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Dear Principal,

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

Over the last few weeks, we have seen how schools respond to the outbreak of atypical pneumonia to ensure that learning continues despite the temporary suspension of classes. I would like to thank you and your colleagues for the efforts you have made in facing up to one of the biggest challenges of our time. The capacity demonstrated by schools in handling this crisis is a reflection of schools' commitment to enhancing the well-being of our students, the flexibility provided by school-based management and effective processes established under the Quality Assurance (QA) Framework.

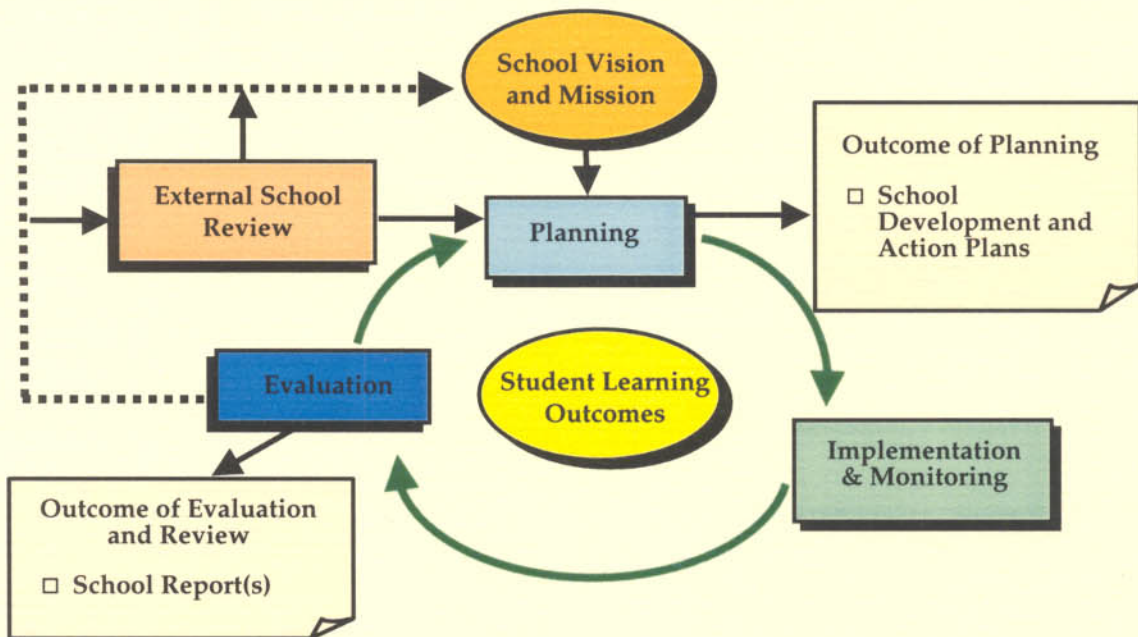
Building on the strengths and experiences from the QA Framework established in 1997, I am writing to you to reaffirm our commitment to building a strong school development and accountability framework based on systematic internal school self-evaluation, complemented by external school review. We firmly believe that rigorous and systematic school self-evaluation, based on genuine evidence, including data on student performance, is the driving force for continuous improvement. Education systems across the world, including Australia, the United Kingdom and the United States, are in their own context showing how self-evaluation can effectively support continuous school development and ensure public accountability for the quality of education delivered.

We have made significant advances with the implementation of School-based Management (SBM) including a well developed and highly valued QA inspection process and a performance indicators framework in four domains, viz. management and organization, learning and teaching, student support and school ethos, and student performance, for school performance management. However, feedback from the education sector and our current QA processes has identified three key areas for

improvement:

- the need to support school self-evaluation with systematic tools, processes and performance measures;
- the need to make available key performance measures (KPM) with various territory norms so that schools are better able to assess their strengths and weaknesses and identify how they might improve; and
- the need for all schools to benefit from external school review within a timeframe consistent with a school's developmental cycle.

To enhance school development and accountability, the way forward is to strengthen self-evaluation in all schools and conduct external school review as a complementary process. The key elements are presented diagrammatically as follows:



The enhanced school development and accountability framework integrates planning, implementation and monitoring, as well as reporting and reviewing processes at the school level.

I appeal to you and your staff to step up efforts on school self-evaluation with emphasis on the following:

- Whole school approach:* This will bring about coherence and strengthen collaboration, communication and ownership among members of the school community.

b. Strategic planning and action planning: Educational change is dynamic and complex. Because of this, a school has to understand the needs and characteristics of its students, evaluate its own strengths and weaknesses, set priorities and goals, devise strategies to achieve its goals, and develop an action plan to build the capacity for educational change and bring about the intended outcomes.

c. Management of performance against key performance measures (KPM):

- i. To facilitate schools' evaluation processes, the Education and Manpower Bureau (EMB) has set out to develop KPM progressively in the four domains of the Performance Indicators as a common platform for the balanced assessment of school performance. The selection of KPM is based on the quality, usefulness and collectibility of the data. Schools may develop additional KPM to suit their needs.
- ii. EMB will provide measurement tools such as standard stakeholder (parents, students, teachers) survey questionnaires to help schools collect relevant information for self-evaluation and provide feedback to support school-based management. EMB will also provide an electronic platform to facilitate schools in collecting data and compiling the KPM.
- iii. From 2003/04 onwards, schools will need to provide school level information on a number of KPM for EMB to generate territory norms. The full set of KPM is set out in *Appendix I*, and those which will be required of the reporting cycle for 2003/04 are underlined in the table. EMB will release the territory norms to schools by stages to facilitate school self-evaluation and reporting.

d. Reporting: In line with the current requirement under SBM, schools will report on their performance annually against the KPM with use of evidence and data. They can include additional measures as deemed valuable in evaluating their own performance and development. The evaluation reports should be accessible to stakeholders for transparency and accountability.

e. Preparation for External School Review: From February 2004 onwards, EMB will conduct external school review of public sector schools (including schools under the Direct Subsidy Scheme). The focus will be to validate a school's self-evaluation and to arrive at an agreed post-review improvement agenda with the

school, so that school performance can be gauged and developmental potential tapped. By December 2003, EMB will timetable all schools by phases for external school review from February 2004 through to 2006/07. It is expected that by 2006/07, the first four-year cycle of external school review covering all Hong Kong schools will have been completed.

We have implemented a pilot project on "School Development through School Self-evaluation" since September 2002. The project schools have formed a network to inform practices in self-evaluation including the design, use of tools and processes. To promote better understanding of self-evaluation and related arrangements, EMB will run a series of seminars in June/July 2003 and organize district collegiate groups for professional sharing and learning. A reference manual will also be made available to all schools by September 2003. It will capture essential elements including templates for school planning and reporting, and guidelines for performance management with use of data and evidence for sustained development and improved learning outcomes. EMB will provide continual support to schools so as to nurture a culture of self-evaluation and enhance accountability in the school system.

We pledge to achieve the following as EMB's commitment to enhancing the quality of school education and student learning outcomes:

- To have performance measures readily accessible to all schools to support open and transparent school self-evaluation;
- To conduct external school review within a four-year cycle to complement schools' internal evaluation and performance assessment;
- To have all processes involved focus on improved learning outcomes;
- To have EMB's support to schools better targeted for the benefits of our students; and
- To have a feedback loop established in the school system to influence policy and priority setting.

Our core business is to collaborate with schools to bring about improved learning outcomes. Major milestones with regard to the fulfilment of our above pledge are set out at *Appendix II*, and a list of useful websites is at *Appendix III* for your reference. I would like to take this opportunity to appeal to you for your sustained efforts in strengthening your self-evaluation processes. Our colleagues in the Quality Assurance Division (QAD) and the Regional Education Offices (REO) will support you in this regard.

If you have any enquiries, please contact your respective Senior School

Development Officer or our QAD colleagues on 2126 5271/ 2122 5821.

With best wishes,

Yours sincerely,



(Mrs Fanny Law)

Permanent Secretary for Education and Manpower

List of Key Performance Measures

Management & Organization	Learning & Teaching	Student Support & School Ethos	Student Performance
1. <u>Composition of SMC</u> 2. Staff's views on school leadership 3. <u>Teachers' professional development (including principal CPD)</u> 4. <u>Teachers' qualification and experience (including LPR)</u> 5. School expenditure on learning and student support	6. Teachers' and students' views on learning and teaching 7. <u>Number of active school days</u> 8. <u>Lesson time for the 8 KLAs</u> 9. <u>Students' reading habit</u> 10. Provision of co-curricular activities	11. Teachers', students' and parents' views on school culture 12. Parents' views on home-school partnership 13. <u>Destination of exit students including early exits</u> 14. Students' attitudes to school	15. <u>HKAT</u> 16. BCA 17. <u>HKCEE</u> 18. <u>HKALE</u> 19. Academic value-added performance 20. Student participation in inter-school events 21. Student participation in uniform / community service groups 22. <u>Students' attendance</u> 23. Students' physical development

Notes:

- (a) Items 13, 17, 18 and 19 – For secondary schools only.
- (b) Items 2, 6, 11 and 12 – Information is to be collected using standard questionnaires prepared by EMB and administered annually by schools.
- (c) Item 14 – Measurement tool is included in the Assessment Program for Affective and Social Outcomes (APASO) developed by EMB.
- (d) Item 19 – Information is provided through the Schools Value-added Information System (SVAIS) developed by EMB.
- (e) Item 16 (BCA) – The use of it in KPM will be reviewed according to its on-going development.
- (f) **The items for mandatory reporting for 2003/04 are underlined in the table above.** Details regarding the requirements will be provided in the subsequent briefing sessions for schools.

**Enhancing School Development and Accountability (SDA)
through School Self-evaluation (SSE) and External School Review (ESR) –
Major Milestones**

Time	Activity
September 2002	A one-year pilot project on “School Development through School Self-Evaluation” was launched to support evidence-based and data-oriented SSE. The project schools have formed a good base as EMB collegiate schools in the development of tools and processes.
May – December 2003	Project on “Pilot ESR” to be implemented District collegiate groups for professional sharing and learning of SSE to be organized in phases by REOs
June/July 2003	Seminars for all schools on the details about the requirements to conduct systematic and rigorous school self-evaluation for development and accountability to be organized
July – September 2003	The following to be uploaded to EMB’s website: i. guidelines for school self-evaluation ii. templates on school plans and reports iii. key performance measures on which schools will need to report iv. stakeholder survey questionnaires (including teachers, parents and students)
September 2003	A reference manual on evidence-based and data-oriented school self-evaluation to be ready for schools’ use
December 2003	All schools to be timetabled by phases through to 2006/07 for external school review
February 2004	ESR to commence to validate schools’ self-evaluation and to report on standards

Some Useful Websites on School Self-evaluation and Related Processes

- ◆ <http://www.scotland.gov.uk/hmie>
(Her Majesty's Inspectorate of Education, Scottish Executive)
- ◆ <http://www.gov.bc.ca/bced>
(Ministry of Education, British Columbia, Canada)
- ◆ <http://www.ofsted.gov.uk/publications/docs/1033.pdf>
(A publication on "Action Planning for School Improvement", Office for Standards in Education)
- ◆ <http://www.emb.gov.hk/qai/qai.htm>
(Quality Assurance Division, Education and Manpower Bureau, HKSAR)