

THE HONG KONG INSTITUTE OF EDUCATION

Final Report of the Management -Initiated Retirement Scheme Working Group

Background

In accordance with the decision of the Council, the terms of reference for the Management-Initiated Retirement Scheme Working Group (“Working Group”), chaired by Mrs. Angela Cheung, a lay Council Member, and consisting of the President and Vice President respectively of the Association of Lecturers, Professor Paul Morris, the Institute’s Deputy Director (Academic)* and Mr. Norman Ngai, the Institute’s Deputy Director (RAS), are as follows:

- (a) To explore the possibility of improving the retirement package for affected staff members who are on Frozen Pension terms; and
- (b) To explore the possibility of assisting the affected staff members with seeking other employment opportunities.

Improving the Retirement Package for affected Staff Members who are on Frozen Pension Terms

2. To improve the retirement package for the affected staff members who are on Frozen Pension, the Working Group unanimously proposed a supplementary ex-gratia payment for the affected staff members who are on Frozen Pension. This payment is additional to that which they are contractually entitled and represents a full and final settlement for those who accept it. The proposal was endorsed by the Council’s Standing Committee and subsequently approved by the Council. The affected staff members on Frozen Pension were offered this supplementary ex-gratia payment and were requested to return the consent form to indicate their acceptance (or otherwise) of the supplementary ex-gratia payment in February 2002. By the deadline for reply, all affected staff members on Frozen Pension returned the consent form to accept the offer. The supplementary ex-gratia payment will be paid to them when they leave the service of the Institute. The Institute will bear the cost of this extra payment, which will amount to HK\$3.2 million.

* *At the time of appointment to the MIRS Working Group, Professor Paul Morris was in the capacity of Deputy Director (Academic).*

Exploring the Possibility of assisting the affected Staff Members with seeking other Employment Opportunities

3. In exploring the possibility of assisting the affected staff members with seeking other employment opportunities, the Working Group:

- (a) contacted Mrs. Fanny Law, Secretary for Education and Manpower, asking for her assistance in soliciting employment information from the Federation for Continuing Education in Tertiary Institutions (“Federation”). Subsequently, the Federation replied and requested the Working Group to submit the CVs of the affected staff members to the Federation. The message was relayed to all affected staff members. Altogether 14 staff members submitted their CVs to the Working Group, which forwarded them to the Federation for onward transmission to its member institutions.
- (b) wrote to Mr. Matthew Cheung, Director of Education, for his assistance in soliciting employment information from the Government schools, non-Government schools and the Education Department. The Education Department replied to say that from time to time, it conducts recruitment exercises and the affected staff members who meet the entry requirements of the posts concerned are welcomed to apply. This message was conveyed to all affected staff members.
- (c) consulted the Deputy Director (Quality Assurance and Educational Services) about employment opportunities in the Early Childhood Learning Centre and the HKIEd Jockey Club Primary School (“Primary School”). Following the information supplied, the Working Group informed all affected staff members of the employment possibilities in the Primary School. One staff member applied for the Principal position in the Primary School and another 5 staff members applied for the positions of Senior Teacher and Subject Teacher and all of them were invited to attend the selection interviews.
- (d) liaised with the Deputy Director (Quality Assurance And Educational Services) and the Head of the Division of Continuing Professional Education (“CPE”) over employment opportunities in the CPE for the affected staff members. As a result CPE agreed to advance their recruitment exercise for the affected staff members who had applied for posts. All of the 5 affected staff members who submitted applications were shortlisted and attended the selection interviews. Offers were made to and accepted by 2 affected staff members under terms normally applicable to staff in the CPE.
- (e) wrote to all affected staff members to ascertain their level of interest in internal transfer within the Institute. Subsequently, 7 affected staff members indicated their interest for internal transfer to other academic departments and 4 affected staff members indicated their interest for internal transfer to non-academic positions. Internal transfer committees were established to consider these applications in March and April 2002. Offers were made to and accepted by 2 affected staff members, to take up non-academic positions under terms normally applicable to non-academic staff.

(f) discussed with the Civil Service Bureau (“CSB”) for clarifications on pension arrangements for the affected staff members if they were to take up employment in Government aided/subsidized schools, tertiary institutions and other educational institutions. The CSB replied and the Working Group conveyed the advice to all affected staff members.

- (g) wrote to the CSB for clarification on the impact of any possible salary reduction on pension. The CSB replied and the Working Group conveyed the advice to all affected staff members.
- (h) requested the Director of Education to consider recognizing the service of the affected staff members in both the HKIEd and the Education Department for the purpose of determining their salary point in case they should take up teaching positions in the Government and Government-funded primary schools and secondary schools. The Education Department replied to advise that, in principle, recognized teaching and lecturing experience would be counted for incremental purpose when affected staff are appointed to teaching posts in government/aided schools. The Education Department also advised that, however, for salary assessment, each and every case would have to be considered on its own merit. The advice was conveyed to all affected staff members.

4. Altogether 10 affected staff members submitted their applications for various positions as well as internal transfers, and 4 of them have been offered employment.

Other assistances rendered by the Working Group

5. In addition to the above, the Working Group:

- (a) met with the Anti-MIRS Committee, established by some of the affected staff members, listened to their concerns, discussed the issues raised and followed up on those that were within the terms of reference of the Working Group, while referring the remaining issues to the relevant body for actions/decisions.
- (b) invited individual affected staff members, if they so wish, to write to the Chairman of the Working Group to express their individual concerns in relation to the Management-Initiated Retirement Scheme. Relevant issues raised by individual staff members that were outside the terms of reference of the Working Group were referred to the Council’s Staffing Committee for consideration/decision. The relevant affected staff members were notified subsequently of the decisions of the Staffing Committee.
- (c) discussed access to library services, sports facilities and e-mail service for all affected staff members after they cease to be employed by the Institute. The Working Group recommended and the Institute agreed that all affected staff members could continue to utilize the library and sports facilities as normal staff members until the normal date of their retirement age as well as having access to the library database, and that guest e-mail accounts could be offered to them upon request.

- (d) through its Secretary and Members, provided advice and support to the affected staff members in writing application letters and curriculum vitae to the Federation and the internal transfer committees.
- (e) posted on the Institute's Intranet brief notes for each and every meeting of the Working Group and, in February, the "Interim Progress Report of the MIRS Working Group" in order to keep staff members informed of the matters discussed by the Working Group and the progress.

Other assistances rendered by the Institute

- 6. To assist the affected staff members, the Institute:
 - (a) agreed to pay the entire requested course fees (i.e. up to 90%) for this year of their staff development programme regardless of the time of their departure.
 - (b) funded and provided information about professional counselling services to all affected staff members.
- 7. As well, the former Director of the Institute met with the Anti-MIRS Committee and provided, upon individual's request, testimonials to the affected staff members to facilitate them in seeking employment.

Conclusion

8. Altogether the Working Group had held 6 meetings since its establishment in November 2001. The Working Group is grateful to the Government (EMB, CSB, FB, ED), the UGC and other organizations for their assistance and co-operation, which had made the work of the Working Group smooth. The Council and the Chairman of the Working Group would also like to take this opportunity to express their appreciation to the President and Vice President of the Association of Lecturers for their hard work and contributions to the Working Group.

MIRS Working Group,
July 2002