

# **The Committee on Teachers' Work**

## *Final Report*

December 2006

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# *Chapter 1 Introduction*

## **Background**

1.1 The issues of workload and work pressure of school teachers resonate in different regions all over the world. Hong Kong, as an international hub, is no exception. Our dedicated teachers, like their counterparts across the globe, also have to face the challenges and demands of a new work era, characterised by heightened expectations, changing nature of work and the threat of work-life imbalance. Mindful that quality education hinges not only on professional expertise, but also on the well being of the teaching force, there has been growing concern about teachers' work and the stress confronting them.

## **Formation of the Committee on Teachers' Work**

1.2 The Committee on Teachers' Work (henceforth referred to as the Committee) was formed in February 2006 by the government to look into teachers' work and related issues in Hong Kong. It was an independent Committee with the following terms of reference:

- i) To examine the nature and arrangements of the work of teachers in public sector schools;
- ii) To study the workload of teachers;
- iii) To recommend measures to enable teachers to engage in effective educational work; and
- iv) To recommend measures to reduce the pressure on teachers.

1.3 The Committee comprised 7 members, including the Chairman, Professor Edmond KO, and 6 members from different professions representing a range of perspectives, knowledge and experiences. Membership of the Committee is at Annex A.

## **Formation of Advisory Group**

1.4 In its first meeting, the Committee endorsed the formation of an Advisory Group (AG) to:

- i) Serve as a link to enhance communication with front-line school personnel;
- ii) Provide professional input and advice; and
- iii) Assist in relevant research studies.

1.5 Eight education organisations were subsequently approached to nominate representatives to the AG. Among the invitees, the Education Convergence and the Hong Kong Professional Teachers' Union declined. The composition of the AG comprised 9 nominees from 6 education organisations. Membership of the AG is at Annex B.

1.6 The next chapter, Chapter 2, describes the work undertaken by the Committee and the AG. After a careful review of the main findings (Chapter 3) of relevant investigative activities, the Committee identifies the major issues at hand in Chapter 4, and makes recommendations in Chapter 5. Chapter 6 contains the conclusion.

## ***Chapter 2 Work of the Committee on Teachers' Work and Advisory Group***

### **Review of Local and International Studies**

2.1 The Committee attached much importance to the improvement of teachers' work as a condition for enhancing the quality of teaching and learning. With a view to examining the worldwide work situation and challenges facing teachers, the Committee undertook an examination of 22 local and international studies on teachers' work. This facilitated a broadened outlook on the issue, informed the various measures adopted by governments and teachers to improve work conditions, as well as shed light on relevant research methodologies which could serve as useful reference points.

2.2 In the course of its work, the Committee noted with interest the release of 4 local studies on teachers' work conducted by various bodies. The findings were carefully examined, as they complemented and built on the findings of other studies, affording enriched perspectives of this complex issue. A list of all 26 references is at Annex C.

### **Commissioned Studies on Local Context**

2.3 To ensure that recommendations were evidence-based and relevant to the local context, the Committee commissioned the Policy 21 Ltd. to conduct an independent study to investigate the nature of work, workload and work stress of teachers in Hong Kong. The study, conducted between March and July 2006, comprised questionnaire surveys and interviews to collect both quantitative and qualitative data. Upon analysis of the findings and discussion with different stakeholders, the Committee decided that the administrative workload of teachers warranted further investigation. The Policy 21 Ltd. was commissioned with the follow-up investigation. The main findings of these 2 studies are in Chapter 3.

### **School Visits by the Committee**

2.4 The Committee also deemed it vital to have personal experience of schools and hear the first-hand voices of teachers, managers and principals in the front line. Being in the field would give members greater insight into the nature and arrangements of teachers' work, which would facilitate triangulation and the formulation of informed recommendations. Accordingly, between late April and

early June 2006, the Committee conducted 14 school visits. As per advice of the AG, these 14 schools are of various finance types and were randomly selected from the public sector, with a spread that covered primary, secondary, and special schools across various geographical locations.

## **Meetings and Consultations**

2.5 Since their inception, the Committee and the AG have held 10 and 7 meetings respectively. Apart from these meetings, the Committee conducted a number of discussion sessions to gauge the views of different stakeholders: 4 teacher education institutions (TEIs), 5 education bodies, 8 school sponsoring bodies, the Advisory Committee on Teacher Education and Qualifications (ACTEQ), and the Education Commission (EC). The professional dialogues encompassed a range of issues, such as the overall work design and progress of work, roles of different stakeholders in addressing teachers' work stress, findings and recommendations, etc.

2.6 In order to promote open and frank dialogues, the Committee agreed prior to the school visits and meetings that the names of the parties concerned would remain anonymous.

## **Interim Report to EMB**

2.7 The Committee presented its Interim Report, outlining preliminary findings and areas of concern to the Education and Manpower Bureau (EMB) in August 2006.

## **Final Report**

2.8 The Interim Report was subsequently modified into the Final Report, with the final recommendations informed by evidence drawn from various investigative activities, consultations with stakeholders, as well as extensive discussions within the Committee and AG. The final recommendations are in Chapter 5.

## *Chapter 3 Main Findings*

### **Findings from Literature Review**

3.1 There are a fairly large number of factors affecting teachers' workload and stress. For heuristic purposes, these main findings are divided into three broad areas:

- i) Actual workload;
- ii) Sources and factors affecting workload and stress; and
- iii) Effective strategies for workload and stress management.

3.2 Globalisation and the knowledge economy have increasingly turned the world into a global village that shares similar concerns. The issue of teachers' workload and stress has been the investigative focus of many international studies, as governments across the globe seek to enhance education through improving the work conditions of teachers and the overall attractiveness of the profession. As background to the investigation into the situation here in Hong Kong, the Committee has reviewed 26 relevant local and international studies (Annex C). The main findings are discussed below.

#### **Actual workload**

3.3 Not all the studies explicitly identified the amount of teachers' work. While some attempted to interpret work intensity with reference to the hours worked, these findings were best understood in relationship to the particular times and socio-political contexts under which the studies took place, and the different assumptions that underpinned the interpretation of workload. In these different studies, teaching was found to be a highly demanding profession requiring intense work that often extended beyond school hours and to the holidays.

3.4 The studies conducted in the UK<sup>1</sup> and New Zealand<sup>2</sup> showed that the hours of work corresponded to the levels of seniority in the school. The average working hours of teachers without management responsibilities were shorter than those of middle and senior managers, and particularly of principals.

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<sup>1</sup> PricewaterhouseCoopers (2001), *Teacher Workload Study*.

<sup>2</sup> ACER (2005), *Secondary Teacher Workload Study Report*.

3.5 Besides attempting to quantify and describe workload in teaching, the aforementioned New Zealand study explored the correlations between various stressors and workload. Findings revealed a significant link, suggesting that the stressor was associated with perceptions of the manageability of workload rather than the actual increased workload. Evidences also showed that these associations between workload and the stressor variables (e.g. clerical activities, paperwork, etc.) differed among teachers at different levels of seniority at the school.

### **Sources and factors affecting workload and stress**

3.6 At a community level, teachers were observed to be concerned about a rift that contributed to a sense of isolation. As borne out in a series of discussion sessions in the UK<sup>3</sup> and a Canadian study<sup>4</sup>, a culture of “critique” permeated the community as members turned to education for economic security and social capital growth. Policies and practices were constantly open to public scrutiny and debates. Nor had media coverage always been tolerant. Instead, the media seemed to rely more often on a populist stance instead of concrete evidence to the debates on the issue at hand. The bad press over singular incidents also had the effect of negating the hard work of the teaching force, leaving teachers unsupported and unappreciated.

3.7 At a system level, systemic changes were adopted by governments as they embarked on a common quest for better education within an accountability framework.<sup>5</sup> This gave rise to an array of changes in curriculum, school administration, performance management, etc., giving a totally new meaning to school life alien to what teachers used to experience.

3.8 The impact of systemic changes was inevitably felt at the school level.<sup>6,7</sup> Teachers felt stressed out by the diversifying nature and demands of their work. The wide range of non-professional duties ran contrary to what they perceived to be the most satisfying aspect of their work: actual class teaching. Pressure arose from high volume, “multi-track” duties, all competing for time and accorded priority by school management.

3.9 Among the non-teaching duties, “paperwork” was frequently cited for its negative impact. In particular, teachers expressed distaste for the paperwork

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<sup>3</sup> Association of Teachers and Lecturers (2001), *Time Well Spent – Work that Teachers Value*.

<sup>4</sup> British Columbia Teachers' Federation (2001), *Teacher Workload and Stress: An International Perspective on Human Costs and Systemic Failure*.

<sup>5</sup> National Union of Teachers (2002), *A Life in Teaching? The Impact of Change on Primary Teachers' Working Lives*.

<sup>6</sup> ACER (2005), *Secondary Teacher Workload Study Report*.

<sup>7</sup> PricewaterhouseCoopers (2001), *Teacher Workload Study*.



connected with accountability. A UK<sup>8</sup> study identified a two-fold reason: the remoteness from students' learning experiences and the seeming disregard for teachers' professionalism.

3.10 The issue of student behaviour was also a major reason for increased workload, as revealed in a study conducted in 2004<sup>9</sup>. Most secondary teachers surveyed in this UK study reckoned management of student behaviour to be the main source of workload and stress.

3.11 At a teacher level, of interest was the finding in a UK<sup>10</sup> study that the views of teachers were often in sympathy with those of the government, but teachers often felt impeded because of the lack of trust.

3.12 The reported high level of stress was believed to be a recurring factor that affected teachers' job satisfaction, reducing their capabilities in facing challenges. Teacher stress was said to arise from demand and pressure in the work environment. In a UK<sup>11</sup> survey and a study in Scotland<sup>12</sup>, work pressure, including issues related to workload and the perceived lack of time, was the most prominent source of teachers' stress.

### **Effective strategies for workload and stress management**

3.13 Effective strategies for handling work and coping with stress identified in the literature review (Annex C) are summarised as follows:

- i) Establishing an independent platform to monitor and review the implementation of policy;
- ii) Employing more flexible and responsive management and administrative practices at the system and school levels;
- iii) Enhancing leadership skill for school management;
- iv) Building a supportive culture in the community and schools;
- v) Transferring clerical and administrative work to non-teaching support staff;
- vi) Making more flexible and effective use of teaching and support staff by identifying the duties they could be expected to perform

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<sup>8</sup> National Union of Teachers (2002), *A Life in Teaching? The Impact of Change on Primary Teachers' Working Lives*.

<sup>9</sup> National Union of Teachers (2004), *A Life in Secondary Teaching: Finding Time for Learning*.

<sup>10</sup> PricewaterhouseCoopers (2001), *Teacher Workload Study*.

<sup>11</sup> Jayne Griffith, Andrew Steptoe and Mark Cropley (1999), "An investigation of coping strategies associated with job stress in teachers", in *British Journal of Educational Psychology*, 69:517-531

<sup>12</sup> The Scottish Council for Research in Education (1993), *Teachers' Workload and Associated Stress*.

- effectively and efficiently;
- vii) Making effective use of Information Technology (IT) for administrative and curriculum purposes;
  - viii) Improving policies and strategies and providing teachers with professional support for managing student behaviour, e.g. employing specialist staff;
  - ix) Enhancing the arrangements for continuing professional development (CPD) to increase efficiency as well as effectiveness; and
  - x) Improving the quality of the work environment.

## Findings from School Visits and Discussion Sessions

3.14 For a close-up and personal view of the multi-faceted aspects of teachers' work and the factors that were affecting their workload, the Committee conducted 14 school visits, with the following main findings.

### Actual workload

3.15 The school visits did not directly study the actual working hours of teachers. Instead, the issue of workload was addressed with reference to teachers' overall perception of the working conditions, together with the distribution and intensity of work during and after school. The following observations were made:

- i) Almost all teachers described their workload as heavy, but most felt it generally manageable most of the time, particularly for duties related to teaching and learning.
- ii) A significant number responded that at certain peak periods, especially during assessment and report writing, workload exceeded reasonable expectations and manageability. This had negative impact on their interaction with students and induced stress.
- iii) Teachers spent most of their time in teaching, marking, and lesson preparation. Many remarked an increase in non-teaching activities (e.g. administrative duties, school promotion activities, writing reports for performance review and quality assurance).
- iv) All teachers interviewed needed to continue schoolwork, mostly marking and preparation, at home after school, at weekends, and during the holidays.
- v) The majority of teachers seemed to accept the notion of working at home as part of the culture of teaching, even when it greatly interfered with family life.
- vi) Most teachers believed that their tight teaching schedule and insufficient free lessons largely contributed to their working at home and outside the school's hours of operation.
- vii) Many commented that their non-teaching period was too short and fragmented to do concentrated work. Stress arose as teachers had too many jobs and not enough time during the day.
- viii) Most teachers felt that the amount of personal control they had over their work affected the degree of satisfaction they experienced in relation to workload.
- ix) Some teachers experienced difficulties in exercising control over the nature, amount and pace of their work.
- x) Teachers expressed a strong desire for professional autonomy and prime responsibility for managing their work. Principals and senior / middle managers were viewed as people who could provide

the leadership, conditions and support for them to work effectively.

### **Sources and factors affecting workload and stress**

3.16 All teachers interviewed appeared to share high levels of personal investment in their work. They subscribed to the common vision and purpose of their profession, *i.e.* to care for the educational needs and general well being of students. Many indicated that apart from the external pressure or control from school management or stakeholders, their overwork was mainly driven by the desire to do things the best they could. Paradoxically, this high level of commitment has taken its toll in an environment characterised by demographic change, flux, and introduction of new tasks.

3.17 Teachers acknowledged that changing times did bring about corresponding changes in the workplace. Workload was not an issue if perceived to be manageable or contributing to student learning.

3.18 In the core business of teaching and learning, teachers found themselves swept along by changes. For example, they indicated that changing practices in curriculum and assessment, and the paperwork associated with External School Review (ESR) and School Self-evaluation (SSE), etc. added to their workload. All these marked a drastic departure from the old days when teaching was seen to be a stable profession. While there were variations in rigor and time devoted by individual teachers and schools to accommodate these processes of change, the overall feeling was that the curriculum and accountability initiatives had induced uncertainties, stress, and a lot of work.

3.19 Teachers also asserted that they had always derived and would continue to derive satisfaction from building relationships with students and seeing their positive response in learning and development. However, changes in student profile presented fresh challenges. The reduction in student allocation bands, implementation of Integrated Education (IE), and emergence of single-parent / single-child family imposed a greater burden on teachers. Work intensified when teachers had to spend greater time and energy on students' behavioural problems, some of which stemming from the home. Some teachers also admitted to not being adequately prepared to handle the diverse student ability and special educational needs in the classroom. Thwarted in their aspiration to help students cultivate positive attitude and develop potential, these teachers felt disoriented.

3.20 At the same time, the decline in student population had immense impact

on the running of schools, while the marketisation of schools also changed the school agenda. Teachers increasingly took up duties that were taking time away from student learning, e.g. production of school banners, participation in exhibitions, attendance at numerous meetings, record keeping and related paperwork, etc.

3.21 With the changing nature of work and proliferation of tasks, teachers articulated a need for better clerical and administrative support to meet the growing complexity of school operations. School-based support differed, both in the type of support and the degree of success in alleviating teachers' workload. On one hand, some schools reported effective use of the Capacity Enhancement Grant (CEG) to employ teaching assistants (TAs) to help teachers with clerical work, like handling electronic data, preparing teaching materials, and general word processing. On the other hand, there were teachers who for various reasons received little support from the TAs, possibly because of unclear delineation of duties or particular preference for deployment. For example, some schools regarded minutes writing as professional matters more suited to professional staff.

3.22 The demands for multi-faceted skills in a fast-changing work environment confronted teachers with the added pressure of being adaptive and quick learners. All teachers saw the need for life-long learning, whether for self-survival to stay in the field or for professional enrichment to enhance student learning. In pursuing their CPD, teachers were concerned about time constraint and possible disruption to student learning. To reap the full benefit that CPD had to offer, teachers needed the time and space to reflect, apply, discuss and share among a community of learners.

3.23 Moreover, the high level of community expectation was a major external factor influencing teachers' workload and inducing stress. In a fast paced city like Hong Kong, long hours and hard work seemed to have been woven into the fabric of life. Teaching was no exception. As parents continued to look to education for a better future for their children, their increased involvement in school activities worked both ways. While many helped to lighten teachers' load (e.g. helping in the library and supervising during lunch, etc), some parents were unreasonable in their demands, a few even quick to rally the support of third parties when in disagreement with the school. At times, teachers' morale was also affected by the media coverage that was sensation seeking, yet undermining their hard work, the image of the school and that of the profession as well.

3.24 In these trying times, teachers appreciated enhanced leadership and support. Management's prioritisation of tasks could help reduce workload. Furthermore, teachers agreed that strong leadership and shared vision would generate high levels of commitment to help raise work satisfaction and productivity.

3.25 While most teachers were satisfied with the physical resources in their schools, some lamented the cramped working space and inadequate IT support.

### **Effective strategies for workload and stress management**

3.26 Teachers believed that they carried chief responsibility for managing their workload and stress. Common strategies included:

- i) Effective time management and organisational skills;
- ii) Prioritising tasks;
- iii) Reducing the amount of time devoted to paperwork, administrative duties, and extra-curricular activities;
- iv) Trying to mark and prepare lessons during school operation hours, hence reducing the time on schoolwork at home;
- v) Seeking assistance from TAs in preparing teaching materials;
- vi) Sharing with colleagues, friends and family; and
- vii) Thinking positively and trying to look at things from a broader perspective.

3.27 Strategies commonly used by principals, senior and middle managers to manage teachers' workload and stress were facilitative and supportive instead of directive. These included:

- i) Employing TAs to relieve teachers of non-professional duties;
- ii) Transferring routine and administrative tasks (e.g. fee collection and pupil supervision outside contact time) from teachers to a wide range of support staff;
- iii) Minimising the number of meetings and using meeting time effectively;
- iv) Prioritising tasks;
- v) Encouraging the use of IT in administrative duties, e.g. collecting fees, handling student attendance, issuing school circulars, and using electronic system for inventory keeping and use of resources;
- vi) Being supportive of teachers' concerns and difficulties, as well as taking a leading role in resolving them; and
- vii) Ensuring effective communication at all levels, especially between middle and senior management groups.

3.28 The Committee also conducted a series of discussion sessions with different education organisations and sponsoring bodies for enlarged perspectives on teachers' work. These bodies proffered views that were consonant with those expressed by teachers, managers and principals, lending support to the emerging themes. Moreover, these education bodies enriched the exploration with further insight into the significant role played by teachers' professional and personal development in the face of changes. Their views converged on the need to strengthen the contents of initial teacher education programmes and CPD, such that teachers could be empowered by a positive attitude, together with the essential skills in managing change and the affective outcomes that might arise from work-related pressure.

3.29 The key findings from the school visits and discussion sessions were consistent with those from the literature review. Teachers over the world faced similar issues: the desire to spend time on student learning and interaction with students, yet drifting away from this goal while being weighed down and stressed out by other concerns. To obtain quantitative information and to further identify issues that might be unique to the local context, the Committee commissioned 2 in-depth studies on teachers' work.

## **Findings from Consultancy Studies**

### **Study Methodology**

3.30 Two studies were conducted. The first focused on teachers' workload, work stress, and relevant coping strategies. The follow-up study gathered information on the amount of time devoted to the different types of non-teaching duties and the views of teachers as to whether these duties should be taken up by them.

3.31 Both quantitative and qualitative information was collected, based on questionnaire surveys of members of school management committees (SMC), principals and teachers, in-depth interviews with principals and focus group discussions with teachers.

3.32 In drawing up questionnaires for the surveys, in particular for the first study, references were made to the pre-test, views of the Advisory Group, and similar studies conducted in other countries.

3.33 The questionnaire surveys in the first study covered a representative sample of 304 members of SMC, 171 principals and 3,723 teachers. In the follow-up study, the questionnaire surveys covered a representative sample of 108 principals and 3,365 teachers. In both studies, in-depth interviews were conducted with 28 principals and 127 teachers in 29 schools.

### **Actual workload**

3.34 Similar to schools in other countries, the school days in Hong Kong were intense. On average, teachers worked about 10 hours a day on a school day in May, including the time spent working at home.

3.35 Work often extended to the weekends and holidays though the intensity decreased significantly during the holidays. For non-school days other than long holidays like Christmas and the summer vacation, teachers usually worked 4.6 hours a day. The overall data showed that teachers on average worked a total of 2,607 hours a year, or about 50 hours a week<sup>13</sup>. It should be noted, however, that the workload was not evenly distributed over the year due to the school holidays inherent in the profession.

3.36 On average, teachers devoted 74.1% of time to teaching related duties

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<sup>13</sup> Figure was estimated on a yearly basis including school days, non-school days, and long holidays.



such as classroom teaching, lesson preparation, student assessment and student support. About 15.8% of time was spent on administrative duties like meetings and paperwork. Continuing professional development accounted for 6.1%, while communications with external stakeholders like parents took up 3.4%.

3.37 As shown in Table A, on comparison with middle and senior managers, front-line teachers devoted a higher proportion of time to teaching-related duties (78.8%), and a lower proportion (12.0%) to administrative duties, continuing professional development (6.0%), and communications with external stakeholders (2.8%).

**Table A: Time spent on different types of duties by different teachers**

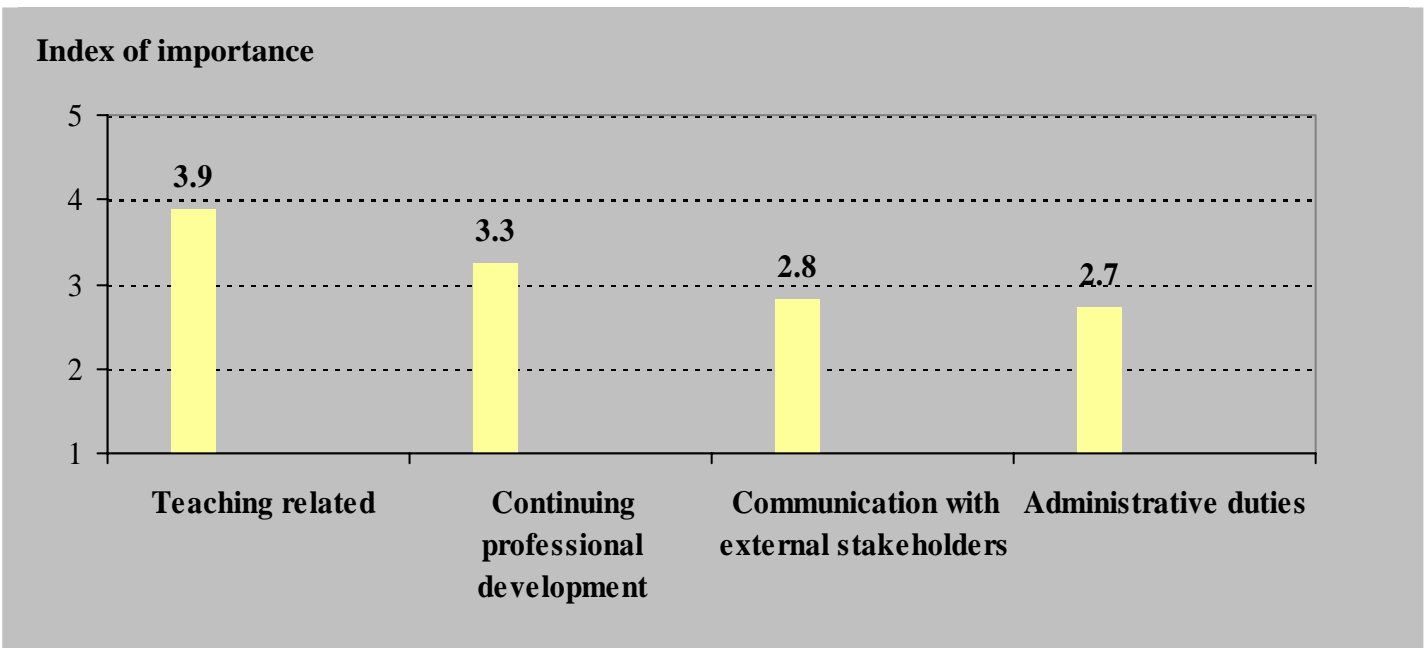
Types of duties	Front-line teachers	Middle managers	Senior managers	All teachers <sup>14</sup>
Teaching related	78.8%	69.8%	56.5%	<b>74.1%</b>
Administrative	12.0%	19.6%	30.7%	<b>15.8%</b>
Continuing professional development	6.0%	6.0%	6.8%	<b>6.1%</b>
Communication with external stakeholders	2.8%	4.0%	5.6%	<b>3.4%</b>
Others	0.4%	0.5%	0.5%	<b>0.5%</b>

\* Figures may not add up to 100% due to rounding.

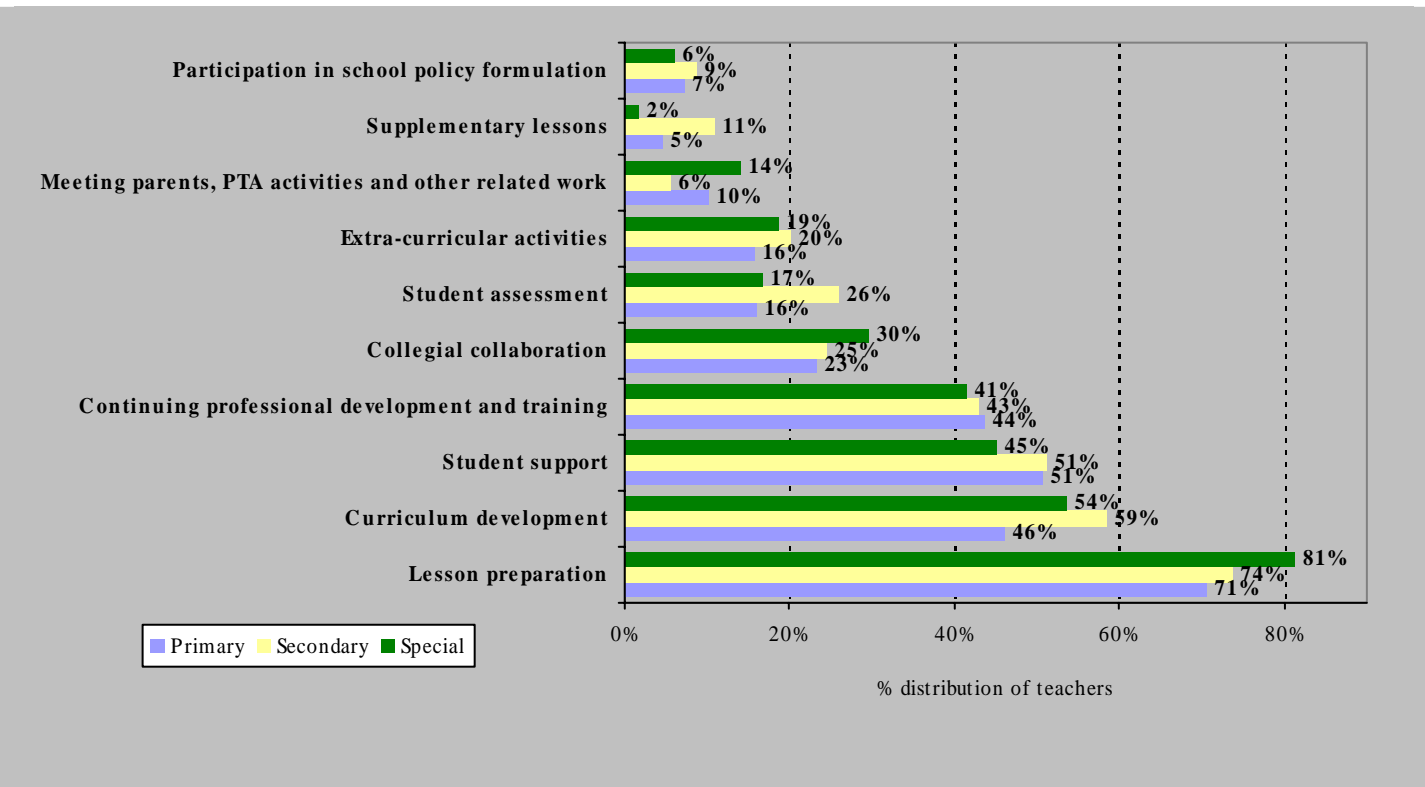
3.38 To teachers, teaching and related duties were the most important, followed by continuing professional development and communication with external stakeholders (Figure 1). Administrative duties were ranked the least important, yet they took up the second largest portion of teachers' time (15.8%), well above continuing professional development which was considered more important. It was apparent that the time apportioned was not commensurate with the rating of importance. Indeed, there is an urgent need to facilitate teachers' continuing professional development as more than 40% of teachers expressed a desire for but could only devote around 6% of their time to such activities (Figure 2).

<sup>14</sup> "All teachers" included front-line teachers, middle managers and senior managers.

**Figure 1 : Teachers' perception of the importance of different types of duties**



**Figure 2: Types of activities that teachers in different types of schools would like to devote more time to**



3.39 Moreover, though teachers were able to spend the bulk of their time on teaching related duties, they still considered this inadequate. The majority would like to have more time for lesson preparation and curriculum development, while nearly half wanted additional time for student support. Needless to say, without increasing the working hours, consideration should be given to reducing the amount of time spent on non-teaching duties, in particular administrative duties.

3.40 The percentage of time given to administrative duties on an ordinary school day varied considerably among teachers<sup>15</sup>. About half of the teachers of ordinary schools (50% for ordinary primary and 56% for ordinary secondary) devoted less than 14% of their time to administrative duties. The percentage was higher in special schools, which took up over 20% of the time of over half of the teachers. In both ordinary and special schools, a number of teachers (12% for ordinary primary, 8% for ordinary secondary and 25% for special schools) devoted as much as 30% or more of their time to administrative tasks.

3.41 Among the different administrative tasks performed by teachers, the top 10 tasks that took up a greater proportion of time are shown in Table B. “Paperwork” topped the list. A closer analysis of the administrative tasks of middle and senior managers revealed that about 10.1% of their time was spent on paperwork, as compared with 9.2% for front-line teachers. Front-line teachers, instead, spent more administrative time on student affairs like student management, registration and attendance records, fee collection, etc.

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<sup>15</sup> Administrative duties referred to “Administration-related meetings of the school”, “Paperwork”, “School planning, management and external communication”, and “Other school activities (e.g. Open Day, examination invigilation, and school promotion)”. Data were collected in May which was usually a high administrative work period in a school year (e.g. preparing school development plan).

**Table B: Top 10 administrative tasks that teachers spent most time on**

Types of administrative duties	Front-line teachers	Middle managers	Senior managers	All teachers <sup>16</sup>
Paperwork	9.2%	10.1%	10.2%	9.6%
Student management (e.g. class detention)	10.3%	6.8%	4.9%	8.7%
Documents, agenda and minutes of meetings related to teaching and learning	7.7%	7.0%	7.0%	7.4%
Administrative duties related to tests and examinations	7.4%	6.5%	3.5%	6.9%
Open Day, Sport Day and other similar activities	5.7%	6.0%	3.6%	5.8%
Inter-school competitions	6.4%	5.0%	2.1%	5.7%
Student information (e.g. registration and attendance records)	6.4%	4.5%	3.0%	5.5%
Classroom amenities (e.g. notice board decoration)	6.7%	4.2%	1.0%	5.4%
Fee collection	6.1%	3.5%	1.1%	4.9%
Examination invigilation	4.7%	3.5%	1.4%	4.1%

3.42 The study also identified the types of administrative duties that teachers perceived to be within or outside their purview. Table C shows the administrative tasks placed by over 40% of the teachers on the “not to be done” list. In top positions were tasks related to the day-to-day operations of schools such as “purchase and management of office supplies”, “fee collections”, and “ordering of textbooks, exercise books, and school uniform”, etc.

<sup>16</sup> “All teachers” included front-line teachers, middle managers and senior managers.

**Table C: Teachers' and principals' perception of the administrative duties that teachers should not take up**

Types of administrative duties not to be taken up by teachers	Front-line teachers	Middle managers	Senior managers	All teachers <sup>17</sup>	Principals
Purchase and management of office supplies	70.6%	72.8%	80.2%	<b>71.7%</b>	86.7%
Fee collection (e.g. book expenses, Student Union fees and picnic fee)	66.6%	71.5%	64.3%	<b>68.5%</b>	65.4%
Ordering of textbooks, exercise books, school uniform, etc.	66.3%	67.0%	58.0%	<b>66.4%</b>	75.9%
Finance Assistance Scheme for students	65.0%	66.4%	47.8%	<b>65.1%</b>	71.8%
Management of school premises (e.g. school decoration, maintenance, improvement work and tenders)	60.0%	62.6%	49.4%	<b>60.7%</b>	58.9%
Arrangement of school bus services	58.8%	60.9%	54.7%	<b>59.5%</b>	58.2%
Management of facilities (e.g. computers, audio visual equipment, teaching aids and other facilities)	53.9%	54.1%	38.5%	<b>53.6%</b>	48.3%
Management of tuck shop and student lunch	54.1%	52.3%	38.2%	<b>52.9%</b>	47.1%
Financial management (e.g. financial planning for subject teaching, extra curricular activities, Parent-Teacher Association)	48.1%	40.1%	14.8%	<b>43.9%</b>	37.0%

3.43 On the other hand, many teachers seemed to accept administrative duties that required their professional input, especially when these matters pertained to student learning and all round development. Table D shows the administrative tasks placed by over 40% of the teachers on the “to be done” list. Teachers assumed that they were the most suitable persons to handle student discipline, answer enquiries during examination invigilation, communicate with parents, etc.

<sup>17</sup> “All teachers” included front-line teachers, middle managers and senior managers.

**Table D: Teachers’ and principals’ perception of the administrative duties that teachers should take up**

Types of administrative duties to be taken up by teachers	Front-line teachers	Middle managers	Senior managers	All teachers <sup>18</sup>	Principals
Examination invigilation	69.4%	70.7%	79.3%	<b>70.2%</b>	82.5%
Open day, Sport Day and other similar activities (e.g. school donation activities)	57.7%	58.3%	82.8%	<b>58.7%</b>	89.8%
Administrative duties related to tests and examinations	53.2%	60.7%	72.9%	<b>56.8%</b>	46.1%
Inter-school competitions	51.3%	48.9%	58.9%	<b>50.5%</b>	59.5%
Student management (e.g. class detention, leave application)	51.9%	47.3%	62.1%	<b>50.3%</b>	63.7%
Counseling services for students on further study and career development	44.8%	50.8%	69.8%	<b>47.9%</b>	62.4%
Documents, agenda and minutes of meeting related to teaching and learning	43.4%	49.8%	52.4%	<b>46.2%</b>	50.7%
School development documents	38.8%	47.0%	68.7%	<b>43.0%</b>	59.6%
Classroom amenities (e.g. notice board decoration)	41.2%	39.3%	52.6%	<b>40.7%</b>	60.4%
Parent-Teacher Association activities	39.8%	39.9%	65.3%	<b>40.6%</b>	46.6%

3.44 It was worth noting that the views of senior managers, middle managers and front-line teachers were not entirely the same. For certain administrative tasks like financial management, management of facilities and tuck shop, a much higher proportion of front-line teachers and middle managers felt that these should not be taken up by teachers, as compared to senior managers. There was thus a need to address and reconcile such a mismatch in expectations as it might have an adverse impact on work distribution and stress.

<sup>18</sup> “All teachers” included front-line teachers, middle managers and senior managers.

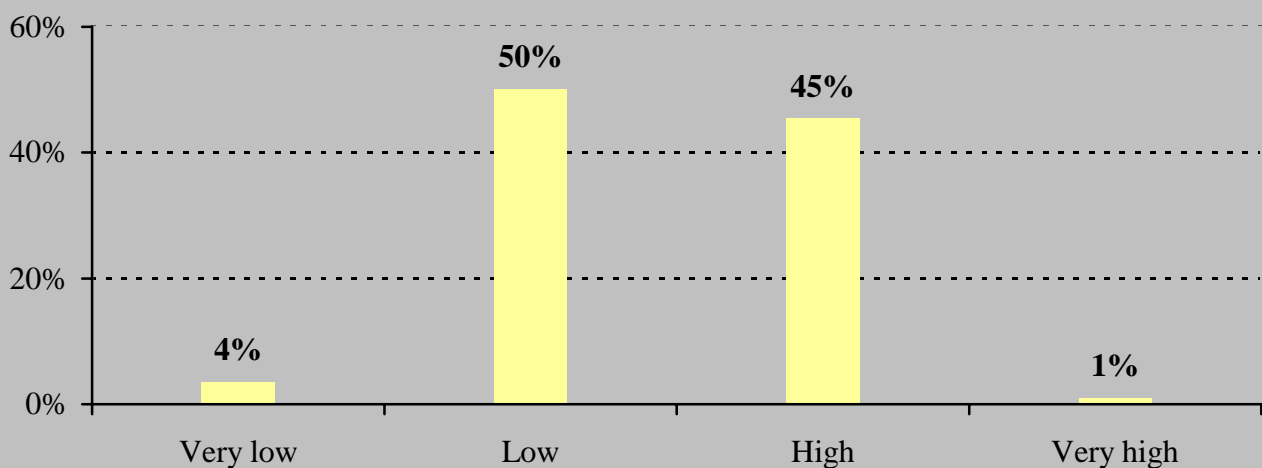
## Sources and factors affecting workload and stress

### Work stress

3.45 Teachers' work stress arose when the environment or work demand was considered to have exceeded teachers' personal resources and disrupted their daily routines. As shown in Figure 3, about 46% of teachers indicated having high or very high work stress while the remaining 54% considered it low or very low. Expressed in a Likert scale of 8, with "1" denoting very low and "8" denoting very high, the average index of work stress was 4.8, which was slightly above the middle point of 4.5.

**Figure 3 : Overall level of teachers' work stress**

% distribution of teachers



3.46 The survey data also identified five dimensions of work stress : “work related stress” (e.g. having had to handle many tasks at the same time), “emotion and anxiety” (e.g. feeling depressed or perplexed by future changes at work), “professional distress” (e.g. lacking recognition or sufficient opportunities to express professional opinion), “time management distress” (e.g. having insufficient time to do the job well) and “student/teacher relationship” (e.g. having difficulties managing classroom discipline).

3.47 Taken as a whole, “work-related” stress was the dimension of the highest level of stress. Across the different years of teaching experiences, this dimension was relatively lower for teachers with 1-2 years of teaching experiences, but was the highest for those teaching for 15-19 years.

3.48 Notable variations were further observed in the level of work stress in the different dimensions when comparing teachers categorised by years of teaching experiences:

- i) Beginning teachers with only 1-2 years of teaching experience had the highest level of stress related to “emotion and anxiety” and “student/teacher relationship”;
- ii) Teachers with 5-9 years of teaching experience had the highest level of stress related to “professional distress” and “time management”;
- iii) Teachers with 20-29 years of teaching experience had the lowest level of stress related to “professional distress” and “student/teacher relationship”; and
- iv) Teachers with 30 or more years of teaching experience had the lowest level of stress related to “emotion and anxiety” and “time management”.

3.49 The index of work stress for the different dimensions was lower for teachers of special schools as compared with that of teachers of ordinary primary and secondary schools. The difference was particularly marked in respect of “professional distress” and “student/teacher relationship”.

3.50 As the nature of work stress faced by teachers varied according to the years of teaching experience and types of schools taught, measures designed to help teachers cope with their work stress would have to be tailored to the needs of individual groups of teachers within the school context.

#### *Source of work stress*

3.51 Apart from personal and family matters, the survey data identified different sources of work stress arranged in five clusters, namely “changes and innovation” (e.g. external school review and curriculum reform), “external stakeholders” (e.g. community expectations, demands of parents and EMB), “test related” (e.g. Territory-wide System Assessment and Language Proficiency Requirement), “school management” (e.g. communication channels, teamwork and cooperation within school) and “pupil-related” (e.g. motivation and attitude of students, diverse student abilities).

3.52 Expressed in a Likert scale of 5, with “1” denoting very low impact on teacher stress and “5” denoting very high, the impact of “pupil-related” sources was the highest (4.1) and was lower for “external stakeholders” (3.7), “changes and innovation” (3.7), “school management” (3.3) and “test related” matters (3.3).

3.53 Similar to the dimensions of work stress, the impact of the sources of



work stress on teachers varied according to their years of experience. Notable observations included:

- i) For beginning teachers with only 1-2 years of teaching experience, the impact of “external stakeholders” on work stress was the lowest;
- ii) For teachers with 5-9 years of teaching experience, the impact of “external stakeholders”<sup>19</sup> and “school management” was the highest;
- iii) For teachers with 15-19 years of teaching experience, the impact of “changes and innovation” and “pupil-related” factors was the highest. The impact of “test related” factors was the lowest for this group; and
- iv) For teachers with 30 or more years of teaching experience, the impact of “test related” factors and “external stakeholders”<sup>19</sup> was the highest, while that of “school management” was the lowest.

3.54 An analysis was also conducted of the data for ordinary (primary and secondary) and special schools. Despite variations in the impact of “changes and innovations” and “school management” on teachers in the different types of school, the variations were slight. Variation was the highest for “test-related” factors – ordinary primary schools experienced the highest level of impact, followed by ordinary secondary schools and then special schools.

3.55 Most teachers interviewed indicated that they did not object to “changes and innovation” and the demands placed on them by “external stakeholders”. Their main concern was that they lacked time and resources to cope satisfactorily with such demands. In particular, they raised the issue of thoroughly piloting changes and innovations before full implementation so as to benefit from the wide range of experiences gained.

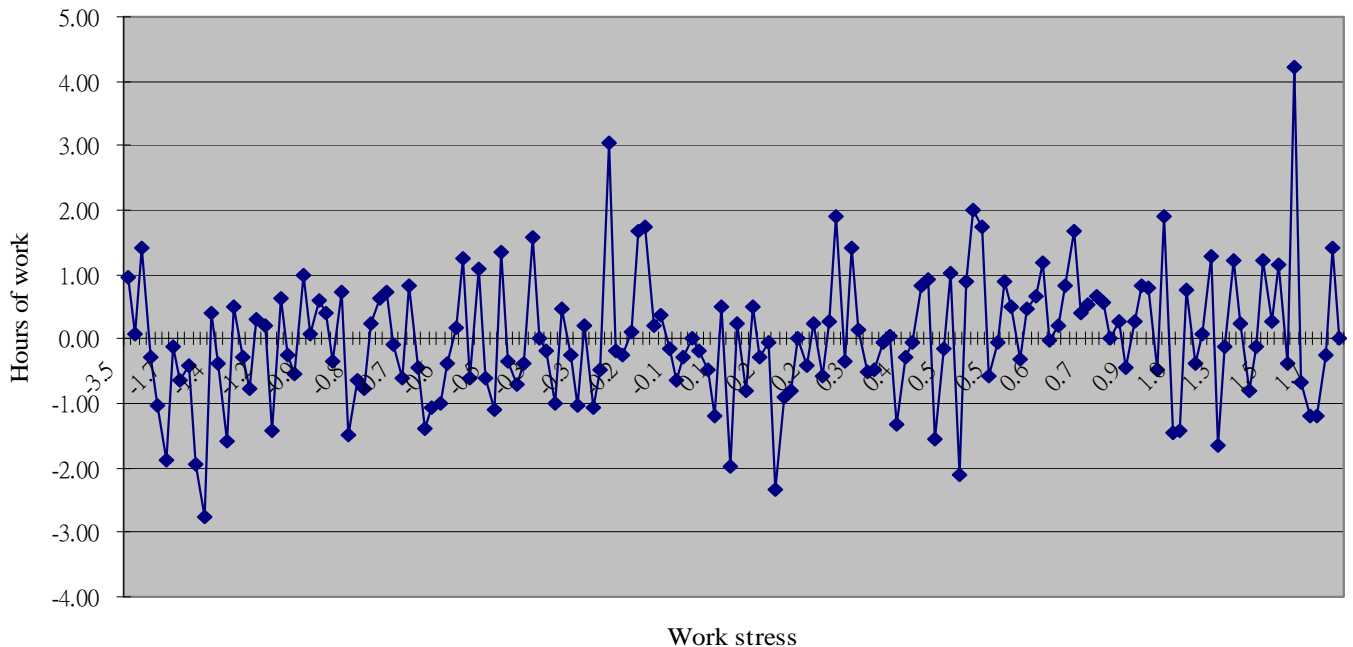
#### *Relationship between hours of work and work stress*

3.56 Figure 4 showed the distribution of the hours of work versus work stress at the school level. There was no discernible pattern and, statistically, no correlation. In other words, while there were schools in which teachers on average worked longer hours and had higher work stress, there were also schools in which teachers worked long hours and had lower work stress. Likewise, there were schools in which teachers on average worked shorter hours and had higher work stress as well as schools in which teachers on average worked shorter hours and had lower work stress. Apparently, there were wide variations among schools in terms of hours of work and work stress.

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<sup>19</sup> The impact of “external stakeholders” was the highest for both groups of teachers with 15-19 and 30 or more years of teaching experience.

**Figure 4 : Standardised scores on mean hours of work plotted against standardised score on work stress at the school level**



3.57 Analysis of survey data on work stress also revealed much diversity among teachers. A cluster analysis<sup>20</sup> on work stress and job satisfaction identified three distinct clusters cut across the different years of teaching experience, as follows:

- i) Teachers who had high work stress and high job satisfaction (the “high/high” cluster), accounting for about 33% of all teachers;
- ii) Teachers who had high work stress and low job satisfaction (the “high/low” cluster), accounting for about 28% of all teachers; and
- iii) Teachers who had low work stress and high job satisfaction (the “low/high” cluster), accounting for about 39% of all teachers.

3.58 In all three clusters, there were teachers who worked long hours and teachers who worked short hours. About 24% of teachers of the “high/high” cluster, 25% of the “high/low” cluster and 32% of the “low/high” cluster worked a

<sup>20</sup> Cluster analysis is a statistical technique used to categorise cases into similar groups or clusters, in order to find some meaningful structure of the data.

daily 8-hour or less on school and non-school days. On the other hand, 22% of the teachers of the “high/high” cluster, 26% of the “high/low” cluster and 19% of the “low/high” cluster usually worked more than 10 hours a day. In other words, teachers could still be under stress even though they did not have to work long hours, or had little stress even when working long hours.

### *Relationship between work stress and other factors*

3.59 As discussed above, factors other than hours of work induced stress. To explore further into the issue, reference was made to the dimensions of stress and sources of stress identified in the surveys (Para. 3.46 and Para. 3.51). A path analysis<sup>21</sup> was conducted to study the relationship between the sources and dimensions of stress. The figures shown in parentheses below were the standardised coefficient of the direct effect, with a higher value indicating higher impact.

3.60 With regard to the “work-related” and “time management” dimensions of stress, it was found that “hours of work” (0.13) had a positive but small impact on individual teachers. Instead, other factors like “school management” (0.21), “external stakeholders” (0.20), “pupil-related factors” (0.20) and “changes and innovations” (0.18) exerted a higher impact.

3.61 With regard to the dimensions of stress related to “emotion and anxiety”, “professional distress”, and “student/teacher relationship”, the “hours of work” had no impact at all. For these dimensions, “external stakeholders” (0.25), “school management” (0.23), “pupil-related factors” (0.21), and “changes and innovations” (0.09) had a higher impact.

3.62 In brief, “hours of work” had little impact on the 5 dimensions of teachers’ work stress. However, the other sources *i.e.* “school management”, “external stakeholders”, “pupil-related factors” and “changes and innovations” had a greater impact on teacher stress.

## **Effective strategies for workload and stress management**

### *Measures by schools to help teachers reduce workload and increase efficiency*

3.63 A number of measures were adopted by schools to help teachers reduce workload and increase efficiency. These measures might be grouped into four categories: “good management” (e.g. implementing new education initiatives in a gradual and step-by-step manner and allowing teachers to participate in discussions on teaching strategies and collective decision making), “external assistance” (e.g.

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<sup>21</sup> Path analysis is a statistical technique to study the relationship between different factors with a view to estimating the magnitude of causal connections between different factors.

inviting external professionals to help solve problems on teaching and learning), “workload reduction” (e.g. employing TAs, reducing non-teaching duties of teachers and simplifying school administrative arrangements) and “training”.

3.64 Expressed in a Likert scale of 8, with “1” denoting not effective at all and “8” denoting very effective, the index of effectiveness, as perceived by teachers, was higher for “workload reduction” (4.5), “good management” (4.2) and “training” (4.2), and was lower for “external assistance” (3.5).

3.65 The index of effectiveness was the highest for teachers who usually worked 6-8 hours on a school day and lowest for those who usually worked more than 12 hours on a school day. In other words, teachers who considered school measures more effective had shorter hours of work, as compared with those who considered these measures less effective. This implied that effective measures by schools helped reduce working hours of teachers.

3.66 Indeed, during discussions with teachers, many pointed to the important role played by the school in helping them cope with workload and stress. Effective measures included:

- i) Using the CEG to employ TAs, administrative assistants or even teachers;
- ii) Simplifying administrative arrangements;
- iii) Reducing the frequency and duration of meetings; and
- iv) Sharing among teachers to minimise duplication of work and increase work efficiency.

3.67 Some principals and teachers agreed that there was much room for further simplification of administrative procedures and reduction of paperwork, e.g. through more innovative use of IT. While individual schools might not have the resources and capacity to develop and experiment with new efficiency measures, the school sector as a whole, with active support from the government, should be in a position to do so.

### *Coping strategies of teachers*

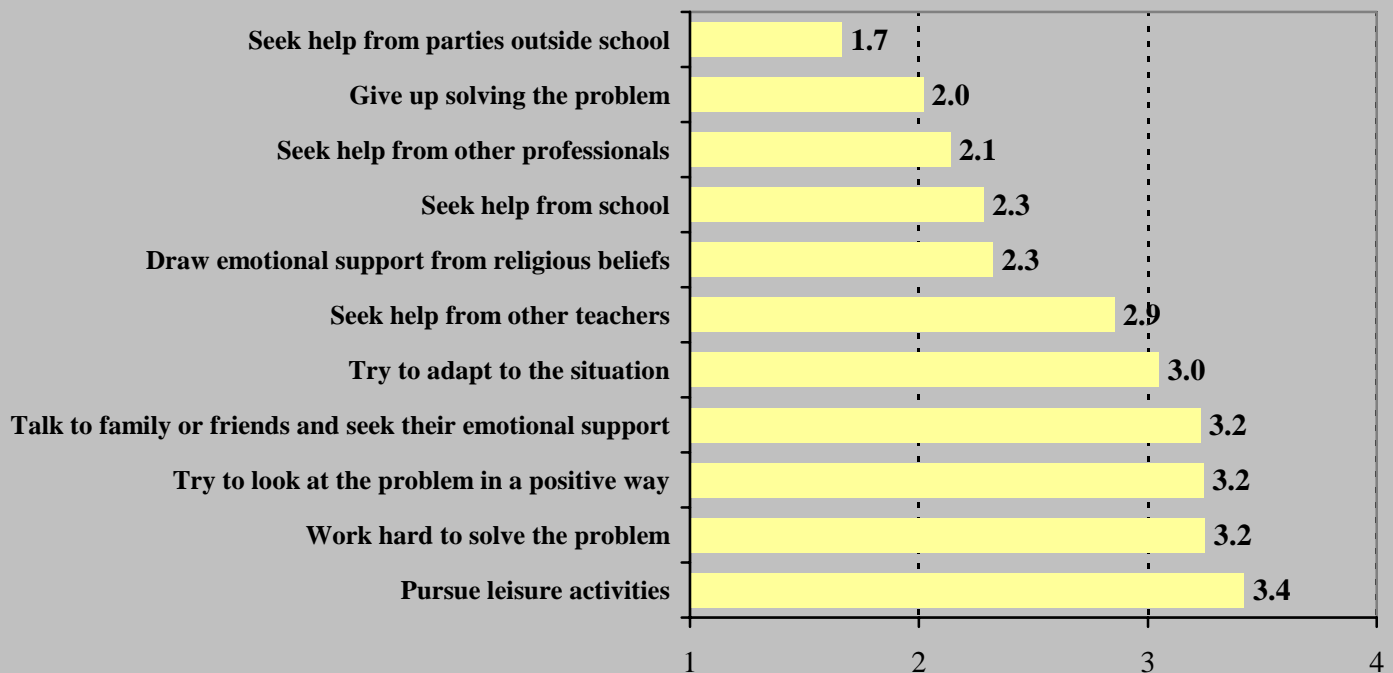
3.68 The ability of teachers to cope with work demands differed. Some were adept at managing “changes and innovation” while others were frustrated by “pupil-related” problems.

3.69 Teachers undertook a number of measures to increase work efficiency. Effective ones included “setting work priority to handle the more important tasks first” and “using IT to raise work efficiency”. Exploratory factor analysis showed that these measures might broadly be classified as measures to reduce workload

(e.g. “avoiding non-teaching duties”, “shortening time for marking students’ assignments” and “division of work by school on matters related to students’ emotional and behavioural problems”) and measures to enhance efficiency (e.g. “co-planning lessons with teachers teaching the same subject”, “using IT”, “setting work priority” and “pursuing CPD to enhance capacity”).

3.70 Teachers also indicated their preference for methods to cope with work stress (Figure 5). The scores were expressed in a Likert scale of 1 to 4, with “1” denoting “would least likely take up such measures” and “4” denoting “would most likely take up such measures”. Measures that were more likely to be taken up by teachers were to “pursue leisure activities”, “work hard to solve the problem”, “try to look at the problem in a positive way”, “talk to family members or friends and seek their emotional support”, and “try to adapt to the situation”.

**Figure 5 : Average score on the likelihood of measures being used by teachers to reduce work stress**



3.71 The majority (86%) of teachers would take a proactive stance and adopt self help measures (e.g. positive outlook, hard work). Only about 33% would consider giving up solving the problems they faced. Nonetheless, very few teachers (about 19%) would seek outside help. During focus group discussions, it transpired that a stigma was attached to seeking outside professional help,

rendering it not a popular culture among teachers.

3.72 In general, teachers with 30 or more years of teaching experience were most likely to “self help” and “seek help”. Teachers with 5-14 years of teaching experience were the least likely to “seek help”. Those teaching for 5-9 years were inclined towards giving up solving the problems.

3.73 As could be expected, the level of work stress was positively correlated with the likelihood of “seeking help” or “giving up solving problems”. In other words, the higher the work stress, the more likely that teachers would seek help or give up solving the problems they faced. It is therefore important to build teachers’ capacity in dealing with work stress and workload problems.

3.74 The foregoing findings are significant as they reveal several key issues confronting teachers in Hong Kong in managing their work and stress. An analysis of these issues is presented in Chapter 4.

## **Chapter 4**    *Issues of Concern*

4.1        There can be no doubt that teachers' work is undergoing radical changes. Notwithstanding such changing circumstances, our teachers have remained steadfast in their commitment to helping students achieve their academic and personal potential. To help our teachers sustain high levels of motivation and job satisfaction, however, requires that proper attention be paid to issues that impact their work and well being. For ease of discussion, such major issues are identified and presented in this chapter at the levels of community, system, school and teacher. Clearly these levels are inter-connected, as one easily laps into and impacts another.

### **At the Community Level**

#### **Declining school enrollment trends**

4.2        In a world characterised by change, uncertainties present both opportunities and threats. One challenge confronting schools is the noticeable decline in school age population, giving rise to keen competition among schools. Schools, therefore, operate under the shadow of school consolidation, reduced teaching positions, or having to transform from English Medium Instruction (EMI) to Chinese Medium Instruction (CMI). In order to generate market competitiveness, many schools are galvanised towards creating a niche for themselves, which can become the driving force for school improvement. On the other hand, it has significant impact on the nature of school activities. For example, teachers are increasingly asked to engage in publicity campaigns and produce measurable outcomes in order to raise the profile of the school.

**Key Issues:**  
**At the Community Level**

- Declining school enrollment trends
- Increasing community expectations

#### **Community expectations**

4.3        In addition to being subject to the vigor of the market, schools have to contend with the heightened expectations of the community. The emergence of a knowledge-based society has called for new competencies and skills in a new work era characterised by the knowledge explosion and job mobility. Even traditional jobs are reinvented with new tasks. To meet these challenges, teachers have to take on new skills, e.g. IT skills, communication skills, team work, human resource management, time management, etc. All the while, they are mindful of the high expectation of society for education to empower the younger generation to ride the tides of the technological age and to bring society to new heights. Inevitably,

teachers also become protagonists in the reform to accommodate these challenging needs.

4.4 With more choices of schools and greater home-school cooperation, parents have acquired a stronger voice in their children's education. While many parents offer staunch support to teachers' work, some hold views that are at variance with the education reform advocated by the government and the goals and policies of schools. Teachers are sometimes caught in the middle, having to spend time in trying to make contact with parents, communicating with them and resolving differences.

4.5 In the meantime, public demand for transparency and accountability has generated greater focus on outcome measures and school performances. The media, as the watchdog, are quick to put the spotlight on any perceived inadequacy of teachers or relevant news story. Views could be critical. A positive climate and encouragement from the community is deemed necessary in uplifting the morale of teachers.

## At the System Level

### Communication

4.6 Teachers are positive about the aim of the education reforms *i.e.* to enhance the quality of teaching and learning. They also agree with the need to be accountable for student learning and the use of public funds. With teaching and learning accorded top priority and a desire to devote more time to such activities, teachers pay relatively less attention to the development of policy initiatives or relevant papers. Instead, they tend to rely on management or colleagues for such updates. External factors like declining birth rate and concern for school consolidation have also colored teachers' perception of these initiatives. Penetration of ideas and strategies from EMB to schools and from management to front-line teachers often goes awry due to the external pressure and misinterpretation along the hierarchy. Thus, despite their good intentions, education policies are often regarded as tools for school consolidation. In a bid for self survival, schools tend to turn the soft targets of various policies into rigid requirements, e.g. the soft target of 150 hours of CPD. By the same token, activities related to the School Development and Accountability (SDA) framework, such as ESR and SSE, are regarded by teachers as indicators for assessing school performance and sealing the fate of schools. Much effort is therefore expended on

#### Key Issues:

##### At the System Level

- Communication
- Implementation of reform initiatives
- Integrated education
- Staff establishment



the compilation of documents as evidence of school achievements, adding to teachers' workload and sense of frustration.

### **Implementation of reform initiatives**

4.7 Despite general agreement with the spirit that underpins new policy initiatives, this sentiment does not apply to the implementation strategies. Compounding the education reform agenda are the diverging views of different stakeholders, with their demands pulling in different directions. Policy makers have thus been criticised for being too fast or too slow. While these conflicting views are often narrowed through processes of consultation that shape the policy initiatives, teachers are often faced with uncertainties as they try to manage change.

4.8 Teachers are naturally concerned about the workload brought by the introduction of many initiatives within a short period of time. Especially in curriculum and assessment matters, they indicate insufficient time as the major obstacle whereby their efforts to improve teaching and assessment practices are impeded by the rapid pace of change.

4.9 The piloting of new initiatives is another area of contention. Properly conducted, piloting plays an important role in testing the feasibility of new policies and providing successful experiences for sharing upon full implementation. However, when pilot schools are mainly those of higher capacity, their experiences do not reflect the issues or assess the impact in schools of lower capacity.

4.10 Meanwhile, the introduction of new initiatives provides schools with additional funding, together with the ensuing accountability measures that require some form of documentation for effectiveness of use. The multiple accountability mechanisms embedded in different initiatives have resulted in extra work. Teachers particularly resent the paperwork connected with what they perceive to be auditing activities, as they feel their professionalism is not duly respected. There is the feeling that the different accountability mechanisms are manifestation of micro management on the part of the government, another indicator of the distrust for school.

### **Integrated education**

4.11 The introduction of IE intensifies the diversity in the classroom. The specialist support from EMB, as well as the assessment tools and resource packages, is considered inadequate. Enhanced training and support are needed to help teachers tackle the diversified needs of students through curriculum adaptation, assessment accommodation, and close liaison with parents.

## Staff establishment

4.12 Demographic changes affect the demand for school places and hence the number of established teaching positions available. The education reform was also introduced at a time of global recession when stringent control over expenditure was exercised in both the public and private sectors. Although additional funding has enabled the appointment of new teachers to maintain a reasonably steady teacher supply and demand, most of these posts are on contract terms. Job insecurity affects the level of commitment and morale, while the disparity in salary and benefits within the staff room can have a negative impact on team spirit. The recent decision of EMB to include certain posts (the specialised teaching posts in Chinese, English and Mathematics (primary) and the temporary Primary School Master (Curriculum Development)) in the permanent teaching establishment has served as an example of how this issue could be addressed.

## At the School Level

### Administrative support

4.13 As a result of the changes in society and education, school operations have become more complex. Senior and middle managers, generally promoted on account of their performance in teaching and learning, now find themselves in new supervisory and management roles for which they have not been adequately prepared. Nor are teachers unaffected as they take up an increased

#### Key Issues:

##### At the School Level

- Administrative support
- School leadership
- Student diversity
- Teaching load vis-à-vis class size

administrative load, e.g. collecting money, overseeing tuck shop and school bus services, preparing documents and attending multitudinous school meetings, etc. Small schools, in particular, are harder hit by the expanding administrative load because of the lack of the economies of scale. Overall, teachers (including managers) regard these non-teaching tasks as burdensome and time-consuming, and believe that they can be performed as well or better by administrative/support staff.

### School leadership

4.14 Links are found between perceived workload manageability and quality of leadership. Many school leaders (including SMC, principal, middle and senior managers) have succeeded in building a collaborative and supportive culture that drives school development through shared vision and positive mindset. Nonetheless, a number of school leaders have difficulties creating such conditions in the school. Without clear direction for school development, coherent plans or

effective deployment of resources, teachers' workload increases as when the school tries to follow every detail or aggressively takes on work that is beyond its capacity, e.g. making concurrent submissions for additional funding. There is a case for rendering priority to promoting best practices and enhancing the capacity of school leaders.

## **Student diversity**

4.15 In the face of a growing heterogeneous student population with varying levels of intelligence, capability and aspiration, teachers need to enhance their skills in managing class discipline and delivering effective lessons that cater to the range of abilities. The requisite expertise in early identification and early intervention will also bolster their confidence in looking after students with special educational needs.

## **Teaching load vis-à-vis class size**

4.16 With specialised teaching yet to be fully implemented, the common practice of many schools to achieve a fair workload distribution through an "even" spread of lessons can often misfire, as the variety of subjects and levels taught by individual teachers is large. The time that some teachers spend on lesson preparation and evaluation contributes significantly to the workload. As regards small-class teaching, its impact is mainly felt in subjects with a lot of marking and feedback to students (e.g. languages). Therefore, taken as a whole, a majority of teachers accept reduced teaching load as a more effective way of alleviating pressure and workload. A lighter teaching load would also free up time for professional duties connected with their core work, thus heightening job satisfaction and morale.

4.17 Accordingly, teachers express a need to further increase the funding for permanent teaching posts, at the same time allowing schools continued flexibility to deploy staff and structure time-table in ways best suited to local needs.

## **At the Teacher Level**

### **Professional dignity**

4.18 Teachers acknowledge that education has to move with the times and are not averse to the additional work that improves student learning. They also embrace the broadened concepts of learning to encompass the all round development of students. Teachers take pride in their work and

#### **Key Issues:**

##### **At the Teacher Level**

- Professional dignity
- Continuing professional development
- Stress management

their ability to nurture young lives. Work is hard but worthwhile. Apart from their own job satisfaction, they seek wider affirmation of their work. To many teachers, the loss of professional dignity contributes far more to stress and poor morale than the physical working conditions. Yet many indicate that this professional dignity is slipping away as their freedom to choose is slowly constricted, and their professional autonomy is undermined by the guidelines that accompany multiple accountability measures.

4.19 Moreover, teaching is increasingly open to public scrutiny. Being a public service, education is subject to the diverse views of parents and members of the public. These views often challenge teachers' sense of professionalism and self-esteem.

### **Continuing professional development**

4.20 Teachers believe in the value of CPD activities. They recognize the need to stay abreast of the changes in education, to adapt and to innovate. However, cognizant that the amount of CPD to be funded by schools is limited, teachers worry about the disruption to classes and to colleagues caused by CPD-related absence during the school day. The alternative of evening sessions may not work well as the sessions make what is already a long day longer, further intensifying the work-life imbalance. Improvements of CPD arrangements would be necessary to allow teachers to benefit more from their professional development.

### **Stress management**

4.21 Stress is a complex issue induced by various factors and agents. Although stress always involves transaction between the individual and the environment, the consultancy studies have shown that teacher stress is mainly attributable to three broad areas: factors intrinsic to teaching (e.g. nature of teaching, student diversity, etc.), factors affecting individual teachers' vulnerability (e.g. personality, coping strategies, etc.), and systemic factors operating at the community level (e.g. declining birth rate, high community expectations, etc.). High levels of stress can lead to decreasing teacher productivity and wellness, which is highly associated with decreasing teacher morale and job satisfaction. Furthermore, data from the surveys clearly identify years of experience as an important parameter in affecting how teachers perceive and cope with stress.

4.22 Based on these issues of concerns, the Committee puts forward suggestions to improve teachers' work in the next chapter.

## *Chapter 5 Recommendations*

5.1 In seeking to improve teachers' work and reduce stress, the Committee has made reference to its remit and the following premises, which underpinned the discussions and recommendations:

- i) Change is inevitable and society ever changes. As society looks to education to drive economic and social sustainability, education has to change as well. So is teachers' work, faced with tension, challenges and new tasks that are common to modern working life.
- ii) The improvement of teachers' work is a complex situation where commonalities are punctuated with subtle variations. Schools operate in diverse contexts, and factors such as teachers' individual disposition, career stage, and domains of expertise can impact their needs and sense of self-efficacy. There could be no one-size-fits-all solution. The recommendations aim to make a significant difference to most teachers.
- iii) With the changes beyond and within the school exerting influence on teachers' work, the quest for quality education entails a broadened view that goes beyond teaching and learning. Teaching and learning takes root and flourishes in a healthy environment where health embraces the well being of students and staff, as well as a robust organisational structure and leadership capability. The onus is on a holistic approach to the development of a healthy and resilient teaching force.
- iv) Resources are not unlimited and have to be well accounted for. Existing resources must be effectively utilised. The results of recent measures introduced by EMB to relieve teachers' workload and stress (Annex D) are just beginning to be felt.
- v) Recommendations are based on credible evidence. Corresponding to their nature, some recommendations are specific, while others establish the general direction, leaving the implementation details to EMB and/or the discretion of schools.

5.2 Based on the findings in earlier chapters, the Committee has identified certain critical needs at present:

- i) To strengthen mutual trust and communication within the education sector;
- ii) To minimise uncertainties in the planning and implementation of education initiatives;
- iii) To allow teachers to redirect time to the core business of teaching

- and learning;
- iv) To enhance the capacity of school leaders and teachers; and
  - v) To leverage community support and respect for the profession.

5.3 To meet these critical needs, the Committee makes recommendations in the following areas.

## Policy Initiatives

5.4 There has been an overall positive response to the direction of policy initiatives. In the implementation, however, teachers have raised concerns about communication, pace of change and workload. In an era characterised by societal and education changes, policy makers have to exercise care in maintaining the delicate balance between pressure and support to advance school development. Teachers, too, have to be attuned to the external changes that drive innovations in education, and update themselves on the latest developments, often available on the web.

**Recommendation 1 :** That communication within schools and among different stakeholders is crucial to quality education. In particular, there must be regular and open dialogue between EMB and teachers to facilitate a better flow of information and feedback that will help clarify query or misconceptions, and on which a climate of trust can be built to facilitate long-term partnership. Communication is ever two-way, requiring the conscientious efforts of the parties involved *i.e.* teachers, schools and EMB.

**Recommendation 2 :** That in cases when new policy initiatives have to be field tested, pilots should best be conducted across a range of schools, differing in student intake and school ability. This will help gauge the array of implementation strategies that would need to be in place across the spectrum of schools. In any education reform, it is inevitable that some schools will be early adapters and some will lag behind. Appropriate encouragement and support should be provided with this in mind.

**Recommendation 3 :** That EMB should actively seek the advice of the Education Commission (EC) on matters concerning the implementation of major reform initiatives. Moreover, apart from focusing on student learning, the EC could provide advice on gauging the capacity of teachers to cope and the impact of these initiatives on teachers' work-life balance.

## School Accountability System

5.5 While there is widespread acceptance of the need to be accountable for public funds and assure the quality of education, this has given rise to a plethora of accountability measures and administrative tasks that impose a burden on teachers and schools.

**Recommendation 4 :** That EMB should look into the various accountability mechanisms that are in force within the system, especially with regard to additional resource allocations. Where necessary, procedures should be streamlined / consolidated to minimise the confusion and workload incurred when teachers have to resort to different sets of performance indicators or requirements, e.g. reporting cycle.

**Recommendation 5 :** That the School Development and Accountability (SDA) framework could serve as the common accountability framework, subject to on-going review. The modifications that have so far been achieved in the procedure and requirements for External School Review and School Self-evaluation could be built on, with the aim of developing SDA into an effective and user-friendly system that drives school development.

## Teaching Staff Establishment and Stability of the Workforce

5.6 Job mobility and demographic change in the external environment have destabilised the teaching profession, with the reality that job-for-life may no longer apply. The class restructuring principles introduced by EMB in August 2006 (Annex D) offer relief and the effect should be monitored and assessed. The view of many teachers in the teaching load vis-à-vis class size debate is that the benefit of small class teaching is more keenly felt in certain contexts, e.g. language classes. Thus, a majority accept reduced teaching load as a more effective way of alleviating workload.

**Recommendation 6 :** That in the light of the wide acceptance among teachers of reduced teaching load as an effective means of relieving workload, 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” depending on local circumstances. EMB should also consider creating more permanent teaching posts and further increasing the teacher to student ratio.

## Enhanced Administrative Support

5.7 The increase in administrative work highlights the need to simplify and redirect non-teaching tasks to allow teachers more time for contact with students and student learning. In recent years, EMB has provided schools with various grants to handle administrative work, e.g. the CEG, the additional provisions in the nine relief measures (Annex D) and the one-off grant for setting up the Incorporated Management Committee etc. The consultancy study has further identified areas of work that teachers regard as better suited for other personnel. In view of the diversity that exists among schools, this compilation will best serve as reference to facilitate school-based review.

**Recommendation 7 :** That schools should put in place a school-based mechanism to regularly examine non-teaching tasks, alongside the support systems available, with a view to streamlining existing procedures, and redirecting tasks that could be better handled by administrative and/or support staff. In this connection, roles and functions of all school staff will have to be reformulated and clearly understood by all. Where necessary, appropriate training will have to be provided to develop the skills of administrative and/or support staff.

**Recommendation 8 :** That, 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.

**Recommendation 9 :** That schools could make optimal use of what technology has to offer to improve efficiency and reduce the administrative burden of teachers, e.g. the use of smart card and web administration, etc. One-off funding could be made available, on application from schools, to top up their IT provisions for administrative purpose.

## School Leadership

5.8 In the face of mounting tasks and demands, the delegation of authority to the school has put school leaders (SMC, principal, senior and middle managers) in better positions to influence school development and the conditions under which teachers learn and work. In this investigation of teachers' work, the Committee has come across many cases of school management leading by example and building a collegial environment where teachers feel valued and appreciated. Leadership counts.



**Recommendation 10** : That the capacity of school leaders (including SMC, principal, senior and middle managers) could be further enhanced through networks and professional development. As leaders of the school, SMC, principal, senior and middle managers should exercise professional control and autonomy amidst the overall reform landscape, in reference to the capacity and developmental stage of the school. There must be courage of conviction to set the vision and prioritise tasks. Pressure has to be sustained at a manageable level, which together with an adequate level of support, will serve as thrust for further development.

## Student Diversity

5.9 There can be no doubt that the diversity in student ability, together with students' behavioural problems and interruptions in learning, is stressful and burdensome to teachers.

**Recommendation 11** : That EMB should continue its review of Integrated Education, and work closely with schools, TEIs and outside bodies (e.g. educational psychologists, voluntary agencies, parents' group, etc.) in the formulation of support measures to tackle special educational needs and student diversity. Particular attention has to be paid to strengthening requisite skills and strategies in teachers, the nurturing of a caring yet disciplined school environment, and where necessary, the provision of coordinated on-site support.

## Stress Management and Healthy Workforce

5.10 With teachers at the heart of student learning, their physical and mental well-being can impact the quality of learning experiences for students. There is an urgent need for better public awareness of the importance of a healthy workforce, together with the nurturing of a support system that emphasises prevention, early detection and intervention.

**Recommendation 12** : That TEIs could consider placing greater emphasis in their teacher education programmes on the physical and mental well being of teachers, alongside their professional growth. With stress and pressure being part and parcel of contemporary life, teachers' professional development could include components that address self management and personal growth, helping them to

achieve better self understanding, as well as acquire and refine healthy life skills throughout their career, such as positive attitude, healthy coping techniques, time management, etc.

**Recommendation 13** : That relevant parties (including EMB, education and professional bodies) could collaborate and refine current understanding of the work stress common to different groups of teachers (e.g. by age, rank, etc.) and particular periods in the school year. The Hong Kong Teachers' Centre could take up a more prominent role in providing the pertinent practical and empathic support to address the needs of teachers at different stages of their life and career so as to achieve better work-life balance.

**Recommendation 14** : That there could be enlarged opportunities for outside experts to foster partnership with schools. Additional emphasis could be placed on the promotion of a healthy school, encompassing both physical and mental wellness of *all* in the school. In this, schools could take a proactive role, with the support of EMB, in utilizing the different community services (e.g. voluntary social services, medical consultancy services, counseling services, etc.) available within the district. This will allow schools to better harness the real-world knowledge and vast experiences that the wider community has to offer across the many dimensions of school life.

**Recommendation 15** : That EMB could continue to extend funding that promotes a whole-school approach to teacher wellness, now available in the special initiative provisions in the Quality Education Fund. This will help heighten awareness and reinforce relevant practices in schools.

## Teachers' Continuing Professional Development

5.11 In their learning that now spans the entire life, teachers' professional development should improve not only their professional knowledge and skills, but also their ability to manage change and take care of their overall wellness.

**Recommendation 16** : That EMB should explore various options to allow teachers the time and space to reap the full benefits of professional development activities, e.g. by providing paid study leave.

**Recommendation 17** : That teachers should exercise discretion to prioritise professional development activities that meet their own and schools' developmental needs, with reference to their actual workload and time available.

## Professional Image

5.12 Job satisfaction hinges on various factors, amongst which is the status within the community. A paradox exists in the public perception of the teaching profession: there is high expectation but the status is not commensurate with the importance attached to it.

**Recommendation 18** : That it is necessary to raise the public profile and standing of the profession. Other than recognition of teachers' work from within the profession (e.g. Chief Executive's Award for Teaching Excellence), the government and outside bodies can acknowledge teachers' achievements in different ways. The selection of a teacher as one of the Ten Outstanding Young Persons 2006 is one fine example, through which parents and the public can gain insight into the complex demands on teachers. Ultimately, it is vital to restore the trust and respect for the profession that it rightfully deserves. In this, every member of the community has a role to play.

## Financial Implications

5.13 The Committee is aware that some of the recommendations have financial implications. For example, the creation of additional permanent teaching posts, further increase in teacher to student ratio, and the provision of paid study leave involve recurrent financial costs. As such, their implementation will depend on the availability of necessary resources.

5.14 The Committee is also aware that there have been new funds from the government in recent years, notably the Capacity Enhancement Grant (CEG), Quality Education Fund (QEF) and Education Development Fund (EDF). The consultancy studies have affirmed the positive impact of CEG in reducing teachers' workload, particularly through the recruitment of TAs to support teachers' work. The government should continue to make the CEG available to schools while schools should continue to ensure its effective use.

5.15 The use of the other two funds requires particular qualifications. To optimise these existing resources, EMB could review the scope for use to encourage a more holistic approach to a range of issues that impact teaching and learning, as proposed in the following paragraph. Where necessary, existing provisions may have to be topped up.

5.16 It is envisaged that resources for implementing some of the recommendations and the ensuing actions from the different parties are as follows:

Recommendation 8	Independent review of administrative work in school	QEF	QEF to include this area in its allocation of funds, schools to apply for funds to conduct the independent review
Recommendation 9	One-off funding to top up IT provisions for school administration	QEF	QEF to include this area in its allocation of funds, schools to apply for one-off funds
Recommendation 10	Leadership development of school management (including SMC, principal, senior and middle managers)	EDF	EMB to organise appropriate professional development activities for school leaders
Recommendation 15	Whole school approach to teacher wellness	QEF	QEF to continue to extend the funding for this area of applications from schools

## ***Chapter 6 Conclusion***

### **Acknowledgements**

6.1 The Committee appreciates the cooperation and support of teachers, middle and senior managers, principals and SMCs for their input and insights. The dialogues with different professional bodies have also enriched the Committee's perspectives and understanding of the issues. The Committee is grateful to all these key players for their invaluable contributions to the study.

### **Way Forward**

6.2 The Report on Teachers' Work marks another step forward in the continuous exploration of ways to relieve teachers' workload and stress. It offers a snapshot of teachers' work within a fluid and dynamic system, with the soon-to-be implemented new academic structure further changing the landscape and posing fresh demands on teachers. Amidst the flux, EMB has to stay vigilant and constantly review the status of teachers' work to ensure that support measures are relevant and vibrant, responsive to the changing times and needs of teachers.

6.3 The Committee is confident that the proposed measures in Chapter 5 will impact positively the lives of many teachers, and looks forward to EMB's implementation plan that will prioritise and get the recommendations off the ground.

6.4 Many of the proposed changes take place obviously in schools. Nonetheless, as a public enterprise, any enhancement of education will need to go beyond the school site, to rally the support of every member of the public who has a stake in education. The Committee is optimistic that the Report will go some way towards raising public understanding, respect and support of teachers' work. In concert, the government, community and profession itself will create the conditions and climate that make a difference to teachers' lives, allowing teachers to do what they are best at: the enhancement of student learning.

# The Committee on Teachers' Work

## *Final Report*

# **ANNEX**

December 2006

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## *Annex A: Membership List of Committee on Teachers' Work*

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

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## *Annex B: Membership List of Advisory Group of Committee on Teachers' Work*

<b>Name</b>	<b>Education Bodies / School Councils</b>
1. Mr <b>LI</b> Sze-yuen (Convener)	Hong Kong Federation of Education Workers
2. Mr <b>YU</b> Kai-chun (Assistant Convener)	Hong Kong Teachers' Centre
3. Mr <b>CHOW</b> Fu-hung	Chief Executive's Awards for Teaching Excellence Teachers Association
4. Mrs <b>CHOW LUK</b> Ying-pui	Special School Council
5. Mr <b>LAU</b> Kwok-leung	Hong Kong Teachers' Centre
6. Ms <b>NG</b> Kit-chee	Chief Executive's Awards for Teaching Excellence Teachers Association
7. Mr <b>POON</b> Shu-chiu	Subsidized Primary Schools Council
8. Mr <b>WONG</b> Ka-leung	Hong Kong Federation of Education Workers
9. Ms <b>WONG</b> She-lai, Shirley	Hong Kong Subsidized Secondary Schools Council
10. Mr <b>LEE</b> Yuk-fai, Steve (Secretary)	Education & Manpower Bureau HKSAR Government

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## *Annex C: Reference List of Local and International Studies*

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## B. Literature related to teachers' stress

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## ***Annex D: Relief Measures for Teachers from Education and Manpower Bureau (EMB)***

### **Three Relief Measures for Teachers announced on 11 January 2006**

- A. Setting up Teachers' Helpline
  - B. Increasing Capacity Enhancement Grant (CEG)
  - C. Setting up an independent committee, the Committee on Teachers' Work, to study teachers' work and stress
- 

### **Nine Relief Measures for Teachers announced on 27 February 2006**

- A. Increasing permanent posts to provide a stable working environment
    - Turning specialised teaching posts permanent for primary ordinary schools
    - Turning 5-year time-limited post for Primary School Curriculum Leader to permanent establishment
  - B. Increasing manpower to enhance teaching and learning
    - Improving student guidance service
    - Providing additional teachers to cover all Band 3 and Bottom 10% students at Secondary 1 – 3
    - Making basic CEG provision recurrent
  - C. Streamlining procedures to reduce workload
    - Simplifying the process of School-based Assessment (SBA)
    - Reviewing the arrangements for Territory-wide System Assessment (TSA)
    - Reviewing External School Review (ESR)
    - Streamlining application procedure for Quality Education Fund (QEF)
- 

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