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To Supervisors, Principals, Teachers,
Members of the School Management Committees, and
Executive members of the Parent-Teacher Associations,

29 July 2005

Dear Sir/Madam,

**School Self-evaluation and External School Review
Modification of Implementation Requirements**

Since the implementation of the School Development and Accountability (SDA) policy in the 2003/04 school year, we have completed external school review (ESR) with 249 schools. This letter summarizes the experiences to-date and proposes modifications to the implementation requirements with a view to allaying anxieties and reducing unnecessary work, so that the school self-evaluation (SSE) and ESR can genuinely serve the purpose of school development and improvement without the interference of extraneous factors.

Impact of SSE/ESR

Schools that have undergone ESR generally found the exercise helpful in identifying areas of improvement based on robust and systematic evidence, in clarifying the connections between education innovations and activities, and in setting priorities. The impact study of ESR on schools by Professor John MacBeath from University of Cambridge confirms that the SDA framework is effective in providing valuable feedback to guide and support school improvement. The Executive Summary of the study can be found on the EMB website.

Schools that have had a positive and satisfying experience of the SSE/ESR are those that have focused on the processes of SSE in fostering ownership of school improvement measures to improve learning outcomes, and sustaining a momentum for change. They have avoided placing too much emphasis on the ratings of school performance in their evaluation process, so that the exercise has not been overly meticulous and labour-intensive. They also had a professional dialogue with the ESR team that is critical but friendly, fair and objective.

On a less positive note, there have been complaints about excessive workload and documentation in preparing for the ESR. For instance, we have received a school self-assessment (SSA) report containing more than 100 pages and some ESR teams have been presented with as many as 72 items of recently prepared documentation, including detailed minutes of the array of meetings in schools. Some schools spent an inordinate amount of time rehearsing and coaching for the ESR. This is totally unnecessary.

The ESR is only one element of the school improvement cycle. It is more important for schools to maintain an *ongoing process* of self-reflection and self-improvement. There has to be alignment of vision and values among all staff prior to carrying out the SSE. The ESR team offers a view of the school through the eyes of a critical friend, rigorous but focused on where the school needs to do better and how.

Modifications of Implementation Requirements

To promote more candid and critical self-evaluation, and professional dialogue amongst teachers and other school community members, we will modify the requirements of ESR process and reporting, commencing from the 2005/06 school year:

- a. Schools will no longer be required to provide ratings on the 14 Performance Indicator (PI) areas in their SSA report. Similarly, ESR teams will not provide ratings in their assessment of the 14 PI areas. Hopefully, this will divert attention away from the quantitative grades to engaging the key stakeholders in meaningful discussions on school improvement for the sake of their students, so that the ESR experience is one of added-value. ESR teams will continue to use the performance indicators with which schools are already familiar as generic descriptions of good practice, bearing in mind that these

descriptors have to be viewed in the context of each school's unique situation. They do not constitute a checklist.

- b. In relation to the 14 core PIs, if necessary, schools may use other qualitative and quantitative descriptors that are relevant to, or commensurate with, the school's developmental stage. The "Performance Indicators for Hong Kong Schools: Evidence of Performance" is a useful reference. This will take account of differences in school context and give recognition to exceptional circumstances and extraneous efforts.
- c. SSA report should be precise and succinct, focusing on the key issues and improvement measures over the next three years. As a general yardstick, the report should not exceed 20 pages. If necessary, schools may look up exemplars of SSA reports on EMB's website.
- d. ESR teams, before or during the visit, will examine three documents, i.e. the SSA report, KPM and the stakeholder survey findings. Where necessary, the team may refer to other existing documents routinely available in schools, e.g. school development plan, annual report and curriculum handbook. There is no need to produce extra documents.
- e. Against the background of a declining student population, we empathise with schools' concern about the transparency of ESR reports which could be selectively reported in the media to the detriment of the schools' reputation. We therefore propose not to upload the ESR reports for the first cycle. Sponsoring bodies will continue to receive copies of the report, and the school community, including parents, through its SMC/IMC, should have a thorough understanding of the school's strengths and directions for improvement through thorough reporting. This will honour the important principle of accountability to the key stakeholders whilst reducing anxieties which are currently distracting attention away from the core purposes of school improvement and student learning.

- f. We will provide more concrete feedback on school performance in the ESR report and, in particular, more specific advice on learning and teaching strategies based on the lesson observations.
- g. A consolidated ESR report on the key observations will be published every year with examples of good practice and areas for improvement. This report will be uploaded to EMB's website for general information and the reference of schools.

We will continue to provide training for principals, teachers, and ESR team members. So far, over 250 principals and other senior school managers have been trained as external school reviewers and over 180 of them have participated in ESR. The feedback from the frontline personnel has been overwhelmingly positive. Together they add an invaluable body of knowledge and expertise to the ESR teams.

Over the past two years, schools have gained much better understanding of SSE and, based on feedback from schools, we will continue to refine and improve the SDA processes and practices. We sincerely hope that these latest measures will enable schools to focus on school development and improved learning for all students.

We look forward to your continual support and unfailing commitment to education. If you have further enquiries, please contact our colleagues in the Quality Assurance Division at 3540 6980.

Yours sincerely,



(Andrew C S POON)
for Secretary for Education and Manpower