals from outside the civil service.

10.38 The CDC was reconstituted in January 1992. Its members, appointed by the Governor, now include employers and parents. The CDI is scheduled to be set up in mid-1992.

### *Support services in schools*

10.39 ECR4 recommended a whole-school approach to guidance and counselling; the transfer of Student Guidance Officer posts to schools; more training opportunities in guidance and counselling; and more training places for Educational Psychologists.

10.40 Improvement measures costing \$47 million between 1992/3 and 1994/5 will be introduced in September 1992. Most of these relate to the transfer and upgrading of Student Guidance Officers.

### *Education enhancement measures*

10.41 The main recommendations were to introduce a school-based remedial support programme applying to the bottom 10% of junior secondary students; develop school-based programmes for academically gifted children as a pilot scheme; set up three more practical schools for unmotivated students and seven skills opportunity schools for students with severe learning problems; and test the feasibility of a bridging course to help students transfer from grammar school to prevocational school.

10.42 Projects to provide three practical schools have been included in the Public Works Programme, with start dates in 1992/3. Research on gifted children is being funded by a donation from the Royal Hong Kong Jockey Club. Funds for other measures have been provided outside the 1992/3 Estimates; implementation will proceed as soon as practicable.

### *Attainment targets and assessments*

10.43 The main recommendation was to develop, initially for the core subjects of Chinese, English and Mathematics, a framework of attainment targets and TRAs.

10.44 Work is proceeding smoothly towards the first TRAs: April/May 1993 for P4, and 1994 for P6. A donation from the Hongkong Bank Foundation is greatly assisting with the development of language-related TRAs.

### *Language in education*

10.45 ECR4 set out a timetable for schools to adopt a firm policy on medium of instruction, and recommended firm guidance to ensure that schools no longer use "mixed code" in the classroom after 1998. It also recommended language bridging courses to help students transfer at various levels from Chinese to English medium teaching.

10.46 Policy approval has been secured for the recommendations on medium of instruction, and implementation will proceed from 1994, once the first TRA results are available to help parents and schools decide on the most appropriate medium for their children. P6-S1 bridging courses are being developed. The Working Party on Vocational English is developing modules to help school leavers prepare for work. Proposals have been developed for bridging courses at sixth form level, to help Chinese-medium students meet the English language requirements of the tertiary institutions. The Education Department is discussing these with the tertiary institutions.

### *Mixed-mode primary schools*

10.47 The ECR4 proposal for mixed-mode (bisessional/whole day) primary schools, as an interim stage towards whole day schooling, was opposed by parts of the education community. The Government, on our advice, therefore approved a policy to give schools more encouragement to convert to full whole day operation where this is possible with existing accommodation. See also Chapter 2 of this report.

### *Corporal punishment*

10.48 Corporal punishment in schools was abolished in 1991.

## Annex A

### **Submissions, panel discussions and visits relating to the preparation of ECR5**

#### *Submissions from educational bodies and individuals*

The following submitted views in writing -

Mr AU YEUNG Ying-cheong, Chairman, Hong Kong Association of Heads of Secondary Schools

Mr CHAN Tin-kei, President, Union of Heads of Aided Primary Schools of Hong Kong

Mr H CHENG, Chairman, Association of Heads of Subsidized Primary Schools of Hong Kong (Co.Ltd.)

Dr CHENG Kai-ming, Department of Education, University of Hong Kong and Chairman, Preparatory Committee, Professional Code for Educational Workers

Mr CHEUNG Man-kwong, Chairman, Hong Kong Professional Teachers' Union

Mr Dino Chincotta, Department of Curriculum Studies, the University of Hong Kong

Mr CHOI Chi-sing, Peter, 41 Battery Street, 1/F, Yaumati, Kowloon

Mr CHOI Kwok-kong, Chairman, Blooming Teachers' Association

Professor Maurice Craft, Dean of Humanities and Social Science, Hong Kong University of Science and Technology

Mr Peter Falvey, Senior Lecturer, Department of Curriculum Studies, the University of Hong Kong

Mr HA Man-ho, Chairman, Education Action Group

Mr HO Kwok-suen, Chairman, Government Schools Non-Graduate Teachers' Union

Dr K K HO, Principal, Chinese YMCA College

Mr LAM Shu-wing, President, Association of Lecturers at Colleges of Education

Ms LAM Wai-har, Teacher, Fanling Government Primary School

Mr P H LEUNG, President, Hong Kong Teachers' Association,

Mr LO Chee-yuen, Chairman, Hong Kong Teacher Librarians' Association

Mr LUK Hung-kwan, President of the Union of Government Primary School Headmasters and Headmistresses

## Annex A page 2

Rev L Mencarini, Acting Chairman, Hong Kong Catholic Board of Education

Mr William Purves, Chairman of Sports Development Board

Mr Hudson SOO, Chairman, Hong Kong Subsidized Secondary Schools Council

Mr P K TAO, Acting Dean, Faculty of Education, the University of Hong Kong

Mr Terence C T TENG, Chairman, Hong Kong Teachers' Association

Mr Simon THAM, Subject Convenor 1991, English Departments, Colleges of Education

Mr D R TOO, Supervisor/Principal, St. Benedict's Secondary Technical School

Ms Eve TSUI Tak-kwan, Chairman, Colleges of Education Review Committee on Teacher Education

Mr Steve Walsh, Lecturer, Sir Robert Black College of Education

Ms Christina WONG, Representative, English Division, Institute of Language in Education

Mr Kenneth WONG, Representative, English Section, Advisory Inspectorate

Dr Walter T H WOU, Chairman, Working Party for the Establishment of General Teaching Council of Hong Kong

Mr Luke YIP, Chairman, Hong Kong Aided School Teachers' Association

Hong Kong Association of the Blind

The following panel speakers were invited to address the Commission on the teaching profession-

Professor J W Barrett, Academic Vice President, Hong Kong Baptist College

Dr Verner Bickley, Assistant Director of Education (Institute of Language in Education), Education Department

Mr CHENG Kai-nam, Chairman, Hong Kong Federation of Education Workers

Mr CHEUNG Man-kwong, Chairman, Hong Kong Professional Teachers' Union

Professor B L Cooke, Department Head of Curriculum Studies, the University of Hong Kong

Professor Maurice Craft, Dean of School of Humanities and Social Science, Hong Kong University of Science and Technology

Professor G Dhanarajan, Director of the Open Learning Institute of Hong Kong

Mr LO Heung-man, Representative, Association of Lecturers of Colleges of Education

Dr Leslie LO, Senior Lecturer of Faculty of Education, Chinese University of Hong Kong

Mr David PUN, Principal, Hong Kong Technical Teachers' College

Mr Hudson SOO, Chairman, Hong Kong Subsidized Secondary Schools Council

Mr TONG Yok-kee, Chairman, Subsidised Primary Schools Council

Ms Eve TSUI Tak-kwan, Chairman, Colleges of Education Reviewing Committee

Dr Walter T H WOU, Acting Chairman, Preparatory Committee, Professional Code for Educational Workers

Mr Luke YIP, Chairman, Hong Kong Aided School Teachers' Association

*Visits by the Education Commission in the course of the study*

26 November 1990	Hong Kong Technical Teachers' College
17 December 1990	Northcote College of Education
7 January 1991	Faculty of Education, the University of Hong Kong
14 January 1992	Faculty of Education, Chinese University of Hong Kong

*Education Commission Visit to the United States and the United Kingdom from 7 February to 22 February 1991*

**United States:**

Centre for the Study of Evaluation at University of California

Los Angeles Unified School District 10th Street School

American Federation of Teachers

National Parent Teacher Association

Department of Education

Association of Supervision and Curriculum Development

National Centre for Education and the Economy

National Governor's Association

Council of Chief State School Officers

School Without Walls

The Holmes Group

IBM Corporation

Teachers College, Columbia University

Public School 148, New York City

New York City Board of Education

The Committee for Economic Development

New York City Teachers Centre Consortium

Coalition of Essential Schools

**United Kingdom:**

Schools Examination and Assessment Council

Department of Education and Science

Institute of Education, London University

National Union of Teachers

National Curriculum Council

## Annex B

### Induction Provision in Local Secondary Schools

The Department of Curriculum Studies of the University of Hong Kong has conducted research on beginning teachers and induction provision in Hong Kong, focusing on beginning teachers who graduated from the University. It includes-

- a comprehensive survey of the experiences, needs and development of 129 graduate secondary school Arts, Science and English beginning teachers in their first year of service (1986-87);
- interviews of selected beginners in the sample to examine the various aspects of beginning teaching in more detail; and
- a survey of principals to identify their perceptions of the problems and needs of beginning teachers, and the availability and nature of school-based induction provision in local secondary schools (1987).

The major findings are as follows-

System-based Only 15% of the teachers reported that induction activities

Induction such as seminars, workshops and other programmes were provided for them by ED.

Only 9% were visited by Advisory Inspectors early in their first year (September) and only 2 more teachers were visited by Inspectors during later periods.

Less than 10% reported further seminars for them by ED later in the year.

Most teachers considered the induction activities and visits not helpful.

An intensive 5-day "Orientation Programme for Beginning Teachers" was jointly offered by 10 professional teacher associations, covering a wide range of aspects including teaching skills, curriculum resources, roles of teachers and contemporary issues in education and teaching.

School-based Most teachers were not given their time-tables and syllabuses

Induction well in advance (two weeks or more) of the start of the school year.

Only 4 out of 27 possible induction activities were available for more than half of the teachers surveyed.

The more common arrangements (experienced by over one-third of the teachers) were offered before the beginning of the first term, and were mainly at the level of familiarisation (such as discussion with panel chairman, subject meetings, meeting staff, orientation meetings) and information provision (such as staff handbook, school documents, or information about facilities and resources).

Little induction provision was offered after term started.

Activities giving follow-up help to beginners to solve specific individual problems on a close, regular basis (such as special meetings for new teachers, lesson observation, regular help and guidance by specific staff members) were reported by few teachers.

Concession  
for new  
teacher

Only 4 of 11 concessions items were received by more than one-third of the teachers. These include simple arrangements such as parallel classes, not allocated administrative duties, and not asked to teach examination classes in general or advanced level in particular.

Concessions involving special support to beginners such as having fewer lessons to teach or given time-off for outside activities were seldom found.

Source: *Beginning to Teach in Hong Kong - A Guide to Induction in Schools*,  
by B L Cooke and K C Pang

## Annex C

### Terms of reference and membership of new committees

#### (1) Committee on Home-School Cooperation

##### *Proposed Terms of Reference*

- (a) To conduct surveys to investigate current perceptions of home-school relationships, the attitudes of parents, and the improvements required.
- (b) To disburse grants to schools which have ideas for innovative approaches to improving home-school cooperation, and ensure that successful schemes are publicised.
- (c) To develop multi-media training and publicity materials to encourage better home-school cooperation.
- (d) To encourage the establishment of Parent-Teacher Associations.
- (e) To promote positive attitudes through publicity programmes, publicity for good ideas, workshops and seminars.
- (f) Through the Advisory Committee on Teacher Education & Qualifications, to advise teacher education institutions on ways to incorporate the concepts and skills of working with parents in courses of initial teacher training, refresher courses and in-service training for school heads and teachers.
- (f) To advise the Education Department and other Government departments and non-government organisations on ways to promote positive parental involvement in the education process.

##### *Proposed composition*

5-6 educators, drawn from the primary, secondary and kindergarten levels

5-6 parents of children in local schools or kindergartens

Chairman: a parent

Secretarial support to be provided by Education Department.

-----

#### (2) Provisional Governing Council of the Institute of Education

##### *Proposed Terms of Reference*

In the light of guidelines laid down by the Executive Council, to -

- (a) prepare for the formal establishment of the Hong Kong Institute of Education (the Institute) as an independent institution under its own Ordinance;
- (b) arrange for the separation of the colleges and ILE from the civil service;
- (c) propose an administrative structure for the Institute;

- (d) propose a staff structure, salary scales and conditions of service for the staff of the Institute;
- (e) prepare draft Drafting Instructions for the Institute's Ordinance;
- (f) draw up, with the help of outside expert advice as necessary, a strategy for upgrading the colleges/ILE;
- (g) prepare a forecast of resource needs of the Institute during the upgrading phase;
- (h) report to the Government as often as may be required; and
- (i) carry out any executive functions as directed by the Government.

*Proposed composition*

3 officials: Secretary for Education and Manpower or representative; Secretary for the Civil Service or representative; Director of Education or representative;  
4 persons experienced in teacher training: 1 from a tertiary institution, 2 from the colleges of education, and 1 from the ILE;  
5 lay persons, including persons knowledgeable in accountancy and management; one of these to be the Chairman.  
Secretarial support to be provided by a separate Secretariat.

-----  
**(3) Advisory Committee on Teacher Education and Qualifications**

*Proposed terms of reference*

Having regard to approved policies on teacher education and training, and to the supply of and demand for teachers with the necessary professional qualifications and skills, to advise the Government on-

- (a) the levels and types of teacher education and training activities needed to meet present and forecast needs of schools;
- (b) the distribution between activities funded by the UPGC, and other activities;
- (c) the funding, academic quality and professional relevance of activities, other than those funded by the UPGC;
- (d) the suitability for teaching in Hong Kong of any academic or professional qualification acquired outside Hong Kong, and appropriate measures for assessing such suitability;
- (e) the need for any policy changes, in the light both of local needs and of developments in teacher education around the world; and
- (f) any other matters relevant to teacher education and training which the Government may refer to it.

*Proposed composition*

Chairman: a member of the public of high standing, with experience in education, administration, commerce or industry

Members: *ex officio (total 6)*:  
Deputy Secretary for Education & Manpower; Deputy Secretary for the Civil Service; Director of Education; Director of the Hong Kong Institute of Education; Secretary-General, UPGC; Executive Director, HKCAA.

*Others (total 11 or more)*:  
an experienced teacher educator from each tertiary institution offering teacher education courses; a primary school head; a secondary school principal; a special school principal; a kindergarten head; a practising teacher; two persons experienced in business, industry or the professions

Secretarial support: provided by Education & Manpower Branch

**(4) Council on Professional Conduct in Education**

See paragraph 8.26 of this Report.

## Annex D

### Proposed Duties of All Senior Posts in Schools

#### Primary School

The duties of the proposed eight Senior Teachers for a standard 24-class whole-day primary school are generally as follows -

(a) *Deputy Head*

general administrative duties, time-tabling, distributing teaching loads, sick/maternity leave arrangements, hiring of supply teachers, arrangement for teaching practice for College of Education students, control of office staff/workmen, school functions (open day, speech day etc), parent-teacher association, induction of new teachers, in-service training and staff development, serving as a link between the Head of the school and the teaching staff.

(b) *In-charge of Academic Affairs*

co-ordinating the work of teachers in charge of various subjects other than English, Chinese and Mathematics, and special education classes (if any) and in the implementation of moral and civil education, liaison with Special Education Section, monitoring activity approach and producing the textbook list, school/class libraries, ETV, wireless induction loop system.

(c) *In-charge of Discipline, Counselling and Guidance*

discipline matters, tracing and reporting drop-outs, coordinating the whole-school approach in school counselling and guidance, liaison with parents, liaison with Student Guidance Teacher, liaison with Police.

(d) *In-charge of General and School Affairs*

admission of new pupils, school internal examinations, matters relating to Secondary School Places Allocation and Primary One Admission Scheme, textbook and stationery grant, student travel assistance scheme, student records, teaching aids and school furniture and equipment, notice boards, minor repairs, first aid, School Health Scheme, School Dental Care Service.

(e) *In-charge of Extra-curricular and Other Activities*

cultural and physical, games day, inter-school sports and dance activities organized by the HK & NT Schools Sports Associations, School Music and Speech Association, organizing educational visits, involvement in community functions relating to civic education, fire drills, safety patrol, Community Youth Club and Junior Police Call activities.

(f)(g) and (h) *Panel Chairs of Chinese, English and Mathematics*

in charge of the overall organization and teaching of the subject in school and its related matters, such as planning the school-based syllabus, preparing the scheme of work, choosing textbooks and resources, implementing and monitoring remedial teaching, planning teaching programmes based on the framework of attainment/learning targets and administering target-related assessments in schools.

## Annex D page 2

The workload of each Senior Teacher will depend on the size of the school for almost every duty outlined above. For schools larger than 26 classes more Senior Teachers will be required and the duties re-distributed accordingly, and for schools smaller than 24 classes, fewer will be required as each Senior Teacher can then take on more responsibilities.

Note: One of the Senior Teachers in the AM rank will be designated as Deputy Head.

### Secondary school

#### *Principal*

To oversee the overall administration and management of the school.

#### *Assistant Principal*

Specific duties of the two APs are as follows -

<b>AP1</b>	<b>AP2</b>
1. planning expenditure	1. student admission
2. control and allocation of funds and resources	2. streaming of classes/timetabling
3. superintending general cleanliness and repairs of school premises and furniture	3. curriculum, syllabuses and choice of textbooks
4. supervising annual stocktaking exercises	4. maintain/coordinate school contacts with outside bodies, e.g. CDI, Inspectorate, teachers' centre.
5. arranging duty roster of staff and cover for absent staff	5. remedial teaching in junior forms
6. planning school calendar and organizing school functions	6. co-ordinating the work of subject panels
7. developing contacts with parents.	7. organizing "INSET" programmes for professional staff and organizing induction programmes for new teachers
8. administration of internal and public examinations	8. coordination of teaching practice and arrangements with universities, Colleges of Education etc

Both Assistant Principals will also undertake the following duties: -

1. class teaching
2. overseeing counselling and guidance, careers, discipline and general welfare of pupils

3. supervising subordinate staff and writing or countersigning their staff reports (if schools have a staff appraisal system)
4. supervising/advising Students' Council/Association
5. promoting extra-curricular activities in school
6. participating in committees, seminars and course in order to contribute to or update one's professional views/standards
7. such other duties as may be required

*Principal Assistant Master/Mistress (Secondary)*

1. To teach academic subjects up to S5 and/or technical/practical/cultural subjects up to S7, if required.
2. To be a Class Master/Mistress if required.
3. To co-ordinate the work of pastoral care in junior forms of the school with the Counselling/Guidance Team, the Discipline Team and the Careers Unit.
4. To assist in promoting extra-curricular activities in school and/or co-ordinate as required.
5. To attend to the special needs of pupils in junior forms and recommend referrals of pupils with such needs to the Special Education Section of the Education Department and other government departments as appropriate.
6. To participate in committees, seminars and courses in order to contribute to and/or update one's professional views and standards.
7. To perform other duties as may be required.

*Senior Assistant Master/Mistress (Secondary)*

1. To teach academic subjects up to S5 or to be a teacher-in-charge of a practical/cultural subject in a secondary school and to supervise closely subordinate staff teaching the same practical/cultural subjects.
2. To be a Class Master/Mistress if required.
3. To assist in organizing and conducting extra-curricular activities.
4. To assist in the performance of special responsibilities and in other administrative work and non-teaching duties of the school.
5. To participate in committees, seminars and courses in order to contribute to and/or update one's professional views and standards.
6. To perform any other duties as required.

**Annex E****The Colleges of Education/ILE**

Name	Location	FTE Places
Grantham College of Education	Main campus: 42 Gascoigne Road Kowloon	1218
	Annexe: 9-11th and 20th floors Argyle Centre Stage I 688 Nathan Road Kowloon	
Hong Kong Technical Teachers' College	Main campus: 373 Queen's Road East Hong Kong	215
	Annexe: Ground, 5th and 6th floor Morrison Hill Technical Institute Oi Kwan Road Hong Kong	
	Ground floor 29 Wood Road Wanchai Hong Kong	
Northcote College of Education	Main campus: 21 Sassoon Road Pokfulam Hong Kong	1042
	Annexe: 9A Bonham Road Hong Kong	
Sir Robert Black College of Education	Main campus: 6 Caldecott Road Piper's Hill Kowloon	1311
	Annexe: Area 5B Yuen Chau Kok Shatin New Territories	
Institute of Language in Education	2 Hospital Road Hong Kong	415

---

**TOTAL 4201**

**Full-time Courses of Teacher Education  
Offered by the Colleges**

Sir Robert Black College of Education					
Northcote College of Education					
HK Technical Teachers' College					
Grantham College of Education					
Courses Offered	GCE	HKTTC	NCE	SRBCE	Awards
Three-year Full-time Course (English)		X	X	X	Teacher Certificate
Three-year Full-time Course (Chinese)	X				
Two-year Full-time Course (English)	X		X	X	
One-year Full-time Course (English)		X			
Advanced Course of Teacher Education	X	X	X	X	Certificate of the Advanced Course of Teacher Education

### Part-time Courses of Teacher Education Offered by the Colleges

Courses Offered	GCE	HK TTC	NCE	SRBCE	Awards
3-year In-service Course of Training for Teachers in Secondary Schools			X		Certificate for Qualified Teachers
2-year In-service Course of Training for Teachers in Secondary Schools			X		
3-year In-service Course of Training for Teachers in Primary Schools				X	
2-year In-service Course of Training for Teachers in Primary Schools	X				
2-year (Day Release) In-service Course of Training for Kindergarten Teachers (Chinese/English)	X				Certificate for Qualified Kindergarten Teacher
(Evening) In-service Qualified Assistant Kindergarten Teacher Training Course (Chinese/English)	X				Certificate for Qualified Assistant Kindergarten Teacher
2-year In-service Course of Training for Teachers of Children with Special Educational Needs				X	Certificate for Teachers of Children with Special Education Needs
2-year In-service Course of Teacher Training (Technical)		X			Certificate for Qualified Teachers
2-year In-service Course of Teacher Training for Lecturers in Technical Institute		X			
Short Courses for Technical Teachers		X			Certificate of Attendance
Refresher Training Course for Serving Secondary School Teachers			X		
Refresher Training Course for Serving Secondary School Teachers (Technical)		X			
5-week Retraining Course for Primary School Teachers X	X				

## Staffing of the Colleges of Education

Academic Staff		Non-academic Staff
Graduate	Non-graduate	
4 Principal	43 Lecturer (Non-graduate)	4 Executive Officer II 15 Laboratory Technician II/III 2 Foreman 1 Hostel Manager 6 Artisan 23 Workshop Attendant 82 Workman II 7 Clerical Officer I 8 Clerical Officer II 11 Clerical Assistant 9 Office Assistant 1 Personal Secretary II 5 Typist 4 Assistant Librarian I 1 Supplies Supervisor II
8 Vice-Principal	131 Assistant Lecturer	
61 Principle Lecturer		
58 Senior Lecturer		
51 Lecturer (Graduate)		
Total 282	174	179

## Staffing of the Institute of Language in Education

Academic Staff		Non-academic Staff
Graduate	Non-graduate	
1 Assistant Director	Nil	1 Executive Officer I 1 Executive Officer II 1 Assistant Librarian I 1 Personal Secretary I 1 Personal Secretary II 2+1 * Typist 1 Laboratory Technician I 1 Laboratory Technician II/III 1 + 1 * Clerical Officer I 3 + 1 * Clerical Officer II 2 Calligraphist 2 Offices Assistant 11 Workman II
6 Vice-Principal		
9 + 2 * Senior Lecturer		
39 + 1 * Lecturer (Graduate)		
Total 55 + 3 *	Nil	28 + 3 *

\* Supernumerary posts

**Extract from Education Ordinance, Cap 279**

**Education Regulations  
SECOND SCHEDULE**

**PART I  
QUALIFICATIONS FOR A REGISTERED TEACHER**

- (1) An approved degree of either the University of Hong Kong, or of The Chinese University of Hong Kong, together with an approved teacher's diploma, certificate, or like qualification to teach;
- (2) a degree in education of either the University of Hong Kong or of The Chinese University of Hong Kong;
- (3) an approved degree of either the University of Hong Kong, or of The Chinese University of Hong Kong, and 3 years approved teaching experiences;
- (4) a teacher's certificate issued by the Hong Kong Government;
- (5) a Hong Kong Government Normal School certificate and 5 years approved teaching experience;
- (6) a Hong Kong Government Evening Institute teacher's certificate and 5 years approved teaching experience;
- (7) a certificate status as "Qualified Teacher" or "Qualified Kindergarten Teacher" issued by the Hong Kong Education Department to a teacher who has completed an approved course of training and passed a written and practical test, and approved teaching experience.
- (8) any other educational training and experience which in the opinion of the Director is equivalent to the qualifications specified in paragraph (1), (2),(3),(4),(5),(6) or (7); or
- (9) (a) 10 years approved teaching experience and one or more Hong Kong Certificates of Education with an aggregate of 5 separate subjects at Grade E or a higher grade, including -
  - (i) English Language in the Hong Kong Certificate of Education (English), or of a standard which in the opinion of the Director is equivalent to Grade E or a higher grade in that Certificate; or
  - (ii) Chinese Language;
- (b) 10 years approved teaching experience and one or more Hong Kong Certificates of Education with an aggregate of 4 separate subjects, 2 of which are at Grade C or a higher grade and the other 2 of which are at Grade E or a higher grade, including -

- (i) English Language in the Hong Kong Certificate of Education (English), or of a standard which in the opinion of the Director is equivalent to Grade E or a higher grade in that Certificate; or
- (ii) Chinese Language;
- (c) 10 years approved teaching experience and any educational training which in the opinion of the Director is equivalent to the other qualifications specified in subparagraph (a) or (b); or
- (d) 10 years approved teaching experience and a Hong Kong English School Certificate, a Hong Kong Chinese School Certificate, or a Hong Kong School Certificate.

For the purposes of this Part -

- (a) "approved" means approved by the Director;
- (b) a subject is not separate from another subject by reason only that instruction in the first subject is given in a different language to that in which instruction in the second subject is given.

## PART II

### QUALIFICATIONS FOR A PERMITTED TEACHER, OTHER THAN A TEACHER TO WHOM PART III OR PART IV APPLIES

- (1) The qualifications (other than 10 years approved teaching experience) specified in paragraph (9)(a), (b) or (d) of Part I; or
- (2) any other educational training or practical experience which in the opinion of the Director is equivalent to qualifications specified in paragraph (1).

## Annex G

### Qualifications for appointment as a teacher

	Qualification	Primary	Secondary
1	First degree (local or recognized equivalent)	CM#	GM
2	First degree (local or recognized equivalent) with postgraduate professional qualification	CM#	GM
3	Other degree not equivalent to a local degree	CM#	CM#
4	Unrecognized degrees + local postgraduate qualification	CM#	CM
5	Post-secondary College diploma; degree from 3 Taiwan institutions*	CM#	CM#
6	Academy of Performing Arts diploma + HKCEE (for teaching music only)	CM#	CM#
7	1-yr f/t teacher's certificate (local or recognized equivalent, before 1982)	CM	--
8	2-yr f/t teacher's certificate (local or recognized equivalent)	CM	CM
9	3-yr f/t teacher's certificate (local or recognized equivalent)	CM	CM
10	In-service certificate of teacher training (primary)	CM	CM#
11	In-service certificate of teacher training (secondary)	CM#	CM
12	Polytechnic/Technical College/Technical Institute Higher Certificate or Higher Diploma, plus 1 yr post-qualification experience	CM#	CM
13	Polytechnic/Technical College/Technical Institute Diploma + 1 yr post-qualification experience + 1 yr f/t technical teacher training	CM#	CM
14	Polytechnic/Technical College/Technical Institute Diploma + 2 yrs post-qualification experience	CM#	CM

15	Polytechnic/Technical College/Technical Institute commercial/secretarial certificate + 1 yr post-qualification experience + 1 yr teacher training	CM#	CM
16	Polytechnic/Technical College/Technical Institute commercial/secretarial certificate + 2 yrs post-qualification experience	CM#	CM
17	10 years approved teaching experience (R-10)	CM#	--
18	Unqualified teacher	UQT	UQT

*NOTES:*

CM      Certificated Master/Mistress (appointed on standard payscale)

CM#     Certificated Master/Mistress (appointed on a sub-point of the standard payscale)

GM      Graduate Master/Mistress

\*        For historical reasons, degrees conferred by National Taiwan University, National Taiwan Normal University, and National Cheng Kung University are accepted as equivalent to a local Post-secondary college diploma for appointment to public sector schools.

Holders of unaccredited degrees (including degrees from PRC, Taiwan other than the three institutions mentioned above) are not at present accepted as qualified to teach in public sector schools. External degrees acquired through distance learning or correspondence courses are not normally accepted.

**Extracts from Education Commission Report No. 1**

4.29 Given the present situation, we do not support the setting up of a Teaching Service along the lines postulated by the Panel either for the control of credentials as this is already the function of the Education Department, or for the determination of conditions of work as there is already considerable union-type activity through which teachers in the government/aided sector are able to influence the conditions of their employment.

4.30 A Teaching Service as proposed by the Panel is not the solution to overcome the problem of disparity in qualifications and conditions of service within the teaching force. While it might be possible, with enormous financial commitments, to achieve parity or near parity in conditions of service between teachers in the private sector and their counterparts in the government/aided sector, the disparity in professional preparation would remain for so long as the shortage of qualified teachers persist. Also, the disparity of standards arising from the generally poorer facilities in private schools would continue.

4.31 In our view, a high degree of comparability of professional qualifications and conditions of service throughout the teaching force in Hong Kong should be brought about by the progressive expansion of the fully aided sector to provide for the full demand of public sector education. Such provision would, through the codes of aid, secure more uniform standards, while still leaving individual schools free to develop their own characters and traditions. The system would also permit the continued existence of a small private sector operating to high and acceptable standards.

4.32 While we do not recommend the setting up of a Hong Kong Teaching Service on the lines proposed by the Panel, we do RECOMMEND the fostering of a sense of professionalism by encouraging teachers, principals, school managements and sponsors to co-operate, through the co-ordination of the Education Department, in the writing of a 'code of practice' for the teaching profession. This code would prescribe ethical standards of conduct for teachers in the execution of their professional duties and all registered and permitted teachers would be expected to subscribe to it.

4.33 In addition, we RECOMMEND the implementation of the Panel's proposal of setting up regional teachers' centres to encourage exchange of experiences, to promote continuous professional development and enrichment, and to foster among teachers a greater sense of unity. In our view, these centres should provide meeting places and facilities for informal contact and discussion among teachers, information on current events of interest and relevance to their work, and reference materials. The pattern of activities which would take place therein would vary according to the needs of the teachers but are expected to include lectures, workshops and short seminars held after school, conferences during school holidays as well as exhibitions of new teaching materials and technical facilities, etc.

## ANNEX I

### MAIN RECOMMENDATIONS IN ECR 1-4, BY LEVEL AND ASPECT

<u>Aspect</u>	<u>Kindergarten</u>	<u>Primary</u>	<u>Secondary</u>	<u>Sixth Form</u>	<u>Cross-sectoral</u>
ACCOMMODATION		<u>ECR4</u> :Mixed Mode	<u>ECR1</u> :expansion of post-S3 provision. <u>ECR3</u> :phase out Bought Place Scheme	<u>ECR2</u> :target for 6th form provision.	
-----					
TEACHERS	<u>ECR2</u> :normative salary scales Fee assistance increase to improve salaries .	<u>ECR1</u> :BEd(Primary)degree courses. <u>ECR4</u> :Mixed Mode teacher ratio; Mixed Mode promotion ratio			<u>ECR1</u> :Teacher involvement in curriculum development; Code of Practice.
-----					
CURRICULUM			<u>ECR1</u> :curriculum review related to post-S3 expansion; Language syllabuses to be redesigned. <u>ECR3</u> :Introduce Direct Subsidy Scheme.	<u>ECR2</u> :standard 2-year course; Broader curriculum. <u>ECR3</u> :standard entry point to tertiary.	<u>ECR4</u> :CDI/CDC; Target-related assessment.
-----					

<u>Aspect</u>	<u>Kindergarten</u>	<u>Primary</u>	<u>Secondary</u>	<u>Sixth Form</u>	<u>Cross-sectoral</u>
LANGUAGE		<u>ECR4</u> :P6 language assessment Language enhancement at P5-6.	<u>ECR1</u> :extra graduate Chinese teacher in large schools; Encourage Cantonese medium teaching; Expatriate English Teacher Scheme. <u>ECR2</u> :half-post for Chinese (small schools) Use/effect of split class teaching. <u>ECR4</u> :language grouping S1 bridging course; Vocational English.	<u>ECR2</u> :language - courses in 6th form. <u>ECR4</u> :bridging course after S7	<u>ECR1</u> :Boost Pu tonghua teaching; Expatriate College of ED lecturers. <u>ECR4</u> :R & D unit at ILE.
SUPPORT SERVICES		<u>ECR4</u> :guidance services:whole school approach.	<u>ECR4</u> :remedial teaching; Gifted children; Practical schools; Skills opportunity schools; Prevoc transfer scheme;		<u>ECR1</u> :Codes of Aid to be simplified. <u>ECR4</u> :Combatting Triad influence .
TRAINING	<u>ECR2</u> :better training for KG teachers		<u>ECR2</u> :expand PGCE places; Degrees for teachers of practical, technical, cultural subjects.		<u>ECR1</u> :craft and technical teacher training.