

For discussion on 12 February 2007

LegCo Panel on Education

Final Report of the Committee on Teachers' Work

Purpose

This paper informs members of the major findings and recommendations in the Final Report of the Committee on Teachers' Work and the Administration's response to them.

Background

2. In response to growing concern about teachers' work and stress confronting them, an independent Committee on Teachers' Work was set up in February 2006 to study teachers' work and related issues. The Committee comprised members from different professions representing a range of perspectives, knowledge and experiences. Membership of the Committee is attached at Annex I. The Committee was supported by an Advisory Group made up of principals and teachers to enhance communication with frontline school personnel and to provide professional advice in the study. The Committee submitted its Final Report to the Secretary for Education and Manpower in December 2006. (A copy of the Final Report is available at www.emb.gov.hk).

3. In carrying out the study on teacher's work, the Committee:
- a) reviewed 26 relevant local and international studies;
 - b) commissioned 2 local studies: first on the nature of work, workload and work stress of teachers, and a subsequent study on teachers' administrative work;
 - c) visited 14 schools of various types which were randomly selected from the public sector; and
 - d) consulted various stakeholders, including 4 teacher education institutions, 5 education bodies, 8 sponsoring bodies, the Education Commission, and the Advisory Committee on Teacher Education and Qualifications.

Summary of Major Findings

4. ***A dedicated teaching force:*** Teachers demonstrated a strong commitment to the profession. They derived satisfaction from building relationships with students and seeing their positive response in learning and development.

5. ***A changing environment:*** The issue of teachers' workload and stress is a complex one, involving the interplay of various factors. Changes in the bigger environment (e.g. globalization) have necessitated changes in education. The decline in school age population has also given rise to keen competition among schools which has in turn had significant impact on the nature of school activities. Students' diverse abilities and special educational needs posed fresh challenges, while the heightened expectations of the community added to teachers' pressure as well. These changes in society and in education had significant impact on the running of schools and the nature of teaching. A greater proportion of teachers' time was taken up with paperwork, student management, meetings, as well as school promotion activities, etc.

6. ***Communication:*** Teachers are generally positive about the direction of the education reforms. However, external factors, such as the decline in student population and concern about school consolidation have coloured their perception of various initiatives. Messages were often distorted and misinterpreted as they passed through the system, causing misunderstanding and mistrust.

7. ***Reform initiatives:*** Different stakeholders often held different views on the implementation of various policy initiatives. Teachers were concerned about the workload brought about by the introduction of various initiatives. Where piloting was required, there was also concern that the experiences gained from high capacity pilot schools could not reflect or assess the impact on all schools at different stages of development. Meanwhile, the accountability mechanism which accompanied various new initiatives also brought extra work.

8. ***Teachers' workload:*** According to the study carried out by the Committee, the school days in Hong Kong are intense. In May 2006, teachers on average worked about 10 hours a day on a school day, including the time spent working at home. Work often extended to the weekends and holidays though the intensity decreased significantly during the holidays. For non-school days

other than long holidays, teachers usually worked 4.6 hours a day. On average, teachers worked a total of 2,607 hours a year, or about 50 hours a week¹.

9. ***Perceived importance of duties and time spent:*** Teachers attached the greatest importance and devoted 74.1% of their time to teaching and related duties. The majority would like to have more time for lesson preparation, curriculum development and student support. Administrative duties were ranked as the least important, yet they took up the second largest portion of teachers' time (15.8%), well above continuing professional development (6.1%) which was considered more important. It is worth noting that the views of senior managers, middle managers and frontline teachers were not entirely the same concerning whether certain administrative duties should be carried out by teachers.

10. ***Teacher stress and sources of stress:*** The average index of teacher stress was 4.8, slightly above the middle point of 4.5 (on a scale of 8). The sources of stress were arranged in five clusters, with "pupil related" matters (e.g. motivation, diverse abilities) exerting the greatest impact, followed by "external stakeholders" (e.g. community expectations, demands of parents and EMB), "changes and innovations" (e.g. external school review, curriculum reform), "school management" (e.g. communication and teamwork within the school), and "test-related" matters (e.g. Territory-wide System Assessment, Language Proficiency Requirement). The impact of the sources of work stress on teachers also varied according to their years of teaching experience.

11. ***Teacher stress and hours of work:*** At the school level, there was no discernible pattern and, statistically, no correlation between the hours of work and work stress. Apparently there were wide variations among schools in terms of hours of work and work stress. At the individual teacher level, "hours of work" appeared to have little impact on various dimensions of stress.

12. ***Leadership:*** Links were found between perceived workload manageability and quality of leadership. While many school leaders (including School Management Committee (SMC), principal, senior and middle managers) succeeded in building a positive culture that drove school development, some had difficulties creating such conditions in the school. Without clear direction, coherent plans or effective resource deployment, teachers' workload increased as when the school tried to follow every detail or aggressively took on work beyond its capacity.

¹ Figure was estimated on a yearly basis including school days, non-school days, and long holidays.

13. ***Class size vis-à-vis teaching load:*** Teachers acknowledged that reduced teaching load or class size could relieve their workload. However, the impact of small-class teaching was more keenly felt in subjects with a lot of marking and feedback to students, e.g. languages. A majority of teachers considered reduced teaching load a more effective way of alleviating pressure and workload.

Recommendations

14. The Committee has put forward 18 recommendations covering 9 areas. The recommendations are summarized as follows:

- a) ***Policy initiatives:*** There should be enhanced communication within the school and among different stakeholders. In particular, there must be regular and open dialogue between EMB and teachers (R.1). Where piloting of policy initiatives is required, pilots should best be conducted across a range of schools, differing in student intake and school ability (R.2). In the implementation of major reform initiatives, EMB should actively seek the advice of the Education Commission (R.3).
- b) ***School accountability system:*** EMB should look into the various accountability mechanisms and streamline procedures where necessary (R.4). The School Development and Accountability framework could serve as the common accountability framework, subject to on-going review (R.5).
- c) ***Teaching staff establishment and stability of the workforce:*** Schools should exercise professional autonomy to flexibly deploy manpower in ways best suited to individual needs, e.g. the adoption of “reduced teaching load” and / or “smaller class size”. EMB should also consider creating more permanent teaching posts and further increasing the teacher-to-student ratio (R.6).
- d) ***Enhanced administrative support:*** Schools should put in place a school-based mechanism to regularly review non-teaching tasks with a view to streamlining existing procedures and redirecting tasks that could be better handled by administrative/support staff (R.7). On a need basis, schools could conduct an independent review of their administrative work to identify the best improvement methods. In cases where improvements of demonstrated needs entail additional resources, EMB should consider rendering the necessary support to

schools (R.8). One-off funding could be made available, on application from schools, to top up their IT provisions for administrative purposes (R.9).

- e) ***School leadership:*** The capacity of school leaders (including SMC, principal, senior and middle managers) could be further enhanced through networks and professional development (R.10).
- f) ***Student diversity:*** EMB should continue its review of Integrated Education (IE) and work closely with schools, teacher education institutions and outside bodies in the formulation of support measures which help tackle special educational needs and student diversity (R.11).
- g) ***Stress management and healthy workforce:*** The teacher education institutions could consider placing greater emphasis in their teacher education programmes on the physical and mental well-being of teachers (R.12), while relevant parties could collaborate to refine current understanding of teacher stress (R.13). In the promotion of a healthy school, schools could take a proactive stance, with the support of EMB, in utilizing the different community services available within the district (R.14). EMB could continue to make available funding under the Quality Education Fund (QEF) to promote a whole-school approach to teacher wellness (R.15).
- h) ***Teachers' continuing professional development (CPD):*** EMB should explore various options to allow teachers to reap the full benefits of professional development activities, e.g. by providing paid study leave (R.16). Teachers, too, should exercise discretion to prioritize professional development activities pertinent to their own and their schools' developmental needs (R.17).
- i) ***Professional image:*** In raising the public profile and standing of the profession, the government and outside bodies could explore different ways of acknowledging teachers' achievements (R.18).

Way Forward

15. EMB attaches importance to the improvement of teachers' work as a condition for enhancing the quality of teaching and learning. Various measures were introduced in 2006 to reduce teachers' work pressure. In January, an

enhanced provision under the Capacity Enhancement Grant, amounting to \$1,650 million was introduced for 3 years from 2005/06 to 2007/08. In February, EMB further introduced 9 new measures which aimed to provide a stable working environment for teachers, increase manpower to enhance the quality of teaching and learning, and streamline procedures to reduce workload. Altogether, some 2,800 permanent teaching posts will be provided of which about 1,400 are newly created posts, involving recurrent expenditure amounting to some \$1,760 million. A summary of these measures is at Annex II.

16. EMB accepts all the recommendations of the Final Report and actions have been/are being taken to implement them. A summary of the follow-up actions is attached at Annex III.

17. Out of the 18 recommendations, 12 (i.e. R.1-5, R.7, R.11-14, R.17-18) would be followed up instantly. Four recommendations (R.8-9, R.10, R.15) involve the use of the Quality Education Fund (QEF) and the Education Development Fund (EDF). The Steering Committees of these two Funds have been consulted on relevant recommendations and their initial response has been positive. Subject to further deliberations, it is expected that these recommendations will be implemented.

18. The remaining two recommendations, (i.e. R.6, R.16) would need careful considerations as they involve significant financial implications. In this connection, it is worth noting that over the years, the Bureau has continuously improved the student-to-teacher ratio, as the following figures² will demonstrate:

	<u>As at beginning of academic year</u>				
	<u>1995/96</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>	<u>2006/07³</u>
Primary school	23.9:1	19.3:1	19.1:1	18.4:1	17.6:1
Secondary school	20.5:1	18.0:1	18.1:1	18.0:1	17.2:1

The situation is expected to further improve with the appointment of additional teachers under the 9 measures introduced in February 2006 and the enhancement of student-to-teacher ratio at senior secondary levels after the double cohort year. In the deployment of manpower resources, EMB concurs with the need for schools to exercise professional autonomy and discretion.

² Controlling Officer's Report, Education and Manpower Bureau

³ Provisional figures

19. With regard to the option of paid study leave in support of teachers' continuing professional development (R.16), the Bureau has been avidly promoting life long learning through a wide range of training opportunities and the provision of supply cover for CPD activities. These training opportunities cover school staff at various levels including principals, panel chairs/middle managers and school managers. Recently a pilot Sabbatical Leave for Teacher Professional Development Scheme has been introduced to enable teachers to take on one to two years of full-time study to upgrade their professional knowledge and qualifications. The Bureau will gather the views of different stakeholders and explore the most viable option(s) that will allow teachers the time and space to inquire, experiment, reflect on and share their learning.

20. EMB welcomes members' views on the Final Report and the measures that will bring about sustainable changes in teachers' work to enhance the quality of education.

Education and Manpower Bureau
February 2007

Membership List of Committee on Teachers' Work

Name	Organization
1. Prof Edmond KO (Chairman)	Department of Chemical Engineering Hong Kong University of Science and Technology
2. Dr CHEUNG Kwok-wah	Faculty of Education The University of Hong Kong
3. Dr KO Wing-man	Private Practitioner
4. Mr LAI Kam-tong	Hong Kong Institute of Human Resource Management
5. Mr David PAO	Efficiency Unit HKSAR Government
6. Prof WING Yun-kwok	Department of Psychiatry The Chinese University of Hong Kong
7. Ms YAN Hau-yee, Lina	The Chinese University of Hong Kong Convocation
8. Mr LEE Yuk-fai, Steve (Secretary)	Education and Manpower Bureau HKSAR Government

Nine Measures to Relieve Teachers' Workload

Relief Measures		Number of Permanent Posts	Recurrent Funding \$m (approximate)	Latest Position/ Further Development
A. Increasing permanent posts to provide a stable working environment				
1	Turning specialized teaching posts permanent for primary ordinary school	1,120	360	<ul style="list-style-type: none"> ➤ 838 permanent teaching posts will be created in public sector primary schools in the 2006/07 school year. ➤ With full implementation in the 2007/08 school year, there will be an accumulative total of around 1,120 teaching posts in the permanent establishment of which 660 are newly created posts.
2	Turning 5-year time-limited post for Primary School Curriculum Leader to permanent establishment	620	330	<ul style="list-style-type: none"> ➤ Around 620 teaching posts will turn permanent in the 2007/08 school year.
B. Increasing manpower to enhance teaching and learning				
3	Improving student guidance (SG) service		220	<ul style="list-style-type: none"> ➤ All primary schools will receive some form of SG support. In the 2007/08 school year, 342 public

Relief Measures		Number of Permanent Posts	Recurrent Funding \$m (approximate)	Latest Position/ Further Development
				sector primary schools (an increase of 95 schools) will be provided with one full-time SG officer/teacher or a whole unit of the SG Service Grant.
4	Providing additional teachers to cover all Band 3 and Bottom 10% students at Secondary 1-3	1,050	400	<ul style="list-style-type: none"> ➤ There will be an increase of 332 graduate teaching posts in the 2006/07 school year. ➤ In the 2008/09 school year, an accumulated total of approximately 760 new graduate teaching posts will be created.
5	Making basic CEG provision recurrent		450	<ul style="list-style-type: none"> ➤ With effect from February 2006, the basic provision of the CEG has been turned into a recurrent grant.
C. Streamlining procedures to reduce workload				
6	Simplifying the process of School-based Assessment (SBA)			<p>After extensive consultations, EMB has</p> <ul style="list-style-type: none"> ➤ accepted the plan of progressively implementing SBA for the HKCEE Chinese Language and English Language within 3 years; and ➤ proposed a strategic plan for the implementation of SBA for the 24 new senior secondary subjects: <ul style="list-style-type: none"> • Full implementation in 2012 for 8 subjects,

Relief Measures	Number of Permanent Posts	Recurrent Funding \$m (approximate)	Latest Position/ Further Development
			<p>including 7 that currently have SBA at the HKCEE level plus Liberal Studies, for which SBA is critical to the design of the subject;</p> <ul style="list-style-type: none"> • a deferral, or the option of a deferral for all other subjects. <p>Note: A further round of consultation will be conducted in early 2008 before finalizing the assessment design for the two languages in the light of experience gained in implementing SBA in the 2007 HKCEE Chinese Language and English Language.</p>
7	Reviewing the arrangements for Territory-wide System Assessment (TSA)		<p>➤ There will be 3 sets of data respectively from Primary 3 and 6 as well as Secondary 3 in 2008. In light of the experience in the past 3 years, EMB will conduct a full review to identify ways to improve the existing administrative arrangements so as to assist schools in their assessment work.</p>
8	Enhancing External School Review (ESR)		<p>➤ To allay teachers' anxieties and to avoid over-documentation by schools in the preparation process for ESR, EMB has put in place a number of improvement measures since</p>

	Relief Measures	Number of Permanent Posts	Recurrent Funding \$m (approximate)	Latest Position/ Further Development
				<p>the 2005/06 school year.</p> <ul style="list-style-type: none"> ➤ EMB has conducted a number of workshops and advanced the ESR pre-visits to June and July 2006 so as to enhance the communication with schools. ➤ Starting from the 2006/07 school year, 6 items of the 23 Key Performance Measures (KPM) that schools have to collect and report have been simplified or removed. ➤ EMB is conducting a review to inform the mode and arrangements of ESR for the second cycle of implementation to commence in the 2008/09 school year.
9	Reviewing Quality Education Fund (QEF)			<ul style="list-style-type: none"> ➤ In order to reduce teacher's workload, the QEF has revised its application procedure to accept year-round applications, reduce the number of QEF projects, and require the school applicant to obtain the consent of teachers before making the application.

Follow-up Actions

Recommendations		Actions
R.1	There must be enhanced communication within the school and among different stakeholders, in particular between EMB and teachers.	Regional Education Officers will meet teachers during their regular school-based liaison visits to collect feedback. Theme-based seminars and forums on major education initiatives for key stakeholders including teachers will continue.
R.2	Where piloting of policy initiatives is required, pilots should best be conducted across a range of schools differing in student intake and school ability.	Subject to schools' consent, pilots will be conducted across a range of schools with different student intake and school ability.
R.3	In the implementation of major reform initiatives, EMB should actively seek the advice of the Education Commission (EC).	EMB will liaise closely with EC on matters concerning the implementation of major reform initiatives. Due attention and advice will be given on teachers' capacity to cope and their work-life balance.
R.4	EMB should look into the various accountability mechanisms and streamline procedures where necessary.	To reduce teachers' administrative work, EMB is exploring the feasibility of standardizing the reporting and evaluation process for the use of grants by schools, eliminating duplicated reporting, and replacing detailed reporting by disclosure in Annual School Reports and targeted evaluations where needed.
R.5	The School Development and Accountability (SDA) framework could serve as the common accountability framework, subject to on-going review.	EMB is reviewing the SDA framework in preparation for the second cycle of ESR in the 2008/09 school year. The review will take account of teachers' concern for undue workload in School Self Evaluation (SSE)/ESR, examine

Recommendations		Actions
		mode and procedures, and provide more effective tools for SSE.
R.6	Schools should exercise professional autonomy to flexibly deploy manpower in ways best suited to individual needs, e.g. the adoption of “reduced teaching load” and / or “smaller class size”. EMB should also consider creating more permanent teaching posts and further increasing the teacher-to-student ratio.	EMB will continue to provide additional permanent teaching posts as committed under the 9 relief measures, including the conversion of temporary Primary School Master (Curriculum Development) and specialized teaching posts to permanent ones. EMB will also closely monitor the provision of teachers to schools and consider creating more permanent teaching posts to improve the teacher-to-student ratio subject to operational needs and availability of funds.
R.7	Schools should put in place a school-based mechanism to regularly review non-teaching tasks and the support system available.	Where appropriate, e.g. through circulars and the web, EMB will remind schools of the need for school-based review of non-teaching tasks and support schools through promulgation of best practices.
R.8	On a need basis, schools could conduct an independent review of their administrative work to identify the best improvement methods. In cases where improvements of demonstrated needs entail additional resources, EMB should consider rendering the necessary support to schools.	Schools can bid for funds from QEF to conduct a school-based review on administrative work. Where implementation of improvement measures arising from demonstrated needs requires additional funding at the initial stage, schools can also make use of QEF.
R.9	One-off funding could be made available, on application from schools, to top up their IT provisions for administrative purposes.	Schools can bid for one-off fund from QEF to top up their IT provisions for administrative purpose.
R.10	The capacity of school leaders (including SMC, principal, senior and middle managers) could be further enhanced through networks and professional development.	A series of 3-day School Leaders Workshops was conducted in the past 2 years for school leaders of all secondary schools and another series of 1-day workshops is being organized for middle managers. EMB will continue to

Recommendations		Actions
		consult SMC, principal, senior and middle managers on their professional development needs in managing the school. Where necessary, relevant professional development programmes will be funded by EDF.
R.11	EMB should continue its review of Integrated Education and work closely with schools, teacher education institutions and outside bodies in the formulation of support measures which help tackle special educational needs and student diversity.	EMB is conducting an on-going review of Integrated Education and gauging the views of stakeholders through regular meetings. Additional resources to schools with effect from the 2006/07 school year include additional teachers at junior secondary levels of schools with Band 3 and bottom 10% students, enhanced speech therapy service for primary schools through the Enhanced Speech Therapy Grant, and the allocation of a Special Education Support Officer to each primary school to act as a resource person. A 5-year teacher training framework will also take effect from the 2007/08 school year to further help teachers take care of students with special educational needs in ordinary schools.
R.12	Teacher education institutions could consider placing greater emphasis in teacher education programmes on physical and mental well-being of teachers.	EMB will remind teacher education institutions of the need for better life skills in their programmes to promote better self-understanding and resilience in teachers.
R.13	Relevant parties could collaborate to refine current understanding of teacher stress. The Hong Kong Teachers' Centre could take up a more prominent role in providing pertinent practical and empathic support to teachers.	EMB will liaise closely with the Hong Kong Teachers' Centre, which is managed by teacher representatives and education organizations, to strengthen support that pertains to healthy life skills and better work-life balance.
R.14	In the promotion of a healthy school,	EMB will encourage schools to develop

Recommendations		Actions
	schools could take a proactive stance, with the support of EMB, in fostering partnership with outside experts and community services within the district.	the culture of a healthy school and establish collaborative partnerships with various sources of expertise. EMB will provide assistance where necessary.
R.15	EMB could continue to make available funding under the Quality Education Fund to promote a whole-school approach to teacher wellness.	QEF will continue to extend funding that facilitates schools to adopt a whole-school approach to teacher wellness.
R.16	EMB should explore various options to allow teachers to reap the full benefits of professional development activities, e.g. by providing paid study leave.	EMB will explore various options for allowing teachers time and space to pursue professional development activities.
R.17	Teachers should exercise discretion to prioritize activities pertinent to their own and their schools' developmental needs.	EMB will promulgate relevant ideas through school visits and experience sharing sessions. Increased emphasis will be paid to supporting school-based professional development programmes. Professional development courses for school leaders and teachers will include components on manpower planning and time management.
R.18	In raising the public profile and standing of the profession, the government and outside bodies could explore different ways of acknowledging teachers' achievements.	EMB will continue the activities that raise public awareness and appreciation of teaching as a profession. Where appropriate, outstanding teachers will be nominated for various awards. Opportunities of collaborating with outside bodies will also be explored.