**Education and Manpower Bureau Circular Memorandum No. 129/2004**

From: Secretary for Education and Manpower

Ref.: EMB(QA/Ind)/PI/1/1

Date: 11 June 2004

To: Supervisors/Heads of all government and aided primary, secondary and special schools (including caput schools and schools under the Direct Subsidy Scheme)

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**Enhancing School Development and Accountability through School Self-evaluation and External School Review –**

**Modification of Implementation Requirements**

[Note: This circular memorandum should be read in conjunction with EMB Circular No. 23/2003 and EMB Circular Memorandum No. 269/2003 on the same subject.]

**Summary**

This circular memorandum announces the modifications for 2003/04 and 2004/05 school years with respect to (i) the collection and reporting of Key Performance Measures (KPM) items by schools; (ii) the preparation and reporting requirements of school self-assessment (SSA)[1] reports; and (iii) the uploading of External School Review (ESR) reports on the web.

**Details**

2. From the experience gained in the initial phase of implementation of the School Development and Accountability framework (SDA), including ESR, and the feedback collected from schools, concerns have been expressed about KPM in terms of collectibility, frequency, and transparency of reporting, the reporting arrangements of SSA, and the uploading of ESR reports on the web. In such light, modifications are made and announced in the following paragraphs.

3. The list of KPM items stipulated in EMB Circular Memorandum No. 269/2003 which schools are required to report annually will remain the same for 2003/04 and 2004/05 school years. Details are at Appendix I. However, the requirements for the collection and reporting of KPM information, the preparation and reporting of SSA by schools and the uploading of ESR reports in 2003/04 and 2004/05 school years have been refined. Please note that under the new arrangement, reporting of KPM is confined to the school management committee (SMC) and key stakeholders only, including parents, teachers and students. It is not necessary for schools to report KPM data on the school web up to 2004/05. Details of the arrangements for the 2003/04 and 2004/05 school years are at Appendix II and III respectively.

4. A number of issues have also been observed during the initial implementation of SDA. These include over-preparation and over-documentation with regard to the SSA reports in preparation for ESR in some schools; undue workload imposed on school staff; and improper administration of the stakeholder survey as well as the SSA reports not truly

[1] SSA refers to the process in which a school conducts a self-assessment of its performance and produces a report for validation by the ESR teams. The SSA should cover the 14 areas of the School Performance Indicators.

reflecting the actual performance of schools in a small number of cases. To facilitate more effective implementation of SDA, the EMB will organize additional sharing sessions on good practices on SSA/ESR as well as the use of data for school development from September to December 2004.

5. ESR will have been conducted in 100 schools by the end of the 2003/04 school year. Reflecting the developmental nature of the SDA framework, the EMB will conduct a review of the ESR processes and outcomes. The review will cover issues such as the selection, collection and reporting of KPM, preparation of SSA and the uploading of ESR reports, as well as a number of other issues identified in paragraph 4 above. Schools will be advised of any further revised arrangements by December 2004. Under the circumstances, the EMB will not conduct any ESR in schools from September to December 2004 and the ESR timetable for schools for 2004/05 will not be finalized until the review is completed. The conduct of ESR in schools will resume in January 2005 and the Regional Education Offices will inform the schools affected in due course.

**Enquiries**

6. Enquiries concerning the content of this circular memorandum can be directed to the Quality Assurance Division at 2126 5288 and 2892 6538.

Andrew C S POON
for Secretary for Education and Manpower

c.c. Heads of Sections – for information

**Appendix I**

**List of KPM Items which schools are required to report in the 2003/04 and 2004/05 School Years**

| | KPM Item | School Type |
|---|---|---|
| KPM 1 | Composition of school management committee | P/S/Sp |
| KPM 3 | Teachers' professional development# | P/S/Sp |
| KPM 4 | Teachers' qualifications and experience (including Language Proficiency Requirement) | P/S/Sp* |
| KPM 7 | Number of active school days | P/S/Sp* |
| KPM 8 | Lesson time for the eight key learning areas | P/S/Sp* |
| KPM 9 | Students' reading habit | P/S/Sp* |
| KPM 13 | Destination of exit students, including early exits | S/Sp* |
| KPM 15 | Hong Kong Attainment Test results | S/Sp* |
| KPM 17 | Hong Kong Certificate of Education Examination results | S/Sp* |
| KPM 18 | Hong Kong Advanced Level Examination results | S |
| KPM 22 | Students' attendance | P/S/Sp |

Note:

1. School type:
   i. P for primary schools, S for secondary schools, Sp for special schools
   ii. * indicates that application of the item depends on the nature of the special school concerned
2. # Only the data on continuous professional development (CPD) status of principals is needed. Reporting on teachers' CPD will not be necessary until further notice.
3. For detailed definitions of the KPM items, please refer to the website: http://svais.emb.gov.hk/kpmweb/eng/index.htm

**Appendix II**

**Modifications for 2003/04 school year**

| Arrangement | Schools having undergone ESR in 2003/04 school year | Other schools not timetabled for ESR in 2003/04 school year |
|---|---|---|
| Reporting of KPM | • All KPM items should be reported to the SMC.<br>• Only the KPM items as specified in Appendix I should be reported[2] to the key stakeholders.<br>• Schools are NOT required to include any KPM items in the School Report to be uploaded on the school web. Should schools choose to do so, they are required to observe the related protocols[3]. | • Only the KPM items as specified in Appendix I should be reported[2] to the SMC and key stakeholders.<br>• Schools are NOT required to include any KPM items in the School Report to be uploaded on the school web. Should schools choose to do so, they are required to observe the related protocols[3]. |
| Preparation and reporting requirements of SSA report | • The SSA report prepared for validation by ESR teams is NOT required to be uploaded on the school web. | • Not applicable |
| Uploading of ESR reports on the EMB homepage | • Consistent with the usual practice in the release of the Quality Assurance inspection reports, the EMB will upload the ESR reports on the EMB homepage to enhance accountability and transparency. However, the reporting format will be refined to better support school development. For the schools that have undergone ESR in 2003/04 school year, the ESR reports will be uploaded in the 4th quarter of 2004. | • Not applicable |

[2] Schools may choose to use the existing channels of communication for reporting KPM data to the key stakeholders, such as the school newsletter.

[3] Consistent with the protocols established in EMB Circular Memorandum No. 269/2003, if schools choose to report certain KPM information on the web, they should continue to report such information in the following years. Furthermore, schools are discouraged from making use of such data in isolation solely for publicity purposes. Schools are reminded that HKAT, Territory-wide System Assessment and value-added data are not for publication on the school web.

**Appendix III**

**Arrangements for 2004/05 school year**

| **Arrangement** | **Schools to undergo ESR in 2004/05 school year** | **Other schools not timetabled for ESR in 2004/05 school year** |
|---|---|---|
| Collection of KPM | • All KPM items should be collected for SSA and external review. A report template will be provided at the KPM website (http://svais.emb.gov.hk/kpmweb/eng/index.htm) to facilitate schools in the collection of KPM data. | • Only the KPM items as specified in Appendix I need to be collected for the SMC and key stakeholders.<br>• Schools are NOT required to administer the stakeholder survey. Should schools choose to administer the stakeholder survey on an annual basis, they should make good use of the information in their SSE. |
| Reporting of KPM | • All KPM items should be reported to the SMC and the ESR Team.<br>• Only the KPM items as specified in Appendix I should be reported[4] to the key stakeholders.<br>• Schools are NOT required to include any KPM items in the School Report to be uploaded on the school web. Should schools choose to do so, they are required to observe the same protocols as for 2003/04 school year. | • Only the KPM items as specified in Appendix I should be reported[4] to the SMC and key stakeholders.<br>• Schools are NOT required to include any KPM items in the School Report to be uploaded on the school web. Should schools choose to do so, they are required to observe the same protocols as for 2003/04 school year. |
| Preparation and reporting requirements of SSA report | • Schools should conduct SSA and prepare a SSA report to be validated by the ESR Team.<br>• There is no need for schools to upload the SSA report to the school web. | • SSA is for the preparation of ESR, hence schools are not required to conduct any SSA. |
| Uploading of ESR reports on the EMB homepage | • Similar arrangements as in 2003/04 school year. | • Not applicable |

[4] Schools may choose to use the existing channels of communication for reporting KPM data to the key stakeholders, such as the school newsletter.