

Presentation to the Education Panel of Legco

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First let me thank the Honourable Members for this opportunity to speak on the relationship between EMB and HKIEd. Since I shall be rendering to the Commission of Inquiry appointed by the Chief Executive a detailed and substantiated account of the allegations contained in my Intranet message of 3 February 2007, I will not elaborate on them here. Professor Morris has spoken about the tipping of the fine but necessary balance between the EMB and the institutions of higher education, and between accountability and autonomy. I intend to focus on the allocation of public resources for teacher education, in which HKIEd has suffered serious disadvantage over the past few years, quite in addition to the denial of a university title long after we have attained self-accreditation. I shall talk about seven episodes.

(1) The “Start Letter for 2005-08”

On 21 January 2004, the UGC issued its “Start Letter” for the eight tertiary institutions to begin their exercises for triennium planning.

(At about the same time, Professor Morris received the first phone call I mentioned in my Intranet message from SEM Arthur Li asserting that HKIEd needed to do something “radical” if it was to be saved from the severe cuts which were about to be inflicted on it in the forthcoming triennium planning exercise.)

The “Start Letter” contained some rather vexing features, some of which were common to all four teacher education institutions (TEIs, viz., HKIEd, CUHK, HKBU and HKU), which I won’t detail here. Specifically for HKIEd, there was a “0” for the Certificate programme in Early Childhood Education (ECE) in 2007-08, down from 200 part-time places in the preceding year. There was also to be a reduction of provision for professional upgrading courses for in-service teachers. Neither of these would be directly connected with the demographic trend of declining pupil enrollment in the schools. On the positive side, there was the encouraging note that the student intake for the BEd (Primary) programmes across Hong Kong would be greatly increased. Since more than 80% of all BEd (P) students study at HKIEd, this was good news for us—if the enlarged quota would be allotted to us. Professor Morris, and the few other colleagues who knew about SEM Li’s phone call, were entertaining hope that the threat to allow the slashing of HKIEd student numbers would not fully materialize.

(2) The second letter

On 17 February 2004, an unprecedented thing happened. There was a second letter from UGC to the four TEIs giving a very different set of indicative student intake numbers—most significantly a reduction of BEd (Primary) places from 1330 in the first letter to 1050 in the second letter, and a slight increase of secondary school teachers to be trained from 1030 to 1050. There was no

explanation given in the second letter why this was to be, and we could see no justification on demographic grounds—the students recruited during the 2005-08 triennium will graduate between 2009 and 2012, when primary school enrollment is expected to stabilize while secondary enrollment would shrink. The “0” for the Certificate in ECE and the lowered provisions for in-service professional upgrading remained unchanged in the second letter.

Following the indicative numbers in the two letters, we at HKIEd had to plan for drastic changes in our programming and staff profile.

Meanwhile, we tried to find out the reasons behind the “0” for the Certificate in ECE. One senior EMB official told us he did not know where it had come from; another senior official confided it had been a clerical error which was then upheld at a higher level. We still do not know why.

(At about this time, a HKIEd delegation led by the Council Chairman, Dr Thomas Leung, met with SEM Li in the Central Government offices, during which the SEM again insisted on a merger with another university, while Professor Morris and I agreed only to explore deep collaboration.)

(3) The “Allocation Letter”

The decisions on our triennium proposals were announced on 7 May 2004, with the “Allocation Letter” from UGC. We found that our First Year First Degree (FYFD) places were to be reduced from 493 in 2004-05 to 433 by 2007-08. At the same time, with the “2+2” collaborative programmes we had agreed to launch with Lingnan, for some reason we could not fathom, all the resources would go to Lingnan, contrary to the announced principle of equal sharing of resources for equal contributions. Altogether, with the 200 part-time Certificate in ECE places restored and the cut in professional upgrading courses remaining, we would suffer a 16% cut in total fulltime equivalent student places. Some of the cutback of course would be attributable to demographic considerations; but some other reductions cannot be explained on educational or planning grounds. (Many places in the “Allocation Letter” attributes its decisions to “advice” from EMB.) Even if most of the cuts could be rationalized in one way or another, was it merely coincidental that all these cuts would be inflicted at the same time?

(4) The funding cut

During the summer and autumn of 2004, we at HKIEd prepared for the implementation of the triennium plan, the most painful part of which was to be the redundancy of some 16% of the teaching staff. We realized that with such a significant reduction in student numbers, and the phasing out of the “front-end loading” of additional resources given by UGC to newly established institutions, the budget cut would be over 20%. Little did we expect to learn on Christmas Eve from a newspaper report that HKIEd would be cut 33%, which rumour was confirmed when we received official notification from UGC after the holidays.

The fight by our staff and students against this cut to the bones is a moving story well known to many Honourable Members and need not be detailed here. I need

to mention only three more incidents relating to early childhood education and the cultural subjects.

(5) Kindergarten teacher education tenders

The HKIEd budget cut crisis in the early months of 2005 gave rise to an occasion for the early childhood education sector to speak up for training and upgrading opportunities for their teachers. While EMB was not prepared to increase the funding to UGC for early childhood education, and reluctant to accede to the sector's demand for HKIEd to be awarded more student places in their area of studies, the Bureau finally decided to put up a large sum of money to run tendered Certificate courses in Kindergarten Education (CE(KG)).

Unlike UGC which has long established procedures and a certain degree of transparency, such is not the case with EMB tendering processes. HKIEd has won 120 out of over 700 places each year for these CE(KG) courses, while more than 1000 students apply for admission to our programmes each year. Along with the competitors, viz., the extramural arm of HKBU and the VTC, we do not know on what criteria each won the number of places that it did. What we at HKIEd do know is that an independent survey of kindergarten principals conducted by CityU in 2006 rated our graduates much the highest among teachers trained in local institutions.

(6) Exclusion from EMB meeting on early childhood teacher education

Despite the CityU independent survey, and our role specified by UGC to train kindergarten teachers, HKIEd did not seem to be favoured by EMB. In June 2006 PSEM Mrs Law, in anticipation of the “voucher system” to be unveiled, convened a meeting of some tertiary institutions to ask them to organize programmes for training early childhood teachers. These institutions included ones that had not been given any role by UGC in the area of teacher education, but did not include HKIEd. (This was about the time when Professor Morris was given the ultimatum: merge or leave.) Again, we can think of no educational, professional, or planning reason for being excluded.

(7) Art, Music and Physical Education today

HKIEd has recently submitted the academic development plan for the “rollover year” of 2008-09. All the UGC-funded institutions were told that the roll-over year was a one-year extension of the current triennium and would not involve any significant changes in student numbers. We were originally informed that it would be the case also with regard to HKIEd’s student numbers. Then we received the “Start Letter” at the beginning of summer 2006, and this gave indicative student numbers of 0 for Art, Music and Physical Education. This means, in effect, that we shall have to close down our department for training Art, Music and PE teachers who are greatly valued in the schools—and HKIEd is the sole provider for some of these subjects. We have made strenuous efforts to argue to retain the student numbers given the importance of these subjects in the upcoming “3.3.4” senior secondary curriculum reform which calls for more emphasis on non-academic subjects and educating for creativity. Our request has

been denied. EMB officials stated their position on a projection that they expect a teacher surplus for 2012. This is a bizarre form of planning to require institutions to close down departments because of the demographic projection for a single year. It will destroy our capacity to train teachers in this area even when we are told that no decision has been made as to the years after 2012.

I may add also that giving the TEIs indicative student numbers subject-by-subject was an innovation made by UGC on EMB advice in 2004. This micro-management has given rise to serious problems for the work of all four TEIs, not only HKIEd. Prior to 2004, each institution was given an indicative student number for each qualification, without subdivision into subjects, which allowed them much more autonomy and flexibility to respond to societal needs.

To sum up: In all of the exercises where the HKIEd numbers have been cut, EMB rationalizes about demographic changes and declining demand for teachers. In the past we have seen many predictions that HKIEd graduates would be unemployed. However, it has become very obvious that these predictions were inaccurate. There is now a shortage of qualified primary school teachers. The HKIEd graduate employment rate is nearly 99% and there are now large numbers of untrained teachers being employed in our primary schools. All these facts clearly point to a shortage of qualified teachers, despite the projections of an oversupply.

The EMB's ability to expand the use of the tendering mechanism is symptomatic of broader issues. This expansion was made possible by a little noticed innovation of Financial Secretary Anthony Leung. Even since the UGC was established in the 1960s, there had been two distinct lines in the government budget for education: one for the UGC, the other for the Education Department. This was part of the structural underpinning which had made the UGC an effective buffer between the government and the higher education institutions. FS Leung combined the two budget lines into one "envelop" which he handed to the SEM. This gave the SEM the freedom to move funds between the higher education and school education sectors. The UGC was thereby rendered into a subordinate body under the EMB. Along with this budgetary change, the Secretary-General of UGC now found that his reporting officer is the PSEM. These changes which hardly caught the attention of the public and of the education community at the time, greatly eroded the independence and buffering role of the UGC, and tipped the balance between EMB and the institutions. This ought to be a major concern not only for HKIEd, but for Hong Kong's higher education system as a whole.

Mr Chairman, from the episodes that I have cited, clearly HKIEd has been treated differently. Every opportunity has been taken to cut our student numbers. We have been excluded from the PSEM's meeting to organize early childhood teacher education. The overall objective has been to require a massive reduction in both student and staff numbers. We believe it has been motivated by our unwillingness to agree to a merger and to silence colleagues. It will require a thorough investigation to establish the truth.

Finally, on an issue unrelated to resources, the Commission of Inquiry does not include in its terms of reference an investigation of the non-reappointment of

Professor Morris as President by the HKIEd Council because as he has stated, he was unwilling to implement a merger. You will be aware that apart from effectively controlling HKIEd's resources, EMB also determines the external Council members who are the ones that can vote on the appointment of the president and vice presidents. Why is that issue not being investigated?

Thank you for your time and patience.