

For discussion  
on 12 December 2011

Legislative Council Panel on Education

Injection into the Education Development Fund

**PURPOSE**

Members are invited to comment on our proposal to inject \$550 million into the Education Development Fund (EDF) to continue providing support for five years from 2012/13 to the school sector in making necessary adjustments arising from the education reform initiatives through school-based professional support programmes for quality enhancement of school education.

**JUSTIFICATION**

2. With the approval of the Finance Committee in July 2004 vide FCR(2004-05)26, the EDF was set up in the 2004/05 school year with a capital of \$550 million to provide differentiated school-based professional support (SBPS) for building schools' capacity in taking forward the education reform initiatives. Since its inception, the EDF has been supporting schools and teachers by way of the following five strands of SBPS Programmes, namely (i) Principal Support Network (PSN); (ii) School Support Partners (Seconded Teacher) Scheme (SSP); (iii) Professional Development Schools Scheme (PDS); (iv) University-School Support Programmes (USP); and (v) Collegial Participation in External School Review. These are based on empirical evidence and feedback from schools that work-embedded support, apart from taking courses, helps principals and teachers to build capacity effectively, in terms of development of a culture for learning, peer collaboration and generation of knowledge in a practical context. To provide support to the school sector in making adjustments arising from the education reform initiatives, the EDF has served to supplement the school-based curriculum support services through rallying flexible support to schools and gauging diverse expertise to add impetus needed for changes. Descriptions of the SBPS Programmes are in **Annex A**.

3. The demand for the support services under the five strands of SBPS Programmes has remained high over the years. In the past seven years, the EDF has provided some 3 800 school support services.<sup>1</sup> There is always over-demand for

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<sup>1</sup> An annual call circular is issued to invite schools to apply for SBPS. Each school can only apply for at most two services among the SSP, PDS and USP projects for each school year.

the SBPS services in the application exercises. On the average, about 40% of the primary and secondary schools, 30% of the special schools and 10% of the kindergartens in Hong Kong joined and benefited from these Programmes in each academic year since the introduction of the EDF in the 2004/05 school year.

4. Literature on education reform has consistently indicated that collaborative and work-embedded support for teacher professional development is instrumental to successful reform implementation and improved student learning. The education reform introduced in year 2000 is a mammoth undertaking. It comprises an extensive curriculum reform, changes to the Primary One and Secondary One admission systems and the senior secondary school academic structure as well as assessment culture. The resultant widened within-school student diversity has necessitated a paradigm shift to cater for the divergent needs, learning approaches and aptitudes of the students. Support at the school and classroom levels is thus essential to facilitate reflective practices and internalisation by teachers of the pedagogical changes envisaged by the reform. The school sector would understandably exhibit very diverse paces and approaches to embracing the challenge. Hence, the various school-based professional support programmes made possible by the EDF are an apt vehicle to engender reflective practices on the part of the teachers.

5. As revealed in the two evaluation studies completed in 2009 and 2011,<sup>2</sup> the SBPS Programmes supported by the EDF have contributed to a paradigm shift in teachers' pedagogical belief and practices as demanded by the education reform, which started in 2000 in basic education and was extended to the senior secondary levels in 2009. A summary of the achievements of the SBPS Programmes under the EDF is in **Annex B**.

6. Our experiences have shown that catering for the more divergent needs of students with different aptitude and inclination and adapting practices according to different school contexts are the greatest challenges. The strategic focus for the next phase of development will be consolidation of various effective learning methods, teaching and assessment strategies and school-based curriculum to cater for the diverse needs of students. EDF will also aim to foster leadership at schools, in particular at the middle managers' level, widen the dissemination of informed practice to improve learning methods, teaching and assessment strategies in the classroom, and support professional learning to support consolidation of the reform initiatives.

7. To build on what EDF has achieved and ensure consolidation of such progress into palpable and sustainable quality enhancement, we propose an

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<sup>2</sup> An external review of the SBPS was completed by Policy 21 Limited, University of Hong Kong in 2009 and an in-house review was completed on the efficacy of the SBPS programmes in 2011.

injection of \$550 million into the EDF for continuation of the school-based support programmes. An extension of five years should allow time for the changes to be progressively sunk in. We expect that conceptual and policy changes will translate into quality changes at the school and classroom levels when school leadership and the teaching force have internalised the paradigm shift.

8. We assess that the proposed injection will enable EDF to continue operation for five years from 2012/13 to support the school sector in making necessary adjustments arising from the education reform initiatives. We will actively monitor the efficacy of individual programmes to facilitate the internalisation of the pedagogy and assessment culture envisaged by the education reform for sustained quality enhancement of school education.

## **IMPLEMENTATION**

9. With new funding injection into the EDF, we will continue with the five strands of school-based professional support strategies and invite more experts and organisations from the relevant professional disciplines to join the SBPS Programmes to promote greater synergy. As and when appropriate, the mode of operation of the five strands of Programmes will be adapted to suit the latest circumstances and needs of the school sector. We plan to, for example, expand the scope of the University-School Support Programme by enlisting the support service of relevant non-governmental organisations with the capacity and proven record of providing quality school support programmes.<sup>3</sup> We also intend to make use of the platform of the School Support Partners Scheme so that suitable teachers who are awarded teachers of the Chief Executive's Award for Teaching Excellence can be engaged to play a role in the school-based support in their own schools or other schools on various theme-based or Key Learning Area projects.

10. For pre-primary sector, we plan to strengthen collegial support and synergise expertise from various sources ranging from experienced principals, cadre of outstanding teachers and other external sources, like tertiary institutions and Mainland teachers, to provide a wide range of support to teachers. As for the support for students with SEN, the increasing number and types of SEN students identified in each school, coupled with the encouraging development of a wide range cross-sector/disciplinary-basis teaching and learning resource packages for students of different SEN, has generated a demand for stronger and more effective school-based support that would integrate the specific strategies/resources in the normal classroom teaching. Besides, we will enlist external resources like tertiary institutions and resource schools (i.e. schools with proven track record in

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<sup>3</sup> For example, this may include innovative projects, which may or may not be funded by the EDF but with effectiveness demonstrated, in addressing the diverse needs of students, such as students with special education needs and/or personality and behavioural problems.

addressing the challenge concerned) to plan and render school-based support programmes to schools in a more coordinated manner for the support for non-Chinese speaking students. On this basis, we shall further consult the EDF Advisory Committee on implementation of the SBPS.

## **FINANCIAL IMPLICATIONS**

11. The accumulated expenditure for the SBPS Programmes since the inception of the EDF in the 2004/05 school and current cash position of the EDF is provided at **Annex C**. As of August 2011, the EDF has a balance of some \$165.6 million. Discounting the committed expenditure, the EDF is now holding an uncommitted balance of about \$60 million which is below the level of average annual expenditure of some \$77 million in the last five years (i.e. from 2006/07 to 2010/11). To facilitate planning for SBPS, especially when some of the programmes would be of two or even three- year long, we consider it appropriate to seek funding injection now. Subject to Members' views, we will seek the funding approval of the Finance Committee for an injection of \$550 million into the EDF to consolidate what EDF has achieved and help the school sector internalise the pedagogy and assessment culture envisaged by the education reform in the five years from 2012/13.

12. A tentative budget of the EDF is appended at **Annex D**. The expenditure will not be uniform among schools nor can it be accurately forecast across the span of a number of years.

## **PUBLIC CONSULTATION**

13. We presented the recent evaluation studies on the EDF at the EDF Advisory Committee in July 2011<sup>4</sup>. Members expressed strong support for the continuation of school-based support to help ensure consolidation of schools' capacity building efforts.

## **BACKGROUND**

14. Pursuant to FCR(2004-05)26, the EDF was set up in July 2004 and held in trust under the Permanent Secretary for Education Incorporated. The trustee

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<sup>4</sup> An advisory committee on the EDF comprising frontline teachers, principals, academics and community members has been set up since August 2004 to advise on the operation of the EDF and the implementation of the SBPS Programmes. A cross-divisional working group within the Education Bureau chaired by a Deputy Secretary has also been set up to oversee and monitor the delivery of the Programmes on a regular basis.

will invest the Fund in accordance with the authority set out in section 5 of the Permanent Secretary for Education Incorporation Ordinance (Cap. 1098). The income of the Fund has been applied in pursuit of the purpose for which it is established. Administrative expenditures are absorbed by EDB.

15. Audited accounts of the EDF have been tabled before the Legislative Council after the closing of the accounts at the end of each financial year. The Education Bureau submits annual progress report on the implementation of the SBPS Programmes to Legislative Council Education Panel by way of information paper.

Education Bureau  
December 2011

## Descriptions of the School-based Professional Support (SBPS) Programmes

The five strands of SBPS Programmes financed by the Education Development Fund are:

- a. Principal Support Network;
- b. School Support Partners (Seconded Teachers) Scheme;
- c. Professional Development Schools Scheme;
- d. University-School Support Programmes; and
- e. Collegial Participation in External School Review.

### **Principal Support Network (PSN)**

2 Experienced principals are invited to provide collegial support for partner principals. Network clusters are formed for interactive professional sharing among principals, with a view to enhancing their leadership skills through various modes of professional exchange activities. Other support activities are also provided under the PSN, such as the workshop/talk series of the “Middle Managers Learning Community” and the “Educational Leadership Programme”, to widen participants’ perspectives when evaluating their practices. Feedback revealed that the PSN had beneficial impact on both the seconded and partner principals as they actually learnt from each other in the network clusters. Positive feedback was also obtained from the participants of other activities, particularly on facilitating their self reflection and on nurturing a professional sharing culture among them.

### **School Support Partners (Seconded Teachers) (SSPs) Scheme**

3. Experienced local teachers are seconded, by invitation, on a part-time basis to provide peer support to teachers in other schools on various theme-based or key learning area projects and to establish platforms for professional sharing.

4. Under the “Mainland-Hong Kong Teachers Exchange & Collaboration Programme”, Mainland expert teachers are invited to work alongside local school teachers on various areas such as curriculum design and collaborative lesson planning and to share professional ideas and research outcomes so as to enhance the effectiveness of learning and teaching in Hong Kong schools.

5. A “Pilot Scheme on Hong Kong Teachers’ Exchange Activities to the Mainland” was launched in May 2010 to facilitate on-site exchange activities with schools in the Guangdong Province.

6. Evaluations on various programmes under the SSP Scheme suggest a the teachers of schools receiving the services commended highly on the effectiveness of those programmes in deepening their pedagogical skills and knowledge, through working closely with local/Mainland secondees in planning,

observing and evaluation of the curriculum. Practical knowledge experience thus gained were also consolidated and disseminated in public sharing seminars.

### **Professional Development Schools (PDSs) Scheme**

7. Schools with exemplary practices in learning and teaching and a good sharing culture are invited as PDSs. Each PDS will form a network with two or three partner schools focusing on specific pedagogical themes to foster an interactive collaborative culture and enhance the effectiveness of learning and teaching through various exchange activities. It has been indicated by the partner schools that the Scheme was effective in helping them to develop their own school-based curriculum or effective pedagogies, with practical and strategic suggestions, as well as the curriculum resources the PDSs had offered them. The experience gained and curriculum materials developed were shared and sustained by means of dissemination activities within the schools (e.g. internal sharing on staff development day) and in a wider community (e.g. public seminars, open lessons, etc.).

### **University-School Support Programmes (USP)**

8. Universities are commissioned to provide a diversified mode of support services to cater for the schools' development needs through connecting research-based pedagogies with classroom practices. It has been pointed out that the USP projects were able to help schools understand and implement the reform initiatives by providing them with a macro view and insights, bringing to them new ideas and teaching methods, and nurturing in them a collaborative and sharing professional culture. Publications and curriculum materials delivered by the projects also support schools' continual improvement and professional sharing among schools.

### **Collegial Participation in External School Review (ESR)**

9. Experienced serving principals and teachers are invited to serve as external reviewers of the ESR team. The partnership relation forged helps enhance their capacity for conducting self evaluation for continuous improvement. It was revealed that school self-evaluation and the external review helps the development of a self-reflective culture in schools. Teachers are more used to peer observations, collaborative lesson planning and co-teaching. Some of the seconded reviewers remarked that by taking part in the ESR, they could learn from the good practices of other schools and evidence-based evaluation.

**A summary of the achievements of  
the School-based Professional Support (SBPS) Programmes**

An Evaluation Study on the achievements of the SBPS Programmes was conducted in 2011 making reference to information collected through opinion surveys (annually distributed to all participant schools with about 80%-89% response rate), interviews/focus group discussion, the External Review report (including an opinion survey distributed to a stratified sample by types of SBPS programme and types of schools, with about 80% response rate) by Policy 21 Limited of the University of Hong Kong (2009), and observations made to the response and changes of projects participants and schools in different cases. Evidence corroborated from various resources suggests that in general, the participant schools/teachers considered the SBPS Programmes as effective in helping them understand and implement the education reform, and in facilitating learning in both teachers and students. The following summarises the key achievements of the SBPS Programmes.

**Objective**

**Achievements of the SBPS Programmes**

School level

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|---|---|
| (a) to support and strengthen schools' understanding of the reform aims and the connection among different reform elements                      | ✓ heightened awareness of the participating schools and teachers of the education reform<br>✓ improved understanding of the participating schools and teachers of various reform initiatives  |
| (b) to help schools prioritise these elements at school level   | ✓ high degree of implementation/adaptation of various reform measures observed in the participating schools, e.g. school-based curriculum development, assessment for learning, effective pedagogies, etc.  |
| (c) to bring coherence to processes and initiatives at school level to maximise the impact of the reform on teaching and learning in particular | ✓ changing culture in the schools towards teacher collaboration and reflection, school-based curriculum development and the continuation/adaptation of the effective pedagogical practices developed under the programmes<br>✓ the artifacts being generated in the practical school context (e.g. curriculum packages) that have provided the schools with necessary knowledge and skills in continuing the project activities |
| (d) to provide support tailored to school needs   | ✓ positive feedback by the participating schools and teachers on the flexibility and practicality of a wide range of expertise being drawn to provide support   |

## Objective

## Achievements of the SBPS Programmes

services tailored to their identified needs

### Teacher level

(e) to build professional capacity in schools to lead the reform

- ✓ increased subject and pedagogical knowledge and skills of the teachers
- ✓ established collaborative and reflective work culture in the participating schools
- ✓ changing atmosphere of classroom learning and teaching towards having a stronger focus on student learning, more teacher-student and student-student interactions, and more active student participation in class and after-class activities

### Student level

(f) to support student learning

- ✓ stronger confidence of teachers in their students' attainment of the basic competencies (in Chinese Language, English Language and Mathematics)
- ✓ students showed improved learning outcomes (e.g. improvement in enquiry learning, communication, etc), and an increased interest and enthusiasm in the learning

2. The achievements of the SBPS Programmes are consistent with the annual Key Learning Area surveys that showed schools' improvement in understanding and implementation of the reform at subject level. These achievements also reinforce the findings of the interim report of the curriculum reform which indicated the successfulness of different modes of on-site support provided by the Education Bureau to facilitate school-based curriculum development; and the EDF in scaling up the SBPS Programmes to offer a wide range and scope of services that cultivated a culture for learning, collaboration and improvement in the school community. These reform efforts have been indicated by McKinsey and Company (2009) in their report as one of the contributing factors to Hong Kong's system (among 20 others) being identified as having achieved significant, sustained, and widespread gains in student outcomes on international and national assessments.

3. The SBPS Programmes had also been provided to support schools in addressing evolving issues such as the learning of the Chinese Language for Non-Chinese Speaking students at different key learning stages, catering for learning diversity and students, the implementation of Liberal Studies, small class teaching and medium of instruction under the fine-tuning policy.

Annex C

**The accumulated expenditure for the School-based Professional Support Programmes since the inception of the Education Development Fund (EDF) in the 2004/05 school year and the Fund's current cash position**

School Year (Sept - Aug)	Accumulated Expenditure (HK\$ Million)								
	2004/05 (Actual)	2005/06 (Actual)	2006/07 (Actual)	2007/08 (Actual)	2008/09 (Actual)	2009/10 (Actual)	2010/11 (Actual)	2011/12 (Estimate)	2012/13 and beyond (Estimate)
<b>Principal Support Network (PSN)</b>	2.29	3.28	4.03	4.89	6.31	7.77	8.08	9.28	11.96
<b>School Support Partners (Seconded Teacher) Scheme (SSP)</b>	1.08	10.51	32.71	58.60	90.37	113.38	141.74	178.94	228.83
<b>Professional Development Schools (PDS) Scheme</b>	1.60	3.16	7.84	10.21	15.20	22.78	29.00	38.90	42.08
<b>University-School Support Programmes (USP)</b>	20.20	44.36	81.46	145.16	175.91	231.40	261.54	297.14	322.71
<b>Collegial Participation in External School Review (ESR)</b>	0.51	1.17	1.95	2.46	2.81	3.57	4.26	4.66	5.77
<b>External Review (ER) of SBPS/SBSS Programmes</b>	0.00	0.00	0.00	0.18	0.55	0.92	0.92	0.92	0.92
<b>Total*</b>	<b>25.7</b>	<b>62.5</b>	<b>128.0</b>	<b>221.5</b>	<b>291.2</b>	<b>379.8</b>	<b>445.5</b>	<b>529.8</b>	<b>612.3</b>

\*Yearly totals being rounded up to one digit after decimal.

**Cash Balance of EDF at the end of each School Year**

School Year (Sept - Aug)	Cash flow (HK\$ Million)								
	2004/05 (Actual)	2005/06 (Actual)	2006/07 (Actual)	2007/08 (Actual)	2008/09 (Actual)	2009/10 (Actual)	2010/11 (Actual)	2011/12 (Estimate)	2012/13 and beyond (Estimate)
<b>Income</b>									
Fund Injection	550.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Interests	11.13	6.98	16.93	16.07	6.44	1.76	1.86	1.29	0.65
<b>Expenditure</b>									
SBPS Programme Expenditure	(25.68)	(36.80)	(65.51)	(93.51)	(69.65)	(88.67)	(65.72)	(84.30)	(82.43)
<b>Cash Balance (by the end of Aug)*</b>	<b>535.5</b>	<b>505.6</b>	<b>457.1</b>	<b>379.6</b>	<b>316.4</b>	<b>229.5</b>	<b>165.6</b>	<b>82.6</b>	<b>0.8</b>

\*Yearly totals being rounded up to one digit after decimal.

**Annex D**

**Tentative budget of the proposed injection into the Education Development Fund (from the 2012/13 to 2016/17 school years)**

<b>Programmes</b>	<b>Programme costs (\$ million)</b>
<b>Principal Support Network (PSN)</b>	86
<b>School Support Partners (Seconded Teacher) Scheme (SSP)</b>	264
<b>Professional Development Schools (PDS)</b>	76
<b>University-School Support Programmes (USP)</b>	120
<b>Collegial Participation in External School Reviews (ESR)</b>	4
<b>Total:</b>	<b>550</b>