

EDUCATION COMMISSION

REPORT NO 2

(RETYPE DOCUMENT)

**August, 1986
Hong Kong**

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Chapter I Introduction

I.1 Appointment

I.1.1 The Education Commission was first established by the Governor-in-Council on 2 April 1984 in response to the Report "A Perspective on Education in Hong Kong" by the Visiting Panel published in November 1982 to submit to the Governor consolidated advice on the education system as a whole in the light of the needs of the community.

I.2 Terms of reference

I.2.1 The terms of reference of the Commission are as follows-

- a) to define overall educational objectives, formulate education policy, and recommend priorities for implementation having regard to resources available;
- b) to co-ordinate and monitor the planning and development of education at all levels; and
- c) to initiate educational research.

I.2.2 In carrying out these tasks, the Commission is to co-ordinate but not seek to direct the work of the Board of Education, the University and Polytechnic Grants Committee and the Vocational Training Council.

I.3 Report No 1

1.3.1 We examined the major observations in the Report of the Visiting Panel and completed Report No 1 in October 1984. On 8 January 1985 the Executive Council advised and the Governor ordered that the recommendations in Report No 1 should be accepted, other than the proposal to introduce a Bachelor degree course in Primary Education for selected primary school heads and teachers which was to be considered further by the Government.

I.3.2 We mentioned in Report No 1 that we intended to consider in subsequent phases of our work the other issues raised by the Visiting Panel which were not covered in Report No 1, and that we also intended to expand further on some of the issues examined in Report No. 1. We are committed to make reports to the Governor-in-Council from time to time following the completion of Report 1.

I.4 Membership

I.4.1 Upon the expiry of the first term of office, the Commission was re-appointed for the period 1 April 1986 to 31 March 1987. Its membership since 1 April 1986 has been as follows -

Chairman - Dr the Honourable Q W LEE, CBE, JP

Vice-Chairman - Secretary for Education and Manpower
(the Honourable J N HENDERSON, OBE, JP)

- Ex officio Members
- Chairman of the Board of Education
(the Honourable Peter C WONG, CBE, JP)
 - Chairman of the University and Polytechnic Grants Committee
(the Honourable John SWAINE, OBE, QC, JP)
 - Chairman of the Vocational Training Council
(the Honourable CHAN Kam-chuen, OBE, JP)
 - Director of Education
(Mr Michael LEUNG, JP)
 - Deputy Financial Secretary
(Mr Selwyn ALLEYNE, CBE, JP)
- Members
- Miss Kathleen BARKER, MBE, JP
 - Mr Peter LEE Shung-tak
 - Professor Brian LOFTS, OBE, JP
 - The Honourable Maria TAM Wai-chu OBE, JP
 - Mr Brian TISDALL, JP
 - Dr Raymond WU Wai-yung, JP
 - The Honourable YEUNG Po-kwan, CPM, JP
- Secretary
- Principal Assistant Secretary for Education and Manpower
(ex officio)

I.5 Changes of membership

I.5.1 Mr Michael Leung was appointed Director of Education from 7 December 1984 and replaced Mr C H Haye as an ex officio Member of the Commission.

I.5.2 The Honourable John Swaine was appointed Chairman of the University and Polytechnic Grants Committee with effect from 1 January 1985 and replaced the Honourable Mr Justice T L Yang as an ex officio Member of the Commission.

I.5.3 Mr Brian Tisdall was appointed a Member of the Commission from July 1985 to replace Mrs Betsy Lee who resigned from the Commission with effect from 1 December 1984.

I.5.4 The Honourable Chan Kam-chuen was appointed Chairman of the Vocational Training Council from 1 April 1986 and replaced Dr Francis Tien as an ex officio Member of the Commission.

I.5.5 We wish to put on record our appreciation of the invaluable service rendered by Mr C H Haye, the Honourable Mr Justice T L Yang, Mrs Betsy Lee and Dr Francis Tien.

I.6 Temporary official members

I.6.1 During the period of writing this report, several Members took leave and were replaced as follows -

Mr M Pagliari acted as Secretary for Education and Manpower in place of the Honourable J N Henderson, and thus as the

Vice-Chairman of the Commission during the periods of 16 June to 6 July 1985, 17 September to 31 October 1985 and 20 March to 8 April 1986;

Mr Michael Leung acted as Secretary for Education and Manpower in place of the Honourable J N Henderson, and thus as the Vice-Chairman of the Commission from 8 to 18 July 1986;

Mr A N Savage acted as Deputy Financial Secretary in place of Mr S E Alleyne and thus as an ex officio Member of the Commission from 30 July to 28 September 1985 and 30 June to 23 August 1986; and

Mr Y T Li acted as Director of Education in place of Mr Michael Leung and thus as an ex officio Member of the Commission from 21 July to 29 August 1986.

I.7 Acknowledgements

I.7.1 We would like to thank the Board of Education; the University and Polytechnic Grants Committee; the Vocational Training Council; the Hong Kong Examinations Authority Secretariat; various tertiary and post-secondary educational institutions, secondary schools' representative bodies, and pre-primary groups; and many government officers and departments for their advice and assistance.

Chapter II Review

II.1 Background

II.1.1 In Chapter IX of our first Report we set for ourselves a programme for future work.

II.1.2 We stated that in the next phase of our work we should be considering the issues raised by the Visiting Panel which were not covered in the first Report, including -

- a) strengthening curriculum planning and development, including promoting civic education;
- b) kindergarten education;
- c) the role of the Hong Kong Examinations Authority;
- d) sixth form education;
- e) development of tertiary education; and
- f) special education.

II.1.3 We said at the same time that we wished to expand further on some of the issues touched upon in our first Report, including -

- a) teacher preparation (specifically graduate teacher preparation, organisation of the colleges of education and harmonisation of preparation for graduate and non-graduate teachers);
- b) development of the teaching profession;
- c) priorities and organisation of open education; and
- d) review of the present modes of financing of education.

II.1.4 We added the rider that these lists of issues were a guide to the programme of work which we envisaged for the next phase of our work, and were not meant to be comprehensive.

II.2 Contents of Report No 2

II.2.1 In the event we found it necessary to review our own priorities. We could not address all the issues we had previously identified in one exercise, and we decided that certain items required our attention first.

II.2.2 Accordingly the principal subjects which we have examined in this Report are -

- a) progress report on Report No 1 (Chapter III);
- b) language in education (Chapter IV);

- c) pre-primary services (Chapter V);
- d) the development of sixth form education (Chapter VI);
- d) teacher preparation (Chapter VII);
- e) open education (Chapter VIII);
- f) financing of education (Chapter IX).

II.2.3 Other matters considered are covered in Chapter X, and include -

- a) civic education;
- b) special education;
- c) academic awards;
- d) fees for senior secondary and sixth form education, colleges of education and adult education;
- e) provision of secondary school places; and
- f) noise abatement measures in schools.

II.2.4 We have specified in Chapter XII the areas which we expect to examine in future phases of our work, although we have decided not to specify either an order of priority or a sequence for their consideration at this stage.

II.3 Structure of future reports

II.3.1 We have found that the size and scope of the subjects covered in this Report has been a considerable strain on both the Commission itself and on the resources of the Government branches and departments advising us. We therefore intend in future to restrict the scope of each Report to a smaller group of subjects or even to a single subject, while continuing to work on a number of topics simultaneously. This should allow us greater flexibility in the timing of our work, and also achieve a more regular output of more manageable Reports.

II.4 Consultation

II.4.1 The complexity of the issues in this Report is responsible for the greater length of time which we have needed to complete it than we originally planned. We have held extensive consultations with a variety of parties over the issues of pre-primary services, the development of sixth form education and open education. We have also received representations from a great many bodies and persons on a wide variety of subjects. These are recorded at Annex IIA.

II.5 Nature of Report No 2

II.5.1 We should explain that this second Report is somewhat different in nature from our first Report. For the first Report our task was to make recommendations within a short time scale on the more specific suggestions in the Visiting Panel's Report, taking into account the considerable volume of public opinion put forward in response to that Report. In this present Report to a large extent we have been dealing with more complex issues - issues such as sixth form education,

which has long been a matter of controversy, where no consensus of public opinion existed; and pre-primary services, where we have had to look back towards first principles to formulate a new statement of policy; open education, where for the post-secondary level we have had to devise the elements of an entirely new programme; and the financing of education, where we have had to take a different approach to the problem and propose a methodology which will make the identification of costs and determination of priorities easier.

II.5.2 This means in our view that this second Report should be seen by the Government and the public as a document of a different nature from our first Report. On all the subjects which we have addressed we have given a clear statement of objectives and put forward a firm and precise programme to achieve these objectives. We think that our proposals are bound to produce a wave of public interest and comments. We therefore recommend that our Report should be published as soon as possible so that the Administration is able to take public comments into consideration before making final policy decisions on our proposals and their implementation.

II.5.3 At the same time we have identified several specific proposals which, as a matter of urgency, should be implemented without delay. These proposals are highlighted in the following chapters.

II.6 Recommendation

II.6.1 In sum, we RECOMMEND that our Report should be published as soon as possible so that the Administration is able to take public comments into consideration before making final policy decisions on our proposals and their implementation.

Chapter III Progress Report on Report No 1

III.1 Introduction

III.1.1 We are conscious of the fact that the issues tackled in Report No 1 require to be followed through, and accordingly we have monitored the progress of our proposals. We include here a review of the progress up to July 1986.

III.2 Junior Secondary Education Assessment system

- III.2.1
- (1) The provision of subsidised post-F 3 education opportunities, comprising vocational education in the form of one-year full-time basic craft courses in technical institutes and training centres as well as general education in the form of F 4 places in secondary schools, should be expanded (paragraph 2.13).
 - (2) For the purpose of educational planning, a total annual provision of 7600 one-year full-time basic craft places should be allowed for from about 1989-90 onwards (paragraph 2.16).

- (3) If the proposal by the Vocational Training Council to run one-year full-time bridging courses to technician studies for about 600 selected graduates of full-time craft courses in technical institutes is accepted by the Government, an additional technical institute should be provided by, say, 1989 to meet the consequential additional number of full-time basic craft places required to maintain the output of craft trainees required by industry (paragraph 2.19).

We note that the Vocational Training Council is exploring the possibility of building additional floors/annexes to two existing technical institutes, instead of an additional technical institute, to achieve the targeted annual provision of 7600 full-time basic craft places and about 600 full-time bridging places by 1989-90.

- III.2.2
- (4) A 5% rate of provision for repetition should be adopted for the purpose of planning the secondary school requirement and 10 new schools should be built under a Stage V (Phase II) of the Secondary Schools Building Programme (paragraphs 2.24 and 2.25).

We note that the proposed Stage V (Phase II) (see Annex IIIA) has been approved by the Finance Committee of the Legislative Council and is scheduled for completion by 1992.

- III.2.3
- (5) The class pattern of existing pre-vocational schools should be modified from 77722 to 66644 and four new pre-vocational schools should be provided under a Stage VI of the building programme to accommodate the displaced lower forms (paragraph 2.27 (a) and (b)).
 - (6) F 4-5 places in satisfactory private independent schools should be bought and the consequential reduction in F 1-3 bought places should be compensated by the provision of 10 new schools under a Stage VI of the building programme (paragraph 2.27 (c) and (d)).

We note that the proposed Stage VI (see Annex IIIA) has been approved by the Finance Committee and is targeted for completion between 1988 and 1993. The four prevocational schools will be located respectively in Yuen Long, Tai Po, Sha Tin and Junk Bay; the other ten new schools will be allocated to districts where demand for school places is greatest.

- III.2.4
- (7) For planning purposes, the 24 schools proposed under Stage V (Phase II) and Stage VI of the building programme should be provided over the period 1989 to 1993 (paragraph 2.29).

We note that the target completion dates of several new schools have been advanced for one year, and Stages V (Phase II) and VI are scheduled for provision over the period 1988 to 1993.

- III.2.5 (8) The JSEA should be phased out in 1991 subject to the acceptance and implementation of the recommendations at items (1) to (7) above and to the formulation of a new means of placement to be devised by the Education Department (paragraphs 2.33 and 2.35).

We understand that the Education Department has established a working party in early 1985 to review the operation of the JSEA, to recommend improvements and to devise a new scheme of placement. Concerned parties are being consulted on the working party's recommendations which include, inter alia, a new scheme of placement to replace the existing JSEA in 1991.

- III.2.6 (9) The curriculum for secondary education should continue to be revised and the examination system should be reviewed and revised as appropriate in parallel with the provision of more subsidised post-F 3 places to achieve the phasing out of the JSEA (paragraph 2.36).

We understand that the Education Department has initiated discussions with the Hong Kong Examinations Authority on proposals for the broadening of the senior secondary curriculum and the review of public examinations at the Certificate of Education level with a view to catering for students of a wider range of ability.

- III.2.7 (10) The Education Department should now conduct the deferred formal operational review of the JSEA (paragraph 2.37).

This item is covered by III.2.5 above.

III.3 Language in education.

- III.3.1 (11) An additional graduate teacher of Chinese should be provided to every secondary school with 18 classes or more to improve the quality of Chinese teaching (paragraph 3.12).

We understand that this proposal will be implemented in September 1988. We have made a further proposal for the smaller secondary schools, which is set out in Chapter IV.

- III.3.2 (12) Expatriate lecturers of English should be recruited for the Colleges of Education and the Institute of Language in Education (paragraph 3.13).

We note that a phased recruitment exercise is in progress and a number of new recruits are expected to be in post by September 1986.

- III.3.3 (13) Secondary schools should be encouraged to employ locally available native English speakers with teaching qualifications to teach English (paragraph 3.13).

We understand that the Government is developing proposals to recruit qualified English teachers whose mother tongue is English.

- III.3.4 (14) Individual secondary school authorities should be encouraged to adopt Chinese as the medium of teaching (paragraph 3.18).
- (15) Secondary schools which use Chinese as the instructing medium should be given additional resources to strengthen the teaching of English to avert any consequential drop in the standard of English due to reduced exposure (paragraphs 3.19 - 3.20).

- (16) A set of comprehensive and clear guidelines should be made available to assist individual secondary school authorities to decide on the language mode of instruction (paragraph 3.21 (a)).

The findings of the research projects on the medium of instruction mentioned in paragraph 3.17 of Report No 1 are reported in Chapter IV. We note that the Education Department has issued a circular and guidelines to Government and aided secondary schools as a first step towards the implementation of the policy of "positive discrimination" in favour of schools using Chinese as the medium of instruction by 1988.

- III.3.5 (17) Secondary schools should be provided with information on the English proficiency of their F I entrants to assist them in grouping their pupils (paragraph 3.21 (b)).

We understand that a language profile test will be made available to schools in 1987.

- III.3.6 (18) Teacher preparation for new and serving teachers should be modified to prepare for a wider use of Chinese in the classroom (paragraph 3.21 (c)).

We understand that all pre-service College of Education courses and the In-service Course of Training for Teachers will be suitably modified with effect from September 1986. The retraining course for serving secondary school teachers will also be modified by 1987. In addition refresher courses for graduate and non-graduate teachers of those subjects which would be taught in Chinese are planned for introduction by 1987.

- III.3.7 (19) Handbooks with technical terms in both languages for the various subjects taught in secondary schools should be compiled and issued to secondary school teachers (paragraph 3.21 (d)).

We understand that handbooks will be issued to secondary school teachers for use during the 1986-87 school year.

- III.3.8 (20) The Chinese and English syllabuses should be redesigned and textbooks in both languages should be published so that they will be available to all schools regardless of the language mode chosen (paragraph 3.21 (e)).

We note that a revised English language teaching syllabus has been introduced in primary schools; a revised English language syllabus for

secondary schools will be introduced, in stages, from September 1986. Revisions of Chinese language syllabuses are in progress.

We also note that the Chinese Textbooks Committee has been established to -

- a) identify the demand for Chinese textbooks, including textbooks for the teaching of the Chinese language, in the light of the policy to encourage schools to use Chinese as the medium of instruction; and
- b) ensure the availability of a variety of good secondary school textbooks written in Chinese in different subjects at different levels on the market for use by the 1989-90 school year to meet the needs of schools.

- III.3.9 (21) An end should be put to the distinction between Anglo-Chinese and Chinese Middle schools by encouraging the removal of such references from the names of schools (paragraph 3.21 (f)).

We note that this encouragement is given in the circular referred to in recommendations (14) to (16) above.

- III.3.10 (22) Further consideration should be given to a proposal to remove the language medium indicator in the Hong Kong Certificate of Education by the relevant authority (paragraph 3.24).

We understand that the Hong Kong Examinations Authority will remove the language medium indicator on the HKCEE result slip and the certificate from 1986 onwards.

- III.3.11 (23) More schools should be encouraged to teach Putonghua either during school hours or as an extra-curricular activity (paragraph 3.27).

We note that Putonghua will be formally introduced as an independent and optional subject in the primary curriculum in September 1986. The Putonghua Pilot Scheme for secondary schools will be completed in 1987. Guidelines on the promotion of Putonghua through extra-curricular activities have now been issued to schools. In-service training programmes on Putonghua have been launched. Putonghua will be offered as a part of pre-service training to suitable students by the colleges of education in September 1986.

III.4 Teacher preparation and the teaching service

- III.4.1 (24) A new college of education should be provided to strengthen both the quality and quantity of teacher preparation (paragraph 4.11).

We understand that the new college project is now in Category B of the Public Works Programme and will be built in Shat Tin by 1990/91.

- III.4.2 (25) A proposal currently in hand to introduce a Bachelor degree in Primary Education to promote leadership at the primary school level should be implemented. (paragraph 4.13).

The Government has yet to accept the proposal. We have reaffirmed our support in Chapter VII of this Report.

- III.4.3 (26) Teachers of craft and technical subjects should be encouraged to update themselves on the latest technological developments (paragraph 4.16).

We understand that the Hong Kong Technical Teachers' College runs updating courses as required. Pre-service training stresses the need for teachers to keep up to date with developments.

- III.4.4 (27) College of Education should continue to give priority for entry to teacher education courses to mature age applicants who have experience of work other than teaching (paragraph 4.17).

We have been told that the Hong Kong Technical Teachers' College gives preference to mature students with industrial or other appropriate working experience. The In-service Courses of Training for Teachers permit mature people to receive training while working as permitted teachers.

- III.4.5 (28) Teachers should continue to play an active role in curriculum development and more attention should be given to secondary school curriculum (paragraph 4.19).
- (29) Curriculum development should be progressively decentralised (paragraph 4.19).
- (30) Schools should be encouraged to develop more teacher participation in decision-making, initially in respect of professional matters and gradually extending to general administration (paragraph 4.20).

The Education Department is reviewing these issues, and we expect to be consulted on proposals in due course.

- III.4.6 (31) In the interest of allowing schools more freedom and flexibility, consideration should be given to the simplification of the codes of aid (paragraph 4.21).

We understand that a review is in progress and the schools councils will be consulted in due course.

- III.4.7 (32) Teachers, principals, school managements and sponsors should be encouraged to co-operate, through the co-ordination of the Education Department, to produce a 'code of practice' for the teaching profession (paragraph 4.32).

We understand that teachers associations and other educational bodies are being consulted on the proposed Code of Practice.

- III.4.8 (33) Government should first set up a regional teachers' centre to assess its viability. In the long-term, regional teachers' centres should be set up with Government assistance and managed by the teaching profession (paragraph 4.33-4.35).

We note that the first centre is planned to be set up in North Point by September 1987.

III.5 Open education

- III.5.1 (34) Whilst we endorse UPGC's recommendation that an open university should not be established in Hong Kong, we shall, in the next phase of our work, examine the development of open education at all levels (paragraph 5.16).

We have examined proposals for open education at the secondary and tertiary levels, details of which are set out in Chapter VIII.

III.6 Educational research

- III.6.1 (35) The educational research efforts of the Educational Research Establishment of the Education Department, the two universities, the two polytechnics and the Institute of Language in Education should be sustained (paragraph 6.8).
- (36) All educational research activities should be co-ordinated with the planning and formulation of educational policies (paragraph 6.8).

We understand that educational research is on-going; in particular we note that the Educational Research Establishment has completed the research projects on the medium of instruction referred to in Chapter IV.

III.7 Financing of education

- III.7.1 (37) Given the priority accorded to the issues discussed in this Report by the Panel and in view of the very strong educational and social reasons advanced for the various recommendations contained in this Report, the indicated order of costs for their implementation should be accepted (paragraph 7.8).

The Finance Committee of the Legislative Council noted the financial implications of our recommendations in Report No 1 on 20 November 1985.

Chapter IV Language in Education

IV.1 Introduction

IV.1.1 We discussed the subject of language in education at length in Chapter III of Report No 1. In this Chapter we wish to put forward supplementary recommendations on both the teaching of Chinese and the medium of instruction in schools.

IV.2 Teaching of Chinese in schools

IV.2.1 We examined the teaching of languages in schools in Report No 1 and endorsed the view that Hong Kong must educate its younger generation to be competent in both Chinese and English. We recommended in paragraph 3.12 of Report No 1 that an additional graduate teacher of Chinese should be provided to every secondary school with 18 classes or more. We noted that the quality of Chinese teaching in smaller secondary schools would also need to be improved but that as the Chinese teaching load in these schools did not justify the provision of an additional teacher, other solutions would need to be devised.

IV.2.2 In this phase of our work we have considered the issue further. In September 1988 there will be 22 smaller Government and aided secondary schools with an ultimate class structure of fewer than 18 classes. In these smaller schools, the workload of each teacher of Chinese is just as heavy as it is for teachers in larger schools. We feel that they should be provided with the

equivalent entitlement in posts to an additional 0.5 teacher of Chinese. Such an additional provision would bring the total teaching workload of a teacher of Chinese in these schools close to the maximum that forms the basis of our earlier recommendation for larger secondary schools, i.e. subject to the teaching constraints of each school, each teacher of Chinese should cover 26 to 28 periods a week and should preferably not teach Chinese language to more than three classes.

IV.2.3 We propose non-graduate posts instead of graduate posts for the additional teachers of Chinese for smaller schools. This is because in September 1985 the Finance Committee of the Legislative Council approved the provision of the equivalent entitlement in posts to 0.5 non-graduate teacher posts for school librarians with effect from September 1986 for the same group of smaller schools: the provision of 0.5 additional non-graduate posts for teachers of Chinese at the same time would greatly simplify the implementation of the two schemes, in that each school would then be entitled to one additional non-graduate teacher in 1986. The provision of non-graduate rather than graduate posts should not have an adverse effect on the quality of Chinese teaching in the schools concerned, since principals have considerable flexibility in the deployment of graduate and non-graduate staff within the approved ratio.

IV.2.4 We have therefore recommended that with effect from September 1986 an additional 0.5 non-graduate posts for teachers of Chinese should be provided for Government and aided secondary schools with fewer than 18 classes. The net additional annual recurrent cost of the Chinese language proposal at

mid-point 1985 salary should not exceed \$850,000. We note that this has now been approved by the Finance Committee of the Legislative Council.

IV.3 Medium of instruction in schools

IV.3.1 We stated in paragraph 3.17 of Report No 1 that the Education Research Establishment (ERE) of the Education Department was undertaking four research projects on the medium of instruction in secondary schools. On the assumption that these research efforts would substantiate the two popular beliefs, namely that, all other things being equal, teaching and learning would be generally more effective if the medium of instruction were the mother tongue, a view endorsed by the Panel, and that the consequential loss of exposure to English might result in a fall in the standard of the latter language, we made a number of recommendations on the medium of instruction in paragraphs 3.18 to 3.24 of Report No 1 to strengthen further the teaching of English and to remove any perceived difference between schools using different media of instruction. We stressed that these recommendations might have to be refined or modified when the findings of the research projects were available.

IV.3.2 The four research projects, three of which were undertaken with the two universities, were completed in late 1985 and a summary of their objectives, methodology and findings is at Annex IVA. Some of the more important findings are set out below.

IV.3.3 In all the research projects, pupils with high language proficiency scores performed better in both the English and Chinese versions of the achievement

tests. However, when tests were set in English only, pupils with low English language proficiency tended to perform at a lower level than those taking the same tests in the Chinese or the bilingual versions.

IV.3.4 There appears to be a threshold for English language proficiency at and above which the use of English as the teaching medium is feasible. There also appears to be a level below which pupils suffer an educational disadvantage if English is used as the medium of instruction.

IV.3.5 Pupils of low English proficiency preferred their teachers to use more Chinese, and bilingual texts and tests improved their test scores.

IV.3.6 Chinese Middle school pupils in the same ability range as their counterparts in Anglo-Chinese schools tended to do better in all the subjects tested apart from English. The differences were less obvious in the science subjects, where it appears that learning is less dependent upon the language of instruction.

IV.3.7 The language proficiency of pupils appears to be dependent upon the nature and extent of an individual's exposure to a particular language. The English language proficiency of pupils in Anglo-Chinese schools was found to be superior to that of pupils in Chinese Middle schools, while pupils in the latter were found to be more proficient in Chinese than their peers in Anglo-Chinese schools.

IV.3.8 In general the research findings substantiate the two assumptions on which the Commission has been working provisionally. They confirm that the majority of the pupils would benefit if Chinese were used as the

medium of instruction in lower forms. Only pupils of high English language proficiency would seem to benefit from the use of English as the medium of instruction. The research findings also show that to adopt Chinese throughout as the medium of instruction at the junior secondary level would probably lead to a drop in the standard of English in secondary forms.

IV.3.9 Apart from the above research projects, the ERE has also conducted a study on the effectiveness of split class teaching of English (Annex IVA.) We had recommended such small class teaching in secondary schools using Chinese as the medium of instruction to strengthen their teaching of English to avert any consequential drop in the standard of English due to reduced exposure (paragraph 3.19 of Report No 1). In the event, split class teaching did not prove to be particularly effective, except in the listening performance of pupils, although it was popular with both teachers and pupils. This research finding is probably a reflection of the fact that, to be effective, split class teaching requires different teaching methods and approaches from those used in conventional classroom teaching.

IV.3.10 In the light of these findings, we now advise that our recommendations on the medium of instruction put forward in paragraphs 3.18, and 3.20 to 3.24 of Report No 1 should be implemented fully. Given the inconclusive findings on split class teaching, we propose that the recommendations in paragraph 3.19 of Report No 1 should be implemented with sufficient flexibility so that schools are allowed to use the resources provided for split class teaching for other measures (such as additional remedial teaching) to strengthen the teaching of English.

IV.3.11 We also recommend that there should be further research into split class teaching of English and other measures to strengthen the teaching of English.

IV.4 Summary of recommendations

IV.4.1 In sum, we RECOMMEND that -

- a) with effect from September 1986 an additional 0.5 non-graduate posts for teachers of Chinese should be provided for Government and aided secondary schools with fewer than 18 classes (paragraph IV.2.4);
- b) the recommendations in paragraph 3.19 of Report No 1 should be implemented with sufficient flexibility so that schools are allowed to use the resources provided for split class teaching for other measures (such as additional remedial teaching) to strengthen the teaching of English (paragraph IV.3.10); and
- c) there should be further research into split class teaching of English and other measures to strengthen the teaching of English (paragraph IV. 3.11).

IV.4.2 In view of the tight time schedule for recommendation (a), we wish to see its implementation commence ahead of consultation on this Report.

Chapter V Pre-primary Services

V.1. Introduction

V.1.1 We stated in Report No 1 that we would consider the issue of kindergartens in this phase of work. In the course of our deliberations we decided that we could not consider kindergartens in isolation from other pre-primary institutions, namely the child care centres. We decided to look at kindergartens and child care centres together, although the improvements which we recommend relate to the standards of kindergartens in particular.

V.2 Observations by the Visiting Panel ⁽¹⁾

V.2.1 The Visiting Panel in its study of kindergartens advocated that very high priority should be given to the training of early childhood professional and ancillary staff. It looked into the services provided by kindergartens and child care centres and advised that the fee assistance scheme for both types of early childhood provision should be monitored to ensure that it provided both for equity among parents and for the balanced development of quality programmes between the two. It pointed out that "the conceptual basis for distinguishing

⁽¹⁾ The subject of kindergartens was dealt with by the Panel in Section III. Chapter 3 of its Report.

between regulations, fees and standards for child care centres as distinct from kindergartens seems weak; policies are difficult to implement". In conclusion the Panel was of the view that "there is no alternative [for the Government] but to become more interventionist in policy determination" and that "in the long term, kindergartens should become part of the aided sector".

V.3 Government policy on pre-primary services

V.3.1 Government policy on pre-primary services was discussed in the 1980 Green Paper on Pre-school Services and Primary Education and then revised in the 1981 White Paper on the same subject. The 1980 Green Paper recognised that kindergartens play a valuable role in the development of the pre-school child. It pointed out that "while the principal objective of a child care centre is care, there should be no difference in the pre-school education available in a child care centre and in a kindergarten". To distinguish between kindergartens and child care centres for regulatory enforcement, it was proposed that no kindergartens should receive any group of children for more than four hours a day and any institution permitting attendance for more than four hours a day or providing luncheon facilities would need to be registered under the Child Care Centres Ordinance. It rejected the proposal for the unification of kindergartens and child care centres on the grounds that the resultant administrative upheaval would not be justified by the marginal advantages to be gained.

V.3.2 In response to public reaction to the Green Paper, the 1981 White Paper attempted to distinguish between kindergartens and child care centres by age on the basis that most younger children require the more care-oriented approach offered by child care centres, while the older group of four and five year-olds are more capable of profiting from a more structured approach to education offered by kindergartens. This new distinction, however, was also received unfavourably and has never been implemented.

V.4 Present provision of pre-primary services

V.4.1 There are about 25 000 places in registered child care centres and nearly 230000 children enrolled in kindergartens. A breakdown of the types of child care places and kindergarten enrolment is shown in Annex VA. Kindergartens and child care centres together provide care and education for a common pre-primary population aged three to five, with the exception that child care centres extend their services also to include two year-olds and below.

V.4.2 We accept that in practice both kindergartens and child care centres are involved in educational activities. The nature of service provided by kindergartens resembles in the main that provided by child care centres; the difference in practice rests with the additional element of care in child care centres reflecting the longer period each day, and the number of days in the year, during which the child is being looked after by the institution. Annex VB summarizes the differences between the two in accordance with the Child Care Centres Ordinance (Chapter 243) and the Education

Ordinance (Chapter 279). Children attending kindergartens and whole-day nurseries ⁽²⁾ come under the same fee assistance scheme administered by the Social Welfare Department. However, the fee assistance scheme for whole-day nurseries covers meal charges, in contrast to that for whole-day kindergartens.

V.4.3 The Government provides different forms of support for kindergartens and child care centres. All kindergartens are privately operated, although some 40% of them are or claim to be non-profit-making (Annex VC). To an increasing extent the Government is involved in the provision of kindergarten places, namely through the rate and rent reimbursement schemes for those kindergartens which have established their non-profit-making status, the Housing Authority's special efforts in allocating kindergarten premises in public housing estates to non-profit-making sponsors, and the formulation of town planning standards and guidelines on kindergarten provision.

V.4.4 The provision of whole-day nurseries is an integral part of the Government's social welfare policy. The Government sees the need to provide sufficient whole-day nursery places for all children, aged two to below six, who cannot be cared for by their parents during the day but whose parents cannot afford to pay the

⁽²⁾ More than 70% of child care centre places are found in whole - day nurseries, which are for children aged two to below six with a demonstrated social need for whole-day institutional care.

full cost of day care services. The Social Welfare Department adopts a planning ratio of 100 places to 20000 population in reserving welfare premises for whole-day nurseries. Non-profit-making whole-day nurseries may apply for a grant from the Lotteries Fund towards the fitting out of premises. In addition, they may receive a subvention equivalent to 5% of the total approved fee income to cushion the operator against any loss of income caused by vacancies.

V.5 Consultation: views of pre-primary groups

V.5.1 In the course of our study we have had the benefit of the views of the Board of Education. We have also consulted twelve pre-primary groups and received a number of submissions on pre-primary services (see Annex IIA). The views expressed by the groups and in the submissions can be summarised as follows-

a) Need for pre-primary services

Pre-primary services were regarded as important for the care and intellectual development of young children and should therefore be subsidized by the Government.

b) Unification of pre-primary services

It was advocated that all kindergartens and child care centres should be unified and governed by the same standards and regulatory measures. The only distinction among the pre-primary institutions should be their hours of operation, i.e., whole-day and half-day. Together they should provide pre-primary services for children aged two to below six.

c) Teacher preparation

The twelve-week in-service course for the training of assistant kindergarten teachers was regarded as inadequate. The two-year in-service course for the training of kindergarten teachers should be expanded and a one year pre-service course should be introduced. There was a need for refresher courses for kindergarten teaching staff and improved training for the lecturing staff of kindergarten teacher training courses. The ultimate goal should be 100% trained teaching staff for all kindergartens.

d) Salaries for teachers

It was proposed that there should be a normative salary scale for kindergarten teaching staff to enhance their job security and status. The salaries should be increased to reduce staff mobility.

e) Fee assistance to parents

The existing fee assistance was regarded as inadequate. The maximum income ceiling for fee assistance should be relaxed to reduce the burden on parents. The application procedures should also be streamlined.

f) Subsidies for kindergartens

It was proposed that there should be subsidies for kindergartens to cover salary increases and improvements in space standards.

g) Curriculum guidance

It was also proposed that there should be more guidance from the Education Department on the development of kindergarten curriculum, especially on the linkage between the curriculum of kindergarten and Primary 1.

V.6 Is kindergarten education essential?

V.6.1 We have considered the educational arguments for kindergarten education to decide if it is essential. We feel that such a judgement is necessary as the basis for any recommendation as to the degree of Government assistance for kindergartens.

V.6.2 We note that there is a lack of local research on which to assess the value of kindergarten education. Earlier studies overseas at first seemed to demonstrate that pre-primary education did confer positive benefits on children participating; but later studies suggested that there was a phenomenon known as the "suntan" effect, i. e. the comparative advantages experienced by such children disappeared by the end of primary education. We noted with particular interest, however, a major longitudinal survey conducted by Cornell University in the United States. Results from this study confirm that students who have been through pre-primary education do not retain an intellectual (cognitive) advantage in the long run, but they do suggest that the children gain other less visible benefits, in the form of better attitudes towards the classroom which make them less likely to repeat grades or to require remedial teaching. Interesting though these results are, however,

we do not feel that we can assume that the same will automatically be true of children in the quite different social and cultural environment of Hong Kong. We are thus left without the very firm basis which we would need to assert that kindergarten education is essential, and thus justify the development of a fully-aided sector.

V.6.3 Nonetheless, three points stand out in relation to pre-primary education in Hong Kong. First, kindergarten education is almost universal within the age group. In September 1985, the enrolment ratio in the three to five year old age group was 88.6%. This is very high by world standards. Second, because of this very high degree of participation, kindergarten education has almost become a requisite, as in practice children starting Primary 1 are assumed to have some fundamental attainment. Third, we also note that those pre-primary groups which responded (paragraph V.5.1) have asserted that kindergarten services are beneficial to the development of pre-primary children by supplementing the educational stimulus available in the home.

V.6.4 Given these considerations our position is that, although we cannot state that kindergarten education in Hong Kong is essential in educational terms, it is so widespread and so clearly perceived as beneficial that no child should be denied access to such education. We recommend that some degree of Government assistance is justified to ensure that all children continue to have access to pre-primary education, although we cannot recommend that kindergartens should be subsumed into an aided sector. We also recommend that longitudinal research studies should be conducted to gauge the long term effects of pre-primary education upon children in Hong Kong.

V.7 Objectives of policy

V.7.1 Drawing on these considerations, we have come to the view that-

- a) the educational function of kindergartens has to be seen in broad terms, and there is no categorical distinction between the roles of kindergartens and child care centres;
- b) present standards in most kindergartens need to be improved, particularly as regards the qualifications of staff;
- c) more stringent regulatory measures to improve the standards of kindergartens would require to be backed by increased financial assistance; and
- d) financial assistance should continue to be directed towards parents rather than operators, and means-tested, but needs to be extended to more parents.

V.7.2 We recommend that the unification of pre-primary services should be the goal. The only necessary categories of pre-primary institutions are half-day and whole-day. There should be no fundamental distinction in purpose between these two groups of pre-primary institutions. The difference in practice lies in the additional care offered by whole-day

institutions, as reflected by their longer operating hours and fewer holidays. This should not be an obstacle to the unification of the standards governing their operation.

V.7.3 We feel strongly that the first and foremost task in the process of unification is to bring together the standards of kindergartens and those of child care centres so that all kindergartens employ trained teaching staff and achieve similar teacher : pupil ratios (see Annex VB).

V.8 The improvement of standards

V.8.1 In our study of kindergarten services, we noted three specific areas in which standards are found to be particularly deficient -

- a) teacher: pupil ratio;
- b) the quality of teachers; and
- c) pupil: space ratios.

On balance we feel that (a) and (b) are more important and should be tackled first.

V.8.2 Having considered the present situation in kindergartens and the staffing standards for child care centres, we recommend that a teacher : pupil ratio of 1:15 should be achieved in all kindergartens over time. A recent survey by the Education Department shows that the better kindergartens have already achieved a ratio of two

teachers for each class, with an overall average of 1.5 teachers per class; and that the average class size is now down to approximately 30 pupils. This suggests that the achievement of a teacher: pupil ratio comparable with the child care centre standard of 1:14 for those aged two or above should not be too difficult or expensive to attain.

V.8.3 To ensure the quality of teaching at kindergartens, we recommend that as an interim target the following staff structure should be adopted by a standard six-classroom kindergarten operating bi-sessionally -

| <u>Post</u> | <u>Grade</u> |
|------------------|---|
| 1 Head Teacher | Qualified Kindergarten Teacher |
| 12 Teachers | 2 Qualified Kindergarten Teachers 8 Qualified Assistant Kindergarten Teachers 2 Unqualified Kindergarten Teachers |
| 1 Clerical Staff | Clerical Assistant |
| 2 Janitors | Workman II |

This is based on the assumption that all staff would work on a full-time basis, i.e. staff would teach either two sessions in half-day kindergartens or one session in whole-day kindergartens. We also recommend that as a long term target all kindergarten teaching staff should be qualified.

V.9. Measures to achieve the improved standards

V.9.1 The following measures are necessary to achieve the improved standards recommended in Section V.8 -

- a) sufficient teacher training courses should be organized to ensure an adequate supply of trained teachers;
- b) regulatory measures requiring individual kindergarten operators to employ trained teachers should be imposed in phases to tie in with (a) above;
- c) a set of normative salary scales comparable to the salary scales for child care centre staff should be introduced for kindergarten teaching staff, promoting improved salaries which will retain experienced staff and encourage them to seek training;
- d) the higher salary costs resulting should be covered by an improved scheme of fee assistance which extends to a sufficient percentage of parents to allow kindergarten operators to increase their fees without fear of losing pupils; and
- e) as all kindergartens are privately operated, and some 60% are not non-profit-making (see Annex VC), it is necessary to ensure that additional fee assistance should go to support increased salary costs rather than increased profits.

V.10 Teacher Preparation

V.10.1 At present it is estimated that only 23% of all kindergarten teaching staff are trained. Teacher preparation takes two forms: a twelve week part-time course run by the Advisory Inspectorate of the Education Department to produce Qualified Assistant Kindergarten Teachers (QAKTs); and a two year part-time course run by the Grantham College of Education to produce Qualified Kindergarten Teachers (QKTs).

V.10.2 On the basis that some training is better than none we propose that the build-up of the QAKT course should be accelerated in the interim, and the QKT course should be expanded with effect from 1990, on the assumption that the planned extension to the Grantham College of Education would be in operation by then (see paragraph V.11.3). The proposed in take and output of the training courses are set out in Annex VD. These additional efforts will bring the percentage of trained kindergarten teaching staff to 66% by 1990 and 84% by 1994 (Annex VE).

V.10.3 We recognise the desirability of full-time training courses but feel that the immediate requirement should be to provide training for as many of the teachers already in service as possible. We propose that full time pre-service kindergarten teacher training as an option should be deferred for consideration until the aims of the immediate programmes have been achieved.

V.11. The possible need for a joint training institute

V.11.1 The 1981 White Paper recommended, inter alia, that a new Training Institute should be created by September 1984 to provide training for both kindergarten teachers and child care centre staff in the most effective and economic manner. The Institute was intended to be a well-equipped institution, and the courses for both types of staff would be co-ordinated, with substantial parts of the courses being shared.

V.11.2 A working party was established in 1982 to implement this recommendation. We have considered its report and in particular note the following findings -

- a) the estimated enrolment in kindergartens and child care centres has been adjusted substantially since the 1981 White Paper in that the estimated enrolment in kindergartens exceeds the White Paper estimate while that in child care centres falls short of the latter. A comparison is made in Annex VF;
- b) the number of kindergarten teaching staff required greatly exceeds the number of child care centre staff required. While existing courses to train child care centre staff are adequate to meet the projected demand, training courses organised by the Advisory Inspectorate and Grantham College of Education cannot meet the

training targets in the White Paper. The Education Department's need is therefore to train a large number of kindergarten teaching staff to basic level, while the Social Welfare Department's objective is to improve the quality and range of training courses for a smaller number of staff.

V.11.3 We endorse the view of the working party that emphasis should be placed on the interim expansion of training for kindergarten teaching staff, especially QAKT, within existing facilities. Further expansion of training capacity for QAKTs and QKTs should be mounted through an extension to the Grantham College of Education.

V.11.4 We thus recommend that a joint training institute for kindergarten teachers and child care centre staff should not be pursued in the short run. However we do not preclude such an institute as a long term goal, to be established at a time when the training of both types of staff is at the same stage of development and entry qualifications are the same. We believe that there are advantages in joint operation and a common core curriculum. The main obstacle to the merger is not a difference in the nature, but in the scale, of training requirements. This, we believe, should disappear as more qualified kindergarten teachers become available and as the salary scales of both types of staff come into line. In the interim child care centre staff should join the courses for kindergarten teachers where the subject matter is of relevance to both groups.

V.12 Training for lecturing staff

V.12.1 Of the existing 25 lecturers and inspectors for the QKT and QAKT courses, only 14 have received substantial specialist training in kindergarten education. An additional 40 lecturers, two principal lecturers and a vice principal will be required by 1993 for the implementation of the proposed training programmes (see Annex VD). The lack of trained lecturing staff readily available means that all new staff will have to be trained. Existing trained lecturing staff will also have to be updated. Opportunities should be open to lecturers of other disciplines who take an interest in kindergarten education.

V.12.2 We propose that the training programme for the lecturing staff of kindergarten teacher training courses should be a flexible combination of pre-service and in-service courses including -

- a) a one-month full-time pre-service course in kindergarten education;
- b) a three-month part-time in-service course in kindergarten education;
- c) a one-year part-time in-service course in kindergarten education; and
- d) a one-year overseas diploma course in early childhood education.

Course (b) is a short run substitute for course (c).

Course (d) would be for senior lecturing staff.

V.13. Regulatory requirements

V.13.1 On the assumption that the training targets for kindergarten teaching staff will be achieved as scheduled we propose that by 1990 all kindergartens should be required to have at least 40% trained staff (either OKTs or QAKTs) for each session; and by 1994 at least 60% trained staff for each session.

V.13.2 To enforce such trained teacher ratios we propose that the Director of Education should be empowered to require teachers to undertake training whenever specific kindergartens fail to reach the required percentage of qualified staff. The Director could also use his existing powers to refuse to issue a permit to a kindergarten to employ an unqualified teacher to replace a qualified teacher when this would result in the number of trained staff in that kindergarten falling below the required percentage of qualified staff.

V.13.3 As regards the teacher : pupil ratio, we propose that the requirement in Education Regulation 88 should be changed with effect from 1990 to one teacher for 15 pupils, regardless of the pupils' age or whether the operation is whole-day or half-day.

V.13.4 The intended improvements to kindergarten space standards in Education Regulation 40 recommended in the 1981 White Paper should be further deferred from 1988 until 1990, and subject to review then.

V.14 Normative salary scales

V.14.1 To promote the improved salaries which we believe are required to retain experienced staff and to encourage them to seek training, we recommend that a set of normative salary scales should be introduced, comparable to the salary scales for child care centre staff. By normative we mean salary scales which are not obligatory, but which should serve as a guideline for operators and which set out the upper limit of salaries which would be accepted as a reasonable element of expense to be supported in fee assistance calculations.

V.14.2 We suggest the following salary scales as a basis for consideration -

| <u>Grade of kindergarten teaching staff</u> | <u>Proposed normative salary scale</u> | <u>Comparison with child care centre staff</u> |
|--|--|--|
| Qualified kindergarten teacher (HKCEE five subjects at Grade E or above plus two years' training) | MPS Point 14-22 (\$4880-\$7425) + \$500 allowance for head teacher | Child care centre supervisor MPS Point 16-22 (\$5505-\$7425) |
| Qualified assistant kindergarten teacher (F 3 or above plus twelve weeks' training) | MPS Point 5-15 (\$2760-\$5190) | Child care worker MPS Point 5-15 (\$2760-\$5190) |
| Unqualified kindergarten teachers | MPS Point 4 (\$2645) | - |

The normative salary scales proposed refer to full-time staff, i.e. staff teaching two sessions in half-day kindergartens or one session in whole-day kindergartens. The monthly salary rates as at 1 April 1986 are quoted in brackets for reference.

V.15 Improvements to the fee assistance scheme : the "split contribution factor" approach

V.15.1 We estimate that upon the implementation of our proposals the average half-day kindergarten fee would increase from \$171 per month in all kindergartens (\$156 in non-profit-making kindergartens) to \$261 per month. This is based on the theoretical position of maximum exposure that all kindergartens, profit-making and non-profit-making, follow the recommended staffing standards and normative salary scales, and therefore raise their fees accordingly. (Details of the estimate are shown in Annexes VG and VH.) The problem, however, is that kindergartens may be reluctant to raise their fees to cover higher salary costs because they are operating in a competitive market. We have therefore considered whether the fee assistance scheme can be improved to get around this problem.

V.15.2 Under the present fee assistance scheme, parents are required to contribute 15 cents in the dollar for each dollar of net income (excluding rent) above the income baseline of the Public Assistance Scheme. Where the parents' assessed contribution is less than the fee for the kindergarten, the Government meets the difference through fee assistance (on application). There is, however, a maximum fee assistance level, which at present is determined by the average fee of all non-profit-making kindergartens (\$156 per month). The calculation of the fee assistance does not take into account the relative proportions of salary and non-salary elements in the fee

charged by the kindergarten. At present, the net effect of the present scheme is that roughly 8 cents of the 15 cents go towards the salary element of the average kindergarten fee, and 7 cents of the 15 cents go towards the non-salary element.

V.15.3 To encourage kindergartens to employ qualified staff, which will mean that their salary expenses will increase, we think it is necessary to provide both incentive and support for a higher salary element in their fees. To do this we recommend that a "split contribution factor" should be used in the fee assistance scheme: the salary and non-salary elements of kindergarten fees should be assessed separately and the parental contribution factor split into two, with a higher contribution factor applied to the non-salary element and a lower contribution factor to the salary element. As indicative figures we have chosen 9 cents and 6 cents as the "split contribution factor" for the non-salary and salary elements of kindergarten fees. Thus, for a given family size, for every dollar of family income (excluding rent) in excess of the public assistance level for that family size the parents would contribute 9 cents towards the non-salary element but only 6 cents towards the salary element of the fee. Thus a kindergarten spending relatively more on salaries as a result of employing qualified staff would attract higher levels of fee assistance for the parents of its pupils.

V.15.4 At present on the basis of the average kindergarten fee of \$156 and the 15 cents single contribution factor, only 17% ⁽³⁾ of pupils are estimated to be eligible for fee assistance. The application of the improved fee assistance scheme on the basis of the 9 cents and 6 cents "split contribution

⁽³⁾ The estimate is based on the findings of the July - September 1985 General Household Survey (GHS) conducted by the Census and Statistics Department. It should be noted that as the number of kindergarten pupils and their characteristics are not the major variables the GHS is designed to estimate, they are subject to large sampling errors. They may also be subject to non-sampling errors due to classification and reporting errors. This may distort the distribution of the number of kindergarten pupils by household income by household size, and hence the estimated percentage of kindergarten pupils eligible for assistance. This would have a bearing on the estimated financial implications of the proposed improved fee assistance scheme.

factor" to the higher fees would push the entitlement up to 57% ⁽⁴⁾, on the assumption of maximum exposure (Annex VJ). As considerably more parents would be eligible for some degree of assistance, we believe that the disincentive to kindergarten operators to increase salaries and therefore fees should be removed.

V.15.5 Under the existing single contribution factor of 15 cents, it is estimated that the Government would contribute 9% towards kindergarten fees if all parents applied for the assistance available. The introduction of the proposed "split contribution factor" and the higher fees would raise this to 23% on the basis of maximum exposure, and on the same theoretical assumption

⁽⁴⁾ 57% of all pupils will be eligible for fee assistance (FA), with the following breakdown -

17% are currently eligible for FA at a fee level of \$156, and will be eligible for more FA without having to pay more;

7% are currently not eligible for FA at a fee level of \$156, but will become eligible for FA and pay \$156 or less; and

33% are currently not eligible for FA at a fee level of \$156, but will become eligible for FA although they will have to pay more than \$156.

43% of all pupils are currently not eligible for FA at a fee level of \$156, and will continue to receive no FA and pay more.

that all eligible parents would apply for fee assistance (Annex VK). Under the new scheme the burden of the fee increases would be shared between parents and the Government. While both parties would have to pay more in absolute terms, the parental contribution would drop in relative terms.

V.16. Administration of the "split contribution factor" approach

V.16.1 In practice this approach would mean that all kindergartens would have to submit audited accounts when applying for fee increases showing the breakdown between salary and non-salary costs, and to submit quarterly salaries returns for their staff. Fee levels for all kindergartens would probably need to be revised annually to reflect increases in the normative salary scales. The Director of Education would approve fee increases by reference to reasonable increases in non-salary costs, plus increases required to allow salaries to rise in accordance with the normative salary scales, taking account of the qualifications of the staff employed by the kindergarten. The Director of Education would also check the quarterly salaries returns to ensure that the staff in kindergartens were paid according to each kindergarten's declared salary scale.

V.16.2 Maximum levels of fee assistance would no longer be calculated by reference to average fees but by reference to the approved fees of each kindergarten. For each kindergarten there would be two maximum fee assistance calculations, one reflecting salary costs and the other for non-salary costs. The total of the two fee assistance calculations would be expressed as one figure, and would be published with the approved fees.

V.16.3 Before the beginning of each academic year the fees and maximum fee assistance levels of individual kindergartens would be approved and published by the Education Department on a district basis. This information would then be made available to parents via the District Offices.

V.16.4 Thus a parent choosing a kindergarten might find that there were two with the same approved fee but with quite different levels of maximum fee assistance. The higher fee assistance would apply to the kindergarten paying better salaries. The parent would thus tend to choose that kindergarten: so market forces would support the better salaries. This would be a clear message to kindergarten operators to employ more qualified teachers and to conform with the normative salary scales. Annex VL demonstrates the effects of the mechanism in greater detail.

V.16.5 Initially the kindergarten operators would be relying largely on untrained teachers because of the lack of trained teachers. Under these circumstances some untrained teachers would also be eligible for better salaries, but not as high as those applied to trained teachers; and this is still desirable because it will promote greater continuity, commitment and experience. It means, however, that costs will not rise immediately to the theoretical limit. The full financial implications will only be achieved over time as trained teachers become available and regulatory measures are imposed.

V.16.6 As to the administration of the fee assistance scheme, we have considered two possible options. The first option would involve the vetting of each and every application by the Social Welfare Department in accordance with the existing means-testing procedures for all other social security schemes. In view of the strain which this might place upon the resources of the Department, we recommend that the kindergarten operators should receive the fee assistance applications, check and forward them to the Education Department for processing. The Education Department should calculate the fee assistance payable, and conduct spot checks on the operators and random means-tests on the parents. Administratively this will be less costly and easier to implement than the first option.

V.17. Curriculum development

V.17.1 We have also considered the present position regarding the development of kindergarten curriculum. In response to the recommendations in the 1981 White Paper, a Kindergarten Education Committee was established under the auspices of the Curriculum Development Committee, drawing members from kindergartens, primary schools, colleges of education and the Education Department, to develop the kindergarten curriculum. A Kindergarten Curriculum Development Team was also set up to develop curriculum materials. The team includes practising teachers seconded on a full-time basis from kindergartens.

V.17.2 In September 1984 the Kindergarten Education Committee published a Guide to the Kindergarten ⁽⁵⁾ Curriculum, advocating the use of a thematic approach in teaching kindergarten children.

V.17.3 We note that the Kindergarten Education Committee will produce a set of guidelines for nursery class activities in kindergartens in 1987, which will recommend the use of informal non-curriculum-based activities to stimulate the mental and physical development of the three year-olds. We recommend that the Guide to Kindergarten Curriculum should be reviewed to co-incide with the issue of the guidelines for nursery class activities in 1987.

V.17.4 We endorse the view that there should be no formal curriculum for nursery and kindergarten classes and that children should learn through play and activities.

V.17.5 We realise that at present many kindergartens are still teaching difficult and formalised curricula through rote learning. We believe that with the increased professionalism promoted through our proposed teacher training programmes, new teaching approaches will be adopted, and the problem should diminish.

⁽⁵⁾ Kindergartens usually run three grades : nursery class for the three year-olds, lower kindergarten for the four year-olds and upper kindergarten for the five year-olds. The Guide refers to the lower kindergarten and the upper kindergarten classes.

V.18. Implications for the unification of pre-primary services

V.18.1 We believe that the introduction of normative salary scales, the improvement in teacher qualifications and the improved teacher : pupil ratio for kindergartens will clear the way to the unification of pre-primary services.

V.18.2 To achieve consistency in the treatment of kindergartens and child care centres, we recommend that the improved fee assistance scheme for kindergartens should be extended to all whole-day or half-day child care centres for children aged 2 to below 6, whether profit-making or non-profit-making, apart from those directly subvented by the Government. We are of the view that the extension of the "split contribution factor" to child care centres will pave the way to eventual unification of all pre-primary institutions, although we are aware of the fact that the staffing at child care centres is already up to standard. We also see the need to remove the differential treatment of meal charges for child care centres and whole-day kindergartens.

V.18.3 The unification of pre-primary services will still require detailed consideration of a host of important issues including -

- a) the qualifications of staff;
- b) suitable curricular guidelines;

- c) the comparability of starting ages;
- d) regulatory measures;
- e) arrangements for supervision;
- f) the question of child care centre subventions (paragraph V.4.4).

We realise that this will require extensive consultation initially between the Education Department and the Social Welfare Department.

V.18.4 We therefore recommend that the Government should establish a working group to develop specific plans to achieve the unification of pre-primary services. The group should also assess the need and the demand for whole-day pre-primary institutions upon unification.

V.19. Financial implications

Teacher preparation

V.19.1 The additional recurrent financial implications of the proposed teacher training programmes as compared with 1986 are estimated as follows -

(\$m)

| Fiscal Year | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 |
|-------------|------|------|------|-------|-------|------|------|------|------|------|
| | 6.87 | 6.87 | 6.87 | 10.53 | 10.95 | 8.98 | 8.98 | 6.40 | 6.40 | 6.40 |

Training for lecturing staff

V.19.2 The additional financial implications of the training of Education Department lecturers and inspectors are estimated as follows -

| | <u>(\$m)</u> | | | | | | | |
|-------------------------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| <u>Fiscal</u> <u>Year</u> | <u>1987</u> | <u>1988</u> | <u>1989</u> | <u>1990</u> | <u>1991</u> | <u>1992</u> | <u>1993</u> | <u>1994</u> |
| <u>Course</u> <u>costs</u> | 0.50 | 0.11 | 0.11 | 0.11 | 0.17 | 0.11 | 0.17 | 0.11 |

Improved fee assistance scheme

V.19.3 On the basis of maximum exposure and a 100% rate of take-up by parents ⁽⁶⁾ the maximum additional annually recurrent expenditure arising from the improved fee assistance scheme (assuming that the split contribution factors are set at 9 cents and 6 cents) is estimated to be \$118m (see Annex VK). In practice it will take some years to even approach this theoretical position. For a long time there will not be enough trained teachers to permit the recommended ratios of staff to be achieved - hence the phased regulatory

⁽⁶⁾ The rate of take-up by parents refers to the percentage of those parents eligible for fee assistance who actually apply for it.

approach in paragraph V.13.1. The rate of take-up by parents will also take time to increase, and would be unlikely ever to reach 100% of eligible parents.

V.19.4 In fact, drawing reference from the existing fee assistance scheme for whole-day nurseries, a maximum 60% take-up rate can be assumed for kindergarten parents under the improved fee assistance scheme. The actual take-up rate will probably be lower still, in view of the lower kindergarten fees and more evenly balanced kindergarten parent income profile.

V.19.5 Annex VE shows that 65.8% and 84.2% of all kindergarten teachers would be trained respectively by 1990 and 1994. It is estimated that the average fee will increase to a maximum of \$248 by 1990 and \$261 by 1994 (at 1985 prices). Given such a pattern of increase, the Government contribution towards kindergarten fees on the basis of a 100% take-up rate would be \$135m by 1990 and \$154m by 1994. Using the 60% take-up rate, however, the Government contribution would be only \$81m and \$92m. Thus a more realistic estimate of the additional annually recurrent expenditure is \$59.4m by 1990 and \$70.4m by 1994.

V.19.6 The additional costs of the Education Department incurred in administering the improved fee assistance scheme would be \$480,000 in capital expenditure, and \$4.8m per annum in recurrent expenditure.

Extension of the fee assistance scheme to child care centres

V.19.7 It is estimated that the extension of the improved fee assistance scheme to child care centres (paragraph V.18.2) would result in an additional recurrent expenditure of \$15.1m per annum on the basis of a 60% take-up rate by eligible parents (Annex VM).

V.20 Summary of recommendations

V.20.1 In sum, we RECOMMEND that -

Is kindergarten education essential?

- a) some degree of Government assistance is justified to ensure that all children continue to have access to pre-primary education (paragraph V.6.4);
- b) longitudinal research studies should be conducted to gauge the long term effects of pre-primary education upon children in Hong Kong (paragraph V.6.4);

Objectives of policy

- c) the unification of pre-primary services should be the goal (paragraph V.7.2);

- d) the first and foremost task in the process of unification is to bring together the standards of kindergartens and those of child care centres so that all kindergartens employ trained teaching staff and achieve similar teacher : pupil ratios (paragraph V.7.3);

The improvement of standards

- e) a teacher : pupil ratio of 1:15 should be achieved in all kindergartens over time (paragraph V.8.2);
- f) as an interim target a staff structure of three Qualified Kindergarten Teachers, eight Qualified Assistant Kindergarten Teachers, two Unqualified Kindergarten Teachers, a Clerical Assistant and two Workmen should be adopted by a standard six-classroom bi-sessional kindergarten (paragraph V.8.3);
- g) as a long term target all kindergarten teaching staff should be qualified (paragraph V.8.3);

Teacher preparation

- h) the build-up of the Qualified Assistant Kindergarten Teacher course should be accelerated in the interim, and the Qualified Kindergarten Teacher course

should be expanded with effect from 1990, on the assumption that the planned extension to the Grantham College of Education would be in operation by then (paragraph V.10.2);

- i) full-time pre-service kindergarten teacher training as an option should be deferred for consideration until the aims of the immediate programmes have been achieved (paragraph V.10.3);

The possible need for a joint training institute

- j) a joint training institute for kindergarten teachers and child care centre staff should not be pursued in the short run (paragraph V.11.4);
- k) in the interim child care centre staff should join the courses for kindergarten teachers where the subject matter is of relevance to both groups (paragraph V.11.4);

Training for lecturing staff

- l) the training programme for the lecturing staff of kindergarten teacher training courses should be a flexible combination of pre-service and in-service courses (paragraph V.12.2);

Regulatory requirements

- m) by 1990 all kindergartens should be required to have at least 40% trained staff (either Qualified Kindergarten Teachers or Qualified Assistant Kindergarten Teachers) for each session; and by 1994 at least 60% trained staff for each session (paragraph V.13.1);
- n) the Director of Education should be empowered to require teachers to undertake training whenever specific kindergartens fail to reach the required percentage of qualified staff (paragraph V.13.2);
- o) the requirement in Education Regulation 88 should be changed with effect from 1990 to one teacher for 15 pupils, regardless of the pupils' age or whether the operation is whole-day or half-day (paragraph V.13.3);
- p) the intended improvements to kindergarten space standards in Education Regulation 40 recommended in the 1981 White Paper should be further deferred from 1988 until 1990, and subject to review then (paragraph V.13.4);

Normative salary scales

- q) a set of normative salary scales should be introduced, comparable to the salary scales for child care centre staff (paragraph V.14.1);

Improvements to the fee assistance scheme

- r) a "split contribution factor" should be used in the fee assistance scheme : the salary and non-salary elements of kindergarten fees should be assessed separately and the parental contribution factor split into two, with a higher contribution factor applied to the non-salary element and a lower contribution factor to the salary element (paragraph V.15.3);

Administration of the "split contribution factor" approach

- s) the kindergarten operators should receive the fee assistance applications, check and forward them to the Education Department for processing. The Education Department should calculate the fee assistance payable, and conduct spot checks on the operators and random means-tests on the parents (paragraph V.16.6);

Curriculum development

- t) the Guide to Kindergarten Curriculum should be reviewed to co-incide with the issue of the guidelines for nursery class activities in 1987 (paragraph V.17.3);
- u) there should be no formal curriculum for nursery and kindergarten classes and children should learn through play and activities (paragraph V.17.4);

Implications for the unification of pre-primary services

- v) the improved fee assistance scheme for kindergartens should be extended to all whole-day or half-day child care centres for children aged 2 to below 6, whether profit-making or non-profit-making, apart from those directly subvented by the Government (paragraph V.18.2); and
- w) the Government should establish a working group to develop specific plans to achieve the unification of pre-primary services. The group should also assess the need and the demand for whole-day pre-primary institutions upon unification (paragraph V.18.4).

V.20.2 We wish to point out specifically that recommendation (h) regarding the planned extension to the Grantham College of Education should be implemented ahead of consultation on this Report, so as to provide the extra training opportunities necessary for the improvement in kindergarten teaching standards.

Chapter VI The Development of Sixth Form Education

VI.1 Introduction

VI.1.1 The development of sixth form ⁽¹⁾ education has been one of the major educational controversies of the last decade. In 1978 the Board of Education appointed a Committee on Sixth Form Education, which produced a report a year later. Since subsequent public consultation led to little agreement as to what should be done, the Board shelved the report in the hope that the overall review of the education system by the Visiting Panel would put the issues in a clearer perspective. Indeed the sixth form question was one of the main issues that prompted the Board's suggestion that such an overall review was necessary.

⁽¹⁾ 'Sixth form' in this chapter refers to the sixth form as a whole, i.e. both Form 6 and Form 7 as appropriate. Form 6 refers to the first year of studies in the sixth form, and Form 7 to the second year of studies.

VI.1.2 The Visiting Panel echoed many of the same points brought out by the Board of Education's Committee, without however putting forward specific proposals. Its most positive statement was that "... the Education Commission should set up a task force to make specific recommendations on the organisation and provision of Form 6/Form 7 education as a matter of urgency", to which it added the rider that "... the fundamental objective is the establishment of a multi-option two-year series of curricula uninterrupted by any formal examination". The Panel added the immediate qualification that "we recognise that there may not be one single simple solution..."

VI.1.3 In the event the subject has been the one to which the Commission has devoted perhaps more time since the conclusion of Report No 1 than any other issue. The Commission has held wide ranging consultations with secondary schools representative bodies, institutions of higher education and the Secretariat of the Hong Kong Examinations Authority. We have found it necessary to go back to first principles, and to consider the objectives of reform. In so doing we have also had to accept that we are not starting with a clean sheet, but with an existing system that has to adjust and adapt; and that students take a highly pragmatic view of the system devised for them, and look for the maximum advantage which they can derive from it.

VI.2 Background

VI.2.1 The most obvious dilemma in our present sixth form is that students completing five years of secondary education can, after taking the Certificate of Education

Examination (HKCEE), either follow a two-year sixth form course in Anglo-Chinese schools leading to the Advanced (A) level examination to compete for entrance to the University of Hong Kong (HKU), the more advanced courses at the polytechnics, the Baptist College and Lingnan College; or else (and particularly in the Chinese Middle schools) follow a one-year sixth form course leading to the Higher (H) level examination and entry to the Chinese University of Hong Kong (CUHK) or Shue Yan College. Some students in this one-year stream will enter overseas institutions offering four-year courses. A sizeable number of students in the two-year sixth form in the Anglo-Chinese schools leave after only one year's study, some also having been accepted by CUHK and the polytechnics, some by four-year institutions overseas, while others leave at this stage to seek employment ⁽²⁾.

VI.2.2 Thus there are two different courses, leading to different sets of tertiary opportunities. In order to maximize their chances of admission to higher education, students are often induced to take two or more public examinations, not based on a common syllabus, within the short span of two years. There are

⁽²⁾ The gross promotion rate (ie the ratio between enrolment in a specified grade and enrolment at the higher grade the following year) from F6 to F7 in all day schools averaged 59.4% between 1982 and 1984. For public sector day schools alone the average gross promotion rate was higher at 79.9%.

clearly undesirable educational consequences arising from such a situation, and no simple solution exists, because it is inherently difficult to design one integrated sixth form course that can satisfactorily match the basic five-year secondary school system with two-year, three-year and four-year post-secondary or tertiary institutions and also take care of those (the majority) who need an 'exit' to the employment market after either one or two years in the sixth form.

VI.2.3 But this is only part of the problem, its structural dimension. The other major area of concern is to enhance the sixth form curriculum so that students do not limit themselves to an excessively narrow range of academic studies determined solely by the entry requirements of post-secondary and tertiary institutions. The sixth form should provide a worthwhile course for students of a wider range of academic ability and aptitude than just those with a good chance of reaching higher studies.

VI.2.4 The Commission has thus looked for a 'best' solution in terms of all these problems.

VI.3 Consultation

VI.3.1 The Visiting Panel recognised that there was no single simple solution, and indeed this has been the experience of the Commission. We therefore had to consider a very broad range of possibilities, and have consulted many parties, including the tertiary and post-secondary institutions and the secondary schools' representative bodies. We made available working papers

and disclosed the full range of options which we considered. A questionnaire relating to these working papers was put to all the five institutions funded by the University and Polytechnic Grants Committee (UPGC), the two recognised post-secondary colleges and nine secondary schools' representative bodies (see Annex IIA), so that they could provide specific and separate responses. Individually or collectively, all of these bodies were invited to appear twice before the Commission to elaborate on their views⁽³⁾. Throughout the process the Board of Education has also been consulted.

VI.4 Objectives of sixth form education

VI.4.1 Starting from the earlier work of the Board of Education's Committee on Sixth Form Education we have identified the following objectives-

- a) to encourage the development of balanced, well-informed individuals;
- b) to prepare students for post-secondary and tertiary education;

⁽³⁾ We should make it clear that our consultations with the post-secondary and tertiary institutions were informal in that the representatives of these institutions were not asked to consult their Senates or Councils. Thus none of the institutions, nor the secondary schools' representative bodies, should be considered as being bound by these discussions.

- c) to develop in all students the ability to communicate effectively in both languages; and
- d) to prepare students for adult life.

VI.5 Problems identified and guidelines set

VI.5.1 Against the background of these objectives we have been particularly conscious of certain problems -

- a) as public sector sixth form education continues to grow as a result of the growth of Form 4 and Form 5 education, the range of ability and interests represented will be greater than before. This means that there must be a curriculum sufficiently broad to provide worthwhile courses and opportunities for all those in the sixth form;
- b) students in Chinese Middle schools suffer the disadvantage of being limited to a one-year sixth form course which lacks the standing of the Advanced (A) level course, and leads to fewer opportunities for entrance to higher education;
- c) there is wide-spread concern about the standards of English and Chinese being achieved by students in the sixth form;

- d) there is a growing demand that students should be able to take all sixth form examinations in Chinese as well as in English;
- e) entry to post-secondary and tertiary education from the sixth form at present involves both multiple points of decision (i.e. the point of selection of candidates by post-secondary and tertiary institutions) and multiple points of admission (i.e. the point at which the selected candidates leave school to enter these institutions);
- f) there is concern about the examination pressure placed on students.

VI.5.2 In trying to deal with these problems we have set for ourselves certain guiding considerations.

VI.5.3 First and foremost, we believe that the sixth form should be a self-contained educational experience which is of benefit to all students who participate in it. Specifically, we have been most concerned to consider the sixth form both as a matriculation stream for higher education, and as something which will have real value for the majority of students who do not proceed to higher education.

VI.5.4 Following from this, we wish to state that we believe in the value of a two-year sixth form, not least for those students who do not proceed to higher education, as a time to mature and to develop intellectual and critical skills; even though we recognise that for a variety of reasons some students will choose to leave the sixth form after the first year.

VI.5.5 We have not at this stage given an opinion on the appropriate length of local tertiary courses. This is a separate issue which must first be considered by the institutions and the UPGC. It is a highly complex issue. It is not simply a question of whether three or four-year first-degree courses are intrinsically better. It involves the sub-degree courses at the polytechnics and post-secondary colleges. It involves the question of what entry qualifications are required for courses leading to recognition by professional bodies. These, however, are only the issues relating to local post-secondary and tertiary courses. An equally relevant consideration is the opportunities which Hong Kong students seek in tertiary education overseas, and the entry qualifications which these require. But for us a more important consideration than any of these points has been a determination not to let questions of the length of tertiary courses dictate the nature of the sixth form course for the majority of students who do not reach the tertiary level. Thus we do not accept that whatever arguments there might be in favour of four-year first-degree courses must mean that students should not be able to study for two years in the sixth form; and equally we do not accept that arguments in favour of three-year first-degree courses must mean that

students should not be able to leave the sixth form after one year with a valid exit qualification. The point is so important that it bears repetition : our concern has been to develop a sixth form that is of benefit to all students who participate in it, whether they go on to local or overseas higher education or whether the sixth form is the culmination of their formal studies.

VI.5.6 We have, however, addressed the important question of whether there could or should be a "common point of decision " for local higher education, since we think this is a legitimate question arising from the sixth form structure and curriculum. By common point of decision we mean the development of a unified admissions system based on a common curricular and examinations structure, so that prospective higher education students can consider at one single stage in their sixth form careers which opportunities in local higher education they should pursue.

VI.6 The '3+3' system

VI.6.1 We should also state at the outset that we do not see any need to move to a common secondary structure based on six years of secondary education on a 3+3 basis, i.e. three years of junior secondary education followed by a three year senior secondary education course.

VI.6.2 We believe that many of those who advocate such a 3+3 system are not fully aware of the implications of adopting such a system. The present

HKCEE is a valuable attainment test, which has achieved widespread recognition, for a secondary course completed in five years. If introducing a 3+3 system were to mean that the present HKCEE was simply deferred for one year, then that would mean that students were held back for one year with no compensating advantages ⁽⁴⁾. If after completion of a 3+3 course there was no sixth form course to which to proceed, then this would also mean giving up the high scholastic standards which the present system achieves.

VI.6.3 Alternatively, introducing a 3+3 system might mean replacing HKCEE with a new senior secondary examination which had to serve as a means of selection for higher education as well as a general attainment test. The problem here would be the great difficulty of devising a satisfactory curriculum and examination which could select the best students for specialised studies while allowing the more average students to gain respectable academic qualifications in a suitably broad field of studies.

⁽⁴⁾ To illustrate the implications of such an approach, of the 79,900 students in Form/Middle 5 day-school classes in 1984 only 23,100 proceeded in 1985 to Form/Middle 6. Under the 3+3 system, the 56,800 who left after Form/Middle 5 would have been obliged to complete an extra year to obtain HKCEE.

VI.6.4 Both of these options have the further major drawback that they would require students to complete six years of secondary education to gain an academic qualification. We believe that this would result in a high drop-out rate and mean that more students would leave school without any formal qualifications.

VI.6.5 A further alternative would be to restrict the number of students proceeding to senior secondary education, so that the general academic standard to be reached in senior secondary education was comparable to the standard reached in the present first year sixth form. This would mean reducing the number of children who completed senior secondary education. This would be a very retrograde move.

VI.6.6 All in all, we are not able to support the case for a six year 3+3 secondary system. We have chosen instead to retain the present structure of junior and senior secondary education followed by the sixth form; and to examine what improvements can be made to sixth form education.

VI.7 Size of the public sector sixth form

VI.7.1 We have investigated the question of how large the public sector sixth form should be. The present policy standard, derived from the 1978 White Paper "The Development of Senior Secondary and Tertiary Education", specifies that subsidized Form 6 places should be made available for up to one third of students entering subsidized Form 4 places two years previously. We have investigated the relationship between senior

secondary education (i.e. the fourth and fifth forms) and the sixth form under present curricula to see how many students should be capable of completing a course of studies at the sixth form level. Overall our judgement is that the policy standard remains broadly appropriate, and we therefore recommend that the future objective of policy should be specified as providing one public sector Form 6 place for every three public sector Form 4 places two years earlier.

VI.7.2 We have noted with concern that not all public sector Form 6 places provided are in fact filled, which in turn leads to a still higher under-utilisation of Form 7 places. This is a distressing waste of scarce resources. We therefore recommend that the Education Department should reinforce its efforts to see that public sector sixth form places are filled where candidates of suitable academic standing are available.

VI.8 Sixth form curricula

VI.8.1 The next issue we have had to address is the question of sixth form curricula.

VI.8.2 We have noted that the H level curriculum does not now carry very much standing as an achievement in the eyes of prospective employers or post-secondary institutions.

VI.8.3 We believe that the A level curriculum as adopted in Hong Kong is of a high academic standard, but in its most common application of a three A level course represents too narrow a concentration of subjects, both in terms of students' requirements for general educational purposes and, in our view, as a preparation for higher education.

VI.8.4 We foresee that the continued growth of the subsidized sixth form sector will mean that it contains students of a broader range of ability than those who could expect to achieve satisfactory results in the conventional three straight A levels.

VI.8.5 We reached the conclusion at an early stage in our study that there is a need to reduce the two different curricula currently followed in the sixth form to one. In particular we wish to remove the problem of students trying to maximize their opportunities by studying both curricula together, often without the support of the school.

VI.8.6 Despite this, we accept that there is still a need to provide a suitable curriculum and possible exit qualification for a one-year sixth form course for those students who, for whatever reason, choose to leave after the first year.

VI.8.7 Given these considerations we have concluded that what is required is an integrated sixth form curriculum, by which we mean the retention of a two-year A level course; the abolition of H levels; and the introduction of a new curriculum derived from A levels to be termed Intermediate (I) levels.

VI.8.8 The I levels are described in Section VI.9 below. Briefly we see these being developed from, and as part of, the A level curriculum. They would be 'half subjects' in that they would represent half the teaching time required for A levels, and accordingly they could be used both to broaden the two-year course and to

provide a one-year course with a formal exit qualification for those leaving the sixth form after Form 6.

VI.8.9 In addition we recommend that more subjects of a less academic nature should be introduced at both A and I levels, to be available as far as practicable in all streams (grammar, technical and prevocational) so as to cater for the wider range of ability and aptitude in an expanding public sector sixth form. Students need to be given a greater choice of subjects so that they have better opportunities to find combinations which suit them. Some suggestions are set out in Annex VIA. The teaching and examination syllabuses should place appropriate emphasis on practical aspects.

VI.8.10 Our aims for the sixth form are thus wide-ranging. We wish to see an integrated curriculum which is capable of flexible application. We wish students to have a greater choice of subjects than they have at present. We believe that these improvements are necessary now, and will become even more important as the public sector sixth form continues to grow and thus takes in an even wider range of ability. We recognise that students in the sixth form have a variety of choices before them about whether to seek higher education, and if so at what level, and whether this should be in Hong Kong or overseas. Thus while we wish to see all students working within the same integrated curriculum we see a need for that curriculum and the structure of the sixth form to be flexible and not restricted to one length of studies or one level of attainment. We accept that the system which we advocate is complex: but we believe that this degree of

sophistication is necessary to fulfil all the proper objectives of sixth form studies, and the range of aspirations and abilities of the students comprising the sixth form.

VI.9 The I level curriculum

VI.9.1 We recognise the need to spell out clearly the rationale for the proposed new I levels. First, we believe that their introduction should make it possible to broaden the course of studies undertaken by students in the sixth form. Second, we see I levels as a means of establishing a valid certificated course of studies for students leaving the sixth form after one year. Further, although in the academic subjects derived from A levels it will be necessary for the I levels to demand comparable intellectual ability, we recommend that some schools should introduce two-year Form 6 streams in which I level examinations can be taken after two years. Students in such streams should be allowed to proceed to take A levels in a third year⁽⁵⁾ (i.e., for them, Form 7) at the discretion of the principal and subject to places being available. We believe that this should provide a worthwhile sixth form course for students not ready to taken A levels in two years. In Annex VIB we have set out possible combinations of courses of studies to illustrate the working of this system.

⁽⁵⁾ Alternatively the two-year Form 6 course might include one or two A levels - see the examples shown under the 'Alternative stream' in Annex VIB.

VI.9.2 The I levels derived from A level subjects should be developed as subsets of those subjects. That is, while assuming comparable intellectual ability the subsets would be developed to cover approximately half the teaching syllabus of the comparable A level. How the individual subsets were derived from A levels would depend on the nature of each subject, but we believe that this should be possible.

VI.9.3 The I level examinations should be scheduled as late in the school year as possible. We propose the end of May to the beginning of June, in order to maximise the amount of teaching time.

VI.9.4 We recognise that in some quarters the introduction of I levels may be seen as increasing examination pressure on students. This will be true insofar as the I level examinations would be public examinations, but the I levels would replace the final internal school examination at the end of Form 6. Thus in practice there should not be an additional examination. In replacing the H level examination the new examination should do away with the more serious problem of many students studying for an examination which is outside their school curriculum.

VI.9.5 We also recognise that the introduction of I levels and the greater range of subjects to be made available to sixth form students will place pressure on the teaching resources of schools. We therefore recommend that split class teaching should be extended, and additional teachers should be provided to facilitate the operation of split classes.

VI.10 Extension of the sixth form

VI.10.1 Consistent with our belief in the value of two years in the sixth form, and our desire to see equality of opportunity extended to the students at present in the Chinese Middle schools, we recommend that a Form 7 should be introduced in all Chinese Middle schools (and those Anglo-Chinese schools which at present offer H level courses) thus making it possible for students in these schools to take A level examinations.

VI.10.2 The four new prevocational schools in the current Secondary Schools Building Programme are already planned to include a sixth form. We believe that all prevocational schools should be able to offer a sixth form course, and that these schools in particular should be able to extend the sixth form curricula offered to include the wider range of subjects which we advocate. Accordingly we recommend that sixth form courses should be extended to all prevocational schools.

VI.11 Language studies

VI.11.1 We have also considered the question of language studies in the sixth form.

VI.11.2 Our first recommendation is that all A and I levels (except for those which are language-specific, such as Chinese Studies or English Studies) should be available for examination in both Chinese and English, and that there should be no language indicator shown in statements of examination results.

VI.11.3 To assist the present Chinese Middle schools with the further changes which we are proposing for them, we recommend that special efforts should be made to improve the standard of English in Chinese Middle schools, in addition to the measures recommended in our Report, No 1, and these should include courses provided by the Education Department for English teachers in these schools.

VI.11.4 In line with the objectives of the sixth form to which we refer in paragraph VI.4.1, we consider the study of both English and Chinese to be an essential part of sixth form studies. We believe that it should be possible to develop language skills while providing a vehicle for the continued general education which the sixth form requires. We recommend that the current Use of English examination should be developed into an English Studies curriculum which will serve as more than a mere matriculation requirement for higher education. We therefore propose that it should be developed as a full I level subject. Similarly we wish to see a Chinese Language and Culture I level curriculum developed to fulfil a comparable function. Details of the proposals are set out in Annex VIC.

VI.11.5 Although inherent in our proposals is the possibility of students taking both examinations at the end of the first year we recommend that the Education Department should encourage schools to ensure that all students continuing into a second year of the sixth form should maintain their studies in at least one of the two languages during that second year.

VI.12 Admissions to post-secondary and tertiary education

VI.12.1 We have also considered at length the implications of our proposals for the sixth form on the process of admissions to post-secondary and tertiary education, and we have received many views on the subject from both secondary schools' representative bodies and institutions of higher education. As we have already stated (paragraph VI.5.5), we have not addressed the question of the length of local tertiary courses. We feel that this is a matter for the institutions and the UPGC in the first instance. We shall of course consider the matter and express our views at an appropriate time in the future. Nevertheless we feel that our recommendations have some clear implications for the process of admissions.

VI.12.2 In particular we feel that our proposals should make it possible to achieve a common point of decision for both the institutions of higher education and the candidates themselves on the basis of I level examination results, on the assumption that a majority of students would in fact be taking I level examinations at the end of Form 6. We recommend that a centralized admissions system should be introduced, under which students' achievements in the three curricular I levels together with the language subjects taken in Form 6 would make it possible for places to be offered at the same time by all the institutions. Such a system might be administered by the Hong Kong Examinations Authority in conjunction with the institutions themselves.

VI.12.3 In the case of places to be taken up after Form 6, the offer of places would be outright, i.e. to be taken up the following term. In the case of those places offered for admission after Form 7, the places could be offered on either a provisional or a conditional basis ⁽⁶⁾, i.e. places would be offered subject to completion of specified A and I levels. In this case it would be up to the institutions to determine what standard the student should achieve in subsequent A and I levels.

VI.12.4 Nevertheless we recognise that all the post-secondary and tertiary institutions may wish to retain some places to be offered on the basis of A levels, or A plus I levels, taken at the end of the second year in the sixth form. Thus the centralized admissions system should also include an allocation of places to be offered after Form 7.

VI.12.5 With the introduction of such a centralized admissions system we believe that CUHK will no longer need its present HKCEE-based Provisional Acceptance Scheme (PAS), since the new system will allow students to enter CUHK after Form 6 on the basis of a public examination within the integrated sixth form curriculum. We note that the PAS has been the subject

⁽⁶⁾ In this context, a provisional offer means that a candidate is required to obtain pass grades only; a conditional offer implies that a candidate is required to achieve specified grades above pass level.

of criticism from some secondary schools. We recommend that CUHK should reconsider the case for the PAS in the light of our proposals.

VI.12.6 Given that CUHK admits students with A level qualifications, and is developing a credit unit system, we also recommend that CUHK should consider now the possibility of granting credit unit exemptions to students with appropriate A, or A and I, level qualifications.

VI.12.7 As a general principle, consistent with our recommendation on the need to broaden the A level curriculum, we recommend that all the institutions which accept students after Form 7 should consider very carefully the extent to which they could admit students on the basis of a combination of A and I levels (of which the optimum combination might be two A plus two I levels). We do not believe this would be detrimental to the development of the students' intellectual abilities, and we do believe that this would be a meaningful step away from the excessively narrow course of study followed by students at present. We consider that two A levels should be an adequate basis for the assessment of a student's intellectual abilities.

VI.13 Recognition of I levels

VI.13.1 In our discussions the question has been raised as to how recognition of the status of the new I level curriculum and its examinations could be obtained. We wish to make it clear that our proposal would have no implications for the standing of the present A levels. The present A levels will remain

unchanged, except for the introduction of new subjects. We believe that the standing of the I levels would be established by their derivation from the A levels, which already have considerable recognition overseas and locally. We do think, however, that the Government as a major employer should take a lead in acknowledging the role of I levels, and we recommend that the Government should consider the appropriate recognition of I levels in its designated 'matriculation' standard for civil service entry.

VI.14 Need for counselling services

VI.14.1 As a function of the increased range of subject choices which would be offered in the sixth form; because some students would have to consider whether to take their I levels in one year or two years; and because the centralized admissions system will lead to students having to make important choices between options, there will be a greater need for counselling services to students. We recommend that the Education Department should take appropriate measures to encourage the schools to provide the necessary student counselling services.

VI.15 Timing and implementation

VI.15.1 As regards the introduction of I level subjects, given a final decision to proceed by June 1987 we estimate that bilingual syllabuses could be published in the spring of 1989. Allowing time for the preparation of teaching materials and selection of textbooks, the first examinations could be taken in the summer of 1990.

VI.15.2 As regards the introduction of A level examinations in Chinese, we believe that it should be possible to publish examination syllabuses in the summer of 1988. Accordingly all schools at present offering only Form or Middle 6 should introduce a Form 7 in September 1990, with students then taking A levels in Chinese for the first time in the summer of 1991.

VI.16 Need for additional resources

VI.16.1 Our recommendations in paragraphs VI.8.9, VI.10.1 and VI.10.2 that new subjects at both A and I levels should be available to students in prevocational, grammar and technical schools, that a Form 7 should be introduced in all schools now offering H levels, and that the sixth form should be extended to include all prevocational schools, have considerable resource implications.

VI.16.2 Additional funds will be needed to meet the cost of -

- a) restructuring the class organisation of individual schools so as to allow the introduction of a Form 7 in schools now offering H levels and of a Form 6 and 7 in prevocational schools;
- b) improving the stock of equipment, reference books and other materials in the schools concerned;

- c) effecting conversion work in a small number of the schools concerned in order to provide sufficient special rooms such as science laboratories; and
- d) providing additional split class teachers to facilitate the introduction of new subjects in all interested schools.

VI.17 Financial implications

VI.17.1 The financial implications of our recommendations are considered below.

VI.17.2 As regards non-recurrent costs, it is estimated that about \$ 9m will be required to enable schools now offering H levels to operate a Form 7. However, the non-recurrent costs of introducing new subjects in the sixth form in Anglo-Chinese, Chinese Middle and prevocational schools (including the cost of conversion, equipment and consumables) cannot be realistically estimated at this stage because the syllabuses have yet to be developed.

VI.17.3 As regards the recurrent costs of introducing new subjects in the sixth form, in particular the cost of providing additional split class teachers to facilitate the introduction of such subjects, it is similarly not possible to give a meaningful estimate at this juncture. However, the recurrent financial implications arising from the operation of additional classes as a result of restructuring public sector secondary and prevocational schools are estimated to be as follows -

| <u>Fiscal year</u> | <u>Recurrent Costs (\$m)</u> | | | | | | |
|---|------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | <u>1989/90</u> | <u>1990/91</u> | <u>1991/92</u> | <u>1992/93</u> | <u>1993/94</u> | <u>1994/95</u> | <u>1995/96</u> |
| Restructuring of Chinese Middle schools and Anglo-Chinese secondary schools | - | 31.3 | 31.3 | 31.3 | 31.3 | 31.3 | 31.3 |
| Restructuring of prevocational schools | 11.0 | 18.6 | 31.5 | 55.4 | 60.1 | 62.3 | 63.2 |
| Total | <u>11.0</u> | <u>49.9</u> | <u>62.8</u> | <u>86.7</u> | <u>91.4</u> | <u>93.6</u> | <u>94.5</u> |

VI.18. Summary of recommendations

VI.18.1 In sum, we RECOMMEND that -

Size of the public sector sixth form

- a) the future objective of policy should be specified as providing one public sector Form 6 place for every three public sector Form 4 places two years earlier (paragraph VI.7.1);
- b) the Education Department should reinforce its efforts to see that public sector sixth form places are filled where candidates of suitable academic standing are available (paragraph VI.7.2);

Sixth form curricula

- c) what is required is an integrated sixth form curriculum, by which we mean the retention of a two-year A level course; the abolition of H levels; and the introduction of a new curriculum derived from A levels to be termed Intermediate (I) levels (paragraph VI.8.7);
- d) more subjects of a less academic nature should be introduced at both A and I levels (paragraph VI.8.9);

The I levels curriculum

- e) some schools should introduce two-year Form 6 streams in which I level examinations can be taken after two years (paragraph VI.9.1);
- f) the I levels derived from A level subjects should be developed as subsets of those subjects (paragraph VI.9.2);
- g) the I level examinations should be scheduled as late in the school year as possible (paragraph VI.9.3);
- h) split class teaching should be extended, and additional teachers should be provided to facilitate the operation of split classes (paragraph VI.9.5);

Extension of the sixth form

- i) Form 7 should be introduced in all Chinese Middle schools (and those Anglo-Chinese schools which at present offer H level courses) (paragraph VI.10.1);
- j) sixth form courses should be extended to all prevocational schools (paragraph VI.10.2);

Language studies

- k) all A and I levels (except for those which are language-specific, such as Chinese Studies or English Studies) should be available for examination in both Chinese and English, and there should be no language indicator shown in statements of examination results (paragraph VI.11.2);
- l) special efforts should be made to improve the standard of English in Chinese Middle schools, in addition to the measures recommended in our Report No 1, and these should include courses provided by the Education Department for English teachers in these schools (paragraph VI.11.3);
- m) the current Use of English examination should be developed into an English Studies curriculum which will serve as more than a mere matriculation requirement for higher education. It should be developed as full I level subject. Similarly a Chinese

Language and Culture I level curriculum should be developed to fulfil a comparable function (paragraph VI.11.4);

- n) the Education Department should encourage schools to ensure that all students continuing into a second year of the sixth form should maintain their studies in at least one of the two languages during that second year (paragraph VI.11.5);

Admissions to post-secondary and tertiary education

- o) a centralized admissions system should be introduced, under which students' achievements in the three curricular I levels together with the language subjects taken in Form 6 would make it possible for places to be offered at the same time by all the institutions (paragraph VI.12.2);
- p) the centralized admissions system should also include an allocation of places to be offered after Form 7 (paragraph VI.12.4);
- q) CHUK should reconsider the case for the PAS in the light of our proposals (paragraph VI.12.5);
- r) CUHK should consider now the possibility of granting credit unit exemptions to students with appropriate A, or A and I, level qualifications (paragraph VI.12.6);

- s) all the institutions which accept students after Form 7 should consider very carefully the extent to which they could admit students on the basis of a combination of A and I levels (paragraph VI.12.7);

Recognition of I levels

- t) the Government should consider the appropriate recognition of I levels in its designated 'matriculation' standard for civil service entry (paragraph VI.13.1);

Need for counselling services

- u) the Education Department should take appropriate measures to encourage the schools to provide the necessary student counselling services (paragraph VI.14.1);



Chapter VII Teacher Preparation

VII.1 Introduction

VII.1.1 We studied teacher preparation in some detail in Report No 1. We now have further recommendations to offer on four specific issues, namely, the preparation of graduate teachers, the improvement of training for technical teachers in technical institutes, the development of degree level qualifications in education, and the improvement of in-service training for teachers of children with special educational needs.

VII.2 Preparation of graduate teachers

Present position

VII.2.1 Both the University of Hong Kong (HKU) and the Chinese University of Hong Kong (CUHK) currently offer one-year full-time pre-service and two-year part-time in-service courses leading to the post-graduate diploma and certificate in education for graduates who are or intend to be teachers. Together the universities have an annual enrolment capacity of 974 full-time equivalent (f.t.e.) places. At present more than 60% of the graduate teachers in Government, aided, caput and the more satisfactory private secondary schools are trained, most of whom received training after they entered the profession.

Interim targets

VII.2.2 We recognise that there is a considerable deficiency of trained graduate teachers which cannot be remedied within the short term. What is required in these circumstances is to set an interim target which represents the best realistic achievement within the medium term. Following consultation between the Education Department and Faculty or School of Education in the two universities, we recommend that the enrolment capacity of the post-graduate diploma and certificate in education courses at both universities should be expanded to achieve the training of 80% of graduate teachers by 1994, following the programme illustrated below -

| | <u>Enrolment Capacity</u> (number of f.t.e. places) | | | | | | | | |
|-------|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------------------|
| | <u>1986</u> | <u>1987</u> | <u>1988</u> | <u>1989</u> | <u>1990</u> | <u>1991</u> | <u>1992</u> | <u>1993</u> | <u>1994</u> |
| HKU | 536 | 536 | 536 | 536 | 536 | 603 | 670 | 670 | 670 |
| CUHK | 438 | 438 | 496 | 550 | 550 | 619 | 688 | 688 | 688 |
| Total | <u>974</u> | <u>974</u> | <u>1032</u> | <u>1086</u> | <u>1086</u> | <u>1222</u> | <u>1358</u> | <u>1358</u> | <u>1358</u> ⁽¹⁾ |

VII.2.3 Plans for the 1985-88 triennium are being implemented, and the enrolment capacity will remain at 974 until the end of the triennium. Given sufficient resources the universities should find it possible to increase the capacity by 11.5% to 1086 by the end of the 1988-91 triennium and by a further 25% to 1358 by the end of the 1991-94 triennium. Details of the provision and requirement for graduate teacher training are set out in Annex VIIA. Realistic projections of requirement beyond

⁽¹⁾ Assuming no further increase in the enrolment capacity in the 1994-97 triennium.

Stage VI of the Secondary Schools Building Programme are not practicable, because the need for, or scope of, a Stage VII has yet to be determined.

Ultimate target

VII.2.4 Clearly the ideal ultimate target would be that all graduate teachers should be trained. This cannot be achieved in practice, however, if only because the more common mode of graduate teacher training is in-service, which means that at any time the profession is carrying a significant number of new teachers who are in training or yet to be trained. The 80% target put forward here for 1994 comes fairly close to the best that can be achieved. We recommend that the ultimate target for the training of graduate teachers, allowing for the newly inducted teachers, should be set at 90%.

Need for review

VII.2.5 To ensure proper co-ordination with the Secondary Schools Building Programme, we recommend that the interim targets for the training of graduate teachers should be reviewed as a matter of course in time for the planning for student targets of training courses at both universities for each new triennium. The review should consider the rate of build-up in relation to the ultimate demand and the rate of wastage so as to avoid any dramatic cutback of training programmes at both universities.

Mix of full-time and part-time places

VII.2.6 We recommend that the proposed additional places in the post-graduate diploma and certificate in education courses should be provided on a part-time in-service basis. This, among other things, obviates

the problem of finding opportunities for teaching practice; it provides a trial period in which new graduates can decide whether they really intend to stay in the teaching profession before undergoing training; and schools should be more willing to provide guidance and practical training for their own teaching staff who are on the part-time course. However, the existing 236 full-time pre-service places should still be provided to meet demand from potential teachers. We also recommend that, as more graduate teachers become trained, the mix between full-time and part-time course should be reviewed.

Subject mix

VII.2.7 We note the worries about a mismatch in the supply and demand of trained graduate teachers of specific subjects. A survey is needed to collect data on serving teachers in order to facilitate the planning of the appropriate subject mix for future training programmes. Starting this year the Education Department will collaborate with HKU to conduct this survey on an annual basis.

Financial implications

VII.2.8 The additional recurrent financial implications of this programme are estimated as follows -

| | (\$'000) | | | | | |
|--------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | <u>1988/89</u> | <u>1989/90</u> | <u>1990/91</u> | <u>1991/92</u> | <u>1992/93</u> | <u>1993/94</u> |
| course | 3160 | 6160 | 6160 | 14910 | 23660 | 23660 |
| <u>costs</u> | | | | | | |
| staff | 0 | 600 | 1680 | 2800 | 5350 | 9030 |
| <u>costs</u> | | | | | | |
| total | 3160 | 6760 | 7840 | 17710 | 29010 | 32690 |
| <u>costs</u> | | | | | | |

The course costs are based on the estimated unit costs of f.t.e. places at both HKU and CUHK; whereas the staff costs are a result of graduate teachers being offered additional increments on achieving diploma or certificate status.

Financing of the programme

VII.2.9 In view of the late notice given to the universities for the additional enrolled capacity to be offered in the 1988-91 triennium, we recommend that the additional effort should be mounted through a blister programme at both universities,⁽²⁾ so as to achieve the target in the short run, and also to make it possible to review the scale of the programme in future. From 1991 onwards, the Government, the University and Polytechnic Grants Committee and the universities should decide together the best mode of financing for the programmes to achieve the training targets without excessive expansion of permanent capacity in the long run.

VII.2.10 There are at present blister programmes for the training of graduate teachers at both universities with a total enrolment capacity of 300 f.t.e. places. They are included in the table in paragraph VII.2.2.

⁽²⁾ Blister programmes are short-run programmes aiming to fulfil special manpower requirements specified by the Government, e.g. for lawyers, doctors, teachers and social workers, They are of fixed duration and are in addition to the normal expansion of the universities, i.e. outside their overall target student numbers.

VII.3 Training of technical teachers in technical institutes

Background

VII.3.1 In 1983 the Vocational Training Council commissioned a consultant, Mr R L Helmore, to undertake a study on the technical education delivered by technical institutes and related issues. The Helmore Report identified serious inadequacies in the teaching qualifications of some of the full-time teaching staff in technical institutes and recommended regular checks on the progress towards improved teacher training in this area.

Present position

VII.3.2 At present only about half of the 400-plus full-time staff have had some form of teacher training. With three new technical institutes coming on stream a further 400 teachers will be required by 1988, so the situation will deteriorate unless a programme for the training of teachers is established and special provision is made.

Proposals for teacher training

VII.3.3 To remedy this the Director of Technical Education and Industrial Training has agreed a training programme with the Director of Education to be run at the Hong Kong Technical Teachers' College (HKTTC). A teacher training course for lecturing staff and an instructional techniques course for workshop instructors of the technical institutes will be offered with effect from 1986 and 1987 respectively. The lecturers' course will be divided into two parts. Part I will be a four-week

block-release course. Part II will be a two-year course with mixed-mode attendance, satisfactory completion of which will lead to a 'qualified teacher' certificate awarded by the Director of Education. The instructors' course will be a four-week block-release course.

VII.3.4 Due to limitations of accommodation and equipment at the HKTTC, the class size will be limited to 20 for each course. The first year intake will be as follows -

| | <u>1986</u> | <u>1987</u> | <u>1988</u> | <u>1989</u> | <u>1990</u> |
|---------------|-------------|-------------|-------------|-------------|-------------|
| <u>Course</u> | | | | | |
| Lecturers | 100 | 100 | 100 | 100 | 0 |
| Instructors | 0 | 20 | 20 | 20 | 20 |

On the basis of this intake pattern a total of 400 lecturers and 80 instructors will have been trained by 1991. Assuming no drop-outs and allowing for 5% annual wastage, this additional output together with existing trained staff should mean that some 75% of lecturers and 85% of instructors will be trained by 1991. If there is a continuing demand for the lecturers' course, the intake will be continued in 1990 and beyond.

VII.3.5 All new lecturing staff will be required to attend Part I of the lecturers' course, whereas Part II of the course will be voluntary. We recommend that the Technical Education and Industrial Training Department should consider offering appropriate incentives to staff who successfully complete the full course for lecturing staff on a voluntary basis.

Financial implications

VII.3.6 We note that the financial implications of this programme are estimated as follows -

| | (\$'000) | | | | |
|---------------------------------------|----------------|----------------|----------------|----------------|----------------|
| | <u>1986/87</u> | <u>1987/88</u> | <u>1988/89</u> | <u>1989/90</u> | <u>1990/91</u> |
| <u>Course costs and other charges</u> | 392 | 743 | 956 | 956 | 352 |

The Director of Education has sought and obtained provision for the first year of this programme in the 1986-87 Estimates.

VII.4 Bachelor of Arts degree in Primary Education for Primary school heads

VII.4.1 In Report No 1 we recommended strongly the early implementation of the proposal for a Bachelor degree in Primary Education to promote leadership at the primary school level, noting that this would improve and enrich primary education as well as enhance the status of primary school personnel. We acknowledged that the proposal would require additional financial resources and would have consequences for the pay structure and scale of primary school teachers. Accordingly we recommended a modest start with 30 suitable candidates, following a suggestion from CUHK.

VII.4.2 This has been the only recommendation in Report No 1 not yet accepted by the Government for implementation. The principal objection raised against it has been that if the objective of the proposed degree course is to raise the standard of non-graduate teachers in primary schools then it would seem more cost-effective

to concentrate on providing more in-service training courses tailor-made to cater for the specific needs of primary schools. It has been suggested as an alternative that such in-service training courses could be introduced when the fourth College of Education is completed in mid 1990, and that this would represent little delay since the degree course could not commence before 1989.

VII.4.3 In fact the objective of the proposal is not solely to raise the standard of non-graduate teachers in primary schools, though this would be a consequential outcome. The main objective is to strengthen the leadership, both administrative and professional, which the head (or potential head) of the school is expected to exercise in all facets of his duties, but which is becoming increasingly complex and demanding in nature. Thus the proposed course will focus on three major areas pertaining to primary education: curriculum research and development, educational administration and guidance and counselling.

VII.4.4 This objective cannot be fulfilled by a course of instruction within a college of education. A three-year part-time degree course is required to provide adequate opportunities for the holders of these highly responsible posts to develop their grasp of issues of both educational theory and educational management; and to provide more time for them to strengthen their leadership by trying out in their own schools the practical applications of their training. This interplay of theory and practice will be an important feature of the proposed course, details of which are described in Annex VIIB.

VII.4.5 We wish to re-assert the case for this proposal and we recommend that a Bachelor of Arts in Primary Education programme for primary school heads, with an annual intake of 30, should be introduced not later than 1991. We also recommend that the programme should be run on a continuous basis as there are 642 government and aided primary schools in the territory as at September 1985, and very few of their heads have received comparable training.

VII.4.6 A university would only be likely to consider this proposal if it was sure that the Government was prepared to recognise the status of the graduates and to provide graduate posts. We therefore recommend that appropriate graduate posts in primary schools should be created for, or appropriate salary increments be granted to, heads who have completed the course, or obtained an acceptable equivalent qualification.

VII.5 Degree courses for special school heads

VII.5.1 Of the 61 heads of special schools, 47 are non-graduates and as such stand to benefit professionally from a Bachelor of Arts in Education course. As shown in Annex VIIC, these heads are all trained teachers, and the great majority of them have completed a recommend course of training in special education. We recommend that a degree course similar to that proposed for heads of ordinary primary schools should also be provided for the non-graduate special school heads to upgrade their performance as school heads and enhance their contribution to the education system.

VII.5.2 We note, however, that of the 47 non-graduate heads, two are in special secondary schools and 38 in special schools with both secondary and primary classes. Their training needs are different from those of the ordinary primary school heads. We recommend that the degree course proposed for the primary school heads should be modified to meet the needs of all special primary and secondary school heads, for instance by offering electives in Secondary School Administration, Remedial Teaching and Teaching of Children with Learning Difficulties, so that all special school heads (and subsequently potential heads) can be trained under the general scheme and no separate provision will be necessary.

VIII.5.3 We recognise that there is a continuing need to send small numbers of heads of special schools overseas for graduate studies in the needs of children with particular handicaps for whom the numbers involved may make it impracticable to run degree courses in Hong Kong.

VII.5.4 The financial implications of the Bachelor of Arts programme for heads of ordinary primary schools and special schools are estimated as follows -

| | (\$'000) | | | | | |
|---------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | <u>1991/92</u> | <u>1992/93</u> | <u>1993/94</u> | <u>1994/95</u> | <u>1995/96</u> | <u>1996/97</u> |
| <u>course costs</u> | 1635 | 1635 | 1635 | 1635 | 1635 | 1635 |
| <u>staff costs</u> | - | - | - | 41 | 154 | 337 |
| <u>total costs</u> | 1635 | 1635 | 1635 | 1676 | 1789 | 1972 |

This is based on the assumption of an annual course intake of 30. The course costs refer to the approximate costs of operating a similar programme at the School of Education at CUHK. The staff costs refer to the assumed additional salaries expense as a result of teachers achieving graduate status.

VII.6 Degree courses for non-graduate teachers of practical, technical and cultural subjects

Present position

VII.6.1 Practical, technical and cultural subjects include Design and Technology, Art and Design, Home Economics, Physical Education and Music. As a group they are distinct from the normal university-oriented academic subjects. In spite of the encouragement and incentives provided by the Education Department, many of the schools offering these subjects do not provide them beyond Form 3. In most schools they are taught by non-graduate teachers even at the senior secondary level.

VII.6.2 At present graduate teachers of these subjects are in very short supply because relevant degree courses are not usually available locally. This is in fact a result of the somewhat circular considerations that -

- a) there are few openings for graduates of these subjects in the school system; and
- b) schools are reluctant to offer these subjects beyond Form 3, partly because graduates are not readily available.

VII.6.3 To equip non-graduate teachers better to teach these subjects beyond Form 3, Advanced Courses of Teacher Education (ACTE) are offered at the colleges of education and HKTCC. While these courses are very useful, they are not comparable to degree courses for the reasons set out in paragraph VII.6.5 below.

Proposals

VII.6.4 We feel that there is a need to raise the status of these subjects vis-a-vis academic subjects; to provide a further incentive for their wider adoption in schools, especially at the senior secondary level; and to ensure that the teaching of these subjects beyond Form 3 is effective.

VII.6.5 We believe that degree courses are more appropriate than ACTE in that they will enable students to acquire a better conceptual and philosophical understanding of their subject, a broader sociological perspective, and a better awareness of the pedagogical implications. We prefer local part-time in-service courses to overseas courses because the latter are invariably less relevant, more expensive and, since replacement teachers are required, more disruptive.

Part-time degree courses

VII.6.6 We recommend that, as a first step, opportunities of graduate level training should be provided for non-graduate teachers who are teaching a practical, technical or cultural subject at senior secondary level and are in charge of the subject. The number of such non-graduate teachers in Government, aided, caput and the more satisfactory private schools by 1991-92 is estimated as follows -

| <u>Subject</u> | <u>Estimated number of non-graduate teachers to be trained by 1991/92</u> |
|---------------------|---|
| Design & Technology | 106 |
| Art & Design | 141 |
| Home Economics | 106 |
| Physical Education | 364 |
| Music | 39 |

This is based on the assumption that all new schools will offer these subjects beyond Form 3, and that existing schools which are not doing so will find a way of doing so over a period of time.

VII.6.7 We note the general lack of suitable local training opportunities at the degree level for teachers in these subjects. At present there are no local courses in Design and Technology, Home Economics or Physical Education. The universities do, however, offer degree courses in Fine Arts and Music.

VII.6.8 We recommend that part-time in-service courses leading to Bachelor of Education qualifications in Design and Technology, Art and Design, Home Economics and Physical Education should be developed in local tertiary institutions. These should be for serving non-graduate teachers who have at least two years' experience in teaching the subject at the senior secondary level and have completed the one-year full-time ACTE in the subject. We recommend that teachers should have the course fees refunded to them on successful completion of these courses.

VII.6.9 We recommend that these courses should be started in 1991-92 by the latest so that the first batch of graduates will come on stream from 1993-94 although we accept that these programmes should have a lower priority than the proposed extension of the post-graduate diploma and certificate in education courses and degree courses for primary and special school heads. In view of the small numbers involved we do not recommend that a Bachelor of Education in Music should be introduced.

Additional graduate posts

VII.6.10 There should be a more generous provision of graduate posts which would enable schools to offer these subjects (including Music) in senior secondary classes without their having to give less emphasis to academic subjects. We recommend that secondary schools in the public sector which offer any of the specified practical, technical or cultural subjects at the senior secondary level should be allowed to employ a teacher who has successfully completed the local degree course (or equivalent) as the teacher-in-charge of the subject and to appoint him or her as a Graduate Master or Mistress outside the normal quota of graduate posts, subject to a maximum of four such appointments in each standard size school. (This maximum has been determined after taking into account the fact that fewer graduate posts will be required for academic subject teaching if practical, technical and cultural subjects are offered very widely in the school beyond Form 3). This will entail consequential adjustments to the number of promotion posts in graduate and non-graduate ranks to maintain the existing promotion ratios. The new posts would be offset by the deletion of the appropriate number of non-graduate posts.

Financial implications

VII.6.11 The financial implications of the proposals for degree courses in technical/practical and cultural subjects are estimated as follows -

| | (\$'000) | | | | | |
|---|----------------|----------------|----------------|----------------|----------------|----------------|
| | <u>1991/92</u> | <u>1992/93</u> | <u>1993/94</u> | <u>1994/95</u> | <u>1995/96</u> | <u>1996/97</u> |
| a) <u>Design and Technology</u> (assumed annual intake: 15) | | | | | | |
| i) course costs | 968 | 968 | 968 | 968 | 968 | 968 |
| ii) staff costs | - | - | 34 | 93 | 152 | 211 |
| Sub-total | <u>968</u> | <u>968</u> | <u>1002</u> | <u>1061</u> | <u>1120</u> | <u>1179</u> |
| b) <u>Art and Design</u> (assumed annual intake: 15) | | | | | | |
| i) course costs | 968 | 968 | 968 | 968 | 968 | 968 |
| ii) staff costs | - | - | 34 | 93 | 152 | 211 |
| Sub-total | <u>968</u> | <u>968</u> | <u>1002</u> | <u>1061</u> | <u>1120</u> | <u>1179</u> |
| c) <u>Home Economics</u> (assumed annual intake: 15) | | | | | | |
| i) course costs | 968 | 968 | 968 | 968 | 968 | 968 |
| ii) staff costs | - | - | 34 | 93 | 152 | 211 |
| Sub-total | <u>968</u> | <u>968</u> | <u>1002</u> | <u>1061</u> | <u>1120</u> | <u>1179</u> |
| d) <u>Physical Education</u> (assumed annual intake: 25) | | | | | | |
| i) course costs | 1613 | 1613 | 1613 | 1613 | 1613 | 1613 |
| ii) staff costs | - | - | 57 | 155 | 253 | 351 |
| Sub-total | <u>1613</u> | <u>1613</u> | <u>1670</u> | <u>1768</u> | <u>1866</u> | <u>1964</u> |
| <u>Total costs</u> | <u>4517</u> | <u>4517</u> | <u>4676</u> | <u>4951</u> | <u>5226</u> | <u>5501</u> |

This is based on the assumption that the degree courses would last for two years. The course costs refer to the average costs of running a similar programme at the School or Faculty of Education at CUHK and HKU. The staff costs represent the additional salaries expense as a result of teachers achieving graduate status.

VII.7 In-service training for teachers of children with special education needs

Background

VII.7.1 We have also studied the training of special education teachers. Specifically we have considered the report of the working group established under the Education Department to examine the in-service training course operated by the Special Education Department of Sir Robert Black College of Education (SRBCE) for teachers of children with special educational needs. This, together with the training for special school heads, are the two areas in special education which we feel deserve the most urgent attention.

Major problems

VII.7.2 We have noted that the report of the working group identified a number of problems which are affecting adversely the operation of the in-service training course. There are difficulties in recruiting and retaining well qualified lecturing staff because of problems associated with the workload, mode of operation and promotion prospects. The quality of the course has suffered from inadequacies in course time, lecture hours,

coverage of the trainee's area of specialization and staff-student ratios. As regards the staff structure, there is no immediate rank filling the gap between the principal lecturer and the lecturers and assistant lecturers, resulting in problems over the sharing of responsibilities among staff. There is also a wide range of qualifications and abilities among trainees, some of whom do not have any initial teacher training but are admitted for operational needs, making it difficult to set a uniform standard in the supervision of teaching practice.

Improvements recommended

VII.7.3 Having considered the proposals put forward by the working group, we feel that the following measures should be taken to maintain a high standard of training, to ensure a reasonable training output and to enable the Special Education Department of SRBCE to discharge its training responsibilities on a more professional standing with greater efficiency.

a) revised mode of operation for the existing course and future development of a retraining course

VII.7.4 We propose that the plans for improvement and development of the existing in-service course for teachers of children with special education needs operated by the Special Education Department of SRBCE should be implemented in two stages: Stage I by 1987 and Stage II by 1990.

VII.7.5 We recommend that in Stage I the existing mode of operation of the course should be replaced by a two-year block-release mode, which includes -

- i) a continuous 16-week block-release course for teacher trainees from special schools to attend lectures at SRBCE; and
- ii) a subsequent period of 18 months of teaching practice in the trainees' own schools with lectures, seminars and discussions arranged by SRBCE at intervals.

This new mode of operation would bring the total lecture and tutorial time from 360 to 480 hours. The additional time will be devoted to Elective Subject Studies so as to strengthen the trainee's area of specialisation. It will also enable the trainees to engage full-time in their study during the 16-week block-release period, and allow progressive programmes in practical work to be arranged in the most desirable sequence to match the theoretical background given in lectures. The staff would also have more time to supervise the trainees during the practical teaching period.

VII.7.6 We recommend that as an immediate measure SRBCE and the Special Education Section of the Education Department should form a working group to plan and organize the curriculum for the block-release course.

VII.7.7 We support in principle the restriction of the two-year block-release course to those teachers who possess recognised initial teacher training qualifications. However, given the number of teachers in special schools at present who have not received initial training, we recommend that the selection of trainees for the two-year course should be exercised with flexibility, especially with regard to unqualified teachers with degree or post-secondary qualifications.

VII.7.8 We recommend that in Stage II a retraining course on a block-release basis should be organised for qualified teachers in special schools who have completed special education training at least five years previously to enable them to keep up with the latest developments in instructional techniques. Subject to the availability of sufficient special education teachers, the course should be operated on a four-block system of eight-week duration each year, with an intake of 30 teachers for each block. There are about 1000 teachers in this category and nearly all of them could be retrained in a period of ten years at the proposed rate of 120 per year.

VII.7.9 We also considered, as an alternative to Stage II, the introduction of a one-year full-time specialist course for selected teachers. We concluded that the block-release course proposed in the preceding paragraph would be a sound compromise in the interim in order to speed up the retraining of teachers. However, we recommend that a one-year full-time specialist course for selected teachers should be the long term target.

b) revised staff establishment for the Special Education Department of SRBCE

VII.7.10 We recommend that the staff establishment for the Special Education Department of SRBCE should be revised for the implementation of Stages I and II. Stage I would require a vice principal for the development of the special education course, two principal lecturers, five senior lecturers and sixteen lecturers for the seven specialised subjects, namely, the education of children with learning difficulties, mentally handicapped children, visually handicapped children, hearing impaired children, maladjusted and socially deprived children, physically handicapped children and the management of children with speech and language problems. We consider that only graduate lecturers with additional qualifications in special education should be recruited to assist the principal/senior lecturers. A further four lecturers would be required for the implementation of Stage II.

c) training opportunities for teaching staff

VII.7.11 We recommend that more training courses, local and overseas, should be provided for selected teaching staff of the Special Education Department of SRBCE in order to enhance and update their professional knowledge, to minimize the turn-over rate of the serving staff and to boost staff morale. Lecturers from other subject departments should also be encouraged to undergo some basic training in special education so that they can bring special education into the initial teacher training courses, and be able to provide additional staff support to the Special Education Department when required.

Consultation

VII.7.12 We note that the Education Department has consulted the Special Schools Council and the Rehabilitation Development Co-ordinating Committee on the report, and that both councils confirm their support for the recommended improvements.

Financial implications

VII.7.13 The additional financial implications of the recommendations for the improvement of the in-service training courses outlined in paragraphs VII.7.5, VII.7.8 and VII.7.10 above are estimated as follows -

| | (\$m) | | | | | |
|--------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | <u>1987/88</u> | <u>1988/89</u> | <u>1989/90</u> | <u>1990/91</u> | <u>1991/92</u> | <u>1992/93</u> |
| Course | 1.21 | 2.08 | 2.26 | 2.77 | 3.05 | 3.05 |
| <u>costs</u> | | | | | | |
| Staff | 4.80 | 9.70 | 9.70 | 11.30 | 12.50 | 12.50 |
| <u>costs</u> | | | | | | |
| Total | <u>6.01</u> | <u>11.78</u> | <u>11.96</u> | <u>14.07</u> | <u>15.55</u> | <u>15.55</u> |
| <u>costs</u> | | | | | | |

The course costs refer to the costs of additional lecturing staff required to operate the courses, whereas the staff costs refer to the costs of hiring replacement teachers for special schools.

VII.8 Summary of recommendations

VII.8.1 In sum, we RECOMMEND that -

Preparation of graduate teachers

- a) the enrolment capacity of the post-graduate diploma and certificate in education courses at both universities should be expanded to achieve the training of 80% of graduate teachers by 1994 (paragraph VII.2.2);
- b) the ultimate target for the training of graduate teachers, allowing for the newly inducted teachers, should be set at 90% (paragraph VII.2.4);
- c) the interim targets for the training of graduate teachers should be reviewed as a matter of course in time for the planning for student targets of training courses at both universities for each new triennium (paragraph VII.2.5);
- d) the proposed additional places in the post-graduate diploma and certificate in education courses should be provided on a part-time in-service basis (paragraph VII.2.6);
- e) as more graduate teachers become trained, the mix between full-time and part-time courses should be reviewed (paragraph VII.2.6);

- f) the additional effort should be mounted through a blister programme at both universities (paragraph VII.2.9);

Training of technical teachers in technical institutes

- g) the Technical Education and Industrial Training Department should consider offering appropriate incentives to staff who successfully complete the full course for lecturing staff on a voluntary basis (paragraph VII.3.5);

Bachelor of Arts degree in Primary Education for primary school heads

- h) a Bachelor of Arts in Primary Education programme for primary school heads, with an annual intake of 30, should be introduced not later than 1991. The programme should be run on a continuous basis (paragraph VII.4.5);
- i) appropriate graduate posts in primary schools should be created for, or appropriate salary increments be granted to, heads who have completed the course, or obtained an acceptable equivalent qualification (paragraph VII.4.6);

Degree courses for special school heads

- j) a degree course similar to that proposed for heads of ordinary primary schools should also be provided for the non-graduate special school heads (paragraph VII.5.1);
- k) the degree course proposed for the primary school heads should be modified to meet the needs of all special primary and secondary school heads, for instance by offering electives in Secondary Schools Administration, Remedial Teaching and Teaching of Children with Learning Difficulties, so that all special school heads (and subsequently potential heads) can be trained under the general scheme and no separate provision will be necessary (paragraph VII.5.2);

Degree courses for non-graduate teachers of practical, technical and cultural subjects

- l) part-time in-service courses leading to Bachelor of Education qualifications in Design and Technology, Art and Design, Home Economics and Physical Education should be developed in local tertiary institutions (paragraph VII.6.8);
- m) teachers should have the course fees refunded to them on successful completion of these courses (paragraph VII.6.8);

- n) these courses should be started in 1991-92 by the latest so that the first batch of graduates will come on stream from 1993-94 (paragraph VII.6.9)
- o) secondary schools in the public sector which offer any of the specified practical, technical or cultural subjects at the senior secondary level should be allowed to employ a teacher who has successfully completed the local degree course (or equivalent) as the teacher-in-charge of the subject and to appoint him or her as a Graduate Master or Mistress outside the normal quota of graduate posts, subject to a maximum of four such appointments in each standard size school (paragraph VII.6.10);

In-service training for teachers of children with special education needs

- p) the plans for improvement and development of the existing in-service course for teachers of children with special education needs operated by the Special Education Department of the Sir Robert Black College of Education should be implemented in two stages: Stage I by 1987 and Stage II by 1990 (paragraph VII.7.4);
- q) in Stage I the existing mode of operation of the course should be replaced by a two-year block-release mode (paragraph VII.7.5);

- r) as an immediate measure the Sir Robert Black College of Education and the Special Education Section of the Education Department should form a working group to plan and organize the curriculum for the block-release course (paragraph VII.7.6);
- s) the selection of trainees for the two-year course should be exercised with flexibility, especially with regard to unqualified teachers with degree or post-secondary qualifications (paragraph VII.7.7);
- t) in Stage II a retraining course on a block-release basis should be organized for qualified teachers in special schools who have completed special education training at least five years previously (paragraph VII.7.8);
- u) a one-year full-time specialist course for selected teachers should be the long term target (paragraph VII.7.9);
- v) the staff establishment for the Special Education Department of the Sir Robert Black College of Education should be revised for the implementation of Stages I and II (paragraph VII.7.10); and

- w) more training courses, local and overseas, should be provided for selected teaching staff of the Special Education Department of the Sir Robert Black College of Education (paragraph VII.7.11).

VII.8.2 We wish to point out that, in view of the tight implementation schedule we put forward for the in-service training courses in Section VII.7 above, the implementation of recommendations (p) to (w) should commence ahead of public consultation on this report.

Chapter VIII Open Education

VIII.1 Overview

VIII.1.1 This Chapter of our Report is divided into six parts. Its second section (VIII.2) deals with open education at the secondary level. The third section (VIII.3) relates to the possibility of regional open education centres. The fourth section (VIII.4) deals with open education for management development. The fifth section (VIII.5) deals with open education at the post-secondary level. The sixth section (VIII.6) covers the problems posed by overseas institutions offering open education courses in Hong Kong.

VIII.1.2 In our first Report we defined open education as "... education which is conducted outside the formal education system". Put another way, this means education outside conventional schools and institutions with their restrictions on access in terms of either age or academic attainment. We noted that "... The aims of open education are manifold and include remedial learning, providing second chance opportunities for obtaining qualifications(updating and keeping abreast of developments in fields where knowledge is expanding rapidly, and fulfilling personal development needs."

VIII.1.3 We also said there that "... In the time available, we have been unable to do justice to the many facets of open education, not the least of which are

identification of the areas of need and their relative priorities as well as the management and operational arrangements. As these are important and complex issues, we intend to study them in depth in the next phase of our work." We then confined ourselves to the specific question of whether Hong Kong should have an autonomous Open University on the British model.

VIII.1.4 We have now completed the review to which we committed ourselves. We have consulted the Board of Education and we have a number of recommendations to make about the development of open education at the secondary level. We have noted the intentions of the Vocational Training Council (VTC) to develop open education in the area of management training. We have studied the prospects for open education at the post-secondary level, and we have specific recommendations to make on how this should be taken forward, together with our views on the regulation of overseas institutions wishing to offer courses in Hong Kong.

VIII.1.5 There is one area of open education which we have not studied. This relates to the many courses in non-formal education (that is, not leading to formal academic qualifications) offered by the Education Department and many other organisations, notably voluntary agencies. This is an area to which we may come in future Reports.

VIII.1.6 On the question of relative priorities, we do not see that this need, in the event, be an area of great conflict or contention. Our proposals for open education at the secondary level are relatively modest, and in fact

straightforward developments of existing practice. The VTC's proposals are similarly modest. Our recommendations for post-secondary open education will require considerable initial financial outlays, which we cannot at this stage determine: but we feel that this is such an important and necessary development that it must proceed as quickly as possible. We therefore recommend that action should proceed to develop open education at the secondary and post-secondary levels, and in the area of management education, simultaneously.

VIII.2 Open education at the secondary level

Present provision

VIII.2.1 We have considered proposals to develop open education at the secondary level in the context of providing more opportunities in secondary education outside the conventional school system.

VIII.2.2 At present, a wide range of courses are operated or administered by the Adult Education Section of the Education Department, covering both formal education courses with standard academic curriculum at the primary and secondary levels; and non-formal educational opportunities such as job-oriented courses, and courses directed towards pre-retirement education, labour education and careers education.

Objectives and admission requirement

VIII.2.3 We consider that the primary objective of developing open education at the secondary level is to provide a second chance for those who missed this opportunity in the past to achieve the same level of

formal education as those who now benefit from expanded provision in schools. At the same time, we wish also to see a second chance provided for those who, for one reason or another, failed to complete a secondary course at school.

VIII.2.4 We note that all of the formal education courses currently being offered require the applicant to have an educational qualification at the preceding level and thus in the strictest sense are not "open" to all. However, in order to ensure that the student derives full benefit from the course, and to minimise wastage, we accept that the applicant should fulfill a similar level of academic attainment for entry as in similar courses in day schools.

Proposals

VIII.2.5 We endorse the Education Department's proposal that the five-year Government Secondary School Course for Adults and the six-year Secondary School Course should be amalgamated into a single course of five years' duration. This consolidation is timely in view of the declining demand for the six-year course and similarity in average age of participants in both the existing courses. It should also provide scope for operating larger centres with improved class organisation, reduce administrative problems and facilitate the standardisation of the curriculum.

VIII.2.6 We also endorse the proposal that planning for a sixth form course should proceed to be developed along the lines set out in our proposals for the future development of sixth form education in schools in Chapter

VI. The present lack of courses at sixth form level is perhaps the most obvious area of omission in the Education Department's adult education programme at secondary level. We see a demand for sixth form courses from, first, those students, averaging 12% of those who complete the Government adult secondary courses, who attain the academic requirements for sixth form education leading to the Advanced level examination; and, second, those who at some time in the past have reached the necessary level of academic achievement at school, but, for whatever reason did not go on to sixth form education and now wish to do so. We note that part of this demand is already catered for by private schools and colleges and it is not our intention to replace this source of provision. The courses should be available in both English and Chinese.

VIII.2.7 At present, years one to three of the Secondary School Course are free, and fees are charged for years four to six. Fees for years one to five of the Government Secondary School Course for Adults are charged at half the standard rate in day schools.

VIII.2.8 We have recommended to the Government on grounds of equity that years one to three of the combined course (i.e. the junior secondary years) should be available free of charge. We understand that the Executive Council has now accepted that no charge should be made for years one to three of the amalgamated secondary school course. The fees for senior secondary and sixth form will be set at one half of the revised day school fees, reflecting the lower number of contact hours involved.

Financial implications

VIII.2.9 The demand for junior secondary courses has already passed its peak and can be expected to decline in future. On the other hand, a tentative projection of the demand for senior secondary courses indicates that it would reach around 6700 places in 1987 with a gradual decline thereafter (Annex VIIIA). Based on these projections, we note that the cost of meeting the demand would increase from the present figure of around \$9 m per annum to some \$11 m in the peak year, declining to around \$5.8 m in 1992.

VIII.2.10 We realise that it is more difficult to assess the likely demand for, and the cost of, sixth form courses. To adopt a practical approach, the number of places is assumed to be equivalent to one-third of the year four evening intake two years previously. We note that using this formula, the cost would rise to \$5.7 m at the peak in 1989 and would decline thereafter. Our calculations of provision and cost are set out at Annex VIIB.

VIII.3. Regional open education centres

VIII.3.1 We believe there could be value in establishing at a regional level centrally-located facilities devoted to both formal and non-formal open education, as a focus of efforts to promote and encourage the development of adult education at all levels.

VIII.3.2 We recommend that the concept of regional centres for adult education should be further explored and proposals for a pilot scheme developed. However, we suggest that the concept should be pursued using existing community facilities, possibly including the new technical institutes at Tuen Mun and Sha Tin.

VIII.4 Open education for management development

VIII.4.1 We note that in early 1985 the VTC, on the advice of its Committee on Management and Supervisory Training, appointed a consultant, Mr S J Dalziel, to report on Open Learning Possibilities for Managers and Supervisors in Hong Kong. The consultant's terms of reference were "to make recommendations on research projects and the development of distance learning materials in the context of Hong Kong management development needs". The report was submitted to the Committee in March 1985.

VIII.4.2 The report argued that there was considerable potential for open learning in the field of management education in Hong Kong. There were opportunities to use open learning materials and support services both by individuals for their personal development (at a place, time and pace convenient to themselves), and by companies for management training activities directly linked to the needs of the business.

VIII.4.3 The report concluded, however, that the initial cost of preparing materials would discourage expansion in this field unless some agency was prepared to fund a project which would demonstrate this potential.

VIII.4.4 The report proposed that a limited open learning development programme for supervisory and management training should be launched by the VTC in Hong Kong, at a level of funding sufficient to demonstrate practical results, test demand and support and illustrate different methods and how experience and materials from outside Hong Kong might best be used. The programme would provide the necessary information to enable informed decisions to be taken on future development in this field.

VIII.4.5 The report advocated that the programme should consist of three elements -

- a) application projects;
- b) training and development in open learning methods; and
- c) support services.

VIII.4.6 The report suggested four pilot application projects in areas where there was evidence of interest and support from Hong Kong managers, i.e. -

- a) business survival and development skills for owner-managers;
- b) practical knowledge and skills for supervision;
- c) supervisory/middle management training in a specific sector; and
- d) training skills for managers.

The minimum development costs of the four pilot application projects would be about \$600,000.

VIII.4.7 The report proposed that to complement these projects, training workshops and other consultancy activities should be provided to develop the necessary skills and methods in open learning. Other support services, such as information storage and distribution resources, should also be provided. The costs of providing consultancy activities and information services for open learning would be about \$100,000.

VIII.4.8 The report recommended that an experienced co-ordinator should be employed to implement the open learning development programme. The report also recommended that the responsibility for co-ordinating the programme should be assumed by the VTC's Management Development Centre, and that the staffing, training and information resources required to implement the programme be provided through its budget. (The Management Development Centre of Hong Kong was set up by the VTC in 1984 to improve the quality and quantity of management in Hong Kong, ensuring that it is capable of meeting changing needs, both in the short and the long term. The Centre focuses its principal activities in the research, development, co-ordination and promotion of management education and training.)

VIII.4.9 The Dalziel report has now been accepted in its essentials by the VTC's Committee on Management and Supervisory Training and the VTC has included in its Programme of Proposed Activities and Estimates of Revenue and Expenditure for 1986/87 one additional professional

staff member with expertise in open learning, a sum of \$600,000 to develop the pilot application projects and the required amount to cover the cost of consultancy and information services.

VIII.5 Open education at the post-secondary level

VIII.5.1 In our first Report we addressed the question of whether Hong Kong should have an open university, taking that to mean a dedicated institution along the lines of the Open University in the United Kingdom (UKOU). For that study we had the benefit of a report prepared by the University and Polytechnic Grants Committee (UPGC). UPGC's report did not favour the establishment of an open university in Hong Kong on the UK model, but it did argue for a very high priority to be given as soon as possible to the development of open education. The UPGC proposed that the development should be based on all the existing tertiary institutions.

VIII.5.2 In our first Report we endorsed the UPGC's recommendation that an open university should not be established, while committing ourselves to the further study of open education at all levels.

VIII.5.3 In the course of this study we have taken advice, in writing or personal representation, from all the tertiary institutions in Hong Kong. Our recommendations are set out in detail in paragraphs.

VIII.5.41 to VIII.5.63.

Objectives

VIII.5.4 We believe that there are three primary objectives for open education at the post-secondary level-

- a) to provide a second chance for those who had to forgo or were denied the opportunity of further education when they left school, or whose requirements for further education develop relatively late in life;
- b) to provide continuing education to update and enhance the training of those who completed their further education at the beginning of their careers;
- c) to provide retraining for those who need to change or extend their career or vocational skills later in life to adapt to technological, economic and social change.

Demand and need

VIII.5.5 We have not found it possible to quantify the demand for a programme of open education at the post-secondary level. The institutions funded by the UPGC were unable to assist us in making an assessment, and instead recommended that there should be a comprehensive survey to assess demand. This would be a major task.

VIII.5.6 The demand does not arise from the same group as those who seek conventional post-secondary education, since that group is limited to a relatively narrow age group between 18 and 24 who have achieved A or H level matriculation qualifications in school. Since open education, by definition, should not be constrained by age or academic qualifications, the size of the potential clientele is much larger. We identify as the sources of potential demand -

- a) the present and accumulated demand from those who have not managed to join conventional post-secondary education programmes;
- b) students in extra-mural programmes whose requirements are not being met in full by those programmes;
- c) students in overseas programmes who might prefer to continue their studies in Hong Kong; and
- d) students in part-time programmes for whom education programme based on distance learning would be more convenient.

We recognise that there may be a considerable degree of overlap in this demand.

VIII.5.7 We have also had considerable difficulty in addressing the question of the need within our society for such opportunities. It is not possible to make simple country-by-country comparisons of output of manpower being trained to post-secondary level because UNESCO figures relate only to the 20 to 24 age group.

VIII.5.8 It is clear to us, however, that the pace of change in a fast developing society and economy is such that initial training at both sub-degree and degree level is out of date within a very few years in many fields. Updating and retraining are thus important tasks for our society. For those with sub-degree qualifications, this may involve advancing to degree level; degree holders may need advanced diplomas or second degrees.

VIII.5.9 We have noted also that social as well as economic need must be considered, and this is likely to require the broadening of the academic profile of an open education programme beyond the most obvious areas such as commercial studies. In the long run at least the requirement should be seen as a broad and balanced programme covering the entire post-secondary field.

VIII.5.10 We have necessarily asked ourselves whether there was any risk of an over-supply of people qualified at the post-secondary level. The fears represented here are that open education will produce an excessive number of highly qualified people who cannot find the level of work or remuneration to which they feel entitled; or whose expectations might somehow force up salary levels and derange the economy; or whose refusal to accept lower levels of work deprives the economy of the lesser qualified people that it requires. We have rejected such fears on the ground that -

- a) even with the proposed third university, there will not be over-provision of degree course places by the end of the century compared with other developed countries;

- b) Hong Kong is at present heavily dependent on opportunities in post-secondary education overseas;
- c) Hong Kong will only maintain the pace of its economic, educational and social development with an increasing supply of better qualified citizens;
- d) our free market economy will adapt flexibly to use whatever skills are available and pay for them in due proportion to the value of their contribution; and
- e) the students in an open education programme will tend to be mature people with a clearer sense of their own aspirations and what benefits they could reasonably expect from such studies.

VIII.5.11 Overall, therefore, although in a subsequent recommendation we have called for a thorough analysis of demand and need, we consider that there is a prima facie case, both social and economic, for an open education programme which will supplement conventional education and provide opportunities for those who otherwise would be denied them.

The scope of an open education programme

VIII.5.12 We consider that there is a need for an open education programme which covers the full range of possible attainments in further education in Hong Kong; i.e. from sub-degree to second degree level.

VIII.5.13 We acknowledge that there is already a variety of courses available which meet part of the potential demand for continuing education and retraining. Some of those are certificated courses, and others are non-certificated. Many of the non-certificated courses have a clear vocational orientation. Most of the certificated courses require entrance qualifications, while most of the non-certificated courses do not. Their other characteristics are that generally they are not derived from a formal academic course of studies, and apart from leading in some cases to an advanced certificate in the same area they do not lead into the mainstream of academic qualification associated with higher education. They are not building blocks; they are only self-contained vocational qualifications. These are major deficiencies.

VIII.5.14 Furthermore, these courses, however valuable, meet only part of the total demand for opportunities in continuing education. They do not meet the full needs of the objectives which we have set out in paragraph VIII.5.4. This is a function of access, structure and content.

VIII.5.15 First, as regards access, other than a few research-based second-degree courses these courses are operated on the basis of contact teaching, following a pre-determined timetable. The student is required to be available at specified times on a regular basis. If he cannot comply with this requirement he cannot complete the course. For many working people this is obviously a major problem.

VIII.5.16 For the courses which lead to formal exit qualifications the student also has to have specified entry qualifications. For the lower level certificate qualifications these requirements may not be exceptionally rigorous, e.g. a number of passes at HKCEE. For the higher level qualifications the requirements usually are the same as those for full-time study. Since the number of places on contact-teaching courses is inflexible, entry is also competitive: only those offering the best qualifications are admitted. There is thus a tendency for opportunities in continuing education to be constrained by the student's attainments in (full-time) secondary education.

VIII.5.17 The problem regarding structure is that most of these courses represent 'single opportunities'. That is to say, a student with HKCEE qualifications can gain admission to a certificate level course; a student with A level qualifications may be admitted to a higher diploma course, professional diploma or degree level courses. But there is only very limited linkage between the various levels of qualifications: an example of this is from diploma to higher diploma status. Although it may be possible to proceed from a certificate to a higher certificate it is difficult to transfer to the higher level of the various diploma courses, or from there to

degree level. Thus a student's ultimate attainments remain constrained by entry qualifications gained in full-time school education. There are few ladders or bridges of opportunity, an important concept in continuing education.

VIII.5.18 As regards content, the problem here is that most part-time courses on offer represent a very high degree of specialisation, usually with a strong vocational bias. There are few of the more general programmes in either the arts subjects or the pure sciences which would satisfy the requirements of those who seek the more general academic qualifications, either for their own sake or as part of the process of developing their basic academic studies to the point from which they may wish to choose a specialist application.

VIII.5.19 These considerations have led us to define the structural requirement for a programme of open education at the post-secondary level as follows -

- a) the programme should represent a continuum, i.e. it should encompass the full range of post-secondary studies, starting at a level related to school leaving qualifications and extending to second degree level;
- b) the structure of the programme will require specific entry points, but it should be able to cater for entrants with a range of (including minimal) formal academic attainments;

- c) the programme should have multiple exit points (e.g. certificate, diploma, degree, advanced diploma and second degree level) appropriate to the requirements of its students;
- d) the programme should have within its basic schools of study central cores of academic and vocational studies allowing development into specialist areas leading to recognised qualifications;
- e) the programme should allow students to proceed, within limits, at their own pace in their acquisition of qualifications.

The need for distance learning

VIII.5.20 We have also considered the relationship between open education and distance learning. By distance learning we mean a form of tuition and study in which the principal element is pre-prepared course material on which the student works off campus to complete assignments or prepare for examinations. In theory there is no necessary connection, and an open education programme could be offered through conventional contact teaching backed up by personal study. In practice, we have concluded that a comprehensive open education programme accessible to all sources of potential demand requires the distance learning approach.

VIII.5.21 We see a number of reasons why distance learning overcomes many of the constraints of conventional contact teaching -

- a) conventional contact teaching requires teachers who can deliver lectures using material which they have selected and prepared themselves: distance learning relies upon pre-prepared course material on which the student can be supervised by a tutor or proctor, who need not be engaged in full time academic work, through correspondence, telephone tutorials or occasional meetings;
- b) because of this dependence on suitable lecturers, conventional teaching requires students to be grouped into classes of a pre-determined size. Distance learning using pre-prepared material does not require students to be grouped into classes, and so the number of students on any course is more flexible;
- c) the students are not bound by a rigid timetable for the attendance at classes, and such time as they have can be used flexibly for studying;
- d) the student is able to determine his own pace through a course to a greater extent, and so distance learning can cope effectively with students with varying amounts of time for study, and varying rates of comprehension; and

- e) distance learning shows economies of scale as the numbers of students on a given course increase, whereas the costs of contact teaching rise in increments as each new class is established.

VIII.5.22 This greater flexibility extends to structure and content as well. Because in distance learning it is the availability of pre-prepared material rather than lecturers and economic class sizes which is the critical constraint, if material already developed can be acquired it will be possible to offer a variety of linked courses which will lead the students through a far wider range of studies, both basic and specialist.

VIII.5.23 A characteristic of distance learning is its emphasis on 'certification by attainment' - that is, the student proves his mastery of a course of study at a specified level by his results in continuous assessment (which may or may not be part of the assessment for a final award) before coming to final course exams. With properly prepared course material and structure (and the use of criterion assessment) it is possible for the student to proceed from a relatively low entry level to the highest levels with assurances about mastery and ability available to both student and institution. The concept of certification by attainment is novel to Hong Kong, but proved elsewhere. It is the application of this technique of distance learning that makes open education a practical proposition rather than a theoretical possibility. The emphasis placed on achievement during the course of study means that less emphasis is required on entry qualifications, and it is thus possible to adopt a more liberal approach in determining who can join a course.

VIII.5.24 Distance learning, of course, also has fewer requirements for physical infrastructure than a conventional institution. The UKOU courses dispense with this to a very large extent: the printed material circulated is comprehensive, designed to reduce or obviate the need for libraries, and home science kits substitute for laboratories. Summer schools are an important part of the experience, but manage with borrowed premises instead of permanent facilities. Contact with tutors is mainly over the telephone or through the written comments made on assignments.

VIII.5.25 We also note that distance learning is not dependent upon the availability of channels in the electronic media. The value of audio-visual and audio material is great, but the mode of delivery has shifted in favour of pre-prepared tapes instead of live broadcasts. Nevertheless, access to this material is one reason why even the UKOU needs well-equipped study centres. Distance learning techniques have varying levels of sophistication and can function with complete dependence on written material : but the best practice seeks to augment the written material with other approaches which do involve physical infrastructure.

VIII.5.26 A distance learning programme in Hong Kong should look to the future, and the possible use of advanced techniques such as teleconferencing and cable television. In particular if cable television is to be available in the future, it would be prudent for the Government to reserve one channel at least for this role. It should, however, be possible to start and run a programme using as technological infrastructure only the existing mail and telephone systems.

'Openness'

VIII.5.27 A critical question is how 'open' the opportunities in the programme should be. There are three theoretical possibilities -

- a) complete openness : that is, admission to courses unconstrained by qualifications but on a first-come first-served basis;
- b) restricted entry : requiring those seeking admission to have the same formal academic qualifications as would be required for comparable courses in conventional institutions;
- c) qualified openness : requiring those seeking admission to have some formal academic qualifications but not necessarily those that would be required by conventional institutions.

VIII.5.28 The UKOU is an example of the first option. The UKOU practice is to admit anyone (subject to a minimum age limit of 21 years and the constraints of a waiting list) and then to require them to take foundation courses in the broad field of study chosen. Foundation courses have three functions -

- a) they serve as a test of intellectual aptitude. The student has to be able to complete one or more foundation courses before proceeding with course work. The

standards of the UKOU foundation courses are now recognised to the point that some British universities accept them in lieu of A levels for admission to conventional programmes;

- b) they inculcate in the student the necessary techniques and disciplines of self study;
- c) they bring the student up to the standard of knowledge necessary to commence the course work (or serve as a refresher course for those returning to academic work after a lapse of time).

The first of these functions means that 'complete openness' is in practice highly conditional: no one is denied the chance of access, but the first requirement thereafter is that they should establish their qualifications.

VIII.5.29 This approach reflects a fundamental difference between conventional education and open education. Conventional education is 'validated' by both the entry and exit qualifications of its participating students: that is to say the institution in effect pre-judges the intellectual quality of the student by the fact of his admission. His final award represents the value added or progress demonstrated by his studies in the institution. Its standing is judged in part by the entry qualifications on which it is developed. Open education, the basis of which is certification by attainment, involves fewer assumptions about the

student's knowledge and ability. Foundation courses, and the assessment of the student during his course work, substitute largely for the rigorous admissions standards imposed in conventional education; the exit qualification is seen as being of paramount importance in establishing the student's attainment.

VIII.5.30 We believe that the value of foundation courses is such that they should be part of an open education programme at this level. If foundation courses are used properly, the formal academic qualifications required for conventional courses should be unnecessary. We see no case for 'qualified openness', requiring students to have some formal academic qualifications but of a lesser standard than conventional institutions would require for a comparable course, other than as a filter: a pre-selection process for admission to foundation courses in the early stages of the programme, in the interests of reducing high initial drop-out rates and ensuring that the programme got off to a good start; fairness to the backlog of relatively highly qualified candidates previously denied post-secondary education; or as a justification for supporting students through publicly financed grants or loans. On these grounds it could be justified, but it should be recognised that the arguments for any form of filter as a means of pre-selection are administrative, not educational. If adopted it should be an interim measure, subject to periodic review.

The development of a comprehensive programme

VIII.5.31 We have considered three possible ways of trying to organise such a programme -

- a) through establishing a new autonomous institution along the lines of the UKOU;
- b) through promoting a co-operative approach among existing tertiary institutions;
- c) through establishing a consortium in which existing tertiary institutions participated.

(a) the autonomous institution

VIII.5.32 The Commission has already considered the first of these options in its Report No 1. It was a specific recommendation of the Visiting Panel that there should be '... a large scale, comprehensive alternative to institutionalised education on the school and technical education/vocational training levels as well as in higher education' (II.6.8). The classic example of the autonomous system is the UKOU itself, and this was the model explored by the UPGC in response to a request from the Government following a recommendation in the Visiting Panel's Report. The UPGC advised against such a model, citing grounds of

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- i) cost, estimating that the 'minimum continuing constituency' required for viability would be 70,000 to 100,000;
- ii) lack of the necessary academic and technical expertise;

- iii) a need to teach both in Cantonese and English, thus incurring the expense of bilingual preparation of teaching material;
- d) the lack of an appropriate environment for home study, requiring a network of study centres.

In the light of these considerations the UPGC recommended instead an approach "... based on all the institutions providing higher education, and that this development be a co-operative and collaborative venture, with a minimal co-ordinating machinery...".

(b) the co-operative model

VIII.5.33 The co-operative model would imply the creation of a co-ordinating body which would determine which institution would offer which course, thus avoiding duplication of effort (or promoting multiple efforts in areas of high demand) and ensuring that coverage was comprehensive.

VIII.5.34 On the face of it this would be the simplest approach to the problem. It would, however, involve considerable difficulties. First would be the question of a student's enrolment. If the necessary diversity of course components is to be achieved, then it will be necessary to operate a modular credit unit system, with different modules being offered by different institutions. If the participating institutions are acting only as part of a loose federation, then there may be difficulties in ensuring compatibility of entry qualifications.

VIII.5.35 More serious would be the problems of who would make final awards to students, and the acceptability to the award-conferring institution of the credits obtained by students at other institutions.

VIII.5.36 Another problem would be the actual administration of such a scheme. The decentralised nature of a co-operative venture implies that the financing of courses, the preparation of course material, the provision of teaching staff and other resources such as laboratories and libraries would all be at the discretion of the individual participating institutions, subject to the guidance of the UPGC. It would presumably be possible for the UPGC, at some distance, to co-ordinate the development of courses through the provision of earmarked grants (in so far as these courses required public funding) but the UPGC could hardly provide the sort of close co-ordination necessary to ensure compatibility in the course material or the equitable allocation of resources. Nor do we consider that this would be compatible with the primary responsibilities of the UPGC.

VIII.5.37 A further problem would be the counselling of students as to how to select their study options, a difficult but vital part of open education programmes.

(c) the consortium

VIII.5.38 We have concluded that something more than the co-operation of autonomous institutions is required for an effective programme, and accordingly we recommend the consortium approach. The concept here is, in effect, mid-way between the autonomous and the co-operative

models. The participating institutions would constitute a consortium for the purposes of operating this programme, but in subscribing to it the institutions would accept that the consortium was (in some sense) an authoritative body. The consortium would allocate responsibility and funds for the preparation or selection of materials, ensure compatibility of standards and deal with the allocation of resources. The consortium would need resources of its own, such as its own administrative staff, its own senior academic staff, and its own counselling staff.

VIII.5.39 The consortium would not be an embryonic autonomous institution but an effective moderator between the participants. The consortium would represent their joint efforts; to a large extent its academic standing would be drawn from them. Nevertheless the consortium should be the entity in which the students enrol, rather than in an individual participating institution, and the awards given to students should be in the name of the consortium. It would thus expect to achieve an identity and reputation of its own, and it would need its own senior academic staff to back this standing. For the purpose of giving awards the consortium would need its own ordinance.

VIII.5.40 There is no novelty in this approach. It has already been the basis of an open education venture in Canada, the Open University Consortium of British Columbia, one of the most successful developments in open education.

Proposals

VIII.5.41 We set out here our proposals for the framework for the comprehensive local programme which we advocate.

a) organisation of the consortium

VIII.5.42 All five institutions of post-secondary and tertiary education which are funded through the UPGC (i.e. the University of Hong Kong, the Chinese University of Hong Kong, Hong Kong Polytechnic, City Polytechnic of Hong Kong and Hong Kong Baptist College) should be invited to participate as core members of the consortium. Their participation should be voluntary, and it should not be a condition of participation that these institutions should curtail any part-time or extra-mural programmes. Participation should, however, be seen as implying a commitment to the aims of the programme, and the institutions should accept an obligation to share plans with the consortium before starting any independent initiatives which might compete with the consortium's programme in terms of the potential clientele or the use of resources, just as the consortium would be consulting all the participating institutions on its own initiatives.

VIII.5.43 The consortium should consist of an executive body, involving a Chief Executive, administrative staff, student counselling staff and (possibly) an educational technology unit; a Council, comprising representatives from the participating institutions, lay members from the community and, ideally, some overseas academics with experience in the field; and an academic board, comprising core academic staff, some possibly seconded from the participating institutions, and staff representing the participating institutions.

VIII.5.44 We recommend that the consortium should have the following functions and responsibilities -

- i) to set priorities and to plan the development of the comprehensive post-secondary programme;
- ii) to commission participants to operate component courses through tutorial support;
- iii) to approve the use of distance learning material and negotiate with originating institutions for its use and development;
- iv) to commission, where appropriate, the local development of course material;
- v) to appoint external examiners to validate course work and examination results;
- vi) to organise the necessary supporting services (access to libraries, laboratories, computers, study centres etc) through its own centre and, when appropriate, at participating institutions or their study centres;
- vii) to operate a student counselling service to advise students on their study programmes;

- viii) to consider students' standing for the purposes of credit transfers and recognition of advanced standing;
- ix) to confer degrees and other qualifications on students.

We consider that the consortium's programmes should be subject to validation by the proposed Hong Kong Council for Academic Awards (HKCAA), or whichever other validating body in future is responsible for certifying academic standards, although a major guarantee of its standing would be the reputations of the participating institutions and its own key academic staff.

VIII.5.45 The consortium would have control over all funds used in the programme. It would receive funds from students; it would give grants to participating institutions for the operation of courses and provision of any other services. This would mean that the consortium would reimburse institutions for the costs of additional staff employed to operate courses or to produce material, since the institutions could not take on additional commitments on behalf of the consortium without additional resources.

VIII.5.46 The consortium should be free to consider which other institutions of higher education should be brought into this scheme, and what relationship they should have with the consortium. A particular issue which must be faced is whether, and under what circumstances, the Open College (OC) of the University of East Asia (UEA) should be involved in the programme,

should it apply to do so. Despite the fact that approval was not given for study centres to be established in Hong Kong, the OC has become an experienced practitioner of distance learning. It has established credibility through its extensive credit transfer agreements with the UKOU and other recognised commonwealth institutions. These are factors which the consortium would no doubt wish to consider should the OC make an application to join it.

VIII.5.47 The consortium would need to consider on what terms the OC, which is not a Hong Kong-based organisation, could establish a working relationship with the consortium. The basic terms for such involvement might be as follows -

- i) OC operations as part of the consortium would have to be administratively separate from any other OC programmes run at the behest of UEA, and would be carried out under the name of the consortium;
- ii) OC operations in Hong Kong would be self-financing under the direction of the consortium, and no disbursements could be made to UEA;
- iii) OC courses in the programme would be subject to validation by HKCAA (as in paragraph VIII.5.44);
- iv) OC courses would lead to awards granted by the consortium (UEA would be free to grant credit transfer recognition).

b) delivery

VIII.5.48 The basis of the operation of the programme would be through written course material supervised by tutors. Students' performance would be graded both by continuous assessment of course work and in general examinations at the end of each course unit. External assessors and examiners would be used to monitor the assessment of course work and examinations.

VIII.5.49 A major resource and administrative centre will be necessary, offering study rooms, libraries and laboratories. We note the UPGC's concerns about the unsuitability of the average home environment for study. Despite these disadvantages the fact is that home study does take place now. The provision of a major study centre should solve the problem at least partly for those with the worst home environment. There should also be a library of audio-visual materials to be viewed on closed circuit television. The resource centre should be in a central location. As an example, Tower II, Argyle Centre, currently used as a temporary base by the City Polytechnic of Hong Kong would be ideal, and could be used as a joint facility for other extra-mural programmes, which would contribute greatly to its viability and visibility. Other regional study centres with fewer facilities would also be necessary.

VIII.5.50 The extension of the use of audio-visual material through the electronic media might become possible later with the introduction of cable television, and we recommend that the Government should reserve at least one channel for post-secondary open education as part of the conditions of granting approval for any cable

television service. The consortium should also take an early look at the use of teleconferencing, radio and other systems.

VIII.5.51 For the reasons given in paragraphs VIII.5.21 and 22, the characteristics of properly prepared distance learning materials should obviate the reservations of the UPGC about the lack of suitable academic expertise. It should certainly be possible to start a programme: the rate at which it could develop and grow would need to be monitored carefully by the consortium and the participating institutions.

c) material

VIII.5.52 It would clearly be impracticable in terms of available resources of finance, manpower and expertise to produce ab initio local course material. The programme should start on the basis of using the best material available from existing operators, bought commercially. Immediate action to deal with language problems would depend on -

- a) the production of glossaries providing explanations of terms used in course material;
- b) the production or adaptation of English skills courses to be added to the foundation course requirements of those students who required them;
- c) the use of advanced English skills courses in language laboratories at the resource and study centres.

VIII.5.53 The translation of courses into Chinese, or the development of specific new courses in Chinese, should be a matter for the consortium's early consideration as part of its development plans. The long term objective should be the development of Chinese language courses: but the initial choice is between English language courses or no programme at all. Again, despite the UPGC's concerns, the fact is that most studies in the post-secondary area are undertaken in English. However desirable it would be to make some courses available in Chinese as soon as possible there is no reason why the programme as a whole should not start in English. Nor is this inconsistent with the bilingual objective for education which we have advocated. While the early introduction of Chinese history, literature and similar areas of study into an arts programme would clearly be highly desirable, the need to translate or develop any Chinese courses in, say, mathematics would have much lower priority.

d) scope

VIII.5.54 The consortium might develop the programme through three basic schools as below -

- a) commercial and social sciences;
- b) arts and humanities; and
- c) mathematics, science and technology.

Linked courses at appropriate hierarchical levels would lead to standard qualifications in these fields, but the range of electives on offer would mean that study in any one field could draw in courses from other fields.

VIII.5.55 A possible area for future inclusion as a fourth school would be education.

e) structure

VIII.5.56 Given the need for the structure of the programme to represent a 'continuum', the proper use of foundation courses as pre-qualifications, and the need for multiple access and exit points, we envisage the following course structure -

| | <u>Filter</u> | <u>Prequalification</u> | <u>Qualification</u> |
|---------------|--|--------------------------------------|-----------------------------------|
| First Sector | HKCEE <u>or</u> lower level aptitude test | foundation course (s) (lower level) | certificate diploma |
| Second Sector | diploma <u>or</u> H, I or A ⁽¹⁾ levels <u>or</u> higher level aptitude test | foundation course (s) (higher level) | ordinary degree honours degree |
| Third Sector | | honours degree | advanced diploma higher degree |

⁽¹⁾ In some cases A levels may be necessary as the minimum academic standing laid down by a professional body before acceptance of a degree.

VIII.5.57 Since much existing material is pitched at degree level, the programme might have to start with the Second and Third Sectors while material in the First Sector was developed or adapted. There is clear evidence already of increasing demand for extra-mural courses leading to second degrees, so the Third Sector must have some priority.

VIII.5.58 We recommend that all courses should be structured on a credit unit system, consistent with the certification by attainment approach, permitting the assessment of students by stages and bringing the advantages of credit transfer and resumption of interrupted work.

f) financing

VIII.5.59 The long term objective should be that the programme should be as far as possible self-financing, i.e. that students should meet the direct costs of the courses which they took. This will have to be studied carefully by the consortium. A view will have to be taken on affordability for students. Cross-subsidization of less popular courses may well be necessary. The costs of developing new or supplementary material will also be considerable. The consortium must aim to build up its enrolment rapidly, as unit costs in distance learning drop dramatically as numbers increase.

VIII.5.60 There would, in any event, be major expense incurred by the consortium at the start of the programme in the acquisition of rights to material and the setting up of the administrative and support services. These

initial costs should be funded by at least a non-interest bearing loan and preferably a grant from the Government. ⁽²⁾

VIII.5.61 The consortium's council should approve the consortium's budget. External auditors should be retained to check the consortium's financial affairs.

VIII.5.62 The consortium and the Government should also be prepared to consider a student financing scheme to assist students in appropriate cases. On the basis that many students will be in employment, a system of loans rather than grants might be justified. We would expect, however, that employers could provide much of the financial support or encouragement that students might need. Grants from public funds might be justified for categories such as disabled students.

g) implementation

VIII.5.63 Implementation of this scheme should be in three phases -

First, a planning committee for the consortium should be set up, on which all the prospective participating institutions should be represented, to -

⁽²⁾ If Tower II, Argyle Centre, were to become the resource centre, then the consortium would have to take over the repayment of the balance of the loan under which the City Polytechnic acquired the premises.

- i) conduct a survey to establish the principal areas of demand and need;
- ii) establish the availability of contributory effort within the participating institutions;
- iii) assess the immediate availability of material from overseas institutions; and
- iv) produce a detailed implementation plan including advice on the future relationship between the consortium's own programme and other extra-mural or part-time courses;

Second, the formal establishment of the consortium, the recruitment of the key academic and administrative staff, the preparation of a detailed financial plan and the organisation of specific courses for offer at the start of the programme;

Third, by 1990, the admission of the first students.

VIII.6 Overseas institutions offering open education and distance learning courses

VIII.6.1 We note the increasing interest among overseas institutions in offering open education and distance learning courses in Hong Kong.

VIII.6.2 We have considered the possibilities and problems posed by these institutions and their courses in relation to both the objectives of the promotion of open education in Hong Kong and the need to review the regulatory framework.

VIII.6.3 The comprehensive local programme proposed in section 5 of this Chapter is unlikely to be so comprehensive as to cover all possible specialist requirements, and external institutions may well be able to fill such gaps.

VIII.6.4 Another important possibility is that external institutions offering appropriate courses could be encouraged to link up with post-secondary institutions in Hong Kong to offer their awards through the local colleges. The example already exists in the Ohio State University link with the Hong Kong Baptist College. The City Polytechnic (CPHK) now offers the Henley/Brunel Master of Business Administration, supervised by CPHK tutors but leading to an academic award from Brunel University. For CPHK the primary advantages are the proven material available which it can use to meet an area of perceived demand and staff development in self-learning techniques.

VIII.6.5 For local post-secondary institutions there could be more profound advantages. Under the right conditions such link-ups could bring to those institutions the materials, techniques and, in particular, the academic input of staff from overseas institutions of good standing which would help to improve the standards of the local institutions.

VIII.6.6 It may seem at first that there would be conflict between the roles of distance learning programmes and those of the internal programmes of local post-secondary colleges. In fact some of the techniques associated with distance learning programmes (e.g. 'mastery learning') are spreading back to traditional teaching institutions as a means of reducing the vagaries of contact teaching methods and enhancing the students' ability to study purposefully on their own. Such an initiative would fall outside the comprehensive programme indicated. Ideally linkages with that programme would be established through credit transfers. More important to the local host institutions would be the accreditation that they could seek to achieve with the overseas institution.

VIII.6.7 We believe that there is a continuing need for public safeguards, on the same grounds that there is regulation of conventional education in Hong Kong: the public needs to be protected from the incompetent, the sub-standard or even downright fraudulent. The particular problem is that there is no practicable way to exercise any supervision over an operation which does not have a base in Hong Kong. It can also be difficult to prove that an operation does in fact have a Hong Kong base.

VIII.6.8 The lesson from previous cases suggests that the registration of any locally-based open education operation at the post-secondary level should be discretionary, that discretion to be exercised by the Executive Council on the advice of the future Hong Kong Council for Academic Awards. This would permit each case to be treated on its merits, and for specific conditions to be laid down for each applicant to fulfil. An

unavoidable limitation is that this form of regulation could only apply to the establishment of a local base for operations within the present restrictions laid down in the Education Ordinance.

VIII.6.9 The Education Ordinance only applies ⁽³⁾ if the institution involved requires a centre for operations in Hong Kong, either for the holding of classes or tutorials or simply as a postal address from which material is sent out. An operation administered entirely from overseas would be exempt from the Ordinance. The Ordinance in some respects thus makes it more difficult to discourage the worse and encourage the better ones, in that the more sophisticated programmes do look for a degree of student: tutor contact and support, and thus some base for a local operation. Historically overseas institutions seeking to establish their own bases have found this difficult. If, however, they link up with local post-secondary or tertiary institutions then the ordinances governing these institutions will cover any

⁽³⁾ Section 3 of the Education Ordinance contains a very broad definition of what constitutes a school -

' "school" means an institution, organization or establishment which provides for twenty or more persons during any one day, whether or not at the same time, any nursery, kindergarten, primary, secondary or post-secondary education or any other educational course by any means, including correspondence delivered by hand or through the postal services'

course being offered on behalf of the overseas institution. Thus the de facto policy has been to allow such link-ups, subject to the agreement of the UPGC as regards arrangements involving UPGC-funded institutions.

VIII.6.10 We recommend that the two objectives of policy as regards external institutions should be, first, to ensure that standards are maintained, and, second, to encourage them to involve local post-secondary institutions where that will benefit the local foundation. The sort of guidelines which would serve as general conditions might be-

- a) that any qualification offered on an external basis must have full equivalence with the comparable internal qualification of the parent institution and that external examiners and assessors would be used to ensure this equivalence;
- b) that the only programmes which could be represented as degree programmes would have to be offered by a recognized Commonwealth degree-awarding institution or, in the case of US institutions, an accredited institution listed as such in the current issue of the "Accredited Institutions of Postsecondary Education" of the Council on Postsecondary Accreditation, or an institution of equivalent standing on the advice of the Hong Kong Council for Academic Awards;

- c) that the overseas institution should either operate under the auspices of a local sponsoring post-secondary institution or provide its own local centre of operations, in either case demonstrating ability to provide the supporting facilities appropriate to the programme (s) proposed (e.g. tutorial staff, libraries, computers, laboratories, study centres and administrative support);
- d) that the course material would be based on recognised distance learning techniques involving periodic assessment of course work as well as final examinations, and local tutor: student communication⁽⁴⁾ ;
- e) that the course material and the award offered must be recognised by the HKCAA as being appropriate to academic studies in Hong Kong, and if necessary new material would be developed, subject to HKCAA approval, to ensure this;

⁽⁴⁾ The need for a continuing tutor: student relationship as a source of intellectual support for a student in distance learning is a recognised feature of the better programmes.

- f) that the overseas institution or local sponsoring institution would provide adequate resident academic staff to support the programmes (and where necessary the overseas institution should arrange suitable opportunities for the academic development of the local institution's staff to the point where they could conduct the programme);
- g) that HKCAA should make periodic assessments or otherwise monitor these programmes to ensure that they remained up to standard;
- h) that the administration of the programme was entirely separate from any programme conducted by a local sponsoring institution which used public funds, and made no direct or indirect use of these funds.

VIII.6.11 These conditions might appear at first to be tough. But the last few years have seen a significant change in the attitudes of overseas governments towards their institutions of higher education. These institutions are required now to do much more to help themselves financially. It is this that has led to the growth of the 'export market' in post-secondary education, and is responsible for the burgeoning of interest among these institutions in Hong Kong. For the time being at least there is something of a buyers' market; and this presents the chance to buy the best.

VIII.6.12 As paragraph VIII.6.8 has indicated, such a regulatory system would apply only to the institutions seeking to establish their own local bases. It would be necessary to reach a clear understanding (as an alternative to legislative changes) with the local post-secondary institutions that might act as sponsors that they would comply with these conditions. Those overseas institutions that operated without either a link-up with a local post-secondary institution or their own base would remain exempt. This would include some of the best and most of the worst. The objective can only be to maintain and promote standards associated with education conducted (in some sense) locally. The implication of this regulatory approach is that those programmes complying would lead to recognition by the Government (as employer) of the qualifications offered. The Government effectively sets the standards in Hong Kong, and on this basis it is at least possible that the good will drive out the bad. For as long as there is no means to discriminate between the two, or to promote positively the good, then the less good will flourish. But if the Government through the HKCAA sets the standards the public itself will shun what is clearly sub-standard.

VIII.6.13 We therefore recommend that the Planning Committee for Academic Awards should be asked to consider the application of the guidelines suggested as a basis for the validation of distance learning courses to be offered by overseas institutions in Hong Kong, either through their own basis or in collaboration with local post-secondary institutions.

VIII.7 Summary of recommendations

VIII.7.1 In sum, we RECOMMEND that -

Overview

- a) action should proceed to develop open education at the secondary and post-secondary levels, and in the area of management education, simultaneously (paragraph VIII.1.6);

Open education at the secondary level

- b) the five-year Government Secondary School Course for Adults and the six-year Secondary School Course should be amalgamated into a single course of five years' duration (paragraph VIII.2.5);
- c) planning for a sixth form course should proceed (paragraph VIII.2.6);

Regional open education centres

- d) the concept of regional centres for adult education should be further explored and proposals for a pilot scheme developed (paragraph VIII.3.2);

Open education at the post-secondary level

- e) there is a prima facie case, both social and economic, for an open education programme which will supplement conventional education and provide opportunities for those who otherwise would be denied them (paragraph VIII.5.11);
- f) there is a need for an open education programme which covers the full range of possible attainments in further education in Hong Kong; i.e. from sub-degree to second degree level (paragraph VIII.5.12);
- g) the programme should represent a continuum, i.e. it should encompass the full range of post-secondary studies, starting at a level related to school leaving qualifications and extending to second degree level (paragraph VIII.5.19);
- h) the structure of the programme will require specific entry points, but it should be able to cater for entrants with a range of (including minimal) formal academic attainments (paragraph VIII.5.19);
- i) the programme should have multiple exit points (e.g. certificate, diploma, degree, second degree and advanced diploma level) appropriate to the requirements of its students (paragraph VIII.5.19);

- j) the programme should have within its basic schools of study central cores of academic and vocational studies allowing development into specialist areas leading to recognised qualifications (paragraph VIII.5.19);
- k) the programme should allow students to proceed, within limits, at their own pace in their acquisition of qualifications (paragraph VIII.5.19);
- l) a comprehensive open education programme accessible to all sources of potential demand requires the distance learning approach (paragraph VIII.5.20);
- m) the value of foundation courses is such that they should be part of an open education programme at this level. If foundation courses are used properly, the formal academic qualifications required for conventional courses should be unnecessary (paragraph VIII.5.30);
- n) the arguments for any form of filter as a means of pre-selection are administrative, not educational. If adopted it should be an interim measure, subject to periodic review (paragraph VIII.5.30);
- o) something more than the co-operation of autonomous institutions is required for an effective programme, and accordingly we recommend the consortium approach (paragraph VIII.5.38);

- p) the consortium should be the entity in which the students enrolled, rather than in an individual participating institution, and the awards given to students should be in the name of the consortium (paragraph VIII.5.39);
- q) all five institutions of post-secondary and tertiary education which are supported by the UPGC (i.e. the University of Hong Kong, the Chinese University of Hong Kong, Hong Kong Polytechnic, City Polytechnic of Hong Kong and Hong Kong Baptist College) should be invited to participate as core members of the consortium (paragraph VIII.5.42);
- r) the consortium should have the following functions and responsibilities -
 - i) to set priorities and to plan the development of the comprehensive post-secondary programme;
 - ii) to commission participants to operate component courses through tutorial support;
 - iii) to approve the use of distance learning material and negotiate with originating institutions for its use and development;

- iv) to commission, where appropriate, the local development of course material;
- v) to appoint external examiners to validate course work and examination results;
- vi) to organise the necessary supporting services (access to libraries, laboratories, computers, study centre etc) either through its own centre or, when appropriate, at participating institutions or their study centres;
- vii) to operate a student counselling service to advise students on their study programmes;
- viii) to consider students' standing for the purposes of credit transfers and recognition of advanced standing;
- ix) to confer degrees and other qualifications on students

(paragraph VIII.5.44);

- s) the consortium's programmes should be subject to validation by the proposed Hong Kong Council for Academic Awards, or whichever other validation body in future is responsible for certifying academic standards (paragraph VIII.5.44);

- t) the consortium should be free to consider which other institutions of higher education should be brought into this scheme, and what relationship they should have with the consortium (paragraph VIII.5.46);
- u) a major resource and administrative centre will be necessary, offering study rooms, libraries and laboratories (paragraph VIII.5.49);
- v) the Government should reserve at least one channel for post-secondary open education as part of the conditions of granting approval for any cable television service (paragraph VIII.5.50);
- w) the programme should start on the basis of using the best material available from existing operators (paragraph VIII.5.52);
- x) the translation of courses into Chinese, or the development of specific new course in Chinese, should be a matter for the consortium's early consideration as part of its development plans (paragraph VIII.5.53);
- y) all courses should be structured on a credit unit system, consistent with the certification by attainment approach, permitting the assessment of students by stages and bringing the advantages of credit transfer and resumption of interrupted work (paragraph VIII.5.58);

- z) the long term objective should be that the programme should be as far as possible self-financing, i.e. that students should meet the direct costs of the courses which they took (paragraph VIII.5.59);
- aa) initial costs should be funded by at least a non-interest bearing loan and preferably a grant from the Government (paragraph VIII.5.60);
- bb) the consortium and the Government should also be prepared to consider a student financing scheme to assist students in appropriate cases (paragraph VIII.5.62);
- cc) Implementation of this scheme should be in three phases -

First, a planning committee for the consortium should be set up, on which all the prospective participating institutions should be represented, to -

- i) conduct a survey to establish the principal areas of demand and need;
- ii) establish the availability of contributory effort within the participating institutions;
- iii) assess the immediate availability of material from overseas institutions; and

- iv) produce a detailed implementation plan including advice on the future relationship between the consortium's own programme and other extra-mural or part-time courses;

Second, the formal establishment of the consortium, the recruitment of the key academic and administrative staff, the preparation of a detailed financial plan and the organisation of specific courses for offer at the start of the programme;

Third, by 1990, the admission of the first students (paragraph VIII.5.63);

Overseas institutions offering open education and distance learning courses

- dd) there is a continuing need for public safeguards (paragraph VIII.6.7);
- ee) the registration of any locally-based open education operation at the post-secondary level should be discretionary, that discretion to be exercised by the Executive Council on the advice of the future Hong Kong Council for Academic Awards (paragraph VIII.6.8);

- ff) the two objectives of policy as regards external institutions should be, first, to ensure that standards are maintained, and, second, to encourage them to involve local post-secondary institutions where that will benefit the local foundation (paragraph VIII.6.10).

 - gg) the Planning Committee for Academic Awards should be asked to consider the application of the guidelines suggested as a basis for the validation of distance learning courses to be offered by overseas institutions in Hong Kong, either through their own bases or in collaboration with local post-secondary institutions (paragraph VIII.6.13).
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Chapter IX Financing of Education

IX.1. Introduction

IX.1.1 We said in Report No 1 that we should need to review the modes of financing of education to determine all possible options by which our recommendations might be financed.

IX.1.2 We are also aware that, as our work develops, the judgements which have to be made as to what extra commitments the Government can undertake will become increasingly complex. The issues we have considered in this report carry significant financial implications, but we have had no means of assessing how they will fit into the overall picture of the Government' s financial commitments, or even the picture of the financial commitments for education. There is an imperative need to devise a systematic approach to how the problems of the financing of education should be addressed.

IX.1.3 Accordingly in this phase of our work we have looked at the problem from a different perspective. We have considered what to recommend to the Administration to make the financial aspects of educational planning more manageable.

IX.2. Expenditure requirements

IX.2.1 Expenditure on education in the past few years has increased substantially in real terms. Its share of Government's total spending has increased from 14.9% (\$5,758m) in 1983-84 to 18% (\$8,741m) in 1986-87, making it the largest single sector of Government spending. The judgements as to which education proposals should be developed have become difficult questions of relative priority and affordability.

IX.2.2 To make such judgements requires in theory -

- a) guidelines as to the likely range of funds available over the period in question;
- b) a time scale showing the possible phasing of the proposals; and
- c) an order of priority, where this can be established, for the proposals under consideration.

IX.2.3 This puts the issue at its theoretical simplest. But in practice an order of priorities for education proposals cannot be drawn up simply on the basis of their own theoretical educational desirability. The competing claims of different sectors have to be weighed against each other. Proposals are often interrelated. While cost benefit analysis can help with the judgements about the merits of individual proposals, it cannot help very much in the process of deciding how

the financial implications of one proposal can be made to fit in with the financial implications of all other proposals under consideration.

IX.2.4 Significant new developments in education programmes usually take a relatively long time to reach the stage of full implementation. The question of affordability of a proposal involves both the capital and recurrent expenditure required; and as such it does not just apply to one point in time, but to a variable time scale. The timing of the implementation of a new proposal, and the rate at which it is introduced, are crucial factors in how it is fitted into an overall budget.

IX.2.5 We believe that a full and adequate assessment of resource requirements and priorities involves a comparison of the demands of each individual proposal projected over a long time scale. The demands of existing programmes must also be considered in relation to new proposals.

IX.3. Revenue requirements

IX.3.1 We note that historically the fiscal policy of the Government has been that there should be no "hypothecation of revenue". This means that all revenue to the Government is credited to the General Revenue Account to form part of a general source of funds for all Government expenditure; an increase in revenue derived from a specific source is not considered as an off-setting credit which justifies expenditure proposals in the same area.

IX.3.2 The relationship between revenue and expenditure, in both the aided and the Government sector, is thus an indirect one, but one which needs careful consideration. We accept in principle that we have an obligation to monitor the maintenance of revenue (i.e. tuition fees) at a reasonable level.

IX.4. The need for financial models

IX.4.1 The development of suitable financial models would allow questions to be asked about the implications of introducing a new programme, or varying the scale of provision, or adjusting expenditure for the rise and fall in the numbers participating in programmes, or increasing revenue. They would provide a basis for planning financial strategy in both the short and longer terms; assessing the consequences of changing circumstances; and testing the impact of alternative strategies. Such models, computer-based, would provide a range of forecasts in answer to the "what if" questions showing how expenditure on, and revenue from, education would develop under different assumptions as to priorities, numbers and level of services. These forecasts can then be compared to see which gives the best all-round programme to serve as a basis for future planning.

IX.4.2 Accordingly we recommend that a series of linked financial models should be developed and made available to the Commission and to the policy planners who consult us, as a basis for the planning of a financial strategy for developments in education and the monitoring of the financial resource and revenue requirements.

IX.4.3 The linked models would operate on two levels. That is, there would be a higher level (macro) model, and a number of lower level (micro) models. The lower level models would deal with detailed work in the main programme areas. The higher level model would work with the aggregates put forward from the lower level models.

IX.4.4 For the purposes of the planners consulting the Commission the operation of the higher level model would involve-

- a) identifying the constituent programmes and the variables in those programmes: this would provide a macro-level analysis of expenditure and revenue in education, and allow initial judgements to be made on priorities in programme areas;
- b) testing the phasing of constituent programmes to produce the optimum arrangement of programme development;
- c) producing ranges of forecasts based on different options under (b) for assessment against the likely availability of finance so that judgements could be made about the adequacy of finance and the realistic prospects for programme development;
- d) in the light of (c), re-assessing priorities where necessary;

- e) checking revenue projections against the cost of services to be provided.

IX.4.5 This higher level model would be supported by the lower level models operating in the main programme areas. These would be used by the Education Department, the Technical Education and Industrial Training Department and the University and Polytechnic Grants Committee (UPGC) Secretariat to carry out broadly similar exercises to assist in their own planning purposes and to pass on the information necessary (and only in such detail as was necessary) for the operation of the higher level model.

IX.4.6 The linked models described here would not be complete when first brought into operation, and indeed would never be "complete". They would be designed for systematic development. The initial requirement would be for the higher level model to contain enough data to handle the broader issues before the planners, and for the lower level models to start work on the principal issues affecting the client agencies (and thus the chief variables in the aggregations in the higher level model). The overall system would develop as a function of -

- a) requirements from the higher level model for more sophisticated projections and analyses of constituent programmes in main programme areas; and
- b) more sophisticated projections and analyses developed by client agencies for their own purposes being passed on to the higher level model.

Thus development would be a two way process, requiring co-ordination of effort between the operators of the two different levels of model. The extent of detail into which the lower level models progressed would depend on the requirements of their operators and the degree to which the analysis of a given constituent programme could be reduced to objective financial or statistical data. For example, the unit cost of sixth form places might be a relatively simple function of data input; while unit cost of tertiary places might involve judgements which would mean that these costs could only be used as basic assumptions, and then only with great care.

IX.4.7 Developing these linked models will be a fairly major undertaking. But we recognize the consequences of not managing to develop such a comprehensive and flexible means of assessing and testing resource requirements. Without such models there is the risk that desirable developments are postponed unnecessarily, or even discarded, on the grounds of a fear that the cumulative expenditure requirements in the education sector may be growing too fast; or that new developments have to be given a lower priority than would be desirable while funds remain committed at what has become an unnecessarily high level in some other sector of education.

IX.4.8 In short, the models should assist in making more confident judgements on the overall burden of expenditure on education, priorities for the use of funds and the phasing of developments. The availability of these models to the planners consulting the Commission would not pre-empt the roles of the UPGC or of the Board of Education or the Vocational Training Council, or their executive agencies, in their own areas of responsibility. The

operators of the lower level models would be responsible for producing their own projections and ranges of options for each of the main programme areas, and some degree of confidentiality would have to be observed about the assumptions and the data used at these levels, reflecting, for example, the confidentiality imposed by the UPGC on some of its dealings with the institutions which it funds. Overall, however, the availability of common shared data and testing of assumptions should assist the process of co-ordination.

IX.5. Implementation

IX.5.1 The development of such models would involve the identification and collection of the necessary data to be included, and the construction of the mechanism for its computation.

IX.5.2 As the first stage of implementation, we recommend that a detailed feasibility (or systems specification) study should be conducted as soon as possible. The objectives of the feasibility study would be to explore and demonstrate -

- a) how the necessary data inputs could be identified, gathered, and updated to the satisfaction of the operators of both the higher and lower level models;
- b) how the system would be constructed around the data available;

- c) the best programme for the development of the system, i.e. the sequence in which programme areas should be brought into the system depending on both initial priorities and availability of data.

It would thus establish which questions could or could not be examined, at least in the first phase of development, and how to start the project.

IX.5.3 We envisage that the second stage would cover the initial development of the model, i.e. the construction of the mechanism, the collection of the data and the testing of the system.

IX.5.4 The feasibility study might require four to six months to complete. The way in which the second stage is undertaken will depend upon the feasibility study but might take a further six to nine months.

IX.5.5 There are not sufficient resources within the Government at present to undertake this task. We recommend that a consultant with appropriate experience should be employed who would undertake the feasibility study and act as the leader of the development team. For the feasibility study the consultant would rely on liaison with existing staff in the agencies involved. For the initial development stage a development team would be required which would involve Government staff specifically assigned to the project. There would be a management and liaison committee to settle issues of definition as they arose and to ensure that all information was made available on time.

The consultant would design the models and define the data required. The Government staff would describe the educational system, collect the data and advise on cost bases.

IX.5.6 The full development team would be set up only for the technical task of creating the models. The models' operation, refinement and development would be the responsibility of small permanent teams to be created within the agencies involved. Models of this nature have already been developed within the Government for such diverse purposes as overall budget management and waste disposal management. The operation and development of the system should not present a problem to trained staff.

IX.5.7 The higher level model would deal with all sectors of expenditure on education, and its principal function would be to assist the policy planners who consult the Commission. The policy branch must have a complete picture of all developments and proposals, and be in a position to monitor expenditure and revenue. For this reason we recommend that the higher level financial model should be operated by the Education and Manpower Branch of the Government Secretariat. However, it would be necessary to retain on a permanent basis the management and liaison committee referred to in paragraph IX.5.5 in order to ensure reliability and consistency, especially in matters of definition and interpretation of data. The operators of the higher level model would ensure that data was used only with the knowledge and agreement of the agencies concerned.

IX.6. Financial implications

IX.6.1 We have no detailed estimate of costs for the consultancy and the development team required for the setting up of the model but we note that the comparable waste management model cost is \$4m at 1984 prices. Possibly \$1.5m will be required for the first stage of this exercise. The cost of the second stage will depend largely on the findings of the first stage, and the scope for collaboration with other agencies working in the same area. The annual manpower and other recurrent costs of the operating teams would need to be determined in the process of the feasibility study. Capital costs would comprise the necessary hardware (probably terminals linked into the Treasury mainframe) and any software packages not specifically provided under the consultancy.

IX.7. Summary of recommendations

IX.7.1 In sum, we RECOMMEND that -

- a) a series of linked financial models should be developed and made available to the Commission and to the policy planners who consult us, as a basis for the planning of a financial strategy for developments in education and the monitoring of the financial resource and revenue requirements (paragraph IX.4.2);
- b) a detailed feasibility (or systems specification) study should be conducted as soon as possible (paragraph IX.5.2);

- c) a consultant with appropriate experience should be employed who would undertake the feasibility study and act as the leader of the development team (paragraph IX.5.5);
- d) the higher level financial model should be operated by the Education and Manpower Branch of the Government Secretariat (paragraph IX.5.7).

IX.7.2 We consider that the implementation of recommendations (b) and (c) should proceed ahead of consultation on this Report.

Chapter X Other Matters Considered

X.1 Introduction

X.1.1 This Chapter deals with the other issues which we have studied in part, or which have been referred to us for our endorsement. These are civic education, special education, academic awards, fees chargeable for courses in Government and aided schools and for other Government courses of instruction, the provision of secondary school places and noise abatement measures in schools.

X.2 Civic education

X.2.1 We said in Chapter IX of Report No 1 that the issue of "... strengthening curriculum planning and development, including promoting civic education" would be considered in the second phase of our work.

X.2.2 We are conscious of the growing public interest in how students should be made aware of the political and social changes that are expected to develop in Hong Kong during the period leading up to 1997 and beyond.

X.2.3 We have throughout taken note of the various views and suggestions made by the public through the press and other media on civic education. We have studied the existing provision of civic education through the formal and the informal curriculum as well as extra-curricular activities in schools, institutions funded by the University and Polytechnic Grants Committee (UPGC) and institutions operated by the Vocational Training Council.

X.2.4 We have been kept informed of the philosophy behind the strategy formulated by the Education Department for strengthening civic education, the "Guidelines on Civic Education in Schools" issued by the Curriculum Development Committee in August 1985 and the subsequent public response. As the Education Department will carry out a review of the strategy in late 1986, we intend to study the conclusions drawn from this review first before considering what if any recommendations we should make on the future of civic education.

X.3 Special education

X.3.1 Special education is one of the issues dealt with by the Visiting Panel but not covered in Report No 1. We have noted the public comments on Section III.7 - Special Groups of the Visiting Panel's Report, and studied the various special education services presently provided. We have focused our attention on two specific areas of concern, namely -

- a) the extent to which children with special educational needs could or should be integrated; and
- b) teacher preparation for and staff problems in special schools and special classes.

X.3.2 We have examined the existing approach to the education of disabled children, which is to promote as far as possible integration with the able-bodied. Children with special educational needs are placed whenever possible in ordinary schools so that they can receive the fullest educational opportunity and the fullest benefit

from mixing with ordinary children in an ordinary environment. We endorse the approach that there should be integration of disabled children in ordinary schools, other than those children who, because of their handicapping conditions, will need more intensive specialist or remedial care that cannot be offered effectively by ordinary schools. We are aware of the need to keep under review the procedures for placing disabled children in special schools or integrating them into ordinary schools, and the supporting services needed, particularly for the integrators.

X.3.3 We have studied some of the staff problems in special schools and special classes in ordinary schools; and examined the existing training facilities for special education teachers and the problems encountered. We have concluded that there is a need to improve the existing in-service course of training for these teachers and to provide degree courses for the heads of special schools. We feel strongly that these two deficient areas in teacher preparation deserve the most urgent attention, and details of our proposals are put forward in Chapter VII.

X.3.4 We have yet to make any specific recommendations on the development of special education. We intend to consider the issue further.

X.4 Academic awards

Introduction

X.4.1 We have been consulted on the establishment of a committee to consider how full local validation might best be arranged and managed.

Background

X.4.2 At present, degree courses in Hong Kong are offered by the two universities and the Hong Kong Polytechnic (HKP) and will be offered by the City Polytechnic of Hong Kong (CPHK) and the Hong Kong Baptist College (HKBC) from September this year. Unlike the universities, which were established as degree-awarding institutions and are thus self-validating, the two polytechnics and the Baptist College are required to forward their proposals for degree courses to the UPGC, which determines whether the United Kingdom Council for National Academic Awards (CNAA) should be asked to assess the proposals. If the assessment is favourable, and if the UPGC decides to support a particular degree course proposal, the Administration will submit the UPGC's recommendations to the Executive Council for advice. Degree course proposals approved by the Governor-in-Council have to be re-validated after six years. Revalidation is at present carried out by the CNAA.

X.4.3 In 1983-84, the UPGC carried out a review of the procedures for validation and revalidation outlined in the preceding paragraph. After discussion within the UPGC and with individuals and institutions both local and overseas, the UPGC took the view that Hong Kong should move as quickly as possible towards the development of its own validation system. The UPGC therefore recommended that a local validation body, analogous to the CNAA, should be established.

The need for a local validation body

X.4.4 The present validation procedures are working well but reliance on the CNAAB, a British body, to validate local degree proposals will no be appropriate in the long run in view of the future arrangements for Hong Kong after 1997. We consider that a local validation body should be set up without delay so that it has sufficient time to gain the experience of a complete cycle of validation and revalidation and to establish itself, so that the qualifications awarded upon successful completion of courses which it has validated gain the international recognition needed to maintain Hong Kong's status as a major international centre.

X.4.5 With HKP offering degree courses now, and CPHK and HKBC doing so from September 1986, the number of degree course proposals requiring validation and the subsequent demand for revalidation will increase significantly. It would be difficult to ask the CNAAB to devote a substantial part of its resources solely to the validation and revalidation of degree courses in Hong Kong; but a local validation body established for the purpose could be called upon as of right and would be more attuned to the local situation. It would be unfortunate if the introduction of degree courses, and the consequential increase in degree places, were to be hindered by a shortage of resources for validation.

X.4.6 We believe that a locally-based validation body will help Hong Kong towards greater self-sufficiency in higher education without sacrificing quality. With experience and accumulated expertise, the local body should be in the best position to assess courses in the context of Hong Kong's development and changing needs,

while at the same time maintaining internationally accepted standards through its association with similar overseas institutions. We have therefore recommended that a Hong Kong Council for Academic Awards should be established.

Decision of the Governor-in-Council

X.4.7 We note that the Governor-in-Council, having considered our advice, has decided that a Planning Committee on Academic Awards should be established as soon as possible with the following terms of reference -

To consider in detail how full local validation of degrees awarded by non-university educational institutions in Hong Kong might best be arranged and managed, and to make costed recommendations to the Government within nine months of the Committee's establishment.

X.5 Fees chargeable for senior secondary, college of education and adult education courses

X.5.1 We have been consulted on the Administration's proposal to increase the fees charged for courses in Government and aided schools and for other Government-run courses of instruction.

X.5.2 The standard fees for senior secondary and sixth form courses were announced in the 1978 White Paper, "The Development of Senior Secondary and Tertiary Education and were phased in over a two-year period. They have remained unchanged since then and we agree that it is fair

and reasonable that these fees should be increased to take account of the substantial increase in the cost of living over the intervening period.

X.5.3 We have endorsed the proposal that, in order to avoid hardship, the revised fee levels should be phased in gradually, and we note that a phasing-in period of five years has subsequently been decided upon by the Government. The existence of the fee remission scheme would also, it was felt, serve to mitigate the effect of the increases upon lower-income families.

X.5.4 We note that fees for College of Education courses will remain in line with those for sixth form courses in order to avoid any disincentive to enrolment, and that fees for adult education courses will similarly be increased to reflect changes in the cost of living.

X.5.5 We note that the additional revenue accruing to the Government as a result of the fee increases is estimated to be \$71m per annum on completion of the phasing-in period in 1990-91.

X.6 Provision of secondary school places

X.6.1 In our Report No 1, we recommended that Government should build another 35 secondary schools between 1987 and 1993 in order to meet anticipated demand. Given the present policy under which secondary schools provision is assessed on a territory-wide basis, we are however concerned that a number of districts, notably those with developing new towns, will experience a shortfall of secondary school places in the years to come.

X.6.2 We note that of the 35 schools, 24 are scheduled for completion before September 1990. To alleviate local imbalances between supply and demand, nine will go to Tuen Mun, six to Yuen Long, four to Shatin, three to Junk Bay and one each to Tsuen Wan and Tai Po. A provisional allocation of the remaining 11 has also been made but this is subject to further consideration in the light of more up-to-date information regarding population migration in the coming years.

X.6.3 We note also that to supplement the additional places which should be coming on stream by the end of this decade, more immediate measures are now being implemented in Tuen Mun where there is an acute shortage of places. These measures include the reduction of discretionary places from 10% to 5%, flotation of more Form 1 classes in existing schools, altering the class structure to suit local need and reprovisioning of schools from over-provided areas to Tuen Mun.

X.6.4 We also note that a working group has been set up to monitor the planning and implementation of school building programmes and to examine issues which may affect the provision and distribution of school places.

X.7 Noise abatement measures in schools

X.7.1 We also considered the Report of the Steering Committee to Evaluate the Pilot Study on Noise Abatement Measures in Schools. The pilot study was conducted following consideration of the problem of noise in schools by the Environmental Protection Advisory Committee's Special Committee on Noise. Seven schools were selected for the study and various abatement measures were tried out to determine their effectiveness in reducing noise intrusion into classrooms.

X.7.2 The Steering Committee recommended, as a result of the studies carried out, a cut-off level of 65 decibels (A) Leq (equivalent continuous noise level) measured externally (or 60 dB(A) Leq measured internally) for traffic noise, and 30 NEF (noise exposure forecast - a measure of frequency as well as intensity) for aircraft noise. These were considered to be the maximum noise levels consistent with a reasonable teaching environment which could avoid undue strain upon teachers and students. Equivalent standards in the UK and USA are 30 NEF for aircraft noise and 52 dB(A) Leq (measured internally) for traffic noise.

X.7.3 The types of treatment identified were double glazing, sealing of existing windows and closing of existing windows, depending on the intensity of the problem. In all three cases, the proposed treatment would require the installation of air-conditioners. We understand that about 10500 (equivalent to 50% of the total) classrooms and special rooms in Government and aided schools are affected by excessive aircraft and/or traffic noise. Accordingly we understand that it is intended that the problem should be tackled by means of a programme phased in order of priority with regard to the severity of the noise problem encountered. Implementation of the whole programme would cost in the region of \$240m in capital expenditure plus some \$50m in recurrent expenditure each year at 1985 prices.

X.7.4 We have recommended that remedial work should proceed initially in the most seriously affectly schools, i.e. those schools exposed to severe aircraft noise, and that this should be implemented by means of a phased programme to spread the financial burden over a number of

years. We have also recommended that where schools must be provided in noisy areas in future, appropriate window treatment and air-conditioning should be provided, and these measures should be incorporated in the design of new schools where necessary.

X.8 Summary of recommendations

X.8.1 In sum, we RECOMMEND that -

Special education

- a) there should be integration of disabled children in ordinary schools other than those children who, because of their handicapping conditions, will need more intensive specialist or remedial care that cannot be offered effectively by ordinary schools (paragraph X.3.2);

and have recommended that -

Academic awards

- b) a Hong Kong Council for Academic Awards should be established (X.4.6);

Fees chargeable for senior secondary, college of education and adult education courses

- c) the revised fee levels for senior secondary and sixth form courses should be phased in gradually (paragraph X.5.3);

Noise abatement measures in schools

- d) remedial work to reduce noise intrusion into classrooms should proceed initially in the most seriously affected schools, i.e. those schools exposed to severe aircraft noise, and this should be implemented by means of a phased programme to spread the financial burden over a number of years (paragraph X.7.4); and
 - e) where schools must be provided in noisy areas in future, appropriate window treatment and air-conditioning should be provided, and these measures should be incorporated in the design of new schools where necessary (paragraph X.7.4).
-

Chapter XI Summary of Recommendations

XI.1 We summarise below our recommendations in this report, in the order in which they appear -

Chapter II- Review

- (1) Our Report should be published as soon as possible so that the Administration is able to take public comments into consideration before making final policy decisions on our proposals and their implementation (paragraph II.5.2).

Chapter IV - Language in Education

- (2) With effect from September 1986 an additional 0.5 non-graduate posts for teachers of Chinese should be provided for Government and aided secondary schools with fewer than 18 classes (paragraph IV.2.4). (see paragraph XI.3)
- (3) The recommendations in paragraph 3.19 of Report No 1 should be implemented with sufficient flexibility so that schools are allowed to use the resources provided for split class teaching for other measures (such as additional remedial teaching) to strengthen the teaching of English (paragraph IV.3.10).

- (4) There should be further research into split class teaching of English and other measures to strengthen the teaching of English (paragraph IV.3.11).

Chapter V-Pre-primary Services

Is kindergarten education essential?

- (5) Some degree of Government assistance is justified to ensure that all children continue to have access to pre-primary education (paragraph V.6.4)
- (6) Longitudinal research studies should be conducted to gauge the long term effects of pre-primary education upon children in Hong Kong (paragraph V.6.4)

Objectives of policy

- (7) The unification of pre-primary services should be the goal (paragraph V.7.2).
- (8) The first and foremost task in the process of unification is to bring together the standards of kindergartens and those of child care centres so that all kindergartens employ trained teaching staff and achieve similar teacher: pupil ratios (paragraph V.7.3).

The improvement of standards

- (9) A teacher: pupil ratio of 1:15 should be achieved in all kindergartens over time (paragraph V.8.2).

- (10) As an interim target a staff structure of three Qualified Kindergarten Teachers, eight Qualified Assistant Kindergarten Teachers, two Unqualified Kindergarten Teachers, a Clerical Assistant and two Workmen should be adopted by a standard six classroom bi-sessional kindergarten (paragraph V.8.3).
- (11) As a long term target all kindergarten teaching staff should be qualified (paragraph V.8.3).

Teacher preparation

- (12) The build-up of the Qualified Assistant Kindergarten Teacher course should be accelerated in the interim, and the Qualified Kindergarten Teacher course should be expanded with effect from 1990, on the assumption that the planned extension to the Grantham College of Education would be in operation by then (paragraph V.10.2). (see paragraph XI.3)
- (13) Full-time pre-service kindergarten teacher training as an option should be deferred for consideration until the aims of the immediate programmes have been achieved (paragraph V.10.3).

The possible need for a joint training institute

- (14) A joint training institute for kindergarten teachers and child care centre staff should not be pursued in the short run (paragraph V.11.4).
- (15) In the interim child care centre staff should join the courses for kindergarten teachers where the subject matter is of relevance to both groups (paragraph V.11.4).

Training for lecturing staff

- (16) The training programme for the lecturing staff of kindergarten teacher training courses should be a flexible combination of pre-service and in-service courses (paragraph V.12.2).

Regulatory requirements

- (17) By 1990 all kindergartens should be required to have at least 40% trained staff (either Qualified Kindergarten Teachers or Qualified Assistant Kindergarten Teachers) for each session; and by 1994 at least 60% trained staff for each session (paragraph V.13.1).
- (18) The Director of Education should be empowered to require teachers to undertake training whenever specific kindergartens fail to reach the required percentage of qualified staff (paragraph V.13.2).
- (19) The requirement in Education Regulation 88 should be changed with effect from 1990 to one teacher for 15 pupils, regardless of the pupils' age or whether the operation is whole-day or half-day (paragraph V.13.3).
- (20) The intended improvements to kindergarten space standards in Education Regulation 40 recommended in the 1981 White Paper should be further deferred from 1988 until 1990, and subject to review then (paragraph V.13.4).

Normative salary scales

- (21) A set of normative salary scales should be introduced, comparable to the salary scales for child care centre staff (paragraph V.14.1);

Improvements to the fee assistance scheme

- (22) A "split contribution factor" should be used in the fee assistance scheme: the salary and non-salary elements of kindergarten fees should be assessed separately and the parental contribution factor split into two, with a higher contribution factor applied to the non-salary element and a lower contribution factor to the salary element (paragraph V.15.3).

Administration of the "split contribution factor" approach

- (23) The kindergarten operators should receive the fee assistance applications, check and forward them to the Education Department for processing. The Education Department should calculate the fee assistance payable, and conduct spot checks on the operators and random means-tests on the parents (paragraph V.16.6).

Curriculum development

- (24) The Guide to Kindergarten Curriculum should be reviewed to co-incide with the issue of the guidelines for nursery class activities in 1987 (paragraph V.17.3).
- (25) There should be no formal curriculum for nursery and kindergarten classes and children should learn through play and activities (paragraph V.17.4).

Implications for the unification of pre-primary services

- (26) The improved fee assistance scheme for kindergartens should be extended to all whole-day or half-day child care centres for children aged 2 to below 6, whether

profit-making or non-profit-making, apart from those directly subvented by the Government (paragraph V.18.2).

- (27) The Government should establish a working group to develop specific plans to achieve the unification of pre-primary services. The group should also assess the need and the demand for whole-day pre-primary institutions upon unification (paragraph V.18.4).

Chapter VI-The Development of Sixth Form Education

Size of the public sector sixth form

- (28) The future objective of policy should be specified as providing one public sector Form 6 place for every three public sector Form 4 places two years earlier (paragraph VI.7.1).
- (29) The Education Department should reinforce its efforts to see that public sector sixth form places are filled where candidates of suitable academic standing are available (paragraph VI.7.2);

Sixth form curricula

- (30) What is required is an integrated sixth form curriculum, by which we mean the retention of a two-year A level course; the abolition of H levels; and the introduction of a new curriculum derived from A levels to be termed Intermediate (I) levels (paragraph VI.8.7).

- (31) More subjects of a less academic nature should be introduced at both A and I levels (paragraph VI.8.9).

The I level curriculum

- (32) Some schools should introduce two-year Form 6 streams in which I level examinations can be taken after two years (paragraph VI.9.1).
- (33) The I levels derived from A level subjects should be developed as subsets of those subjects (paragraph VI.9.2).
- (34) The I level examinations should be scheduled as late in the school year as possible (paragraph VI.9.3).
- (35) Split class teaching should be extended, and additional teachers should be provided to facilitate the operation of split classes (paragraph VI.9.5).

Extension of the sixth form

- (36) Form 7 should be introduced in all Chinese Middle schools (and those Anglo-Chinese schools which at present offer H level courses) (paragraph VI.10.1).
- (37) Sixth form courses should be extended to all prevocational schools (paragraph VI.10.2).

Language studies

- (38) All A and I levels (except for those which are language-specific, such as Chinese Studies or English Studies) should be available for examination in both Chinese and English, and there should be no language indicator shown in statements of examination results (paragraph VI.11.2).

- (39) Special efforts should be made to improve the standard of English in Chinese Middle schools, in addition to the measures recommended in our Report No 1, and these should include courses provided by the Education Department for English teachers in these schools (paragraph VI.11.3).
- (40) The current Use of English examination should be developed into an English Studies curriculum which will serve as more than a mere matriculation requirement for higher education. It should be developed as a full I level subject. Similarly a Chinese Language and Culture I level curriculum should be developed to fulfil a comparable function (paragraph VI.11.4).
- (41) The Education Department should encourage schools to ensure that all students continuing into a second year of the sixth form should maintain their studies in at least one of the two languages during that second year (paragraph VI.11.5).

Admissions to post-secondary and tertiary education

- (42) A centralized admissions system should be introduced, under which students' achievements in the three curricular I levels together with the language subjects taken in Form 6 would make it possible for places to be offered at the same time by all the institutions (paragraph VI.12.2).
- (43) The centralized admissions system should also include an allocation of places to be offered after Form 7 (paragraph VI.12.4).

- (44) CUHK should reconsider the case for the PAS in the light of our proposals (paragraph VI.12.5).
- (45) CUHK should consider now the possibility of granting credit unit exemptions to students with appropriate A, or A and I, level qualifications (paragraph VI.12.6).
- (46) All the institutions which accept students after Form 7 should consider very carefully the extent to which they could admit students on the basis of a combination of A and I levels (paragraph VI.12.7).

Recognition of I levels

- (47) The Government should consider the appropriate recognition of I levels in its designated 'matriculation' standard for civil service entry (paragraph VI.13.1).

Need for counselling services

- (48) The Education Department should take appropriate measures to encourage the schools to provide the necessary student counselling services (paragraph VI.14.1).

Chapter VII - Teacher Preparation

Preparation of graduate teachers

- (49) The enrolment capacity of the post-graduate diploma and certificate in education courses at both universities should be expanded to achieve the training of 80% of graduate teachers by 1994 (paragraph VII.2.2).
- (50) The ultimate target for the training of graduate teachers, allowing for the newly inducted teachers, should be set at 90% (paragraph VII.2.4).
- (51) The interim targets for the training of graduate teachers should be reviewed as a matter of course in time for the planning for student targets of training courses at both universities for each new triennium (paragraph VII.2.5).
- (52) The proposed additional places in the post-graduate diploma and certificate in education courses should be provided on a part-time in-service basis (paragraph VII.2.6).
- (53) As more graduate teachers become trained, the mix between full-time and part-time courses should be reviewed (paragraph VII.2.6).
- (54) The additional effort should be mounted through a blister programme at both universities (paragraph VII.2.9).

Training of technical teachers in technical institutes

- (55) The Technical Education and Industrial Training Department should consider offering appropriate incentives to staff who successfully complete the full course for lecturing staff on a voluntary basis (paragraph VII.3.5).

Bachelor of Arts degree in Primary Education for primary school heads

- (56) A Bachelor of Arts in Primary Education programme for primary school heads, with an annual intake of 30, should be introduced not later than 1991. The programme should be run on a continuous basis (paragraph VII.4.5).
- (57) Appropriate graduate posts in primary schools should be created for, or appropriate salary increments be granted to, heads who have completed the course, or obtained an acceptable equivalent qualification (paragraph VII.4.6).

Degree courses for special school heads

- (58) A degree course similar to that proposed for heads of ordinary primary schools should also be provided for the non-graduate special school heads (paragraph VII.5.1).
- (59) The degree course proposed for the primary school heads should be modified to meet the needs of all special primary and secondary school heads, for instance by offering electives in Secondary Schools Administration, Remedial Teaching and Teaching of Children with Learning Difficulties, so that all

special school heads (and subsequently potential heads) can be trained under the general scheme and no separate provision will be necessary (paragraph VII.5.2).

Degree courses for non-graduate teachers of practical, technical and cultural subjects

- (60) Part-time in-service courses leading to Bachelor of Education qualifications in Design and Technology, Art and Design, Home Economics and Physical Education should be developed in local tertiary institutions (paragraph VII.6.8).
- (61) Teachers should have the course fees refunded to them on successful completion of these courses (paragraph VII.6.8).
- (62) These courses should be started in 1991-92 by the latest so that the first batch of graduates will come on stream from 1993-94 (paragraph VII.6.9).
- (63) Secondary schools in the public sector which offer any of the specified practical, technical or cultural subjects at the senior secondary level should be allowed to employ a teacher who has successfully completed the local degree course (or equivalent) as the teacher-in-charge of the subject and to appoint him or her as a Graduate Master or Mistress outside the normal quota of graduate posts, subject to a maximum of four such appointments in each standard size school (paragraph VII.6.10).

In-service training for teachers of children with special education needs (see paragraph XI.3)

- (64) The plans for improvement and development of the existing in-service course for teachers of children with special education needs operated by the Special Education Department of the Sir Robert Black College of Education should be implemented in two stages: Stage I by 1987 and Stage II by 1990 (paragraph VII.7.4).
- (65) In Stage I the existing mode of operation of the course should be replaced by a two-year block-release mode (paragraph VII.7.5).
- (66) As an immediate measure the Sir Robert Black College of Education and the Special Education Section of the Education Department should form a working group to plan and organize the curriculum for the block-release course (paragraph VII.7.6).
- (67) The selection of trainees for the two-year course should be exercised with flexibility, especially with regard to unqualified teachers with degree or post-secondary qualifications (paragraph VII.7.7).
- (68) In Stage II a retraining course on a block-release basis should be organized for qualified teachers in special schools who have completed special education training at least five years previously (paragraph VII.7.8).
- (69) A one-year full-time specialist course for selected teachers should be the long term target (paragraph VII.7.9).

- (70) The staff establishment for the Special Education Department of the Sir Robert Black College of Education should be revised for the implementation of Stages I and II (paragraph VII.7.10).
- (71) More training courses, local and overseas, should be provided for selected teaching staff of the Special Education Department of the Sir Robert Black College of Education (paragraph VII.7.11).

Chapter VIII - Open Education

Overview

- (72) Action should proceed to develop open education at the secondary and post-secondary levels, and in the area of management education, simultaneously (paragraph VIII.1.6).

Open education at the secondary level

- (73) The five-year Government Secondary School Course for Adults and the six-year Secondary School Course should be amalgamated into a single course of five years' duration (paragraph VIII.2.5).
- (74) Planning for a sixth form course should proceed (paragraph VIII.2.6).

Regional open education centres

- (75) The concept of regional centres for adult education should be further explored and proposals for a pilot scheme developed (paragraph VIII.3.2).

Open education at the post-secondary level

- (76) There is a prima facie case, both social and economic, for an open education programme which will supplement conventional education and provide opportunities for those who otherwise would be denied them (paragraph VIII.5.11).
- (77) There is a need for an open education programme which covers the full range of possible attainments in further education in Hong Kong; i.e. from sub-degree to second degree level (paragraph VIII.5.12).
- (78) The programme should represent a continuum, i.e. it should encompass the full range of post-secondary studies, starting at a level related to school leaving qualifications and extending to second degree level (paragraph VIII.5.19).
- (79) The structure of the programme will require specific entry points, but it should be able to cater for entrants with a range of (including minimal) formal academic attainments (paragraph VIII.5.19).
- (80) The programme should have multiple exit points (e.g. certificate, diploma, degree, second degree and advanced diploma level) appropriate to the requirements of its students (paragraph VIII.5.19).
- (81) The programme should have within its basic schools of study central cores of academic and vocational studies allowing development into specialist areas leading to recognised qualifications (paragraph VIII.5.19).

- (82) The programme should allow students to proceed, within limits, at their own pace in their acquisition of qualifications (paragraph VIII.5.19).
- (83) A comprehensive open education programme accessible to all sources of potential demand requires the distance learning approach (paragraph VIII.5.20).
- (84) The value of foundation courses is such that they should be part of an open education programme at this level. If foundation courses are used properly, the formal academic qualifications required for conventional courses should be unnecessary (paragraph VIII.5.30).
- (85) The arguments for any form of filter as a means of pre-selection are administrative, not educational. If adopted it should be an interim measure, subject to periodic review (paragraph VIII.5.30).
- (86) Something more than the co-operation of autonomous institutions is required for an effective programme, and accordingly we recommend the consortium approach (paragraph VIII.5.38).
- (87) The consortium should be the entity in which the students enrol, rather than in an individual participating institution, and the awards given to students should be in the name of the consortium (paragraph VIII.5.39).
- (88) All five institutions of post-secondary and tertiary education which are funded through the UPGC (i.e. the University of Hong Kong, the Chinese University of Hong Kong, Hong Kong Polytechnic, City Polytechnic of Hong Kong and Hong Kong Baptist College) should be

invited to participate as core members of the consortium (paragraph VIII.5.42).

(89) The consortium should have the following functions and responsibilities -

- i) to set priorities and to plan the development of the comprehensive post-secondary programme;
- ii) to commission participants to operate component courses through tutorial support;
- iii) to approve the use of distance learning material and negotiate with originating institutions for its use and development;
- iv) to commission, where appropriate, the local development of course material;
- v) to appoint external examiners to validate course work and examination results;
- vi) to organise the necessary supporting services (access to libraries, laboratories, computers, study centres etc) through its own centre and, when appropriate, at participating institutions or their study centres;
- vii) to operate a student counselling service to advise students on their study programmes;
- viii) to consider students' standing for the purposes of credit transfers and recognition of advanced standing;

ix) to confer degrees and other qualifications on students

(paragraph VIII.5.44).

- (90) The consortium's programmes should be subject to validation by the proposed Hong Kong Council for Academic Awards, or whichever other validating body in future is responsible for certifying academic standards (paragraph VIII.5.44).
- (91) The consortium should be free to consider which other institutions of higher education should be brought into this scheme, and what relationship they should have with the consortium (paragraph VIII.5.46).
- (92) A major resource and administrative centre will be necessary, offering study rooms, libraries and laboratories (paragraph VIII.5.49).
- (93) The Government should reserve at least one channel for post-secondary open education as part of the conditions of granting approval for any cable television service (paragraph VIII.5.50).
- (94) The programme should start on the basis of using the best material available from existing operators (paragraph VIII.5.52).
- (95) The translation of courses into Chinese, or the development of specific new courses in Chinese, should be a matter for the consortium's early consideration as part of its development plans (paragraph VIII.5.53).

- (96) All courses should be structured on a credit unit system, consistent with the certification by attainment approach, permitting the assessment of students by stages and bringing the advantages of credit transfer and resumption of interrupted work (paragraph VIII.5.58).
- (97) The long term objective should be that the programme should be as far as possible self-financing, i.e. that students should meet the direct costs of the courses which they took (paragraph VIII.5.59).
- (98) Initial costs should be funded by at least a non-interest bearing loan and preferably a grant from the Government (paragraph VIII.5.60).
- (99) The consortium and the Government should also be prepared to consider a student financing scheme to assist students in appropriate cases (paragraph VIII.5.62).
- (100) Implementation of this scheme should be in three phases -

First, a planning committee for the consortium should be set up, on which all the prospective participating institutions should be represented, to -

- i) conduct a survey to establish the principal areas of demand and need;
- ii) establish the availability of contributory effort within the participating institutions;

- iii) assess the immediate availability of material from overseas institutions; and
- iv) produce a detailed implementation plan including advice on the future relationship between the consortium's own programme and other extra-mural or part-time courses;

Second, the formal establishment of the consortium, the recruitment of the key academic and administrative staff, the preparation of a detailed financial plan and the organisation of specific courses for offer at the start of the programme;

Third, by 1990, the admission of the first students (paragraph VIII.5.63);

Overseas institutions offering open education and distance learning courses

- (101) There is a continuing need for public safeguards (paragraph VIII.6.7).
- (102) The registration of any locally-based open education operation at the post-secondary level should be discretionary, that discretion to be exercised by the Executive Council on the advice of the future Hong Kong Council for Academic Awards (paragraph VIII.6.8).
- (103) The two objectives of policy as regards external institutions should be, first, to ensure that standards are maintained, and, second, to encourage them to involve local post-secondary institutions

where that will benefit the local foundation (paragraph VIII.6.10).

- (104) The Planning Committee for Academic Awards should be asked to consider the application of the guidelines suggested as a basis for the validation of distance learning courses to be offered by overseas institutions in Hong Kong, either through their own bases or in collaboration with local post-secondary institutions (paragraph VIII.6.13).

Chapter IX - Financing of Education

- (105) A series of linked financial models should be developed and made available to the Commission and to the policy planners who consult us, as a basis for the planning of a financial strategy for developments in education and the monitoring of the financial resource and revenue requirements (paragraph IX.4.2).
- (106) A detailed feasibility (or systems specification) study should be conducted as soon as possible (paragraph IX.5.2). (see paragraph XI.3)
- (107) A consultant with appropriate experience should be employed who would undertake the feasibility study and act as the leader of the development team (paragraph IX.5.5). (see paragraph XI.3)
- (108) The higher level financial model should be operated by the Education and Manpower Branch of the Government Secretariat (paragraph IX.5.7).

Chapter X - Other Matters Considered

Special education

- (109) There should be integration of disabled children in ordinary schools other than those children who, because of their handicapping conditions, will need more intensive specialist or remedial care that cannot be offered effectively by ordinary schools (paragraph X.3.2).

Academic awards

- (110) A Hong Kong Council for Academic Awards should be established (X.4.6). (see paragraph XI.2)

Fees chargeable for senior secondary, college of education and adult education courses

- (111) The revised fee levels for senior secondary and sixth form courses should be phased in gradually (paragraph X.5.3). (see paragraph XI.2)

Noise abatement measures in schools

- (112) Remedial work to reduce noise intrusion into classrooms should proceed initially in the most seriously affected schools, i.e. those schools exposed to severe aircraft noise, and this should be implemented by means of a phased programme to spread the financial burden over a number of years (paragraph X.7.4). (see paragraph XI.2)

(113) Where schools must be provided in noisy areas in future, appropriate window treatment and air-conditioning should be provided, and these measures should be incorporated in the design of new schools where necessary (paragraph X.7.4). (see paragraph XI.2)

XI.2 We wish to point out that recommendations (2) and (110) to (113) have already been considered by the Government and are included in this Report as a matter of record.

XI.3 We wish to reiterate that, as explained in earlier Chapters, recommendations (12), (64) to (71), (106) and (107) should be implemented ahead of public consultation on this Report.



Chapter XII Tasks Ahead

XII.1 In Chapter II we have said that while we would specify the areas which we expect to examine in future phases of our work, we do not wish to specify an order of priority or a sequence for their consideration.

XII.2 There are, however, two areas which we expect to address earlier rather than later.

XII.3 The first of these relates to the study of curriculum and behavioural problems in primary schools and junior secondary classes. This issue has been referred to us by the Director of Education following a request for a review from the UMELCO Standing Panel on Education. Our objectives here would be -

- a) to evaluate the adequacy, appropriateness and effectiveness of the curriculum in primary schools and junior secondary classes in meeting the needs of the academically less gifted pupils and equipping them for the future; and
- b) to identify the nature and magnitude of behavioural problems in primary schools and junior secondary classes and to evaluate the adequacy and effectiveness of existing arrangements and services for helping pupils with such problems.

XII.4 The second area relates to private independent secondary schools. We have been kept informed by the Education Department of its programme for the phasing out of the purchase of places from the less satisfactory schools. We shall wish to consider what measures are appropriate to ensure that private schools remaining in the scheme in future offer the same quality of education as the Government and aided schools.

XII.5 The other areas of concern which we expect to consider are a combination of issues which we have examined in part in earlier stages of our work and entirely new topics. We are not yet ready to state the sequence in which we shall approach them, and we do not rule out the possibility that other issues will join them in our agenda. The issues which we foresee include -

- civic education
 - curriculum development
 - the development of tertiary and post-secondary education
 - the development of the teaching profession
 - educational research
 - education for high technology
 - the future organization and role of the colleges of education
 - the future role of the Hong Kong Examinations Authority
 - linkage in educational standards
 - non-formal open education
 - professional education
 - the teaching of Chinese and English
 - special education
-

Consultation and submissions

I. Educational groups and institutions consulted

In the course of preparing Report No 2 we have consulted a number of educational groups and institutions on the future development of sixth form education, pre-primary services and open education. They are -

- a) consultation on sixth form education
The Association of Heads of Secondary Schools
The Association of Hong Kong Chinese Middle Schools
Association of Principals of Government Secondary Schools
Caput Schools Council
Grant Schools Council
Hong Kong and Kowloon Private Chinese Schools Association Ltd
Hong Kong Prevocational Schools Council
Hong Kong Private Schools Association
Hong Kong Subsidized Secondary Schools Council
Syndicate of English and Chinese Private Schools Ltd
The university of Hong Kong
The Chinese University of Hong Kong
Hong Kong Polytechnic
City Polytechnic of Hong Kong
Hong Kong Baptist College
Shue Yan College
Lingnan College

- b) consultation on pre-primary services
The Committee for the Improvement of Primary Schools Entrance Procedures
Hong Kong Christian Kindergarten Teachers' Association
The Hong Kong Council of Early childhood Education and Services
The Hong Kong Council of Social Service
The Hong Kong Housing Estate Kindergarten Association
Hong Kong, Kowloon and the New Territories Kindergarten Education Advancement Association Ltd
The Hong Kong Professional Teachers' Union
Joint Committee on Concern for Pre-school Education and Services
The Non-profit-making Kindergarten Council of Hong Kong
Primary Education Committee of the Hong Kong Catholic Diocesan Schools Council
Sheng Kung Hui Kindergarten and Nursery Council
Syndicate of English and Chinese Private Schools Ltd.
- c) consultation on open education
The University of Hong Kong
The Chinese University of Hong Kong
Hong Kong Polytechnic
City Polytechnic of Hong Kong
Hong Kong Baptist College

II. Submissions

We have also received submissions from various interested parties and concerned groups as well as from individuals on a wide range of education issues, a list of which is appended below -

Mr P D Reynolds, Dean, Faculty of Education , University of Hong Kong
Hong Kong Professional Teachers' Union
Education Action Group
Hong Kong Federation of Education Workers
The Joint committee on Junior Secondary Education Assessment
Miss Yip Sau-wah, Principal, Hong Kong True Light College
Mr David C K Cheung, Principal, Carmel English School
Committee on Education, Hong Kong Council of Social Service
Mr W D Lovatt, Hong Kong Baptist College
Members of the Faculty of Education, University of Hong Kong
Hong Kong Association for Science and Mathematics Education
Mr Chan Yuen-pui
Mr Lau Chi-lam
Mr Lai Kwok-hung
Mr M T Lo
Mr Fung Man-ching
Mr P F Barrett, Chairman, Committee on Management and Supervisory Training, Vocational
Training Council

Mr Wong Man-hei
Mrs Janice Y Chen
Hong Kong Association for Continuing Education
Mr Ho Wai-choi
Mr J A Cribbin, Secretary, Faculty of Arts, University of Hong Kong
Chinese General Chamber of Commerce
In-service Course of Training for Kindergarten Teachers Alumni Association of Hong Kong
Grantham College of Education
Mr C C Lee, Principal, Delia Memorial School
Hong Kong Association of the Blind
Central and Western District Board
The Education Committee of the Progressive Hong Kong Society
Miss Yau Yuk-lan, Aberdeen Social Centre Caritas Hong Kong
Joint Conference on the Promotion of Civic Education
Mr Bai Wing-kwai

The Secondary Schools Building Programme

The Secondary Schools Building Programme recommended in paragraph 2.29 of Report No 1 has been revised as follows -

| | | <u>(Position as at 30 April 1986)</u> | | | | | | | |
|------------|--|--|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| | | <u>Number of Schools to be completed in Year</u> | | | | | | | |
| | | <u>1987</u> | <u>1988</u> | <u>1989</u> | <u>1990</u> | <u>1991</u> | <u>1992</u> | <u>1993</u> | <u>Total</u> |
| Stage V | | | | | | | | | |
| (Phase I) | | 7 | 4 | - | - | - | - | - | 11 (a) |
| Stage V | | | | | | | | | |
| (Phase II) | | - | - | - | - | 4 | 6 | - | 10 |
| Stage VI | | - | 3 | 5 | 5 | - | - | 1 | 14 (b) |
| Total | | <u>7</u> | <u>7</u> | <u>5</u> | <u>5</u> | <u>4</u> | <u>6</u> | <u>1</u> | <u>35</u> |
| Cumulative | | | | | | | | | |
| Total | | (7) | (14) | (19) | (24) | (28) | (34) | (35) | |

Notes

- (a) Completion of three schools has been advanced by one year.
 (b) Completion of seven schools has been advanced by one year.

The advancement refers mainly to school projects entrusted to the Housing Authority in the course of developing public housing estates.

The language research projects

As mentioned in paragraph 3.17 of Report No 1, the Education Research Establishment (ERE) of the Education Department undertook four research projects on the medium of instruction in secondary schools, three of which were conducted in collaboration with the University of Hong Kong (HKU) or the Chinese University of Hong Kong (CUHK). In addition the ERE also undertook a study on the effectiveness of split-class teaching of English, one of the measures for strengthening the teaching of English proposed in paragraph 3.19 of Report No 1. These five research projects were completed in late 1985 and the following is a summary of their objectives, methodology and findings.

a) An investigation of the effectiveness of various language modes of presentation, spoken and written, in Form 3 in Hong Kong Anglo-Chinese secondary schools

2. This research, conducted in collaboration with HKU, used videotaped material or printed texts in a twenty-minute lesson to 1296 Form 3 pupils in ten schools. The videotaped presentation was in three different language modes, namely, English, Cantonese, and bilingual. The printed text had five versions, namely: English only, English with Chinese gloss, bilingual, Chinese with English gloss, and Chinese only. After the lesson, tests in English and Chinese versions were administered to measure the pupils' understanding. All pupils also sat for graded English and Chinese language proficiency tests so that the effects of language proficiency on test performance and opinion could be assessed.

3. This research indicates that some 30% or so of pupils can perform effectively in English. Another 30% or so have severe difficulty and the remainder come somewhere between. The 30% or so who experienced severe difficulty clearly preferred to work fully in Chinese and could perform effectively in this medium. Overall, only a tiny percentage (2-3%) preferred monolingual English presentation. About a half preferred monolingual Chinese oral presentation and a third monolingual Chinese written presentation. The remainder preferred bilingual modes of spoken or written presentation.

b) The effects of the medium of instruction on the achievement of Form 2 pupils in Hong Kong secondary schools

4. This research, conducted jointly with HKU, set out to investigate the effect of different modes of medium of instruction on pupils of different ability and language proficiency, in different teaching/learning environment. Topics in History and Science at Form/Middle 2 level were selected and taught form a period of six weeks. Different approaches were used in teaching different ability groups in 29 secondary schools.

5. The general conclusion drawn is that for 70% of pupils English texts are a definite disadvantage, even if enhanced in Chinese, where testing is in English. For the 30% of pupils who are most proficient in English, there is advantage in English instruction where the subject is heavily language dependent and tested in English. The research also finds a strong correlation between proficiency in English and proficiency in Chinese.

c) Studies on the modes of language of instruction at junior secondary levels in Anglo-Chinese secondary Schools

6. This longitudinal research covered 7500 pupils in Form 1 to 3 from 15 Anglo-Chinese schools over a period of two years during which tests of Chinese, English, Mathematics, Science and History were administered at intervals. A questionnaire was issued to pupils to find out the amount of English spoken in class, their understanding of English instruction and their difficulties with textbooks.

7. The research indicates that the use of Chinese for instruction purposes has increased in recent years in Anglo-Chinese schools, that it is more effective in promoting classroom interaction and that its use is particularly prevalent in those subjects which involve complex concepts requiring verbal explanation. The findings confirm that those who are proficient in English cope well with instruction in English; while those who are not experience difficulty and do less well. They also tend to confirm a correlation between proficiency in language and proficiency in other subjects. In other words, the good student will not find the language of instruction a significant barrier.

8. Three versions of test papers - English, Chinese and bilingual, were used in the research. Students with high English proficiency performed equally well in the English version and in the bilingual version. For students with low English proficiency, the lowest results were with the English version and there was no significant difference between the results of the Chinese version and the bilingual version.

d) A comparison of academic performance of junior secondary pupils in Anglo-Chinese and Chinese Middle Schools

9. This research, designed after consultation with CUHK, set out to compare the academic performance of pupils in junior secondary classes in Anglo-Chinese and Chinese Middle schools. A total of 4981 Form/Middle 1 to 3 pupils were selected from 25 Anglo-Chinese and Chinese Middle schools. The ability of pupils chosen from the two streams was comparable, and their socio-economic background, school facilities and the qualification of the teachers were either statistically or experimentally controlled in the research. Their performance in English, Chinese, Science, Mathematics and History was tested and compared over a period of two years.

10. The conclusion is that pupils in Anglo-Chinese schools do better in English and pupils in Chinese Middle schools do better in Chinese and History. Differences in performance in Science and Mathematics were less clear cut, but there were some indications that the Chinese Middle school pupils tended to do better. In Anglo-Chinese schools, use of bilingual test papers produced the best results while papers in English only produced the worst.

11. The research supports the proposition that exposure and use of a language for other purposes, i.e. learning other subject matter, is an effective means of improving proficiency. The slight edge of Chinese Middle school pupils in Science and Mathematics probably indicates the advantage of the mother tongue in explaining complex concepts - the effect not being greater because Chinese is also used to some extent in the Anglo-Chinese schools.

e) Additional teachers for split class teaching of English

12. This research sought to identify the effectiveness of language teaching when pupils were taught in smaller classes. Split class teaching of English at Form/Middle 1 and 2 was introduced in six schools for the 1984/85 academic year. Additional English teachers were provided in these schools so that English lessons were taught by one teacher in a class half the size of a normal class, i.e. 20 rather than 40 pupils. At the end of the experiment, language proficiency tests were administered and the results were compared with those of normal class teaching.

13. This research is rather different from the others in that it deals not with the relative effects of instruction in English and Chinese but rather with the effectiveness of teaching English to smaller groups of students.

14. The results are somewhat surprising. Small classes are favoured by both teachers and pupils, but the effects are only marginal. Listening performance was somewhat improved, as was the performance of low ability groups in Form 1. Effects were also more noticeable in Anglo-Chinese than in Chinese Middle schools. It was suggested that the effectiveness of split class teaching might be enhanced if teachers were appropriately prepared to undertake split class teaching through pre-service and in-service training programmes.

Provision of child care places and enrolment in kindergartens

I. Registered child care centres (Position as at 31.8.1985)

| Category (a) | Places | Number of Centres |
|------------------------------------|--------|----------------------|
| 1. <u>Creches</u> (below 2) | | |
| whole-day | 971 | 19 |
| residential | 514 | 13 |
| sub-total | 1485 | 32 |
| 2. <u>Nurseries</u> (2 to below 6) | | |
| whole-day | 18145 | 164 |
| half-day (b) | 3142 | 15 |
| half-day English speaking (b) | 1702 | 24 |
| residential | 164 | 2 |
| sub-total | 23153 | 205 |
| 3. <u>Mixed centres</u> (c) | | |
| | 232 | 4 |
| 4. <u>Special centres</u> (d) | | |
| | 480 | 11 |
| <u>Grand total</u> | 25350 | 252 |

Notes

- (a) Excluding the Lady Trench Training Centre which provides practical training for child care workers.
- (b) All the half-day nursery places are in the private profit-making sector.
- (c) Including centres providing both whole-day and residential services or/and nursery and creche facilities.
- (d) For disabled children.

II. Enrolment in kindergartens (Position as at mid September 1985)

| | <u>Half-day Kindergartens</u> (a) | <u>Whole-day kindergartens</u> (b) | <u>Total</u> |
|--------------------------------|--|---|--------------|
| <u>Number of classes</u> | 7519 | 83 | 7602 |
| <u>Permitted accommodation</u> | 227477 | 2617 | 230094 |
| <u>Enrolment</u> | 227213 | 1876 | 229089 |

Notes

- (a) Including: - Half-day nursery classes for children aged 3 - 3 8/12.
- Half-day lower kindergarten and upper kindergarten classes for children aged 3 8/12 to 5.
- (b) Including whole-day lower kindergarten and upper kindergarten classes for children aged 3 8/12 to 5.

Distinctions between a child care centre and a kindergarten according to the
Child Care Centres Ordinance (Chapter 243) and the Education Ordinance (Chapter 279)

| | Child Care Centres (CCCs) | Kindergartens | | |
|--------------------|--|---|-----------------------------------|-----------------------------------|
| | | Whole-day | Half-day | |
| | | | Nurseries | Kindergartens |
| Definition | CCC means any premises at which more than 5 children who are under the age of 6 years are habitually received for the purposes of care and supervision during part of the day or for longer periods. | School means an institution, organisation or establishment which provides for 20 or more persons during any one day, whether or not at the same time, any nursery, kindergarten, primary, secondary or post-secondary education or any other educational course by any means, including correspondence delivered by hand or through the postal services. | | |
| Age | For the purpose of this analysis, CCC refers to any non-residential centre for the children of the age of 2 to under 6. | 3 years 8 months to 5 years | 3 years to 3 years 8 months | 3 years 8 months to 5 years |
| Staff: pupil ratio | 1:14 | 1:20 (1) (2) | 1:20 (1) (2) | 1:30 (1) (2) |
| Floor Area | 1.8 sq m per child (1) (3) | 1.8 sq m per child (1) (3) | 1.2 sq m per child (1) (3) | |
| Staff | <p>Child Care Worker:</p> <p>a) completion of approved training course; <u>or</u></p> <p>b) completion of F/M 2 and approved training course, and 3 years' child care experience before 1.9.1981; <u>or</u></p> <p>c) completion of F/M 3 and approved training course</p> <p>Trainee Worker:</p> <p>Completion of F/M 3, satisfies the Director of Social Welfare (DSW) of the intention to complete an approved training course and aged 18 or above</p> | <p>Registered Teacher:</p> <p>a) Approved degree and teacher's certificate/diploma; <u>or</u></p> <p>b) Approved degree and 3 years' teaching experience; <u>or</u></p> <p>c) Certificate of status as "Qualified Teacher" issued to a teacher e.g. on completion of 2-year in-service training course for kindergarten teacher at GCE; <u>or</u></p> <p>d) 5 Es or 2 Es + 2 Cs in HKCEE and 10 years' teaching experience</p> <p>Permitted Teacher:</p> <p>a) 5 Es or 2 Es + 2 Cs in HKCEE <u>or</u></p> <p>b) any equivalent qualifications approved by the Director of Education (DoE) (Administratively, DoE issues a special permit to persons who have completed F/M 3 to teach in kindergartens.) (Qualified Assistant Kindergarten Teacher is not a category covered by the Regulations).</p> | | |
| Fee | An inclusive monthly fee in respect of the care and supervision of a child in centre may be charged if approved by DSW. Any increase in fee charged is subject to the approval of DSW. No other fee may be charged without DSW' s approval. | An inclusive fee, if approved by DoE, may be charged in 10 or 12 equal monthly instalments. Any change in the inclusive fee must be approved by DoE. No other collections may be made without prior approval from DoE. | | |
| Meal (4) | Kitchen facilities, diet and preparation of food must meet the requirements of DSW and DoE respectively. | | N.A. | |
| | Must provide at least one meal a day | | | |

- Notes :
- (1) Effective from September 1988
 - (2) Existing standard : 1 teacher per 45 children
 - (3) Existing standard : 0.9 sq m per child
 - (4) Standards for whole-day kindergartens will come into effect as from September 1986.

Number of operating kindergartens by type
(Position as at September 1985)

Kindergartens (a)

| | <u>Whole-day</u> | | <u>Half-day</u> | | <u>Total</u> | |
|--------------------------|------------------|----------|-----------------|----------|--------------------|----------|
| | <u>Number</u> | <u>%</u> | <u>Number</u> | <u>%</u> | <u>Number</u> | <u>%</u> |
| <u>Non-profit-making</u> | 12 (1114) | 42.9 | 311 (104041) | 40.2 | 319(b) (105155) | 40.5 |
| <u>Profit-making</u> | 16 (762) | 57.1 | 463 (123172) | 59.8 | 468(c) (123934) | 59.5 |
| <u>Total</u> | 28 (1876) | 100.0 | 774 (227213) | 100.0 | 787 (229089) | 100.0 |

Notes

- (a) Figures in brackets refer to the enrolment in the respective types of kindergartens.
- (b) Of the 319 kindergartens, 4 operated both half-day and whole-day classes.
- (c) Of the 468 kindergartens, 11 operated both half-day and whole-day classes.

Proposed intake and output of kindergarten training course

| Year | 2-year part time day | 2-year part time evening | 12-week part time day | 12-week part time evening | Total intake | Total(a) output |
|------|-------------------------------|-----------------------------------|--------------------------------|------------------------------------|-----------------|--------------------|
| 1986 | 240 | - | 360 | - | 600 | 432 |
| 1987 | 240 | - | 360 | 960 | 1560 | 1404 |
| 1988 | 240 | - | 360 | 960 | 1560 | 1404 |
| 1989 | 240 | - | 360 | 960 | 1560 | 1404 |
| 1990 | 360 | - | 480 | 1140 | 1980 | 1674 |
| 1991 | 360 | - | 540 | 1140 | 2040 | 1728 |
| 1992 | 360 | 390 | 540 | 180 | 1470 | 972 |
| 1993 | 360 | 390 | 540 | 180 | 1470 | 972 |
| 1994 | 360 | 390 | 180 | 180 | 1110 | 999 |
| 1995 | 360 | 390 | 180 | 180 | 1110 | 999 |
| 1996 | 360 | 390 | 180 | 180 | 1110 | 999 |

Note

(a) Assuming 10% wastage during the training courses

Estimated number and percentage of trained kindergarten teachers

| <u>Year</u> | <u>Estimated output of trained teachers</u> (a) | <u>Total No. of kindergarten teachers required</u> | <u>Estimated number of trained teachers available</u> (b) | <u>Percentage of trained kindergarten teachers</u> |
|-------------|--|--|--|--|
| 1986 | 432 | 8622 | 1981 (c) | 23.0 |
| 1987 | 1404 | 8875 | 3187 | 35.9 |
| 1988 | 1404 | 9219 | 4272 | 46.3 |
| 1989 | 1404 | 9506 | 5249 | 55.2 |
| 1990 | 1674 | 9722 | 6398 | 65.8 |
| 1991 | 1728 | 9795 | 7486 | 76.4 |
| 1992 | 972 | 9808 | 7709 | 78.6 |
| 1993 | 972 | 9754 | 7910 | 81.1 |
| 1994 | 999 | 9643 | 8118 | 84.2 |
| 1995 | 999 | 9488 | 8305 | 87.5 |
| 1996 | 999 | 9294 | 8474 | 91.2 |

Notes

- (a) Trained kindergarten teachers include both Qualified Assistant Kindergarten Teachers and Qualified Kindergarten Teachers.
- (b) A wastage rate of 10% is assumed in estimating the number of trained teachers available.
- (c) Including 388 teachers with non-standard kindergarten teacher training.

Projected enrolment at kindergartens and child care centres: 1986-1996
(Position as at October 1985)

| Year | kindergartens | | Child Care Centres | |
|------|---------------------|-----------------------------|---------------------|-----------------------------|
| | Projected Enrolment | (1981 White Paper Estimate) | Projected Enrolment | (1981 White Paper Estimate) |
| 1986 | 237 000 | (181 100) | 25 000 | (56 900) |
| 1987 | 243 900 | (184 500) | 27 000 | (58 000) |
| 1988 | 253 500 | (187 400) | 28 800 | (58 900) |
| 1989 | 261 500 | (190 900) | 30 700 | (59 500) |
| 1990 | 267 600 | (193 500) | 31 900 | (59 700) |
| 1991 | 269 600 | (195 000) | 33 100 | (59 500) |
| 1992 | 270 000 | (195 000) | 33 900 | (59 000) |
| 1993 | 268 500 | - | 34 100 | - |
| 1994 | 265 400 | - | 34 300 | - |
| 1995 | 261 100 | - | 34 500 | - |
| 1996 | 255 700 | - | 34 700 | - |

Note

The difference between the two sets of estimates is due mainly to -

- a) the difference in the population projections derive from the 1976 By-census and the 1981 Census; and
- b) the decision to change the 1981 White Paper policy and allow kindergartens to continue to operate nursery classes for three year-olds.

Estimate of teaching and non-teaching staff cost per kindergarten place per annum

Based on the normative salary scales proposed, the staff costs for a standard six classroom kindergarten operating bi-sessionally will be as follows -

| <u>Post</u> | <u>Grade</u> | <u>Monthly salary per person</u> | <u>Total annual staff costs</u> |
|--------------------------|--------------------|----------------------------------|---------------------------------|
| 1 Head Teacher | QKT | \$6,635 | \$ 79,620 |
| 12 Teachers | 2 QKT | \$6,135 | \$147,240 |
| | 8 QAKT | \$3,715 | \$356,640 |
| | 2 UQKT | \$2,645 | \$ 63,480 |
| 1 Clerical staff | Clerical Assistant | \$3,490 | \$ 41,880 |
| 2 Janitors | Workman II | \$2,805 | \$ 67,320 |
| Total annual staff costs | | | <u>\$756,180</u> |

Assuming the existing average permitted accommodation per class to be maintained, ie 30 per class for nursery classes and 31 per class for lower and upper kindergarten classes, the total number of kindergarten pupils in a standard kindergarten is estimated to be 368 -

| <u>Grade</u> | <u>No of classes</u> | <u>Class size</u> | <u>No of pupils</u> |
|--------------------|----------------------|-------------------|---------------------|
| Nursery | 4 | 30 | 120 |
| Lower kindergarten | 4 | 31 | 124 |
| Upper kindergarten | 4 | 31 | 124 |
| <u>Total</u> | <u>12</u> | <u>30.7</u> | <u>368</u> |

Therefore the staff cost per place per annum is $\$756,180/368 = \$2,055$

Note The monthly salaries rates are based on the mid-point MPS recommended in paragraph V.14.2 of Chapter V.

Estimate of new kindergarten fees

| | <u>Non-Profit making kindergartens</u> | <u>Profit making kindergartens</u> | <u>Profit and Non-profit-making kindergartens</u> |
|--|--|--|---|
| 1. Weighted average kindergarten fee for 1986/87 (\$) | 155.70 | 183.28 | 171.15 |
| 2. Salary expenditure as a percentage of fee income (%) | 63.3 | 45.6 | - |
| 3. Salary expenditure (\$) (3)=(1)x(2) | 98.56 | 83.58 | - |
| 4. Non-salary expenditure (\$) (4)=(1)-(3) | 57.14 | 99.70 | 80.25 |
| 5. Enrolment September 1985 | 103400 | 122822 | 226222 |
| 6. Proposed staff cost per place per annum (\$) | 2055 | 2055 | - |
| 7. Weighted average number of instalments in 1985/86 | 10.93 | 11.71 | 11.35 |
| 8. Proposed staff cost per place per instalment (\$) (8)=(6)/(7) | 188.01 | 175,49 | 181.22 |
| 9. New kindergarten fee (\$) (9)=(4)+(8) | 245.16 | 275.20 | 261.47 |

Note

- (a) The estimated fees are based on a class size of 30 pupils for nurser classes and a class size of 31 pupils for lower and upper kindergarten classes and weighted by the respective enrolment of non-profit-making and profit-making kindergartens.
- (b) The proposed staff cost per place per annum is worked out in Annex G.

Estimate of the percentage of kindergarten pupils eligible for fee assistance (a)

| <u>Parental contribution factor (per dollar income net of rent above the public assistance level</u> | <u>Maximum fee assistance level per month (\$)</u> | <u>Estimated percentage of eligible kindergarten pupils (b)</u> |
|--|--|---|
| <u>Existing fee assistance scheme</u> | | |
| a single contribution factor of 15 cents | 156 (c) | 17 |
| | 261 (d) | 34 |
| <u>Improved fee assistance scheme</u> | | |
| split contribution factors - | | |
| I) 6 cents for salary elements | 181 (e) | |
| ii) 9 cents for non-salary elements | 80 (f) | |
| iii) Total = (i)+(ii) | 261 (d) | 57 (g) |

Notes

- (a) Based on an average class size by survey of 30 pupils for nursery classes and of 31 pupils for half-day lower and upper kindergarten classes.
- (b) Based on the findings of the July - September 1985 General Household Survey conducted by the Census and Statistics Department. Reference should be made to footnote (3) in Chapter V.

- (c) \$156 = Recommended maximum fee assistance level for 1986/87 based on the weighted average fee of non-profit-making kindergartens under the existing fee assistance scheme.
- (d) \$261 = New fee based on the recommended staffing structure and normative salary scales (see Annex VH)
- (e) \$181 = Proposed staff cost per place per instalment for all kindergartens (see Annex VH).
- (f) \$80 = Weighted average of non-salary expenditure per place per instalment for all kindergartens (see Annex VH)
- (g) Please refer to footnote (4) in Chapter V.

Estimated relative share of expenditure (a) between parents and the
Government on the existing average fee and proposed new fee for kindergartens

| <u>Kindergarten Fee</u> | <u>Estimated government contribution</u> (1) | <u>Estimated parental contribution</u> (2) | <u>Total expenditure on fees</u> (1) + (2) |
|--|---|---|---|
| (\$m) | | | |
| <u>Existing fee: \$156 (b)</u> (and maximum fee assistance level) | | | |
| at a single contribution factor of 15 cents | 36 (9%) | 370 (91%) | 406 (100%) |
| <u>Proposed fee: \$261 (c)</u> | | | |
| at split contribution factors of 9 cents for non-salary elements and 6 cents for salary elements | 154 (23%) | 525 (77%) | 679 (100%) |
| <u>Additional contribution</u> | 118 | 155 | 273 |

Notes

- (a) Based on the assumption of maximum exposure and 100% rate of take-up by parents
- (b) See note (c) of Annex VJ
- (c) See note (d) of Annex VJ

Examples showing the effects of the application of the
improved fee assistance scheme on different types of kindergarten fees

Four hypothetical sets of kindergarten fees are shown in the table overleaf to illustrate how the "split contribution factor" affects the level of maximum fee assistance and hence minimum parental contribution of a household living below the Public Assistance level.

2. Kindergartens A1 and A2 have the same non-salary fee element of \$120 but the salary fee element of A2 is \$30 higher than that of A1. Under the new fee assistance scheme, the same parent at A2 is entitled to a maximum fee assistance of \$200, which is \$30 more than what he is entitled at A1. Therefore the minimum parental contribution at A1 and A2 will be the same.

3. Similarly kindergartens B1 and B2 have the same non-salary fee element of \$90 but B2 charges \$30 more for the salary element. Still the minimum parental contribution is the same for both, i.e. \$10. This demonstrates how the new scheme will cushion the effect of higher fees on parents as a result of higher salaries for teachers.

4. A comparison between the fees of A1 and B1 shows that parents will receive more fee assistance if they send their children to those kindergartens with a higher salary fee element given that their overall fees are the same. Both A1 and B1 charge an overall fee of \$210, but A1 has a higher non-salary element. Therefore the same parent will be entitled to less fee assistance at A1, i.e. \$170 as compared with \$200 at B1. Similarly a comparison between the fees of A2 and B2 demonstrates the same effect.

| | Standard kindergarten | | | Kindergarten (A1) | | | Kindergarten (B1) | | | Kindergarten (A2) | | | Kkindergarten (B2) | | |
|--------------------|-----------------------|------------------------|-------------------------------|-------------------|------------------------|-------------------------------|-------------------|------------------------|-------------------------------|-------------------|------------------------|-------------------------------|--------------------|------------------------|-------------------------------|
| | Fee | Maximum Fee Assistance | Minimum Parental Contribution | Fee | Maximum Fee Assistance | Minimum Parental Contribution | Fee | Maximum Fee Assistance | Minimum Parental Contribution | Fee | Maximum Fee Assistance | Minimum Parental Contribution | Fee | Maximum Fee Assistance | Minimum Parental Contribution |
| Salary Element | \$181(1) | \$181(3) | \$0 | \$ 90 | \$90(3) | \$ 0 | \$120 | \$120(3) | \$ 0 | \$120 | \$120(3) | \$ 0 | \$150 | \$150(3) | \$ 0 |
| Non-salary Element | \$80(2) | \$80(4) | \$0 | \$120 | \$80(4) | \$40 | \$ 90 | \$80(4) | \$10 | \$120 | \$80(4) | \$40 | \$ 90 | \$80(4) | \$10 |
| Total | \$261 | \$261 | \$0 | \$210 | \$170 | \$40 | \$210 | \$200 | \$10 | \$240 | \$200 | \$40 | \$240 | \$230 | \$10 |

Notes

- (1) Based on the proposed normative salary scales (see Annex VH).
- (2) Based on the weighted average of the non-salary element of the fees of all kindergartens (see Annex VH).
- (3) Calculation of the salary element of the fee assistance for individual pupils is as follows -

Salary element of fee (\$181 or actual amount whichever the lower) minus parental contribution at the rate of \$6 for every \$100 income net of rent above Public Assistance level.

- (4) Calculation of the non-salary element of the fee assistance for individual pupils is as follows -

Non-salary element of fee (\$80 or actual amount whichever the lower) minus parental contribution at the rate of \$9 for every \$100 income net of rent above Public Assistance level.

Estimated relative share of expenditure between
parents and the Government on child care centre fees

| | (\$m) | | |
|--|---|---|---|
| | <u>Estimated Government contribution</u> (1) | <u>Estimated parental contribution</u> (2) | <u>Total expenditure on fees</u> (1) + (2) |
| <u>Exising fee assistance scheme</u> | | | |
| at a single contribution factor of 15 cents | 47.6 (27.3%) | 126.9 (72.7%) | 174.5 (100.0%) |
| <u>Improved fee assistance scheme</u> | | | |
| at split contribution factors of 9 cents for non-salary elements and 6 cents for salary elements | 67.2 (35.9%) | 111.8 (64.1%) | 174.5 (100.0%) |
| <u>Additional contribution</u> | 15.1 | -15.1 | - |

Notes

The estimates are based on the assumptions that

- a) the improved fee assistance scheme would be extended to all whole-day and half-day nurseries;
- b) 60% of parents eligible for fee assistance would apply for it; and
- c) the average fee for child care centres, including private centres, was \$606 per month.

Possible A and I level vocationally-oriented subjects for the sixth form

(a) Prevocational schools

Art and Design
Business Studies *
Computer Studies
Design and Technology (metal bias)
Electronics and Electricity
Engineering Science
Graphic Communication (formerly Technical Drawing)
Principles of Accounts *

(b) Grammar and technical schools

Art and Design
Computer Studies
Design and Technology
Electronics and Electricity
Graphic Communication
Home Economics

* These two subjects are already available to grammar and technical schools in the Advanced Level Examination.

The two-year integrated sixth form
Possible combinations of courses of studies

a) Normal stream

The normal stream should offer a combination of two-year A level courses and one-year I level courses. In addition courses in Chinese Language & Culture and English Studies should be offered, at least one of which should be carried on to F 7.

| <u>F 6</u> | <u>F 7</u> | <u>Total F 7 Achievement</u> |
|--|--|--|
| C, E, I1, I2, I3 or C, E, I1, I2, I3 or C, E, I1, I2, I3 | C or E, A1, A2, A3 C or E, A1, A2, I4 C or E, A1, I4, I5 | C, E, A1, A2, A3 C, E, A1, A2, I3, I4 C, E, A1, I2, I3, I4, I5 |

b) Alternative stream

The alternative stream should offer two-year I level courses for the academically weaker students.

| <u>F 6 (first year)</u> | <u>F 6 (second year)</u> | <u>Total F 6 Achievement</u> | <u>(Possible F 7)</u> |
|-------------------------|--------------------------|------------------------------|-----------------------|
| C, E, I1, I2, I3 | C, E, I1, I2, I3 | C, E, I1, I2, I3 | C or E, A1, A2, A3 |

Further possible permutations would be -

| <u>F 6 (first year)</u> | <u>F 6 (second year)</u> | <u>Total F 6 Achievement</u> |
|-------------------------|--------------------------|------------------------------|
| C, E, I1, I2, I3 | C, E, A1, I2, I3 | C, E, A1, I2, I3 |
| or C, E, I1, I2, I3 | C, E, A1, A2, I3 | C, E, A1, A2, I3 |

Notes

- C Chinese Language & Culture (I level)) (see paragraph VI.11.4)
- E English Studies (I level))
- I_n Curricular Subject n at I level
- A_n Curricular Subject n at A level

Proposed Chinese and English courses at the sixth form level

Three Chinese courses are proposed for the sixth form students -

- (a) an I level "Chinese Language and Culture" course (the 'Use of English' analogue);
- (b) an A level "Chinese Studies " course (replacing the present A level Chinese Language & Literature course); and
- (c) an I level "Chinese Studies" course derived from (b).

Course (a) would be a core subject for all Form 6 students while courses (b) and (c) would be electives for Form 6 and Form 7 students.

The I level "Chinese Language and Culture" course

2. This course would aim to improve the standard and knowledge of the Chinese language among students and to enrich their understanding of Chinese culture. It would be an extended course of the Chinese language subject in the Form 4 and 5 curriculum. It would strengthen the verbal and written language skills of students and equip them with the basic knowledge of language syntax, structure, rhetoric etc. Further it would incorporate elements of Chinese culture into the learning of the language.

3. For those students who pass the examination in Form 6 but who wish to continue their studies in Chinese language and culture in Form 7, there will be an extension course which will not lead to any public examination.

The A level "Chinese Studies" course

4. This course would aim to promote literary appreciation and an in-depth understanding of Chinese literature among students. It would train the students to understand, appreciate, analyse and criticise works of Chinese literature. It would also introduce the various schools of thought that have influenced Chinese literature and culture.

The I level "Chinese Studies" course

5. The course content would be the same as the first half of the A level course and it would provide a deeper study of Chinese literature and schools of thought than the Form 4 to 5 Chinese literature curriculum.

The I level "English Studies" course

6. The objective of the new course should be to develop the present Use of English syllabus to produce a positive washback effect on the teaching of English in Form 6 and Form 7. There should be an optional Part I ("first certificate") examination for Form 6 students for the purposes of students seeking matriculation for higher education in Form 6, with a Part II ("full certificate") for students taking the examination in Form 7. Students should however be allowed to take the Part II examination in Form 6 should they choose.

7. The syllabuses for the two certificates would be similar, with the difference lying in the amount of exposure to the language. Basic skills to be developed would include listening; writing; reading and language systems; and practical skills for work and study.

Graduate teachers training provision and requirement for Government,
aided, caput and the more satisfactory private secondary schools

(Position as at October 1985)

| | <u>1986</u> | <u>1987</u> | <u>1988</u> | <u>1989</u> | <u>1990</u> | <u>1991</u> | <u>1992</u> | <u>1993</u> | <u>1994</u> |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| (i) Total enrolment at HKU & CUHK (a) (fte) | 974 | 974 | 1032 | 1086 | 1086 | 1222 | 1358 | 1358 | 1358 (b) |
| - HKU | 536 | 536 | 536 | 536 | 536 | 603 | 670 | 670 | 670 |
| - CUHK | 438 | 438 | 496 | 550 | 550 | 619 | 688 | 688 | 688 |
| (ii) Total output at HKU & CUHK | 939 | 932 | 939 | 1043 | 1043 | 1043 | 1303 | 1303 | 1303 |
| - HKU (c) | 520 | 520 | 520 | 520 | 520 | 520 | 650 | 650 | 650 |
| - CUHK (d) | 419 | 412 | 419 | 523 | 523 | 523 | 653 | 653 | 653 |
| (iii) Total number of graduate teachers who are untrained (e) | 4179 | 3979 | 4236 | 4166 | 3994 | 3817 | 3592 | 3086 | 2558 |
| (iv) Number of graduate teachers who are trained (e) | 6451 | 6945 | 7397 | 7825 | 8327 | 8795 | 9230 | 9896 | 10516 |
| (v) Total number of graduate teachers | 10630 | 10924 | 11633 | 11991 | 12321 | 12612 | 12822 | 12982 | 13074 |
| (vi) Percentage of graduate teachers who are trained (iv)/(v)x100 | 60.7 | 63.6 | 63.6 | 65.3 | 67.6 | 69.7 | 72.0 | 76.2 | 80.4 |

Note: Figures for (iii) - (vi) are cumulative

(a) Total enrolment at HKU and CUHK

= Planned enrolment in full-time course + Planned fte enrolment in the first and second year of part-time course

(b) Subject to the review for the 1994-97 triennium

(c) allowing a 3% drop-out

(d) allowing a 5% drop-out

(e) allowing a wastage rate of 7%

Proposed degree course for primary school heads and potential heads

1. proposals

- (a) To introduce a three-year part-time in-service course at the Chinese University of Hong Kong (CUHK) leading to the award of a Bachelor of Arts (B.A.) in Primary Education for able, experienced and well-motivated heads of primary schools and senior teachers who have the potential and are likely to be heads;
- (b) To provide graduate posts in primary schools for heads who have completed the aforesaid course or obtained an acceptable equivalent qualification.

2. Objectives

To improve the quality of primary education by -

- (a) providing appropriate training opportunities for primary school heads and potential heads to enable them to become capable and effective managers of their teaching staff and of the material resources available to them;
- (b) enhancing the status, prestige and career of primary school heads;
- (c) promoting leadership at the primary school level.

3. The proposed course

The course focuses on three major areas pertaining to primary education : curriculum research and development, educational administration, and guidance and counselling. It aims -

- (a) to extend students' level of intellectual and professional education to degree standards;
- (b) to encourage, stimulate and guide students towards high calibre service in primary education in Hong Kong;
- (c) to broaden the interests of the students, give them a wide perspective and cultivate in them the ability to face the issues of contemporary life in a rapidly changing society;

- (d) to extend students' personal commitment to primary education and the community as a whole by developing the concept of accountability;
- (e) to extend students' ability to undertake the challenge of rational enquiry, discussion and self-evaluation;
- (f) to enable students to offer effective leadership in the roles of primary school administrators and as leaders amongst peers;
- (g) to enable students to function effectively as school administrators giving priority to the roles of the school as a vital social organisation and as a progressive educational and cultural agency;
- (h) to enable students to become intelligent consumers and competent participants in educational research;
- (i) to enable students to co-operate productively with specialists such as those involved in child guidance, school social work and social organisations;
- (j) to enable students to communicate effectively in both speech and writing in the roles of education and social leaders within the primary school and in related environments;
- (k) to enable students to continue their personal professional development during and after the course.

4. Selection and admission

(a) Annual intake

Subject to review in the light of actual experience and requirements, the course will have an annual intake of 30 students.

(b) Target group

Applicants must be primary school heads and potential heads who are aged 45 or less on entry to the programme so that after successful completion of their studies they will have at least 7 years (government sector) or 12 years (aided sector) to serve before the normal retirement age.

Information on heads of special schools
(Position as at early 1986)

| Category | Number of School | *Entitled Headship rank | Substantive rank of the present head of the school | Whether or not completed a recognised course of training in special education | Whether or not completed a recognised course in teacher training (general) | The academic status of the present head of school |
|--|------------------|--|--|---|--|---|
| Special school with primary classes only | 10 | AM : 8 SAM : 2 | CM: 4 AM : 5 SAM : 1 | Trained : 9 Untrained : 1 | Trained : 10 Untrained : 0 | Graduate : 3 Non-graduate : 7 |
| Special school with secondary classes only | 2 | SAM/GM : 2 | CM : 0 AM : 1 SAM : 1 PAM : 0 GM : 0 SGM : 0 | Trained : 2 Untrained : 0 | Trained : 2 Untrained : 0 | Graduate : 0 Non-graduate : 2 |
| Special school with both primary and secondary classes | 49** | SAM/GM : 45 PAM/GM : 3 | CM : 9 AM : 16 SAM : 16 PAM : 0 GM : 3 SGM : 4 | Trained : 45 Untrained : 3 | Trained : 48 Untrained : 0 | Graduate : 10 Non-graduate : 38 |
| Total | 61 | AM : 8 SAM : 1 SAM/GM : 48 PAM/GM : 3 | CM : 13 AM : 22 SAM : 18 PAM : 0 GM : 3 SGM : 4 | Trained : 56 Untrained:4 | Trained : 60 Untrained : 0 | Graduate : 13 Non-graduate : 47 |

* In a school with at least 2 graduate teachers on the teaching staff entitlement, the graduate headship rank shall be SGM.

** One of the needs of these 49 schools is subvented by Social Welfare Department and therefore not included.

Projected demand and estimated costs of provision of senior secondary course

| | <u>1986</u> | <u>1987</u> | <u>1988</u> | <u>1989</u> | <u>1990</u> | <u>1991</u> | <u>1992</u> |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| (a) Population aged 15-29 | 1612300 | 1580000 | 1542700 | 1500700 | 1456600 | 1408700 | 1367100 |
| (b) Persons educated to Form 4 level | 945013 | 971718 | 996414 | 1015689 | 1035136 | 1044909 | 1054973 |
| (c) Eligible population (a)-(b) | 667287 | 608282 | 546286 | 485011 | 421464 | 363791 | 312127 |
| (d) Demand for Form 4 evening places (0.52% of (c) *) | 3496 | 3187 | 2862 | 2541 | 2208 | 1906 | 1635 |
| (e) Demand for Form 4 classes ((d)/40) | 88 | 80 | 72 | 64 | 56 | 48 | 41 |
| (f) Demand for Form 5 classes | 72 | 88 | 80 | 72 | 64 | 56 | 48 |
| (g) Number of Form 4/5 classes | 160 | 168 | 152 | 136 | 120 | 104 | 89 |
| (h) Total cost at \$65,600 per class (\$m) | 10.5 | 11.0 | 10.0 | 8.9 | 7.9 | 6.8 | 5.8 |
| (i) Additional cost ** (\$m) | 1.4 | 1.9 | 0.9 | -0.2 | -1.2 | -2.3 | -3.3 |

Notes * 0.52% is the mean demand for Form 4 places in the Government Secondary School Course for Adults/Secondary School Course from 1983 to 1985 expressed as a percentage of the eligible population.

** At present 139 senior secondary classes are operated at a cost of \$9.1m.

Projected provision of sixth form courses

| | <u>1986</u> | <u>1987</u> | <u>1988</u> | <u>1989</u> | <u>1990</u> | <u>1991</u> | <u>1992</u> |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| (a) Provision of Form 6 places (1/3 of Form 4 evening places 2 years previously) | 750 | 960 | 1170 | 1080 | 960 | 840 | 750 |
| (b) Provision of Form 6 classes ((a)/30) | 25 | 32 | 39 | 36 | 32 | 28 | 25 |
| (c) Provision of Form 7 classes | - | 25 | 32 | 39 | 36 | 32 | 28 |
| (d) Number of Form 6/7 classes | 25 | 57 | 71 | 75 | 68 | 60 | 53 |
| (e) Cost at \$76,370 per class (\$m) | 1.9 | 4.4 | 5.4 | 5.7 | 5.2 | 4.6 | 4.1 |

Note

The starting date for these courses has yet to be determined.