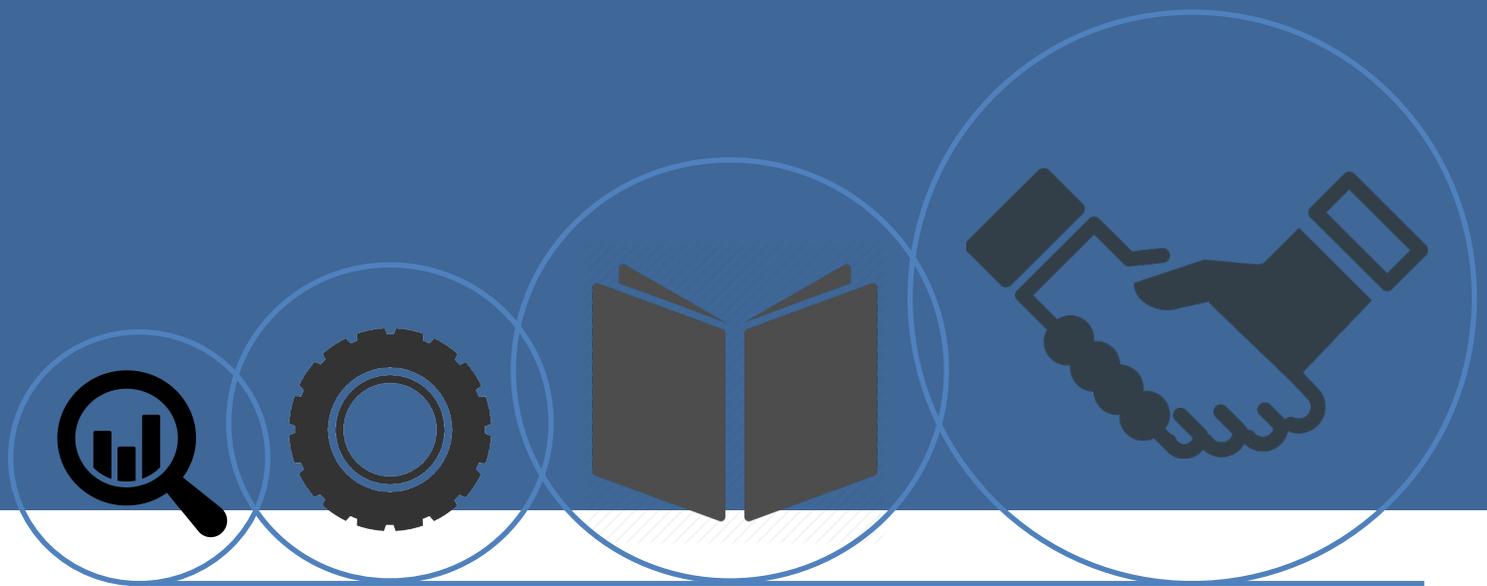


2015-16

# Social Impact Measurement



Consulting Report for

**Teach4HK 良師香港**



Teach4HK 良師香港

*Dr. Sammy Fung Mr. Matthew Lee Ms. Sophia So*

**October 2016**

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#### Disclaimer

This consulting report (“Report”) has been produced independently by Dr. Sammy Fung, Mr. Matthew Lee and Ms. Sophia So (collectively the “Consultants”) on the request of Teach For Hong Kong Foundation Limited (trading as Teach4HK), a limited company incorporated in Hong Kong by guarantee. The information, statements, statistics, measurements and analyses (collectively the “Information”) contained in this Report have been prepared by the Consultants from publicly available materials, information provided by Teach4HK and data collected from stakeholders. The Consultants do not express an opinion as to the accuracy or completeness of the information provided, the assumptions made by the parties that provided the information or any conclusions reached by those parties. The Consultants have based this Report on information received or obtained, on the basis that such information is accurate and complete.

## Executive Summary

The objective of this consulting project is to develop tenable performance measurements on Teach4HK (“TFHK”) for capturing its fulfilment of its social missions and to establish a set of key performance indicators (“KPIs”) for performance appraisal of TFHK.

The project covers the fellowship programme of TFHK for the academic year 2015-16. The consulting team started with an understanding of TFHK’s background and operation. After that, we assisted TFHK’s management to understand their stakeholders’ concerns and needs together with their social impacts creation. Last but not least, we helped formulate and implement a social performance measurement framework for the project after performing comprehensive analyses of TFHK’s vision and mission, strategies and stakeholders’ views. This framework is primarily developed based on the methodologies of the Social Return on Investment (“SROI”) and the Social Impact Assessment Tools (“SIAT”) developed by the Hong Kong Council of Social Service (“HKCSS”).

The framework measures TFHK’s social impacts in the following major elements: 1) employment creation; 2) recipients’ benefits for stakeholders including teaching fellows, participating schools and students; 3) volunteer force; 4) outplacement; and 5) community engagement and awareness. To quantify these elements, a comprehensive review was conducted on information currently available from TFHK and outside authorities. The consulting team strives to compile the useful information including data and representations provided by management of TFHK and other publicly available information to develop the list of measurements for the key elements mentioned above.

At the investment level made and planned by the management of TFHK, the SROI of the project is calculated to be **1 : 5.88**, which means that for every HK\$1 invested, a social return of HK\$5.88 will be generated in the period of 2016 to 2021. The social impacts which are unquantifiable in the calculation of SROI will be developed as KPIs and documented in the last section of this report.

## Chapter 1. Background of Teach4HK

### 1.1 Vision, Mission and Strategies

Vision & Mission	<p>Founded by young leaders in 2013, TFHK has the mission of enlisting passionate and outstanding university students with diversified talents to serve in schools with underprivileged students through a 1-year fellowship.</p> <p>TFHK partners with businesses and education institutions to provide leadership and career opportunities to nurture teaching fellows to become servant leaders with empathy, who thrive in various fields and continue to advocate for education post-fellowship.</p>
Strategies	<p><b>a. Recruit and train teaching fellows to deliver quality education to underprivileged students</b></p> <p>TFHK's recruited 6 university students as teaching fellows. With partnership from education institutions and corporate partners, TFHK developed a two-month summer training and a year-long support structure to enable fellows to deliver quality education to underprivileged students.</p> <p><b>b. Nurture fellows as servant leaders</b></p> <p>TFHK provided ongoing leadership training and facilitated their pursuance of any post-fellowship career paths that they were interested in. Attractive post-fellowship opportunities for the first batch of fellows could build a strong case to attract more quality students to apply in future fellowships.</p> <p><b>c. Construct an effective system to analyse fellows' impact</b></p> <p>TFHK strived to develop quality and quantity indicators to track fellows' performance, justify resources spending as well as explore potential improvements on the programme.</p> <p><b>d. Build sustainable funding model for further expansion</b></p> <p>TFHK aimed to diversify the sources of funding from one-off seed donations from individuals and corporates to multi-year funding from foundations. Moreover, TFHK aimed to explore school-based government funding as additional sources of income.</p>

## 1.2 Achievements and challenges

<p>Major accomplishment as perceived by the management of TFHK</p>	<p><b>a. Utilised social resources to build a strong advisory teams</b> TFHK invited prominent leaders from businesses, education and social enterprises to serve as advisors.</p> <p><b>b. Attracted approx. 120 applications for fellowship in 2015-16</b> TFHK's campus promotion was well received and attracted applications from students of diversified majors in top local and overseas universities.</p> <p><b>c. Partnered with schools and other organisations</b> TFHK lined up 3 partner schools and was supported by a variety of corporate and social enterprise (“SE”) partners, which provided both financial and non-financial sponsorships.</p> <p><b>d. Strong media coverage and social media</b> TFHK was interviewed by newspaper and other media. In particular, it has attracted large number of followers in Facebook and other social media, which helped TFHK reach and market to its target audience ranging from 18-24 years old.</p>
<p>Challenges as perceived by the management of TFHK</p>	<p><b>a. Lack of precedence</b> Given 2015-2016 was the first fellowship programme of TFHK, there was a lack of precedence to demonstrate the intended impacts of the programme. TFHK failed to obtain some opportunities from corporates which looked for track record. The management of TFHK has nevertheless built a pipeline by meeting senior executives from more than 30 companies.</p> <p><b>b. Collaboration with exiting teachers in the current education system</b> After meeting more than 10 schools by the management of TFHK, 3 partner schools were picked where the principals and teachers share the same vision with TFHK. In the future, in order to expand the fellowship, TFHK needs to convince teachers' unions to allow them to scale to larger number of schools in Hong Kong.</p>

### 1.3 Envisaged impacts by management of TFHK

For partner schools	<p>Schools benefitted from having fellows of TFHK as energetic young teachers with various professional background in areas where they need help:</p> <ol style="list-style-type: none"> <li>1) Enhancement of <b>in-class learning</b> and improvement of students' communication skills and critical thinking;</li> <li>2) Leverage of the teaching fellows' diversified background to offer <b>extracurricular and enrichment activities</b> to broaden students' horizon and motivate learning; and</li> <li>3) Provision of quality <b>teaching support</b> and reduction of the <b>workload</b> of existing teachers in schools.</li> </ol>
For students	<ol style="list-style-type: none"> <li>1) Under-privileged students are able to learn from fellows as role models to obtain <b>life and career planning guidance</b>; and</li> <li>2) Under-privileged students are able to participate more <b>extra-curricular activities</b> organised by fellows.</li> </ol>
For fellows	<ol style="list-style-type: none"> <li>1) Fellows benefit from hands-on <b>teaching experience</b> and potential <b>career opportunities</b>;</li> <li>2) Fellows are able to refine their leadership development and <b>knowledge transfer</b> techniques;</li> <li>3) Fellows can obtain living subsidies for the year; and</li> <li>4) Fellows are able to develop better understanding Hong Kong's <b>education system and social issues</b>.</li> </ol>
For society	<ol style="list-style-type: none"> <li>1) TFHK creates a sustainable social movement by <b>nurturing servant leaders</b> with empathy through teaching for the underprivileged and attracting diversified talents to consider education as their career.</li> <li>2) In the long run, no matter what career paths they choose, TFHK fellows form a <b>huge network of alumni who are strong advocates for education</b>.</li> </ol>

## Chapter 2. Social impact measurement

In this chapter, the major concepts of the social performance measurement and reporting tools are introduced, including Social Accounting and Audit (“SAA”), SROI and SIAT. We adopt the SROI and SIAT framework to facilitate the design and measurement of the social impact of TFHK.

### **2.1 Social Accounting and Audit**

“Social accounting is a systematic analysis of the effects of an organisation on its communities of interest or stakeholders, with stakeholder input as part of the data that is analysed for the accounting statement” (Quarter, Mook & Richmond, 2003, xix). It is also known as social and environmental accounting, corporate social reporting, corporate social responsibility reporting, and non-financial reporting or accounting.

A description of a typical SAA process reads:

“The first step is about organisations clarifying their mission, objectives and related activities, and the values and principles that underpin all their actions, as well as identifying their key stakeholders. The second step involves recognising the quantitative and qualitative indicators that enable the enterprise to report effectively on its performance and impact against its stated mission, objectives and values through data collection and consulting appropriately with its key stakeholders. The third step is about bringing all the collected information together into social accounts that are then verified by an independent panel that, once satisfied, issues a social audit statement.” (Pearce J., Kay A, 2005)

SAA requires that all aspects of the SE’s operations that should have impacts on others be accounted for. This implies a need to translate an SE’s mission statements and organisation objectives into detail breakdown of its activities with an articulation of these activities’ impacts mostly in qualitative but sometimes in quantitative terms. The

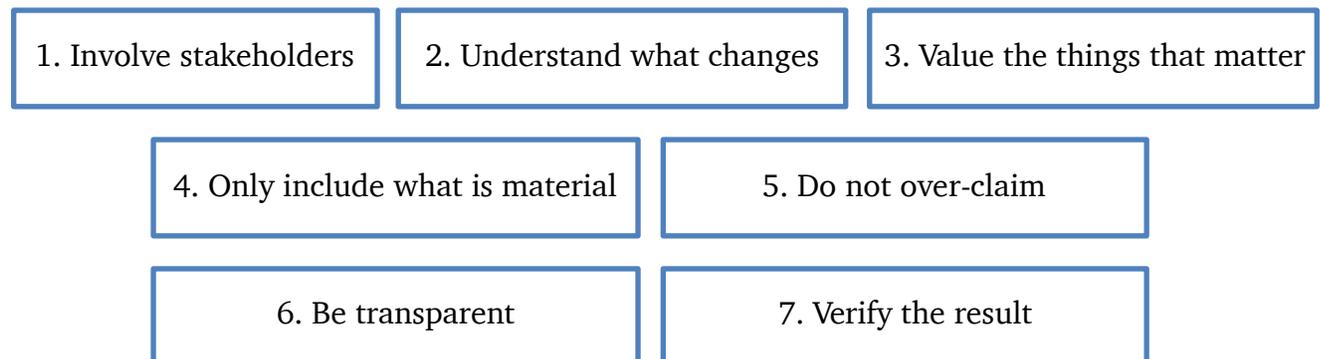
social accounts are therefore a full statement of all activities of the SE that impact others.

### Models of Social Accounting:

Social Accounting projects generally falls into two broad categories, one that produces qualitative social accounting information to supplement conventional financial accounting, the other focuses on integrating social, environmental and economic information to make integrated social accounting. The former makes it difficult to judge whether the social and environmental actions of corporations brings material impact relative to its economic performance; it is often being criticised as having secondary status, or even being dismissed as “greenwashing”. The latter assigns monetary value in their social accounting statements to non-monetary social and environmental items as if they are actually exchanged in the market. Full statements of all activities that have social and environmental impacts would involve the deployment of numerous proxies, justification of which is not only a consuming process but also attracts criticism.

## 2.2 Social Return on Investment

The SROI of SE is defined as “a form of adjusted cost-benefit analysis that takes into account, in a more holistic way, the various types of impact” (Lawlor, 2009) that a SE has. There are a range of approaches to SROI. “A Guide to SROI”, published by the United Kingdom Cabinet Office of the Office of the Third Sector, states seven principles of SROI:



## Strengths and Limitations of SROI:

SROI, if properly implemented, should achieve the following benefits for the SE:

- a) Enhance communication and understanding amongst stakeholders and between the SE and stakeholders: the mapping out of relationships amongst inputs, outputs and outcomes helps set expectations, thus fostering a better understanding amongst the parties involved, clarifying responsibilities and accountabilities and making transparent how key operations are conducted in the SE.
- b) The steps involved in compiling SROI are processes that force the SE and stakeholders concerned to be “aware of the careful judgments involved in any kind of assessment of social and environmental impacts” (Arvidon, M, Lyon, F, McKay, S. & Moro, D., 2010). In other words, the process calls for clear justification to establish a causal relationship between the SE’s inputs and the claimed outcome.
- c) A lack of quality evidence on the impacts of SE and NGO is a common problem faced by these organisations. The process of SROI compilation promotes the accumulation of quality data that can be used as evidence for impact assessment.
- d) The compilation process also enables a better understanding of the activities in the SE concerned, thus facilitating self-improvement.

However, SROI has its limitations when applying to SE:

- a) There is a general lack of existing quantitative data or a lack of resources to collect data by SE in order to compile SROI.
- b) The judgmental and discretionary nature in making choices of activities, indicators and assigning value to impacts implies a possibility of hiding information, or biases in choices made.

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- c) There is an overemphasis on outcomes and impacts created, while the understanding of how these deliverables are achieved becomes secondary.
  - d) The need to compile data and evidence may lead to a bias in choosing missions and objectives that are comparatively easier to quantify.
  - e) The process of assigning economic values to “cost” and “benefits”, which are often intangible, itself is problematic. Besides, proxy figures assigned to “cost savings” or “benefits achieved” do not translate to actual impacts on books.
  - f) With SE very often drawing support from volunteers, the “price-tagging” process of SROI compilation unavoidably involves the assignment of value to volunteer support, which itself generates debate at both the conceptual and the practical level.
  - g) Each SROI ratio produced is specific to each SE involved, and cross-comparison may be misleading, thus having limited value as a decision enabler in allocating resources among SE. Nevertheless, policy makers, investors and funders have a tendency to allocate limited resources according to cross-comparison of such ratios. SROI compilation has a tendency to be motivated mostly by the need to attract funds and resources, which may lead to opportunistic behaviour of impartiality reporting or biased choices in report compilation.

### 2.3 Social Impact Assessment Tool

HKCSS with the support of McKinsey in 2009 developed the SIAT, which is tailored to measure the performance of SE in Hong Kong. SIAT evaluates the following aspects of an SE:

1. Financial Sustainability: “ability to retain sufficient cash to pay off its expenses”.
2. Employment or workfare: “number of jobs created and employee profile”.
3. Recipients’ benefits: “tangible and intangible benefits created for the beneficiaries (number of training hours, skill advancement and self-actualisation)”.
4. Community awareness: “increased community awareness as well as public engagement and supportiveness”
5. Volunteer force: “volunteer involvement in terms of magnitude of volunteering force, contributing hours and expertise”
6. Outplacement: assessment on the ability to return to the labor market (e.g. number of out-placed worker).

SIAT as a tool tailored for the Hong Kong situation. It puts emphasis on economic and social impacts of an SE, particularly that of the provision of employment opportunities – 50% of the performance aspects examined are related to quantifying the economic benefits related to labor inputs (employment opportunities, recipients benefits, and outplacement). Even “volunteer force” is suggested to be measured by the equivalence of labor outputs. These, together with the measure of financial sustainability, meant that five out of six of the evaluation aspects of SIAT are related to economic outputs. Contrast to the clarity of measuring these economic aspects, SIAT does not provide the necessary details on what community awareness is created by SE and how to measure such.

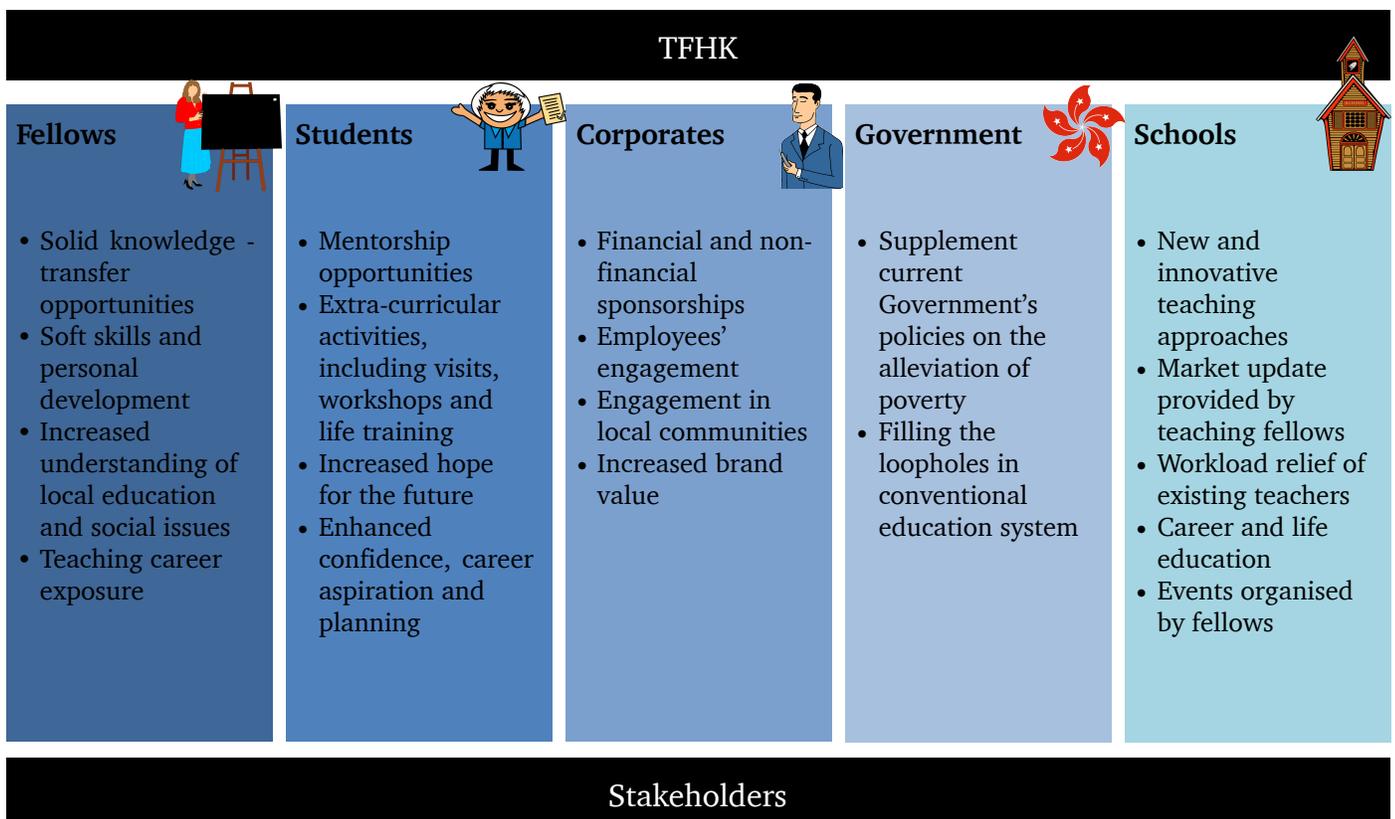
Despite having been developed for a few years and tailored for Hong Kong, there is only limited application of the tool to evaluate the performance of SE in the city. We have adopted the SIAT model with some modifications to measure social impact of TFHK.

## Chapter 3. Stakeholder analyses

### 3.1 Introduction and methodology

Over the academic year commencing September 2016, impacts generated by the fellowship programme of TFHK on different stakeholders, including but not limited to teaching fellows, students on attachment to TFHK, participating schools, corporate sponsors, government, founders, staff and advisors to the society at large have been captured. To best measure both the quantifiable and non-quantifiable impacts, methodologies adopted include personal interviews (including preliminary and follow-up interviews), questionnaires, and data analyses from information and reports from TFHK, which assisted us to refine existing and develop further KPIs for TFHK.

In summary, TFHK has made significant achievements as a start-up with no precedence and increasing impacts are anticipated as the programme expands. In this chapter, results of questionnaires distributed and interviews conducted, together with our further comments and analyses are documented.



## 3.2 Teaching fellows

To capture the changes of the teaching fellows before and after the one-year fellowship programme, teaching fellows were invited to complete two questionnaires, one at the beginning of their fellowship and one at their completion. Follow-up interviews have been conducted personally with four teaching fellows.

The questions were set to explore any changes in the perceptions and attitudes of the teaching fellows towards the fellowship programme, the participating schools, the underprivileged students, and the education system in Hong Kong. Further questions were set to explore whether the fellowship has changed their career choices, aspiration and life plans. Teaching fellows were also welcomed to express their concerns of the fellowship in the questionnaire.

Teaching fellows in the 2015-16 fellowship programme were all fresh graduates, both undergraduates or postgraduates, from a diversity of background - arts, business administration, social science, engineering and science. In addition to teaching academic subjects, including English, Mathematics, General Studies, Integrated Science, Integrated Humanities and Geography, teaching fellows were in-charged of a wide variety of extra-curricular activities which helped broaden students' horizon and brush up their practical life skills, including school journalism, cycling, gardening, coding, memory training and magic. 5 teaching fellows had experience in helping underprivileged students prior to the fellowship through a variety of volunteer work. 4 of them engaged in voluntary teaching in Hong Kong and 1 of them joined a voluntary trip to rural areas in the mainland China to teach English to primary students.

### 3.2.1 Results of preliminary questionnaire

The preliminary questionnaire which was completed by the teaching fellows at the commencement of the 2015-16 fellowship programme consisted of 4 main parts -

- (i) Career aspirations and reasons for joining the fellowship programme;
- (ii) Perceptions of the fellowship programme
- (iii) Skills, qualities and knowledge; and
- (iv) Understanding of underprivileged students and their challenges in Hong Kong.

(i) Career aspirations and reasons for joining the fellowship programme

The objective of this part is to identify the goals of the teaching fellows and their reasons of joining TFHK.

The result reveals that TFHK has been attractive and unique to fresh graduates in numerous ways:

- (1) **5 teaching fellows (83%) expressed their intention of being a registered teacher in the future, or embarking on education-related work.** The one-year fellowship programme could provide a platform for teaching fellows to discover whether they were suitable to become teachers, explore which path to pursue in education and gain teaching experience before proceeding to studying Postgraduate Diploma in Education (“**PGDE**”) with determined specialisation;
- (2) **2 teaching fellows** who studied Educational Psychology could **gain practical experience in applying their knowledge to counsel young children;**
- (3) **1 teaching fellow** who expressed his interest in social entrepreneurship and had the goal of initiating innovative social projects in future company could **learn from the leadership of TFHK;**
- (4) Teaching fellows could get **detailed exposure to inequality, poverty and many other social problems** in Hong Kong and a **first-hand experience in understanding the needs of underprivileged students;**
- (5) Teaching fellows were able to **meet people from a diversity of background** and get other **networking opportunities;** and
- (6) The one-year fellowship programme offered **personal development and enrichment opportunities.**

We are of the opinion that the **non-binding nature** and **flexibility** of the fellowship programme has provided a suitable duration for teaching fellows to explore and reflect on their strengths and weaknesses, potentials, interests, ambitions and options before

making a decision on which route to embark on. The experience is not only useful for teaching fellows who plan to embark on a teaching career. The soft skills that can be learnt during the one-year are valuable to teaching fellows whichever career paths they subsequently pursue.

We would also invite TFHK to direct its attention to some of the concerns of the teaching fellows when they first considered joining the fellowship. Aside from being a pilot project which had no reputational record and the lack of precedence, teaching fellows mostly concerned on whether the one-year teaching experience would be recognised by professional qualifications or future employers. Moreover, 1 teaching fellow expressed the worries of her parents on the legitimacy of the fellowship programme. We are of the view that their concerns could be the concerns of many potential future participants and TFHK should take active steps to clarify. Besides, one teaching fellow thought that the amount of living subsidy was comparatively low. Out of 5 marks, the average score for the sufficiency of living subsidy as perceived by teaching fellows is 3.67, comparatively lower than the results of other questions.

#### (ii) Perceptions of the fellowship programme

The first question in this part invited teaching fellows to rate a set of statements relating to their perceptions on the teaching profession, education system in Hong Kong and the fellowship programme, as documented in **Chart 1**.

Teaching fellows strongly agreed that the teaching profession was an important occupation in Hong Kong (4.5 out of 5 marks) but all of them gave lower scores to the statement “being a teacher is a prestigious career option to students” (3 out of 5 marks). Teaching fellows also had strong disagreement over the effectiveness of existing education system in Hong Kong in addressing the needs of underprivileged students (1.5 out of 5 marks) and the abundance of resources and support granted by the government to schools in Hong Kong (2 out of 5 marks). This was in line with the mission of TFHK, which the teaching fellows expressed that they understood and agreed with.

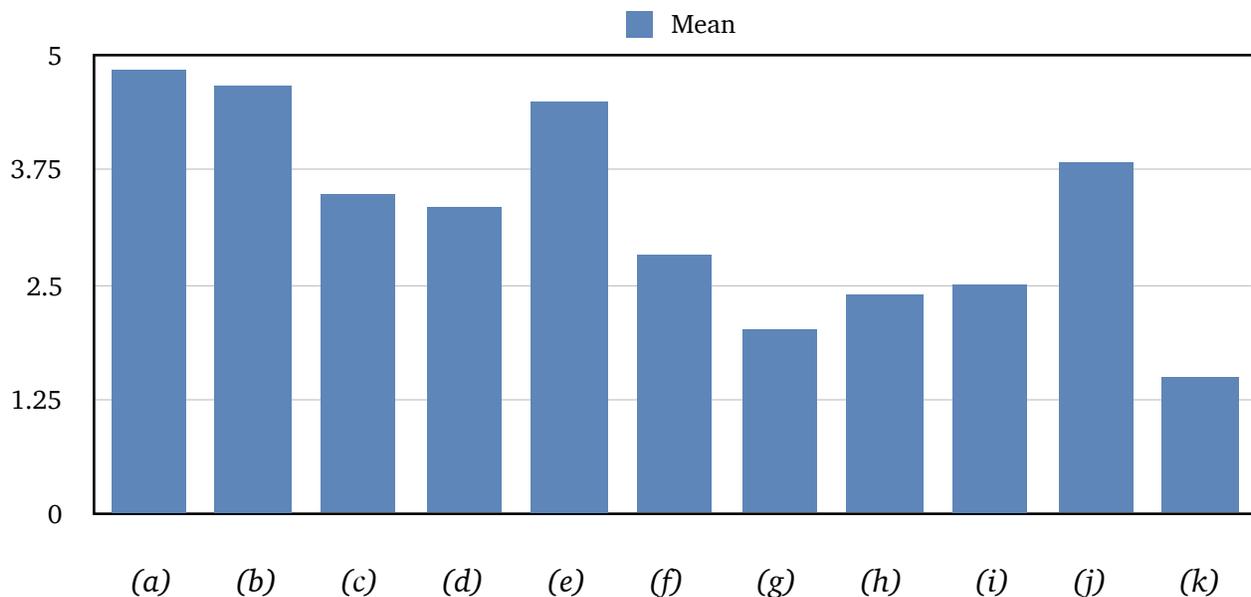
### Chart 1 - Ratings by teaching fellows in respect of their perceptions on the teaching profession, education system in Hong Kong and the fellowship programme

Question: Please rate the following statements.

Scale: 5: strongly agree; 4: agree; 3: neutral; 2: disagree; 1: strongly disagree; 0: no opinion

Statements:

- (a) I understand the mission of TFHK.
- (b) I agree with the mission of TFHK.
- (c) I have a good understanding of poverty in Hong Kong prior to joining TFHK as a teaching fellow.
- (d) I have a good understanding of the education system in Hong Kong prior to joining TFHK as a teaching fellow.
- (e) 'Teacher' is an important occupation in Hong Kong.
- (f) Being a 'teacher' is a prestigious career option to students.
- (g) The education system in Hong Kong can address the needs of underprivileged students.
- (h) The government provides enough resources and support to secondary schools in Hong Kong.
- (i) My family has negative concerns over me joining TFHK as a teaching fellow.
- (j) The fellowship programme of TFHK is effective in helping underprivileged students.
- (k) At this moment, I regret joining TFHK as a teaching fellow.



The second question in this part invited teaching fellows to evaluate the trainings during the fellowship programme, as documented in **Chart 2**.

However, scores in this area were comparatively low. Teaching fellows gave 3.83 out of 5 marks for the sufficiency of trainings. Some trainings, such as the career development workshop and the theory-based educational training workshop, were also not regarded by teaching fellows as being highly useful. One teaching fellow also expressed that she would prefer more trainings on problem-solving skills with more practical exercise.

We share the same view with the teaching fellows that quality and practical trainings, both pre-fellowship and continuous training during the fellowship, are crucial. As fresh graduates, teaching fellows have had no prior teaching experience or experience in addressing the needs of underprivileged students. As the 2015-16 fellowship programme has come to an end, we would recommend TFHK to fine-tune its training programme for the fellowship based on its first-year experience.

### **Chart 2 - Ratings by teaching fellows in respect of the trainings in the fellowship**

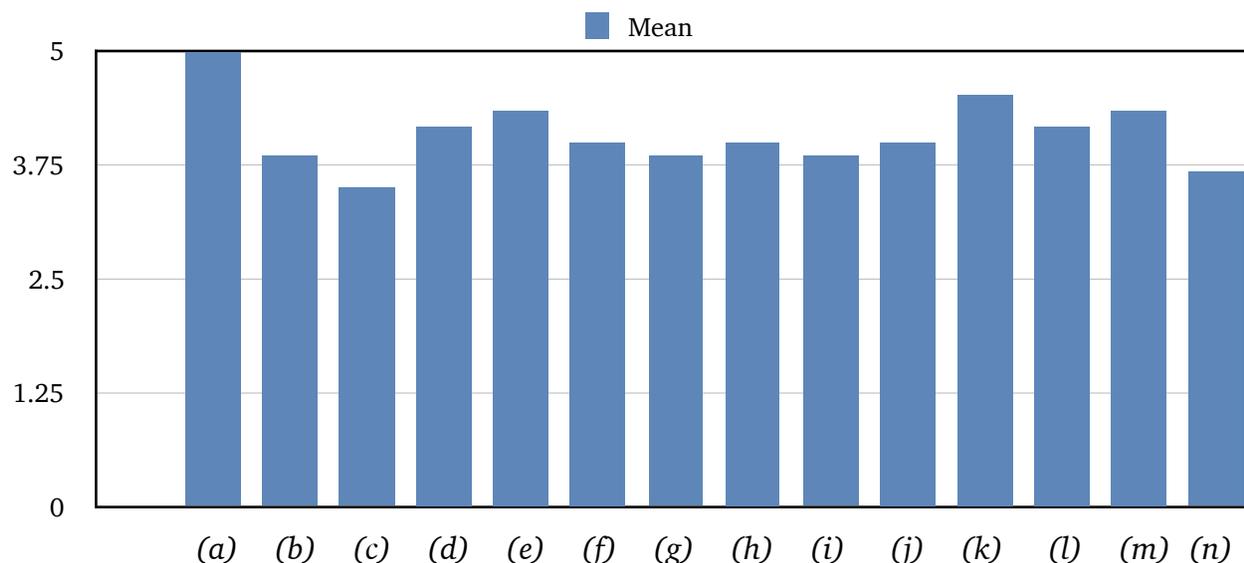
*Question: Please rate the following statements.*

*Scale: 5: strongly agree; 4: agree; 3: neutral; 2: disagree; 1: strongly disagree; 0: no opinion*

*Statements:*

- (a) I have attended most of the trainings offered by TFHK.*
- (b) TFHK has provided teaching fellows with sufficient trainings.*
- (c) The Career Development Workshop in the Summer Training is useful.*
- (d) The Leadership Workshop in the Summer Training is useful.*
- (e) The Education Sharing in the Summer Training is useful.*
- (f) The Social Innovation Workshop in the Summer Training is useful.*
- (g) The Theory-based Educational Training Workshop in the Summer Training is useful.*
- (h) The Voluntary Teaching in the Summer Training is useful.*
- (i) TFHK has satisfied my needs and preferences expressed in the application.*
- (j) TFHK has addressed my concerns expressed in the application.*
- (k) TFHK provides sufficient channels for me to ask questions or comment during the fellowship programme.*

- (l) *TFHK has been responsive in answering my questions or comments during the fellowship programme.*
- (m) *TFHK has explained to me clearly on my performance evaluation criteria.*
- (n) *TFHK has provided me sufficient financial support (e.g. salaries, allowances, subsidies or other welfare) during the fellowship programme.*



(iii) Skills, qualities and knowledge

The following skills, qualities and knowledge have consistently been rated by teaching fellows as very important in performing their role, as documented in **Chart 3**: communication skills, creativity and innovation, endurance, crisis management ability, self-motivation, endurance and the personality of being humble and willing to improve on weaknesses (4.67 out of 5 marks).

Teaching fellows have nevertheless self-evaluated their crisis management ability, creativity and innovation and communication skills amongst their weakest skills and qualities (all getting an average of 3.5 or less out of 5 marks).

After the fellowship programme, these skills and qualities were perceived by teaching fellows as the ones which have improved the most, as documented in subsequent sections.

Other skills, qualities and knowledge that have been rated by teaching fellows as important (over 4 but less than 4.67 out of 5 marks) include leadership skills, patience, being proactive, ability to build bonds, being an active listener, and teamwork. It can also be observed that teacher fellows generally regarded soft skills and personalities as being more important than technical skills and knowledge, in particular, the importance of teamwork as teaching fellows collaborate in pairs.

### **Chart 3 - Ratings by teaching fellows in respect of their pre-fellowship skills, qualities and knowledge and the importance of them to their roles as fellows**

*Question A: Prior to joining TFHK, to what extent do you think the following skills, qualities or knowledge are important to your role as a teaching fellow?*

*Scale: 5: very important; 4: important; 3: neutral; 2: unimportant; 1: useless; 0: no opinion*

*Question B: Please rate your performance in the following skills, qualities or knowledge prior to joining TFHK as a teaching fellow*

*Scale: 5: Excellent; 4: Good; 3: Average; 2: Poor; 1: Very poor; 0: no opinion*

*Skills, qualities or knowledge:*

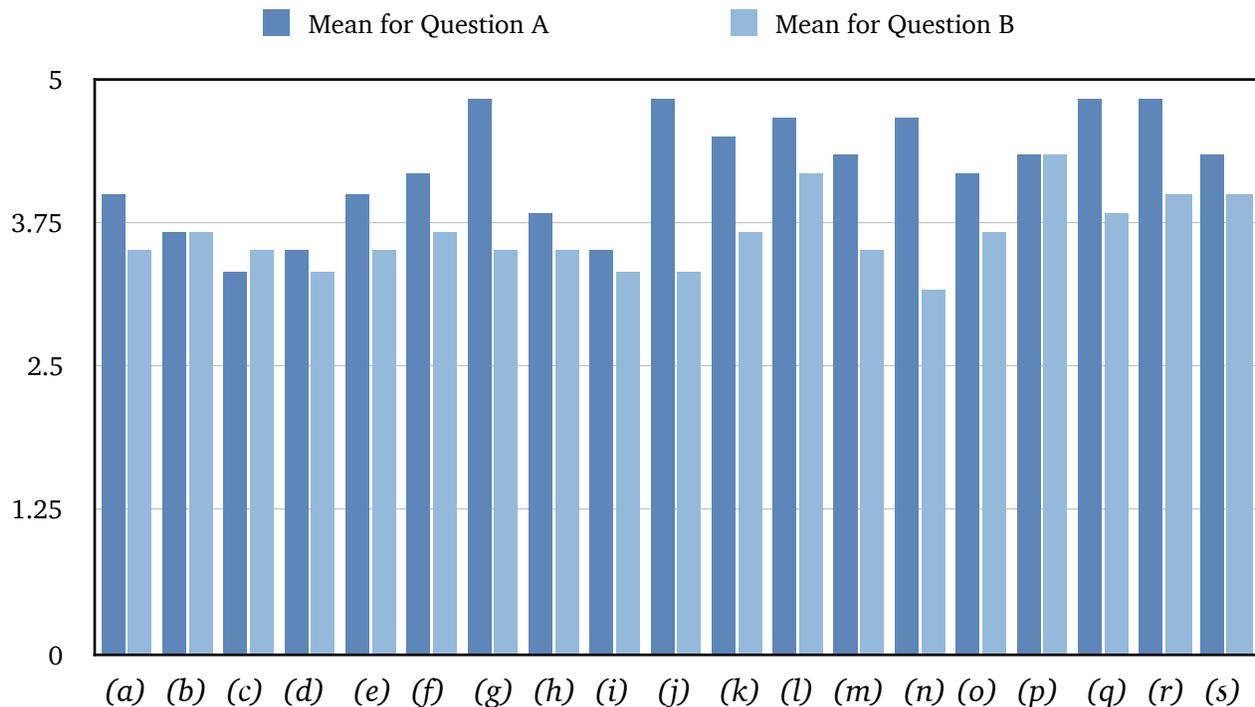
#### Technical skills and knowledge

- (a) *Subject related knowledge*
- (b) *Language ability*
- (c) *Computer skills*
- (d) *Academic qualifications*
- (e) *Knowledge on underprivileged students*

#### Soft skills

- (f) *Leadership skills*
- (g) *Communication skills*
- (h) *Voluntary service experience*
- (i) *Global exposure*
- (j) *Creativity and innovation*
- (k) *Patience*

- (l) Endurance
- (m) Being proactive
- (n) Crisis management ability
- (o) Good at bond-building
- (p) Being an active listener
- (q) Self-motivation
- (r) Being humble and willing to improve on weaknesses
- (s) Teamwork



(iv) Understanding of underprivileged students and their challenges in Hong Kong

The objective of this part is to understand the views of teaching fellows over challenges of underprivileged students in Hong Kong and how they expect TFHK to alleviate those problems.

This part is not a test of their knowledge on the issues being faced by underprivileged students but rather an understanding of how they interpret and react to those issues.

The first question asked teaching fellows how underprivileged students should be defined for the TFHK fellowship programme.

We are of the view that the definition is important as underprivileged students can be delineated into various sub-groups and they need different types, forms and extent of support and attention, and thus TFHK should have a clearer definition of underprivileged students and to avoid going too broad.

The result is as follow:

- (1) All 6 teaching fellows were of the view that underprivileged students should be defined by their financial capabilities and family status.
- (2) 4 out of 6 teaching fellows opined that underprivileged students should be defined by their physical or mental capabilities or nationality or race.
- (3) Only 3 teaching fellows considered school banding matters.

We concur with the teaching fellows that school banding and nationality or race of students are not preferable factors due to their labelling effect, which may potentially harm the favourable inclusive learning atmosphere.

The other two questions in this part which required teaching fellows to identify the challenges currently faced by underprivileged students in Hong Kong and whether TFHK could solve these challenges are interrelated.

The top three challenges of underprivileged students are the lack of motivation to learn, the lack of career aspirations and the lack of well-rounded exposure. These three challenges coincide with what they perceive TFHK can solve as these three challenges also top the list. Teaching fellows also perceived that the fellowship programme could offer students extra care, increase their confidence, increase students' understanding of their strengths and weaknesses, and provide them hope for the future.

To sum up, teaching fellows were positive over the fellowship programme. They found the programme meaningful, challenging and inspirational, which aligned with their

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career aspirations and goals. One suggestion provided by a teaching fellow which deserves TFHK's consideration is to extend the fellowship programme to 2 years. It was suggested that the current fellowship programme was too short to bring significant impact to students and was more beneficial to teaching fellows only.

### 3.2.2 Follow-up interviews with teaching fellows

Two interviews were conducted after the preliminary questionnaire - one interview with two fellows teaching in primary school and another one with two fellows teaching in secondary school.

Theron and Francis were teaching at Tsuen Wan Trade Association Primary School. While they were undecided whether to become teachers in the future, both of them were interested to experience the life of a teacher. Even if they do not choose to become a teacher, they reckoned that **personal development could be achieved** through the fellowship programme. Despite having expectation of the challenges, they still found difficulties greater than expected. The difficulties were related to the low educational standard, language barrier, little family support and discipline of students, but not to their knowledge. Through the fellowship programme, they found improvements on their problem solving skills, adaptiveness and communication skills.

Gabi and Shawn were teaching at Lok Sin Tong Yu Kan Hing Secondary School. Gabi was a marketing major graduate of HKU and targeted to be a teacher in 3 to 5 years. TFHK provided a good platform for her to gain exposure to the teaching environment. Moreover, she was quite interested to know more about the domestic education system and related social issues. Shawn was quite enthusiastic about Hong Kong education, social and political affairs. Yet, he still wanted to pursue an engineering career right after graduation. He estimated that there was 30% probability that he would become a teacher in the long-term.

Both teaching fellows revealed that they would **pay more attention to domestic education, poverty and social inclusion issues** after serving as teaching fellows. Besides, both agreed that there were plenty of under-privileged students in Hong Kong and conventional education system might not well address the needs of this group of students.

Both teaching fellows reported that the fellowship programme could broaden their horizons. Also, given that they did not need to bear formal teaching duties, they could **spare more time to provide tailored-made services to the students**, particularly extra-curricular activities, counselling and career planning.

Both found that serving as teaching fellows can provide them **a real teaching platform, instead of in-class training like PGDE**, which was considered quite expensive for them. Also the teaching, knowledge-transfer and mentoring experience could **enhance their presentation and organisation skills and sense of responsibility** that would benefit both themselves and the students in life time. In addition, they could obtain **first-hand experience to teach and witness the education problems faced by under-privileged students**.

Last but not least, both supported that Hong Kong government should spare more resources to help under-privileged students. More concretely, schools should organise more events to work on career planning and ethics education. Moreover, both teaching fellows proposed to TFHK that it would better to provide some soft skills training, such as presentation and value transfer, to fresh graduate before placing them on jobs in the schools.

### 3.2.3 Results of post-fellowship questionnaire

There are a total of **5 parts** in this post-fellowship questionnaire. For comparison purpose, each of these parts is related back to the preliminary questionnaire. Our key findings for these parts are as follow:-

- (i) More teacher fellows are determined to pursue education-related careers

The objective of the first part of this post-fellowship questionnaire is to understand the plans of teaching fellows after the one-year fellowship programme.

At the commencement of the fellowship programme, 2 teaching fellows expressed their interests in PGDE after the fellowship; 3 fellows would like to proceed on further study in education psychology; and 1 fellow would like to work in corporate

and consulting. Most of them were undecided about their future career and would like to use the one-year fellowship programme to taste the life as a teacher.

**After one year,**

- (1) **4 fellows have determined to embark on an education-related career, including but not limited to the pursuance of PGDE.**
- (2) **1 fellow** will also work as the **Programme Manager at TFHK** and plans to spend two years at TFHK as he wants to learn more about how to run a non-profit organisation, help the development of TFHK and give more meaningful experience to more people.
- (3) The other **5 fellows** will also become **mentors** of new teaching fellows and offer guidance and help to TFHK, demonstrating their continuous commitment and support to TFHK. This is one great move for TFHK in reaching their goal as documented in Chapter 1.3 in p.4 of this report - forming huge network of alumni who are strong advocates for education.

(ii) A positive result in mission fulfilment

The objective of the second part of this questionnaire is to explore any change(s) in values and perceptions of teaching fellows on the mission and vision of TFHK, the education system and social problems. The results are documented in **Chart 4**.

**Chart 4 - Ratings by teaching fellows on the mission and vision of TFHK, the education system and social problems in Hong Kong post-fellowship**

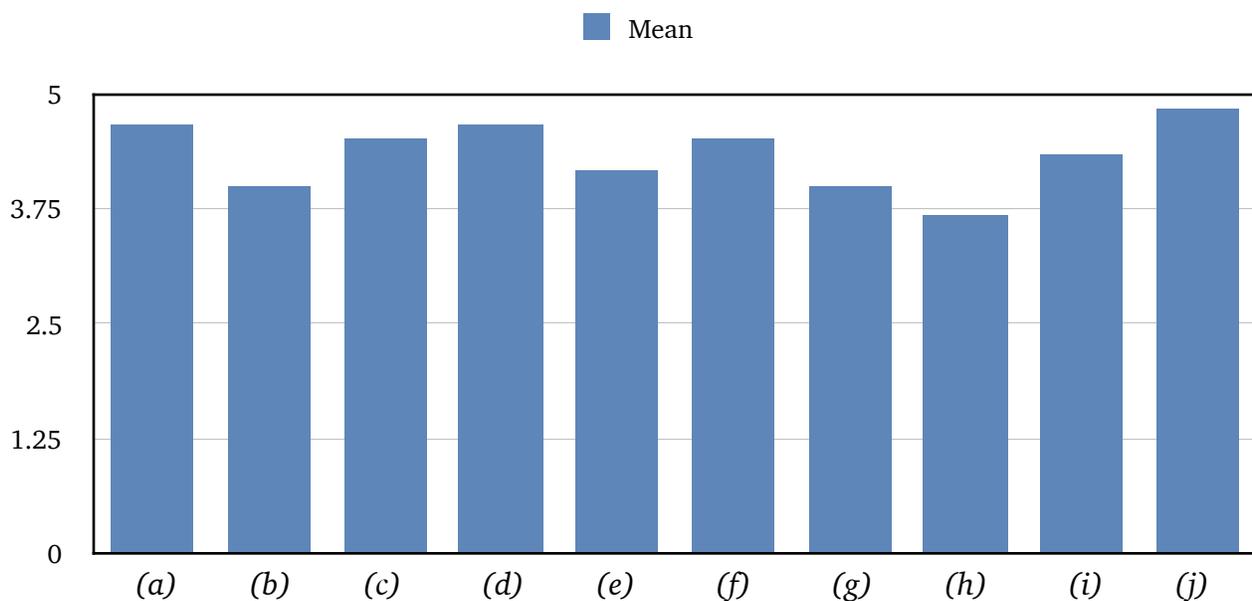
*Question: Please rate the following statements.*

*Scale: 5: strongly agree; 4: agree; 3: neutral; 2: disagree; 1: strongly disagree; 0: no opinion*

*Statements:*

*(a) I understand more about the mission and vision of TFHK.*

- (b) I have a stronger agreement with the mission and vision of TFHK.
- (c) I have a better understanding of poverty in Hong Kong.
- (d) I have a better understanding of the education system in Hong Kong.
- (e) I value higher on social inclusion.
- (f) I would be proud to become a teacher in the future.
- (g) I would recommend others to participate in the fellowship.
- (h) I have higher interest in participating in voluntary service.
- (i) I have developed emotional attachment with the school I worked in.
- (j) I have developed emotional attachment with the students I have taught.



In the preliminary questionnaire, teaching fellows gave an average of 2.83 out of 5 marks for the prestige of being a teacher in Hong Kong although all of them agreed or strongly agreed that teacher is an important occupation in Hong Kong.

In the post-fellowship questionnaire,

- (1) **50%** of the teaching fellows strongly agreed and **50%** agreed that they would be **proud to become a teacher in the future**;

- (2) **83%** of the teaching fellows strongly agreed and **17%** of them agreed that they have **developed emotional attachment with the students** they have taught; and
- (3) Emotional attachment with schools is lower. **33%** of the teaching fellows strongly agreed and **67%** of them agreed that they have developed **emotional attachment with the schools** they have worked in.

On the other hand, all teaching fellows have understood more about the mission and vision of TFHK through the one-year fellowship programme. **84%** of them strongly agreed or agreed that they have **developed a stronger agreement with the mission and vision of TFHK**. The result is favourable as all teaching fellows thought that they have developed a better understanding of poverty and the education system in Hong Kong. **83%** of the teaching fellows also **valued higher on social inclusion**.

While most of the results in this part is favourable, one question received a less favourable response. When being asked whether they would recommend others to participate in the fellowship programme, the result is quite diverse, with 33% of the teaching fellows strongly agreed, 33% agreed and 33% being neutral. This result is comparatively worse than other questions. This can be interpreted that while some fellows find the fellowship meaningful, they may find better opportunities upon graduation. We would suggest TFHK to manage the expectation of teaching fellows and make sure that their objectives are aligned with the fellowship.

(iii) The training programmes in the fellowship have rooms for improvement

In the third part, teaching fellows were asked to evaluate the fellowship programme, including the trainings, support and feedback provided, as documented in **Chart 5**.

Continuous trainings and support to teaching fellows are important because:

- (1) teaching fellows had no prior teaching experience;
- (2) they facilitate personal development and foster improvements of fellows;

- (3) they ensure a two-way communication between fellows and the founders and management of TFHK; and
- (4) they directly impact the attractiveness and reputation of the fellowship programme.

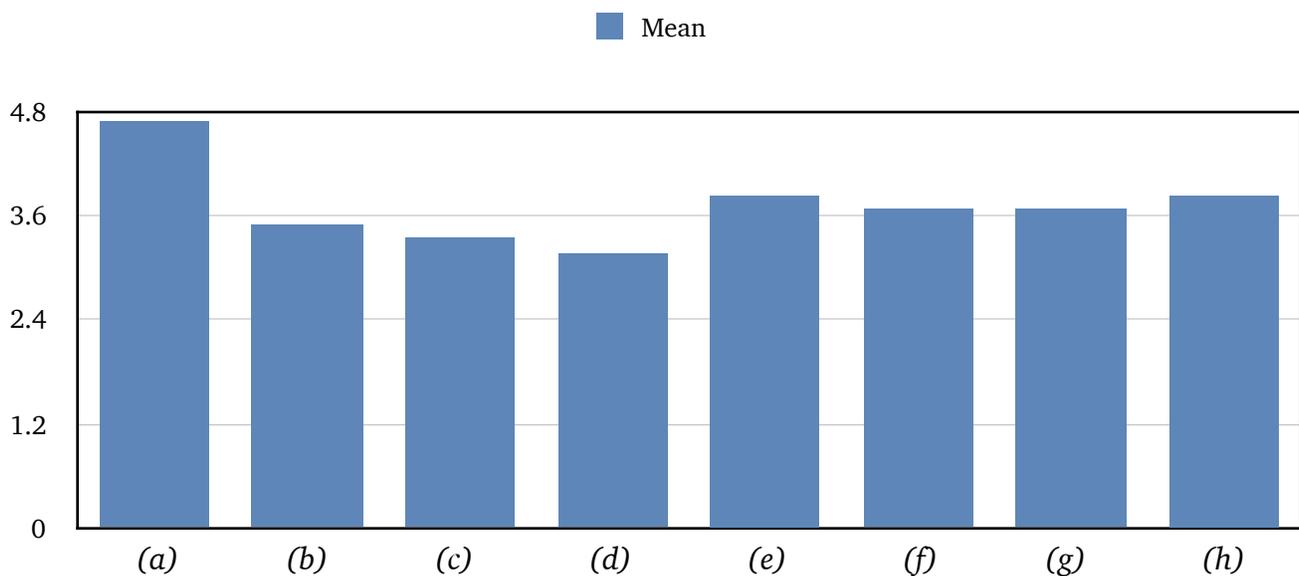
**Chart 5 - Ratings by teaching fellows on the trainings in the fellowship**

*Question: Please rate the following statements.*

*Scale: 5: strongly agree; 4: agree; 3: neutral; 2: disagree; 1: strongly disagree; 0: no opinion*

*Statements:*

- (a) I have attended most of the trainings offered by TFHK.*
- (b) TFHK has provided me with sufficient trainings.*
- (c) TFHK has provided me with trainings of high quality.*
- (d) TFHK has taken into account differences in personalities and abilities of fellows.*
- (e) TFHK has provided sufficient channels for me to express my concerns, comments and feedback.*
- (f) TFHK has been responsive towards my concerns, comments and feedback.*
- (g) TFHK has provided me sufficient feedback on my performance.*
- (h) I can observe continuous improvement of the programme.*



Unfortunately the overall result of this part is comparatively worse than other parts in this post-fellowship questionnaire.

In the preliminary questionnaire, teaching fellows gave an average of **3.83 out of 5 marks** for the sufficiency of training, which covered their perceptions of all the summer trainings before attachment to the schools.

In the post-fellowship questionnaire, they gave an average of **3.50 out of 5 marks** for the same question. The lower mark may signify that TFHK has not provided sufficient continuous trainings after the summer trainings. Teaching fellows also gave an average of **3.33 out of 5 marks** for the quality of trainings.

We are also of the view that TFHK should pay greater attention to the differences in personalities and abilities of teaching fellows, for instance in the design of trainings, matching of schools and fellows, etc. In this aspect, teaching fellows only gave an average of **3.17 out of 5 marks**.

With regard to whether TFHK has been responsive towards the concerns, comments and feedback of teaching fellows, teaching fellows gave an average of **4.16 out of 5 marks** in the preliminary question but this score has significantly dropped to 3.67 in the post-fellowship questionnaire. Moreover, teaching fellows gave **3.67 out of 5 marks** for the sufficiency of performance feedback received. This result demonstrates that more resources should be spent to provide more individual attention to each teaching fellow.

Most of the free-text comments of teaching fellows in the post-fellowship questionnaire are related to the hierarchy of TFHK. One fellow suggested a better and more structural communication to improve and assist fellows' work. Another fellow suggested an enhancement is needed to the middle management of fellows.

As the fellowship programme is a first-year project, it is understandable that perfection is difficult to be reached and there can be rooms for improvements. Overall 67% of teaching fellows strongly agreed or agreed that continuous improvement of the fellowship programme could be observed.

(iv) Personal development of teaching fellows being a strong indicator of value creation

In this part, teaching fellows were asked to rate their improvements on skills, qualities and knowledge after participating the fellowship programme. The overall result is very favourable, as documented in **Chart 6**.

### **Chart 6 - Ratings by teaching fellows on their skills, qualities and knowledge post-fellowship**

*Question: Please evaluate: after one-year of fellowship programme, have you improved in the following skills, qualities or knowledge?*

*Scale: 10: highest improvement; 1: lowest improvement*

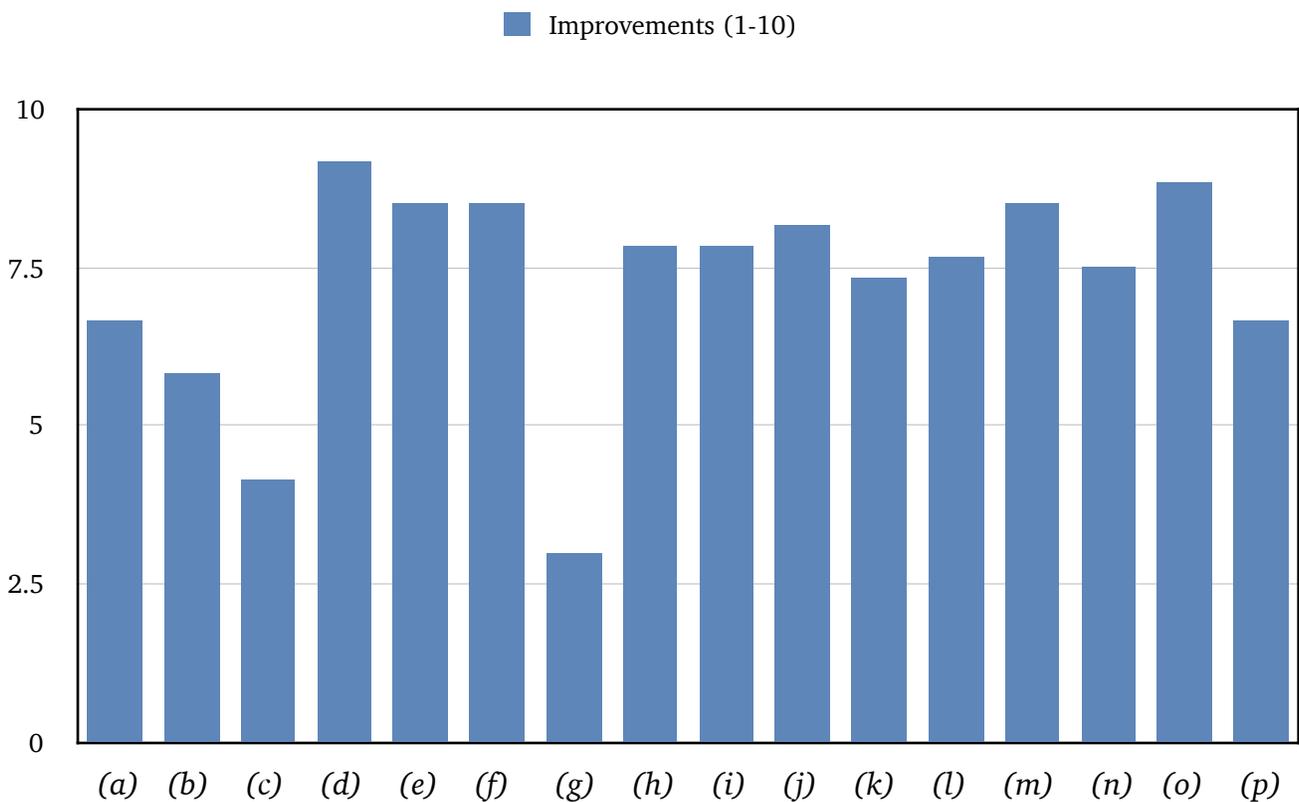
Skills, qualities or knowledge:

#### Technical skills and knowledge

- (a) Subject related knowledge
- (b) Language ability
- (c) Computer skills
- (d) Knowledge on underprivileged students

#### Soft skills

- (e) Leadership skills
- (f) Communication skills
- (g) Global exposure
- (h) Creativity and innovation
- (i) Endurance
- (j) Being proactive
- (k) Crisis management ability
- (l) Good at bond-building
- (m) Being an active listener
- (n) Self-motivation
- (o) Being humble and willing to improve on weaknesses
- (p) Teamwork



On a scale of 10 (10 for highest improvement and 1 for lowest improvement), very high improvements (8-10) were observed on 6 aspects - (1) knowledge on underprivileged students, (2) humbleness and willingness to improve on weaknesses, (3) being an active listener, (4) leadership skills, (5) communications skills, and (6) being proactive. Teaching fellows also found high improvements (6-8) on their (1) creativity and innovation, (2) endurance, (3) bonding building skills, (4) self-motivation, and (5) crisis management ability.

In particular, for crisis management ability, creativity and innovation and communication skills, which teaching fellows considered themselves weakest in the preliminary questionnaire, teaching fellows found significant improvements on them after the fellowship programme, with the score of **7.33**, **7.83** and **8.5** respectively.

We are of the view that these skills and qualities, unlike technical knowledge, are useful to teaching fellows whether they will embark on a teaching career or not. These skills and qualities are cross-disciplinary and beneficial to the personal development of the teaching fellows.

- (v) Gradual improvements of students could be observed

In this part, teaching fellows were asked to rate the level of improvements of students in different areas after the one-year fellowship. The overall result is positive as documented in **Chart 7** and **Table 1**. We are of the view that teaching fellows had been prudent in rating students' improvements in this part.

### **Chart 7 - Ratings by teaching fellows on students' performance pre- and post-fellowship**

*Question A (in preliminary questionnaire): Are the following challenges to underprivileged students in Hong Kong?*

*Scale: 5: greatest challenge; 3: neutral; 1: not a challenge; 0: no opinion*

*Question B (in preliminary questionnaire): Prior to joining TFHK, to what extent do you think the fellowship programme of TFHK can solve the following possible challenges faced by underprivileged students in Hong Kong?*

*Scale: 5: very effective; 3: neutral; 1: ineffective; 0: no opinion*

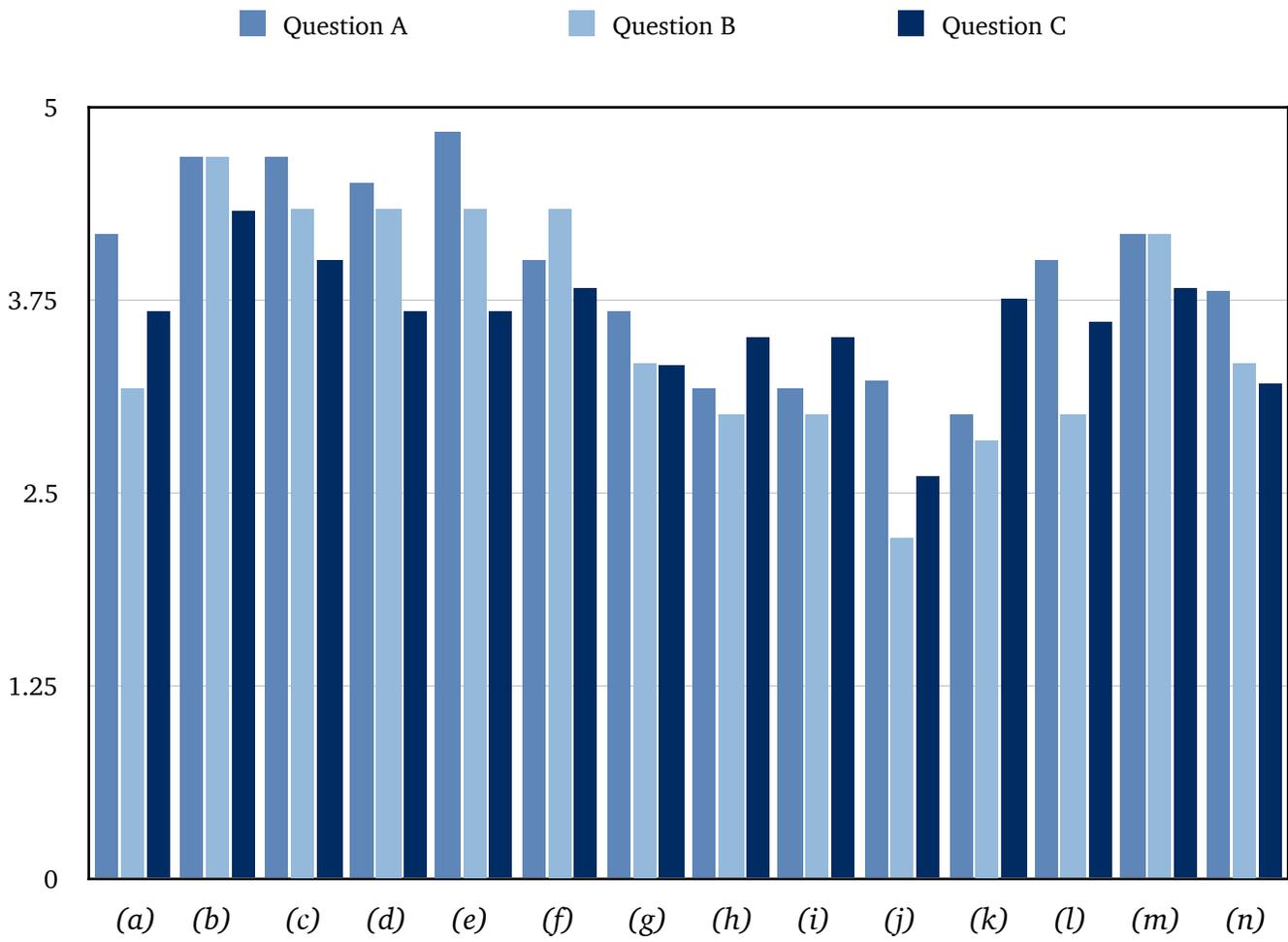
*Question C (in post-fellowship questionnaire): Please evaluate: after one-year of fellowship, for each of the following areas, do you see improvements of the students you taught or supervised?*

*Scale: 5: high improvement; 4: some improvement; 3: slight improvement; 2: no improvement; 1: even worse after the fellowship; 0: no opinion*

*Areas of assessment:*

- (a) Academic performance*
- (b) All-rounded exposure*
- (c) Career aspiration*
- (d) Confidence*
- (e) Motivation to learn*
- (f) Understanding of personal strengths and weaknesses*
- (g) Communication skills*
- (h) Ability to express and control emotions*

- (i) Leadership skills
- (j) Financial management skills
- (k) Basic living skills
- (l) International exposure
- (m) Hope for the future
- (n) Vocational skills



**Table 1 - Ratings by teaching fellows on students' performance pre- and post-fellowship**

	Question A (preliminary)	Question B (preliminary)	Question C (post- fellowship)
(a) Academic performance	4.17	3.17	3.67
(b) All-rounded exposure	4.67	4.68	4.33
(c) Career aspiration	4.67	4.33	4.00
(d) Confidence	4.50	4.33	3.67
(e) Motivation to learn	4.83	4.33	3.67
(f) Understanding of personal strengths and weaknesses	4.00	4.33	3.83
(g) Communication skills	3.67	3.33	3.33
(h) Ability to express and control emotions	3.17	3.00	3.50
(i) Leadership skills	3.17	3.00	3.50
(j) Financial management skills	3.23	2.20	2.60
(k) Basic living skills	3.00	2.83	3.75
(l) International exposure	4.00	3.00	3.60
(m) Hope for the future	4.17	4.17	3.83
(n) Vocational skills	3.80	3.33	3.20

None of the items on the list received a majority vote for high improvement. Majority of teaching fellows found some improvement on students' academic performance, all-rounded exposure, motivation to learn, understanding of personal strengths and weaknesses, and hope for the future.

We would highlight the result of students' improvement on international exposure, which the result is more favourable than expected. 50% of teaching fellows found some improvements of students while 33% found slight improvements. This may to a large extent be attributed to the extra-curricular activities for students, such as visits to Fossil, a multi-national corporation.

### 3.3 Students, including under-privileged students

In the internal questionnaire conducted by TFHK to 713 students, the result is very favourable:

- (1) **95%** of the students **enjoyed the lessons** offered by the teaching fellows;
- (2) **92%** believed the fellows has **increased their learning motivations**;
- (3) **92%** believed that they have **improved under the teaching of the teaching fellows**; and
- (4) **96%** believed that the teaching fellows have **cared about their individual learning progress**.

Moreover, to capture the impacts generated through the fellowship, a total of 5 students (4 male and 1 female students) of Tsuen Wan Trade Association Primary School ranging from primary 2 to 3 were invited to attend 2 sessions of interview on 18 January 2016.

In general, they had poor academic results and **needed extra care and attention from their status as ethnic minorities or students from low-income households**. The purpose of the interview was to discover students' attitudes towards the teaching fellows, knowledge and attitudes towards their future, and their past and current patterns in participating extracurricular activities. During the academic year 2015-16, three of them were taught Mathematics and two of them were taught English by the teaching fellows. One of them was also taught Magic by teaching fellows.

The first part of the interview was focused on existing opportunities, subsidies or assistance provided to students by the school. There were two main observations:

- (i) While students received free tutorials on homework to facilitate their academic studies, they **did not usually receive free ECAs and relied heavily on parental support**. For example, one student joined paid football training at HKSKH Lady MacLehose Centre Services for Ethnic Minorities.
- (ii) Prior to the fellowship programme of TFHK, students mostly received tutorials and participated in extra curricular activities from outside bodies. While these bodies did provide quality learning opportunities at nominal costs, **the wide range of free extra curricular activities offered by teaching fellows could better tailor to the individual needs of students and the curriculum of a particular school**, with more feedback and personal advice.

During the second part of the interview, students were asked to rate some statements on their attitudes and perceptions towards their future, including their further studies and career aspirations. Despite having the ambition to earn their living when grow up, passion to work hard for getting the job their like and wish to improve lives of their family through work, they did not have knowledge about their options and their families were unable to provide them with useful advice. Out of 5 marks, the average score for students' knowledge of different options in relation to higher level of studies and parental understanding of education and career choices are 2.5 and 2 respectively, which are much less positive than scores reflecting students' ambition and passion towards life improvement.

We are therefore of the opinion that early life education, including useful and personal advice of the teaching fellow on further studies and career development would be beneficial to students, in particular they could get exposed to their possible options.

However, the meaning of life education and life planning, or whether education and career choices would have direct impact on life planning, could be too difficult for junior primary school students to apprehend considering their young age. Life education should be confined to having the objective of increasing the confidence of primary school

1  
students and incentives of them to climb up the social ladder, which were what TFHK has insofar achieved. The more technical and complicated aspects of life education would be more suitable for secondary students.

2  
The third part of the interview was focused on students' comments on the teaching fellows. Their comments were positive - One student thought that Mr. Mok was a good teacher and what he taught has been useful; another student thought that Mr. Mok was a bit strict so he was a bit worried about his future.

3  
In addition to the above, we are of the view that the students have developed **strong bonds with the teaching fellows** and the teaching fellows have become **their life-long mentors**. This is important in several ways:

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6
- (i) While students thought that they were confident to communicate in both Chinese and English which they all gave 5 out of 5 marks, we found that they might find difficulties expressing themselves and elaborating on their views accurately at times. For instance, when students were asked their expectation of their future, they were able to give simple answers such as to stay in Hong Kong or to go back to Pakistan but were not able to elicit their reasons. Through their bonding with the teaching fellows, they were provided channels and opportunities to openly and confidently express themselves with people they trust.
  - (ii) Students got an early exposure to the real world. Teaching fellows, as their mentors, did not label them or give them special and favourable treatment. Rather than that, students expressed that teaching fellows have been strict to them. The intimate bonding has facilitated teaching fellows to assist students in jumping over different obstacles and hurdles, as opposed to avoiding them and walking easier paths.

### 3.4 Participating schools

7  
Participating schools have been positive towards the fellowship programme of TFHK. They are generally willing to continue their partnerships with TFHK.

An interview was conducted with Principal Lau of Lok Sin Tong Yu Kan Hing Secondary School in March 2016. Principal Lau supported the project actively and found that the

teaching fellows referred were mature and able young men. He has been satisfied with their performance. During the interview, Principal Lau revealed how the programme could add values to participating schools.

(a) Values added by teaching fellows

In addition to providing teaching assistance which could relieve the burden of existing teachers, teaching fellows, as fresh graduate, were able to **bring in innovative and market update**.

Acknowledging the importance of enrichment activities outside academic studies to underprivileged students, Principal Lau reckoned that under-privileged students, including those receiving social security, SEN and ethnical minority, were able to benefit more from the teaching fellows who could help **broaden the students' horizons by the way of personal sharing, counselling and workshops and other ECA**.

(b) Values added to the curriculum

Currently, the curriculum for underprivileged students has been inclined towards academic studies. However, for the sake of all-rounded development, students should be provided with **opportunities to explore their capabilities outside of the curriculum**. This was of particular importance to underprivileged students, who needed more individual attention and tailor-made programmes to satisfy their different needs. This service could not be well delivered by traditional teachers due to heavy teaching load and lack of updated market information. In 2015-2016, teaching fellows provided various trainings to students, such as life skills training and career workshops.

Overall, for the value of service provided by teaching fellow, Principal Lau personally found that **one full-year teaching fellow experience was even more valuable or at least equivalent to PGDE qualification**, with current tuition fee being **HK\$42,100**.

Moreover, being satisfied with the performance of the programme, **Principal Lau reflected that he would be willing to use the budget of teaching assistant (currently around HK\$15,000) to hire teaching fellows next year**. Currently, the salaries of

teaching fellows are fully paid by TFHK in the form of living stipends.

### 3.5. Government

Based on our observations, the Government has had a supportive and welcoming attitude towards TFHK.

TFHK has successfully obtained a HK\$1 million grant from the Government's Social Innovation and Entrepreneurship Development Fund ("**SIE Fund**"). An interview has been conducted with Mr. Howard Ling, Consultant of Hong Kong Council of Social Service and Ms. Eureka Tuo, Programme Manager in June 2016.

As a gate-keeper on behalf of the SIE Fund, Mr. Ling revealed that TFHK has so far fulfilled its mission and vision. In particular, Mr. Ling was satisfied with the professionalism and cooperative manner of the project management.

TFHK has added the following values which facilitates governance in Hong Kong.

#### (a) Poverty alleviation

Mr. Ling believed that the fellowship programme of TeachHK could **supplement existing government policies on underprivileged students** and **help alleviate poverty issue** in Hong Kong.

#### (b) Mentorship opportunities

The fellowship programme provided good opportunities for top and elite college graduates to serve underprivileged students.

Under this circumstance, top elite college graduates were able to **gain exposure to the domestic social problems** (e.g. poverty, education and discrimination).

For under-privileged students, they were able to **obtain assistance and mentorship** from college graduates.

(c) Filling the loopholes in conventional education system

TFHK has demonstrated its innovative capabilities to serve those under-privileged students that **conventional domestic education system has not not well covered**. Some students with learning and adaptation difficulties, for instance, because those of SENs, family problems and cultural differences, were hard to get support from the school. TFHK could help **fill this gap**.

While TFHK provides an innovative method to satisfy the needs of underprivileged students, we are of the view that underprivileged students should be properly defined to determine the scope of the programme. Does underprivileged students cover only students with financial difficulties, SEN and ethnical minorities?

### 3.6. Corporates

TFHK has excelled in partnering with companies and organisations, ranging from multinational corporations to charities, across various sectors including manufacturing, legal service and book-selling, including Scholastic, Education for good and Ashurst. This is in line with the growing demand on corporate social responsibilities in Hong Kong.

In addition, TFHK has collaborated with a number of donors, including GivingHand, HS Chau Foundation, Mr. Frank Wong, Mr. Rob Glucksman, Mr. Nelson Yuen and Tin Ka Bing Foundation.

In addition to partnership proposals and reports with corporate sponsors reviewed, interview was conducted in June 2016 with Ms. Claire Quigley, Global Giving Manager & Human Resources of Fossil Group, an American designer and manufacturer of accessories in 26 countries. Fossil Group was founded in 1984 in Dallas, Texas, USA.

Overall, we are of the view that the partnership has achieved a more than positive result. We find three significant values being generated from this partnership.

(a) Partnership beyond financial subsidy

1

While Fossil Group did provide financial subsidy to TFHK, including HK\$200,000 per annum on a 3-year basis from July 2015 which has been used to support the basic living stipend of 2 teaching fellows, and donations for presents, the most impressive part of the partnership is the non-financial subsidy.

2

30 students visited Fossil's Office in November 2015. In addition to learning about watch designing, the event was designed to **enrich students' understanding on how multinational corporations function and develop stronger global vision.**

3

This event exposed students to a socially integrated atmosphere and has directly increased their **motivation and confidence towards future career.** It also **enlightened students to discover their potential outside of their academic studies** and to **take up positions that best match their talent in the future.**

4

Similar enrichment programmes are not frequently organised by schools due to the lack of human and financial resources. Yet, it is necessary for students to **gain exposure in real world** or else they would find difficulties to adapt and self-sustain upon their completion of studies.

5

(b) Leadership of teaching fellows

6

It is impressive that the teaching fellows have taken leadership roles in the collaboration with Fossil Group.

7

For instance, in mid July 2016, a section has been scheduled during the summer training programme for teaching fellows to discuss with representatives of Fossil Group on how to strengthen collaboration. By **empowering teaching fellows,** their leadership, organisation and communication skills can be greatly enhanced. Moreover, they would be able to arrange enrichment programmes that best fit the needs and abilities of students.

8

(c) Benefits to Fossil Group

9

Our interview with Fossil Group reveals that to Fossil Group, finding a social partner which focuses on youth empowerment is not that easy and TFHK fits well with their

objectives. By having 80% local staff member, we can appreciate how Fossil Group treasure local workforce. Partnership with TFHK provides a valuable channel for Fossil Group to **engage in local community** and **increase their brand value**. Moreover, the staff engagement during the visit **fosters mutual understanding**. For instance, while students were shy and kept quiet during the visit at the beginning, they asked questions when presents were given. The skill of how to motivate others is very important to employees' personal development.

TFHK has provided a vivid example of how business sectors could gain through social contributions, both financially and non-financially.

To generate more value, it is recommendable for TFHK to give leadership role to more teaching fellows in liaising with corporate sponsors. In 2015-2016, while all six teaching fellows participated in the summer section with Fossil, only the idea of one teaching fellow has materialised. It is also favourable to have more employees of corporate sponsors involved.

## Chapter 4. Proposed social impact measurement framework

### 4.1 The social impact measurement framework

Impact Elements	Employment	Recipients' benefit	Volunteer Force	Outplacement	Community Awareness
Input	Teaching opportunities for Teaching Fellows	1) On the job training for TF; 2) extracurricular activities for students; 3) services provided to participating schools	Volunteers' service (e.g. free training delivered by professional trainers to the TFs)	N/A	Learning opportunities for the TFs, students, corporate sponsor
	↓	↓	↓	↓	↓
Output	Teaching opportunities for Teaching Fellows	Trained TFs; Students activities; enhanced learning environments in participating schools	Free training provided to TFs	N/A	Changes of attitude of social inclusion, education systems by TFs, students, school management and corporate sponsors;
	↓	↓	↓	↓	↓
Economic Proxy for SROI calculation	Workfare/ subsidies earned by TFs	1) PGDE tuition; 2) market rate of events organized for students; and 3) salary of teaching assistant of HKD14,625	Market rate of training cost	N/A	1) Per headcount subsidy for SEN by Community Care Fund and EDB; 2) corporate sponsorship
	↑	↑	↑	↑	↑
Sources of information	Client's management information; Education Bureau	1) Universities providing PGDE; 2) management information; 3) EDB	Client's management information; Market research	N/A	EDB; Corporate sponsorship

## 4.2 Methodologies

This performance measurement framework of TFHK combines the SIAT developed by HKCSS and the McKinsey and the SROI approach. In essence, it takes into consideration the social impacts created by TFHK's actual and planned investments for the period of 2016-2021 and reflects the social returns on these investments.

In order to do so, TFHK's inputs and outputs under each of the SIAT element is reviewed. If the output of an element is an economic value or can be translated into monetary value, the amount will be used for calculating the SROI of the project. But if the output or impacts of an element is intangible and hard to be quantified, a set of KPIs will be designed and explained in Chapter 6.

Under the original SIAT's approach, the economic impact is termed as "financial sustainability". Given that TFHK does not generate revenue in the current year and financial return is not major concern for the TFHK's management, we will not include "financial sustainability" in the framework above.

The social impact of TFHK can be measured by examining its contributions on the 5 elements, that is, a) employment created; b) recipients' benefits; c) volunteer forces; d) community awareness and e) outplacement.

- (a) **"Employment created"** refers to the employment opportunities created by TFHK to the teaching fellows, management and administration staff of the project.
- (b) Considering the nature of TFHK's operation, the **"recipients' benefits"** should include the benefits received by the students, teaching fellows and participating schools respectively. Specifically, teaching fellows can obtain one-year teaching

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4  
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exposure and participating schools are able to have more manpower to conduct more student enrichment activities. For the students, they can have more opportunities to receive career and study counselling, as well as to attend extra-curriculum activities.

- (c) For the element of “**volunteer force**”, we use the average market rate of volunteers as an economic proxy. Like other NGO and SE, TFHK is able to mobilise volunteers each year. As per discussion with management, some professional trainers did provide free service to teaching fellows. We will monetise the contributions of volunteers based on the number of hours served and the nature of training.
- (d) “**Community awareness**” is one SIAT element that is quite vague and present problems not only in quantification but also in definition. We need to be very prudent to monetise the community awareness to minimise the chance of over-claim by TFHK on their social impact. To concretise the impact of community, we eventually use the amounts of corporate sponsorship and the funding given by the Education Bureau and the Community Care Fund as financial proxies for the community awareness.
- (e) “**Outplacement**” refers to the likelihood of future job placement in the labor market. Although we strongly believe that one-year teaching fellow experience is beneficial for their future careers, it is hard to monetise the benefits. Thus, we do not use any economic proxy in SROI calculation for this dimension. Some KPIs has been designed instead.

### 4.3 Key Assumptions of the Framework

To appraise the social performance of TFHK, a number of assumptions are made in order to operationalise the major elements of SIAT as inputs for calculating the SROI of TFHK.

(a) Investment period and amount

After soliciting inputs from the founder, Mr. Arnold Chan, TFHK management has solid operation plan and forecast for the upcoming 5 years, say from 2016 to 2021. Thus, we will use 6 years as an investment period in this report.

For the investment amount, Mr. Chan estimated that HK\$200,000 will be budgeted for each teaching fellow assigned and, on average, 150 students will be served by each teaching fellow. **Table 2** below summarises the key actual and forecasted operation figures.

**Table 2 - Operation Forecast for the Period 2015 - 2021**

Year	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
No. of Primary School	1	3	5	7	9	11
No. of Secondary School	2	3	5	7	9	11
	3	6	10	14	18	22
No of teaching fellows	6	12	20	28	36	44
No. of students served	713	1800	3000	4200	5400	6600
Investment Amount	1,200,000	2,400,000	4,000,000	5,600,000	7,200,000	8,800,000

(b) Discount rate

Due to the embedded philanthropic and education nature of the project, the discount rates used in calculating SROI is conservative at the actual and forecasted inflation rate of Hong Kong. We use the actual inflation rates for the years 2016 to 2021 and use the moving average inflation rate of prior 2 years for the period.

(c) Employment created

The labour cost or subsidies of HK\$8,000 per month of teaching fellow is provided by management for the year 2015/16. In addition, we will make estimation on the labor cost for the upcoming 5 years based on the 5% growth rate. All numbers will be adjusted by the discount rates to calculate their present value.

(d) Recipients' benefits

*Teaching Fellows*

As TFHK provides pre-job and on-the-job training to the teaching fellows, their training savings should be taken as the social contributions of fellowship programme. Based on discussion with the principals of participating schools, they opine that the value of one-year teaching fellow experience is quite comparable with a PGDE qualification. Thus, we use the annual tuition fee of PGDE of HK\$42,100 as an economic proxy and 5% annual growth rate will be applied in the subsequent years.

*Students*

Students are expected to have more chances to participate in extra-curricular activities with presence of teaching fellows. Besides, teaching fellows will provide career counselling and life education to the students. From 2011 to 2014, the Community Care Fund provided HK\$3,000 funding support for the primary and secondary students from low-income families to attend overseas learning activities and competition. We use this HK\$3,000 as a benchmark of the economic value of the events organised by teaching fellows. Given that the funding is one-time nature and TFHK's teaching fellows provide a year-long service to the students, it is prudent to use HK\$3,000 as an economic proxy in our calculation of SROI.

### *Participating Schools*

As per discussion with school principals, teaching fellows can bring them innovative teaching approach and help provide quality career and life education to the students. Moreover, teaching fellows can help bear some teaching loads of the existing teachers. Thus, it should be prudent to use the market salary of formal teachers to reflect the value of teaching fellows to the schools. We use the market salary of a teaching assistant, HK\$14,625, as a proxy in the calculation of SROI and 5% annual growth rate will be applied.

#### (e) Volunteer force

TFHK engages volunteers to work as trainers to teaching fellows. We therefore collect the data of number of hours volunteer served and their background information. Then we estimate the value of volunteer contributions based on the management and market data for the sake of prudence.

#### (f) Community engagement and awareness

“Serving under-privileged students” is a core construct around which TFHK is built and evolving, as reflected by its mission and vision. Therefore, in measuring TFHK’s social impact on community awareness, the construct of “serving under-privileged students” is an appropriate proxy for the purpose of operationalising the element as an input for SROI calculation.

In fact, starting from 2015/16, the Education Bureau and the Community Care Fund has launched the “Pilot Project on Special Educational Needs (“SEN”) Coordinators” to schools with more than 55% of under-privileged students. Those schools can apply to have one extra full-time teacher headcount as SEN coordinator to promote and coordinate activities for the students with SEN. We found that this project’s spirit is pretty

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much in line with TFHK's initiative. Thus, we use the market salary of 1 full-time teacher, around HK\$30,000 and multiplies the number of partner schools of TFHK as an economic value of the government's initiative.

In addition to the social value of serving under-privileged students, we also use the actual corporate sponsorship and personal donation of 2015/16 with annual growth rate of 5% to represent how corporate sector supports TFHK.

## Chapter 5. Computation of the Teach4HK's social impact

### 5.1. Computation of TFHK's social impact

Computation of TFHK's SROI shows that over the period from 2016 to 2021, every HK\$1 invested generates around HK\$5.88 social return in present value as at January 1, 2016.

Per discussion with management, TFHK have roughly invested HK\$200,000 for each teaching fellow and the total estimated investment at present value as on January 1, 2016 for the period 2016 to 2021 is around HK\$26 million. **Table 3** indicates that for an investment HK\$26 millions, the project is able to generate a total social impact of around HK\$152 million in the 6-year period of 2016-2021.

**Table 3 - Social Return on Investment for the Period 2016 to 2021**

	2016	2017	2018	2019	2020	2021	Total	Percentage
<b>Investment</b>	1,200,000	2,313,476	3,729,368	5,041,633	6,264,108	7,395,800	25,944,385	100.00%
Employment of teaching fellows	576,000	1,165,992	1,973,581	2,801,434	3,654,750	4,530,779	14,702,536	56.67%
Recipients' Benefits	3,444,600	8,108,502	13,724,614	19,481,637	25,415,741	31,507,794	101,682,888	391.93%
Volunteer Force	30,000	60,729	102,791	145,908	190,352	235,978	765,757	2.95%
Community Awareness	2,380,000	3,502,024	5,036,744	6,607,548	8,227,418	9,889,627	35,643,361	137.38%
<b>Total</b>	<b>6,430,600</b>	<b>12,837,247</b>	<b>20,837,730</b>	<b>29,036,526</b>	<b>37,488,261</b>	<b>46,164,178</b>	<b>152,794,543</b>	<b>588.93%</b>
No. of teaching fellows	6	12	20	28	36	44		
No. of students served	713	1,800	3,000	4,200	5,400	6,600		
Inflation Rate	3.74%	3.39%	3.56%	3.48%	3.52%	3.50%		

As illustrated by **Table 3** above, the return portfolio of TFHK indicates that the recipients benefits created by TFHK yields 392% of the overall investment; this is followed by the community awareness and employment of teaching fellows, taking up 137% and 57% of the project's total investment respectively. Last, but not the least, the economic value generated by volunteer force accounted for around 3% of the total investment.

## 5.2 How to use and maintain the framework

The social performance appraisal framework is deliberately designed in a way that TFHK can continue to use it to track its social impact. This should therefore be useful as a management tool to perform regular and cross-unit comparison to highlight the areas for social performance improvements or for performance comparison with other social enterprises and NGOs.

It is understandable that, as TFHK grows and expands, its management team might desire to make changes and adaptation of the framework with a view to tailoring a measurement framework for individual unit's needs. If efforts are used to examine the relevance of the proxies or to add the number of proxies or to change the proxies used for each element, the cross-unit benchmark nature of the framework remains intact.

## 5.3 Strengths and limitations of the proposed framework

### (a) **Lack objective choice of elements to calculate social impact:**

A major weakness of SROI is the subjective choice of objectives and activities to measure. The deployment of the SIAT elements as inputs for calculation of TFHK's SROI means an avoidance of judgmental and discretionary decisions on what to include and what not in the appraisal of the company's social performance.

### (b) **Low cost for information collection:**

The framework is tailored to mobilise either management information or publicly available information, thus avoiding the common weakness in preventing the calculation of SROI - the general lack of existing quantitative data or lack of resources to collect data by social enterprises, which are usually of comparative small scale.

(c) **Continuity:**

The framework is designed to allow TFHK to revisit its SROI each year for management use. Upon the closure of each annual year, TFHK management can replace the forecast number of the year with the actual numbers, revisit the forecast growth rate of the inputs and the discounts rate used in order to update its SROI. This should allow management to deploy this framework as a management tool in setting targets and tracking performance. In addition, should TFHK increases its capital investment in the future, TFHK can use the SROI number as a baseline to better understand the marginal increase on social and economic impact brought about by the additional investment.

(d) **Versatility:**

The framework is constructed so that additional factors under each SIAT element can be added to the calculation if required. For instance, should TFHK sees the appreciation of the concept of “people of difference” as an appropriate factor to be quantified under the element of community awareness, the construct can then be added as an additional factor within the SIAT elements.

(e) **Cross comparison enabled:**

The framework allows cross comparison of SROI of social enterprises, that is, it allows social enterprises that pledge to serve the disabled or the disadvantaged to compare their performance by using the same yardsticks - the elements of SIAT. This does not only allow each social enterprise to set self-improvement targets as well as highlighting which element(s) should need improvements, but also allows policy makers and potential funding organisations to make better resource allocation decision.

## 5.4 Limitations of the framework

The major drawback of the framework is the monetary value assigned to various social contributions. Despite the choice of proxies for quantifying the elements is done in a very prudent way, the price-tagging process and the corresponding assumptions should unavoidably attract controversy. For instance, the volunteer contribution, whose market rates of salary is hard to determine.

In addition, the need to quantify outputs leads us to underestimate the project's social impact, particularly the intangible contributions of the inputs of TFHK, such as improvement in learning experience of students and their families as well as value of education of social inclusion for teaching fellows and corporate sponsors, are still left unaccounted for.

## Chapter 6. Summary of Key Performance Indicators

TFHK has in fact generated more social impacts than those items quantified in SROI calculation above. However, some social impacts are intangible in nature and are unable to be measured in monetary value. Thus, a summary of KPIs of TFHK is designed and presented in this chapter in order to provide a fairer and more holistic picture to the report users.

The KPIs for the five elements - (1) recipient benefits, (2) employment, (3) outplacement, (4) community engagement and awareness and (5) volunteer force are presented in **Table 4, 5, 6, 7 and 8** below respectively.

**Table 4 - KPIs for TFHK on recipient benefits**

KPIs - Recipient benefits	2015/16 Data & Estimates
<b>1. Recipient Benefits 受惠者得著</b>	
<b>Benefits to students</b>	
1.1 Hours of teaching	2,941 hours
1.2 Improvement in academic result	3.67/5 (5 marks max)
1.3 Number of enrichment activities	30
1.4 Indicators for personal development of students	
(a) All rounded exposure	4.33/5 (5 marks max for highest improvements)
(b) Career aspiration	4.00/5 (5 marks max for highest improvements)
(c) Confidence	3.67/5 (5 marks max for highest improvements)
(d) Motivation to learn	3.67/5 (5 marks max for highest improvements)

KPIs - Recipient benefits		2015/16 Data & Estimates
(e) Understanding of personal strengths and weaknesses		3.83/5 (5 marks max for highest improvements)
(f) Communication skills		3.33/5 (5 marks max for highest improvements)
(g) Ability to express and control emotions		3.50/5 (5 marks max for highest improvements)
(h) Leadership skills		3.50/5 (5 marks max for highest improvements)
(i) Financial management skills		2.60/5 (5 marks max for highest improvements)
(j) Basic-living skills		3.75/5 (5 marks max for highest improvements)
(k) International exposure		3.60/5 (5 marks max for highest improvements)
(l) Hope for the future		3.83/5 (5 marks max for highest improvements)
(m) Vocational skills		3.20/5 (5 marks max for highest improvements)
1.5	Percentage of students who perceived that the fellowship has increased their learning motivations	92%
<b>Benefits to Teaching Fellows</b>		
1.6	Indicators for knowledge and values	
	(a) Better understanding of poverty in Hong Kong	4.50/5 (5 marks max)
	(b) Better understanding of the education system in Hong Kong	4.67/5 (5 marks max)
	(c) Value higher on social inclusion	4.17/5 (5 marks max)

KPIs - Recipient benefits	2015/16 Data & Estimates
(d) Better understanding about the life as a teacher	4.67/5 (5 marks max)
(e) Proudness to become a teacher in the future	4.50/5 (5 marks max)
1.7 Indicators for personal development of teaching fellows	
(a) Leadership skills	8.50/10 (10 marks for highest improvements)
(b) Communication skills	8.50/10 (10 marks for highest improvements)
(c) Global experience	3.00/10 (10 marks for highest improvements)
(d) Creativity and innovation	7.83/10 (10 marks for highest improvements)
(e) Ensurance	7.83/10 (10 marks for highest improvements)
(f) Being proactive	8.17/10 (10 marks for highest improvements)
(g) Crisis management ability	7.33/10 (10 marks for highest improvements)
(h) Bond-building	7.67/10 (10 marks for highest improvements)
(i) Being an active listener	8.50/10 (10 marks for highest improvements)
(j) Self-motivation	7.50/10 (10 marks for highest improvements)
(k) Humbleness and willingness to improve on weaknesses	8.83/10 (10 marks for highest improvements)
(l) Teamwork	6.67/10 (10 marks for highest improvements)

KPIs - Recipient benefits	2015/16 Data & Estimates
1.8 Hours of trainings to teaching fellows	~ 600
1.9 Values of trainings to teaching fellows	~ HK\$25,000

**Table 5 - KPIs for TFHK on employment**

KPIs - Employment	2015/16 Data & Estimates
<b>2. Employment 就業機會</b>	
2.1 Subsidy to teaching fellow	HK\$600,000
2.2 Number of teaching fellows in 2015/16	6
2.3 Number of administrative workers in TFHK	~ 1
2.4 Number of employees in the management level in TFHK	~ 4

**Table 6 - KPIs for TFHK on outplacement**

KPIs - Outplacement	2015/16 Data & Estimates
<b>3. Outplacement 再就業情況</b>	
3.1 Number of teaching fellows who pursue education-related career	4
3.2 Number of teaching fellows who will join TFHK	1
3.3 Number of retainment of teaching fellows by participating schools to be full-time teacher (if any)	0
3.4 Fellowship as an easier channel to pursue a teaching career as perceived by teaching fellows	3.80/5 (5 marks max)
3.5 Teachers of participating schools who agreed that the teaching fellows have performed better than an average entry level teacher	100%

KPIs - Outplacement	2015/16 Data & Estimates
3.6 Outsider's willingness to hire teaching fellows as reflected by principal's rating average	7.30/10 (10 marks max)

**Table 7 - KPIs for TFHK on community engagement and awareness**

KPIs - Community engagement and awareness	2015/16 Data & Estimates
<b>4. Community Awareness 社區參與及公眾認受</b>	
4.1 Number of applications received for the teaching fellowship	~ 120
4.2 Number of followers in Facebook and other social media	~ 5,000
4.3 Number of corporate sponsors and donors	~ 16
4.4 Amount of corporate sponsorships and donations	~ HK\$1,288,949
4.5 Number of news report and interviews of TFHK	~ 17
4.6 Number of certification and awards received by TFHK	~ 10

**Table 8 - KPIs for TFHK on voluntary force**

KPIs - Voluntary Force	2015/16 Data & Estimates
<b>5. Volunteer Force 義務工作</b>	
5.1 Number of training workshops delivered by volunteer trainers	Over 20
5.2 Market value of the training workshops to teaching fellows	~ HK\$5,000 per teaching fellow

## Chapter 7. The way forward

TFHK has developed at a steady progress. It has expanded with 6 partner schools and 11 teaching fellows in 2016-17 fellowship programme. While the first-year fellowship programme has achieved favourable results, we would like TFHK to consider the following issues and recommendations:

- (i) Given that the programme has been quite well-received by participating schools, TFHK may consider charging partner schools the fee of teaching fellows. Based on the discussion with the school principals, they were quite satisfied with the performance of teaching fellows and some reflected that the service or workload delivered by a teaching fellow is equivalent to a teaching assistant or even full-time teacher.
- (ii) TFHK should regularly research and review its elaboration on how they see the major problems in Hong Kong education to keep them up to date. For instance, it was mentioned that “(i) underprivileged students generally lack well-rounded exposure and guidance for them to plan for the future, and *thus* (ii) only 1 out of 10 of them can make it into universities”. TFHK may want to further research on the connecting factors between these two statements as they may highlight what underprivileged students in Hong Kong need most.

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## Social Impact Measurement

Consulting Report for Fellowship  
Programme of Teach4HK in 2015-16

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