

Statement by Professor Phillip J. Moore, Hong Kong Institute of Education**Prefatory Comments**

As a member of HKIEd's senior management team for a number of years, I have been in a position to hear, from time-to-time, information related to matters of concern to the Commission. It should be noted that most of my evidence is not first-hand but rather reports on what others, particularly Professor Morris has mentioned to me, either on an individual basis or at meetings he has chaired or been attending. I did not make any personal written record of these discussions but am able to place some of these discussions in the context of events in which I was playing a leadership role. It is these that I will focus upon.

These are a short summary of my recollections from those times.

1. In the early part of 2004, a time when EMB and UGC were considering student numbers for the following triennium, Professor Morris informed me he had received a phone call from Professor Li (SEM) indicating that a merger, as opposed to deep collaboration or federation should be pursued with another university, from memory, the Chinese University of Hong Kong. I was also informed by Professor Morris that this call included a comment from Professor Li stating the price for not merging would be cuts to the Institute's student numbers for the coming triennium.
2. On 19th March, 2004, the Institute was the site of a conference of local school principals (over 1,000 attended) co-organized by members of the Institute, The Hong Kong Subsidized Secondary Schools Council and the Primary Schools Council. The conference concluded by listing a number of common concerns about the educational reforms (curriculum, assessment etc) underway in Hong Kong. The press coverage following the conference highlighted these concerns, many of them critical of the reforms, their timing and pressure on schools. The following morning I personally greeted Professor Li to the campus as he was a guest for a function. My recollection of the greeting was that he was clearly unhappy with the Institute and one of his first comments to me queried the quality of HKIEd graduates, implying the quality was poor. I tried, in vain, to respond with evidence to the contrary (e.g. employer surveys). Several days later, the organizers of the conference advised me that they had set up a web-site which listed the common concerns over the reforms (emerging from the conference) in order to encourage further debate and discussion on line. In the light of my recollections of the reported merger-and-threats-to-cut-numbers phone call of earlier in the year, I discussed the matter with Professor Morris and I then acted to ensure the

web-site did not attribute any comments to the HKIEd nor its management. As the web-site was an open forum for comments and opinions, it was necessary to ensure no misunderstanding as to the source of any comment that might appear on the site. From memory, I was expeditiously prompted to act in this way as I was concerned that Professor Li or others in government might take the opportunity to explicitly link the Institute and management with any possible negative comments and then seek to take the opportunity to reduce student numbers. My recollection is that at about the same time, Professor Morris informed me Professor Li had phoned him to express displeasure at the outcomes of the principals' conference and there would be repercussions. The event provided me with a context for recalling and locating the reported phone call regarding merger. As noted above, I also recall being concerned that cuts in student numbers might occur because the conference had been critical of educational reforms.

3. I played a significant role in the preparation for and conduct of the Institutional Review (2003) for self-accrediting status. The review was initially planned for June 2003 but the outbreak of SARS delayed the process. UGC informed the Institute (15th September, 2003) that the review would be held in late October, 2003. Senior management of the Institute was concerned about the delays and it was personally reported to me in early October (by Professor Morris) in a confidential email that Professor Li had reportedly discussed with UGC a delay/deferment of the review so that possibilities such as a merger could be considered. (Please see Exhibit I: 6th October email to Thomas Leung & Alfred Chan from Professor Morris)
4. I also played a significant role in the deep collaboration Joint Agreement with Chinese University of Hong Kong as a member of the Joint Task Force on Deep Collaboration (see Niland Report "Integration Matters", 2004, UGC). It was necessary to obtain UGC's agreement to some paragraphs of the agreement because of resource implications. The Chairperson of UGC was consulted on this matter. A little earlier than the signing date, Professor Morris reported to me that he had heard Professor Li wanted to see a statement about a merger in the final agreement statement. Merger is different from "Deep Collaboration" in that the former is the surrender of an institution's legal and cultural identity to form, from the merging parties, a new amalgamated institution. The Deep Collaboration agreement between HKIEd and Chinese University of Hong Kong was proposing a less extensive form of integration. No statement proposing a merger appeared in the final signed agreement of July, 2005.
5. In the latter half of 2006 and into January 2007, Professor Morris informed me, the Council (December, 2006 meeting - Prof Morris's Self-evaluation document was

distributed) and the wider community, through the press (especially on 26th January), that he considered his re-appointment (or not) was related to the merger issue. I was at that Council meeting in an "in-attendance" capacity as my role in senior management is not recognized for Council membership purposes.

6. Over the last four or five years, there have been a number of times when collaborations, including merger, have been discussed within the Institute (beyond those mentioned above):
- (i) At an Institute Council meeting (November, 2002), Professor Li indicated that the government was prepared to provide additional resources to facilitate a merger. I was present at this meeting and his comments are recorded in the formal minutes of the meeting.
 - (ii) Professor Morris informed me, in early 2003, that there had been a meeting between HKIEd Council officers and Professor Li at which Professor Li reportedly said the Institute would be "raped" if it did not merge. My understanding of this reported comment was that resources would be cut if a merger was not forthcoming.
 - (iii) In 2003, the Institute Council established a Task Force for the Future Development of the Institute which had a number of focus groups, one related to the long term role and positioning of the Institute (Focus Group on Long Term Role and Positioning). I served on both the Task Force and the Focus group. Matters of merger, deep collaboration and other forms of integration were discussed in these meetings. However, the final recommendations for future development stressed collaboration and bilateral alliances with other institutions.
 - (iv) Two Institute Council retreats were organized in April and June, 2004. I participated in these. The focus was on the UGC's Niland Report "Integration Matters". Following these retreats, the Council approved at its 21st June, 2004 meeting, a set of deep collaboration parameters that stated opposition to a merger (as defined by Niland, 2004) and support for the maintenance of academic, financial, and governance and management independence in any collaboration. The agreement between HKIEd and Chinese University of Hong Kong (para 4 above) was premised on these parameters.
 - (v) On 9th October, 2006, I received a confidential letter from Professor Morris reporting on a meeting that was held on 17th April, 2006 at which Professor Li, Professor Morris and others were in attendance. This letter, Exhibit 2, states that the Vice Chancellor of the Chinese University of Hong Kong reportedly viewed future relationships with the Institute as one of merger (not a federal arrangement). (See Exhibit 2).

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In summary, each of the above points [except 6 (i), (iii), and (iv)] represents second or third hand information related to the allegations. Points 6 (i), (iii) and (iv) report first-hand information from Institute meetings discussing merger and deep collaboration.



12th March, 2007.

Phillip J. Moore

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