

ASSOCIATION OF LECTURERS AT THE HONG KONG INSTITUTE OF EDUCATION

Submission to the Legco Panel on Education
At Meeting on 22 October 2001:
HKIED Management-Initiated Retirement Scheme

The stand of the Association of Lecturers at the Hong Kong Institute of Education (ALHKIED) concerning the HKIED Management-Initiated Retirement Scheme (MIRS) and related issues is as follows.

Concerning MIRS:

It is regrettable that the actual implementation of MIRS:

1. did not follow the HKIED Council's instruction that targeted staff be treated with dignity and their identity be kept confidential;
2. aroused many colleagues' strong suspicion that the selection criteria had not been faithfully and properly applied, because these colleagues could not see how some targeted colleagues who were respected for their contributions to HKIED could now be said to match the stated criteria for compulsory early retirement;
3. breached many colleagues' trust in the Institute's management since the promises of dignified treatment and confidentiality had been blatantly broken, and the application of selection criteria was questionable.

Judging from the strong sentiment displayed by colleagues at the meeting held at PTU on 13 October (attended by over 200 staff members) and at the peaceful demonstration held on 16 October at Taipo Campus (attended by about 270 staff and students), we are very sure that colleagues are very disappointed at and angry about what the Management has been doing. We firmly believe that the Council must take immediate, concrete action to deal with the matter. **Therefore the Association of Lecturers at the Hong Kong Institute of Education (ALHKIED) requests that the HKIED Council should:**

- (1) freeze the MIRS immediately and re-start negotiation,**
- (2) appoint an independent committee to conduct investigations into the matter, and**
- (3) take any necessary actions to remedy the damage caused by the MIRS and to restore staff's confidence.**

Concerning the vote of no confidence:

The Council should be aware that the motion of no confidence passed by a substantial number of the staff clearly indicates that they are not satisfied with the present management in general. (See the supplementary information concerning the motion of no confidence below.) As a matter of balance, the Council should consider the views of staff and the reasons for these views, lest the Council be seen as avoiding the issue by ignoring staff views.

In view of the importance of this issue, **ALHKIEd requests that the HKIEd Council should respond to the vote of no confidence by:**

- (1) forming an independent committee to review the whole managerial structure and process and,**
- (2) taking any necessary actions to restore staff's confidence in the managerial structure and process.**

What the Association did

- The Association of Lecturers did not want to be dragged into this confrontation.
- We had gone out of our way to avoid it, by negotiating in good faith with management.
- We were very positive in our attitude, saying that although we oppose the compulsory nature of the scheme we cannot prevent it, if it is government led.
- Instead we asked for, and were given, full assurances that the process would be handled with dignity and confidentiality – respecting the sensitivities of the situation and the professionalism of our colleagues.
- We helped management put that message across to all staff at a forum on 6th September. The mood of our pre-forum meeting with management was very positive and we helped smooth the way for them at the forum. (It was recorded)
- On the first day of implementation, the Association was distressed by how badly it was being handled. It lacked all sense of dignity and confidentiality.
- Management had made a decision, after the forum, that staff would be laid off teaching for two weeks, but had not told the Association or staff. Staff could not understand what was happening, and said it felt like summary dismissal.
- Names of staff were posted on classroom doors cancelling their class, so betraying both confidentiality and dignity, and also lying to students who were told that colleagues were sick. (See the sample notice – we have many.)
- The Association felt betrayed and staff accused us of siding with management, and failing the members.
- Nevertheless we tried to control the staff response, by posting a motion at our AGM that did not target management but rather the system.
- However, staff were so incensed by what had happened that they would not accept that motion. Hence the motion put to Council.

- The Association was caught out, but ultimately not surprised. For the past few years we have tried to signal that there were problems. Our communications with staff and our surveys had told us that a distinct lack of trust was growing, and there was widespread dissatisfaction with the style of management and decision making processes (See Theall Report). MIRS is the tip of the iceberg.
- If HKIEd is going to grow and prosper there must be trust, and there must be staff ownership of (trust in) the decision-making processes. We call on Council to undertake a full and thorough review.

Supplementary information concerning the vote of no confidence

At the Annual General Meeting of the Association of Lecturers at the Hong Kong Institute of Education, held on 26th September 2001, the following motion was unanimously carried:

The Association of Lecturers at the Hong Kong Institute of Education has no confidence in the leadership, management and decision-making processes at the Institute. The Association calls upon Council to initiate a full and thorough review of the entire management structure and all decision making procedures, to bring an end to the system of patronage in regard to staffing decisions, and to acknowledge that the implementation of the Management Initiated Retirement Scheme (MIRS) did not follow the stated procedures, its conduct lacked integrity, and it was neither dignified nor confidential as staff had been promoted.

The recent Management Initiated Retirement Scheme is only *one* of many concerns that arise from the actions of the Directorate that need to be reviewed. The following list gives a sample of colleagues' concerns.

MIRS related:

1. Altering the processes and procedures of MIRS that were published and presented to staff without consulting or informing staff, thus catching targeted staff completely unaware.
2. Treating targeted staff without professional dignity and confidentiality, as promised in forum discussions, thus causing the present situation of protest and instability
3. Using "criteria" that are open to abuse, because they can be loosely interpreted. In some departments *any* staff may be targeted, while in others staff not meeting the basic definition of "qualification normally needed to teach at a university level" are not targeted, leading to gross inconsistencies and mistrust in the process.

In addition, and over a long period of time:

1. Allowing an atmosphere of mistrust to develop and continue in many areas, as evident in the recent Institute-commissioned Theall Report (copies are available on request).
2. Adopting a hierarchical and impositional form of decision making throughout the management structure where the appraisal of staff is entirely downward rather than sideways and upward.
3. Failing to follow stated criteria for substantiation and renewal of contract, e.g. the most recent round of substantiation.
4. Proliferating modules and failing to implement course development in which efficiency and true modularization occurs.
5. Creating and maintaining a management structure of departments, schools, centres, and endless committees that results in constant tension, constant reduplication of effort in administration and excessive and unnecessary staff workload.
6. Maintaining a costly and inefficient administrative sector.
7. Creating a school structure that lacks credibility in terms of department attachment to schools and which perpetuates the problems inherent in the previous matrix system.
8. Failing to address the excessive timetabled teaching and teaching practice supervision hours, which severely impacts on the attempts of all staff to produce high levels of research.
9. Reducing existing classroom space in order to house non-teaching and administrative activities.
10. Changing the conditions of service in the Staff Handbook by edict and without consulting staff.
11. Allowing cultures of intimidation by constant bullying to exist within certain sectors of the Institute.
12. Producing conditions of service that are not compatible with the Institute's slogan of Joy in Learning.
13. Failing to respect the academic expertise of staff by constantly importing 'experts' to instruct staff, and by cowering to the often conflicting criticisms of external academics, many of whom do not know the particular context of our courses, modules and students.